

Strategic Lean Project Report



For Reporting Period: January 1, 2016 through June 30, 2016

I. General Information:

Lead agency name: Puget Sound Partnership

Partner agencies: Environmental Protection Agency

Improvement project title: Improving performance monitoring for local partner contracts

Date improvement project was initiated: 1/8/2016

Project type: New Project

Project is directly connected to:

Results Washington performance measure

Agency Strategic Plan

If applicable, specify the alignment:

Customer satisfaction

Shared Measurements

Report reviewed and approved by: Jen Benn, Director of Administrative Services

II. Project Summary:

The Puget Sound Partnership improved Local Integrating Organization (LIO) contract management, resulting in increased efficiencies, accountability, communication, and problem-solving.

III. Project Details:

Identify the problem: There are Local Integrating Organizations in 9 Puget Sound geographic areas. They were created to integrate local efforts with regional efforts to advance the priorities of the Puget Sound Action Agenda – the shared roadmap for improving the health of Puget Sound. As the agency responsible for leading the region’s collective recovery efforts, the Partnership is the contract manager for the federal pass through funding to all 9 LIOs. Over \$2.2 million in LIO Contracts are managed by multiple staff in the agency and there was a lack of consistency in monitoring performance and no simple or efficient way to raise concerns to supervisors or agency management before they became unmanageable. In addition, the funder, the Environmental Protection Agency (EPA), was concerned about consistency in tracking and reporting on performance with multiple staff involved.

Problem statement: The process for overseeing LIO contracts has lacked internal consistency and effective performance management. Our goal was to improve internal management, contract management, and communication; streamline requests for information from the local partners; and improve external communication to the funding agency.

Improvement description: Using Smartsheet, an online spreadsheet tool, Partnership grant managers were asked to provide updates and flag concerns around contract deliverables, performance, and upcoming contract progress on a biweekly basis. This information was assessed by team managers and, where appropriate, used to raise issues to management or to directly intervene with the LIO if an issue around performance

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Improvement description: Con't was arising. The program funder, EPA, was provided a demonstration of the tool and consolidated reports upon request. In addition to tracking and reporting internally and to EPA, one benefit to this new tool is that it relieves some of the burden upon the local partners (LIOs) for responding to frequent information requests or performance updates because the information is kept up to date and discussed by the contract managers.

Customer involvement: Before developing the tool, the team managers spoke with the Partnership’s fiscal department to identify needs and requirements for performance management. The contract management tracking tool was also shared with EPA for review and input. They identified the key pieces of information around contract management that they were most interested in and this was incorporated. The tool will continue to be updated to support tracking and reporting based on feedback internal users and EPA.

IV. Project Details:

Improved process as measured by: <i>(Click those that apply)</i>	Specific results achieved: <i>(Complete the narrative boxes below)</i>	Total Impact: <i>(Actuals; Current Reporting Period)</i>	Results status:
<input checked="" type="checkbox"/> Cost	Avoided misuse of contract funds by identifying and addressing concerns around spending and performance early and often. Avoided unnecessary “check-in” meetings with fiscal and EPA liaisons to provide updates on performance management.	\$6,500 (estimated)	Final
<input checked="" type="checkbox"/> Quality	Increased quality of performance by partners by identifying and addressing concerns early and often. Improved on time deliverable submission from 50% to 90% due to closer tracking and early intervention.	40% increase in on-time deliverables	Final
<input checked="" type="checkbox"/> Time	Decreased time spent troubleshooting problems/performance concerns – due to early flagging and intervention – from 120 hours to 20 hours.	100 staff hours saved	Final
<input checked="" type="checkbox"/> Customer Satisfaction	Increased trust, from the funder (EPA), in contract management by the Partnership and performance of the local partners. Received positive feedback on tool from EPA, fiscal department, and internal EPA liaison.	Increased trust	Final
<input checked="" type="checkbox"/> Employee Engagement	Increased engagement by ensuring management, fiscal department, and the agency EPA liaison were on the same page regarding contract status and performance.	Increased engagement	Final

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VI. Visual – Local Integrating Organization Contract Tracking Tool:

Task	Deadlines	Deliverable/Activ	LIO B	LIO B Comments	LIO C	LIO C Comments	LIO D	LIO D Comments
Task 2: AA Coordination	Quarterly	Funding for NTA Implementation	2		1	Seed money approved to use on the final aspects of contracted work	2	The LIO is not actively providing funding ever emerges from the EPA/SIAT.
	Quarterly	Address NTA Barriers	2		2	Coordinator actively works to make sure projects move forward and new NTAs get developed.	1	LIO team is making good efforts to fac
	Varies by LIO	Seed Money	1	Seed money under subcontract	1	Using all available to further the 2014NTA		N/A
	Quarterly (for 2014)	NTA Status Reporting	2	Similar to comment for LIO A	1	All NTAs have been completed	1	At least one 2014 NTA remains active have been reporting on it.
Task 3: Performance Management	Quarterly	Progress reports/billing on	2	Waiting for July 15 reports/billing. Sent multiple reminders to prepare for end of fiscal year.	3	They may start attempting to bill time for staff that are not associated with the LIO contract or deliverable. I won't be accepting those invoices if that is attempted.	1	The LIO submitted the most recent bill chance to review the invoice yet so I c
	ongoing	2015-2016 Fundin Spend Down (Se rows 1-2 for	2	Did not spend full FFY2014 base grant	2	Had not billed any to this contract. After discussion with fiscal staff and LIO coordinator we are re-billing to the base	1	The LIO is spending money at an appr