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Department of Administrative Services, Office of
Procurement Services

Determination and Recommendation Process
October – December 2015

SIMPLER. FASTER. BETTER. LESS COSTLY.

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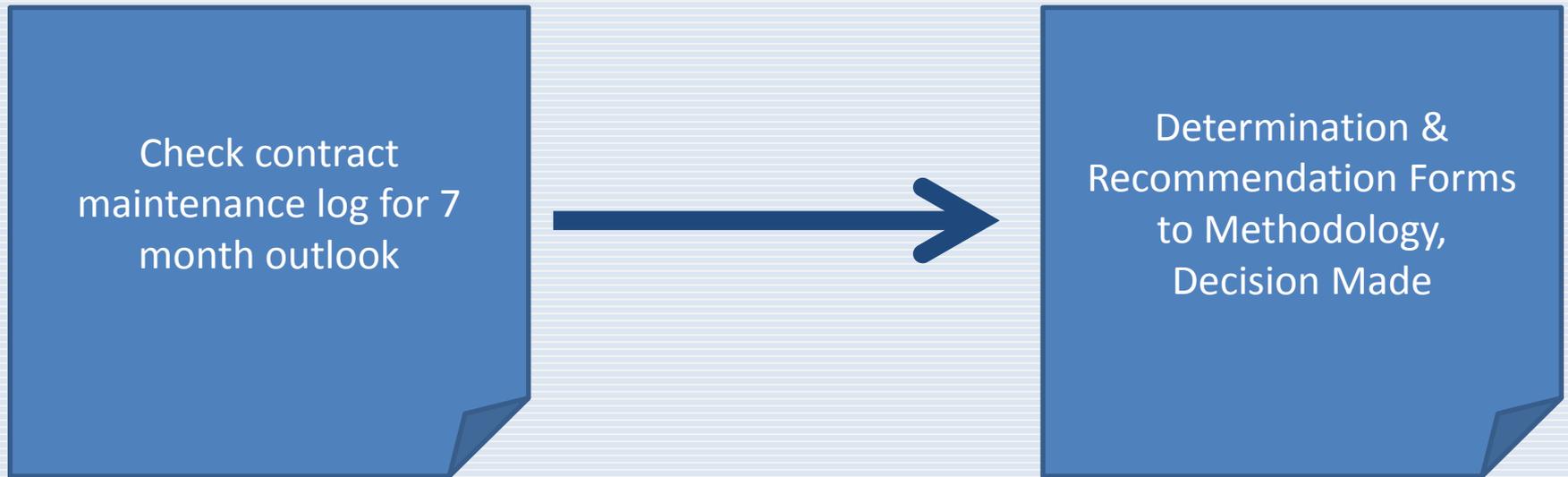
Team

- Alan Childress – Team Lead
- Kristen Johnson – Team Member
- Samuel Lange – Team Member
- Patrick Means – Team Member
- Pam Osborne – Subject Matter Expert
- Kathy Frato – Subject Matter Expert
- Phil Murray – ODNR, Customer
- Lisa Barna – Fresh Perspective

How Did We Get Here?

- Identified a need to assure that replacement contracts/renewals are in place in a timely manner;
- Identification of complex, time-sensitive contracts that may need early review;
- Varying understandings of the existing D&R timeline;
- Anticipation of a 30-days-prior-to-expiration metric.

