

LEANOhio



Green Belt Six Sigma Project Report Out
Erika C. Sowry, Ohio Dept. of Health
1/19/17

Ohio Department of Health
Out-of-State Travel Request Process

ODH OST Request Team



- × (From left) Cathy McCartney – OFA Purchasing Staff
- × Barb Richardson – OFA Purchasing Supervisor
- × Robin Wilson – OFA Purchasing Staff
- × Lawissa Tidrick – Lean Ohio Black Belt and Project Mentor
- × Erika Sowry – Lean Ohio Project Facilitator (for Green Belt)
- × Paul Maragos – OFA Manager and Project Sponsor

How Did We Get Here?