Scope of the Event



Baseline Data

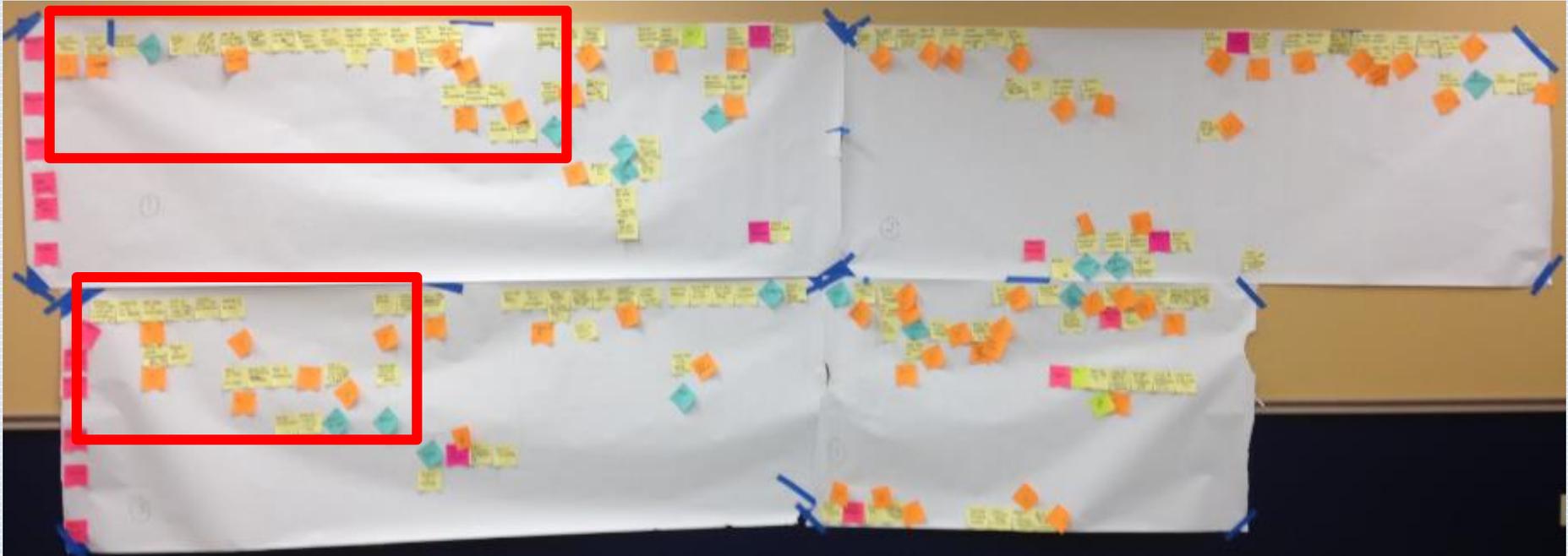
- Number of cycles have processed
 - Between January 2015 – June 2015, 165 contracts were reviewed with the Determination & Recommendation process.
- Average number of days prior to contract expiration that a Determination & Recommendation arrives at Methodology
 - 75 days

Process Improvement Goals

Contracts requiring a transition period and needing 6+ months of work are always identified via a standard process

A standard process is available to evaluate previous procurement methodology decisions

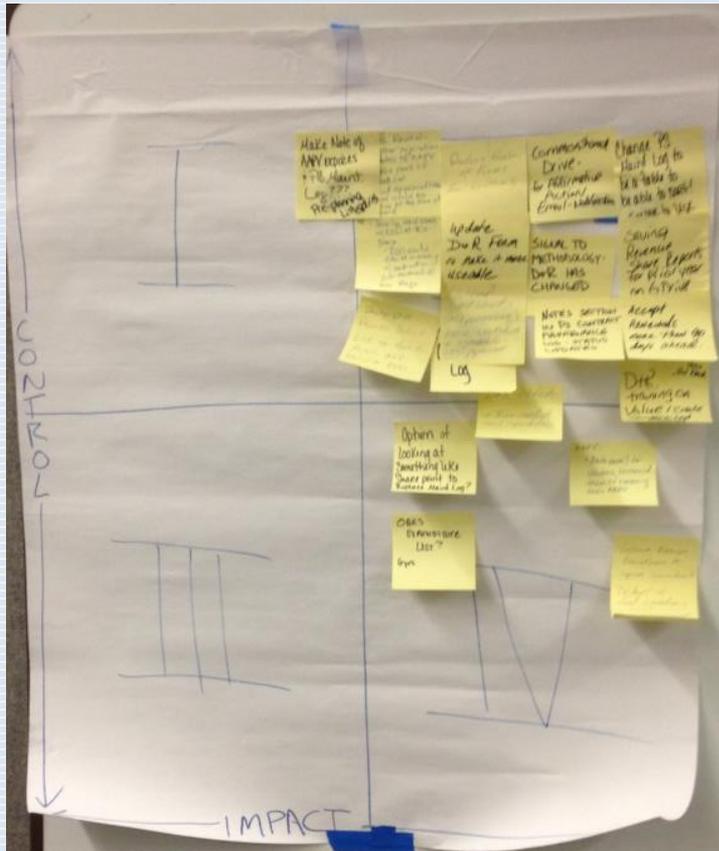
Current State



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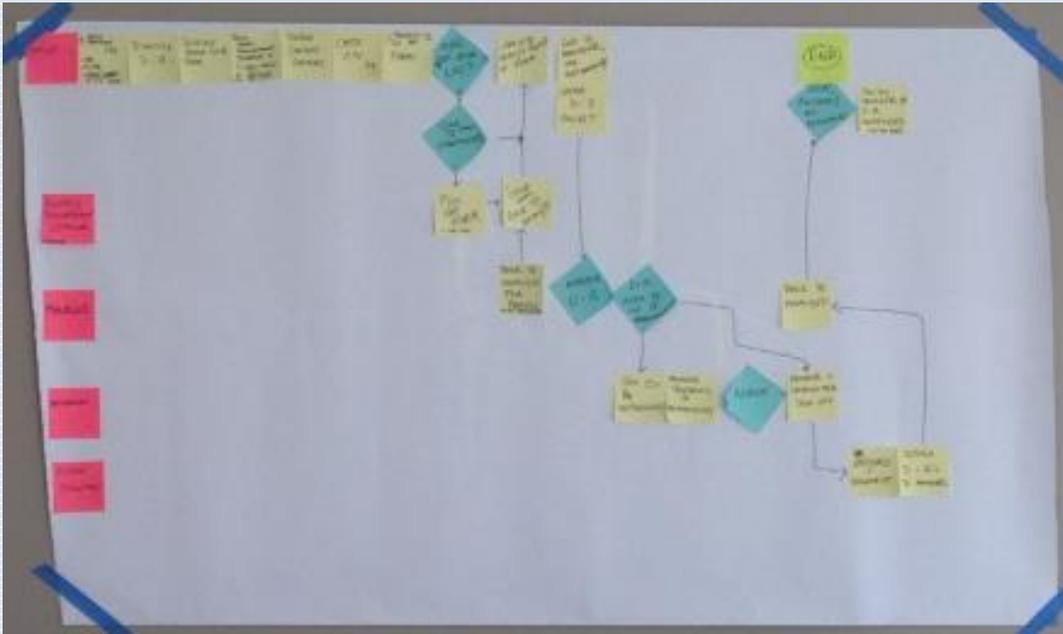
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Brainstorming



- Brainstorming
- Analysis
- Problem Solving

Future State



- Future State Process Development
- Discussion and Consensus
- Details
- Improvements made

Summary Scorecard

Measure	Current Level	NEW	Change
Process Steps	36	20	44%
Decision Points Handoffs Loopbacks	6	6	N/A
D&R Presentation at Methodology	2.25 Mos. Prior to Expiration	5.0 Mo. Prior to Expiration	100%

Implementation Planning

OPS Process Improvement Implementation Plan		
Spreadsheet		
What	Who	When
Mock up maintenance log	Kristen, Sam, Marianne, Kellie	December 21 st
Review mock up with management	Kristen & Sam	January 4 th – 8 th
Prepare maintenance log for go-live	Kristen & Marianne	February 1 st
Communicate to staff at PSS meeting and go-live	Alan & Kristen	February 10 th – 13 th
D&R Form		
What	Who	When
Mock up changes	Lisa	December 1 st
Review mock up with management	Alan	December 15 th
Finalize revised template	Angie	January 15 th
Communicate to staff at PSS meeting and go-live	Alan	February 10 th – 13 th
Data		
What	Who	When
Identify metrics <ul style="list-style-type: none"> • Timely receipt of D&Rs • # of methodology changes • # of contract delays (methodology) • Kelly/Sandy thoughts 	Andrew & Alan	December 15 th
Tracking/measurement plan	Sandy & Alan	January 15 th
Implement plan	Sandy & Alan	February 1 st
Procedures		
What	Who	When
Review existing procedures & gap analysis	Patrick	December 15 th
Draft revisions	Patrick	February 1 st
Review with management	Patrick & Alan	February 7 th
Final draft of procedures and go-live at PSS meeting	Patrick & Alan	February 10 th – 13 th

Special *thanks* to...

Senior Leadership:

- Erik Yassenoff
- Kelly Sanders

Sponsor:

- Sandy Herrel

Subject Matter Experts, Customers, and Fresh Perspectives:

- Pam Osborne, Lisa Barna, Phil Murray, Kathy Frato, Meghan Altier, Michael Buerger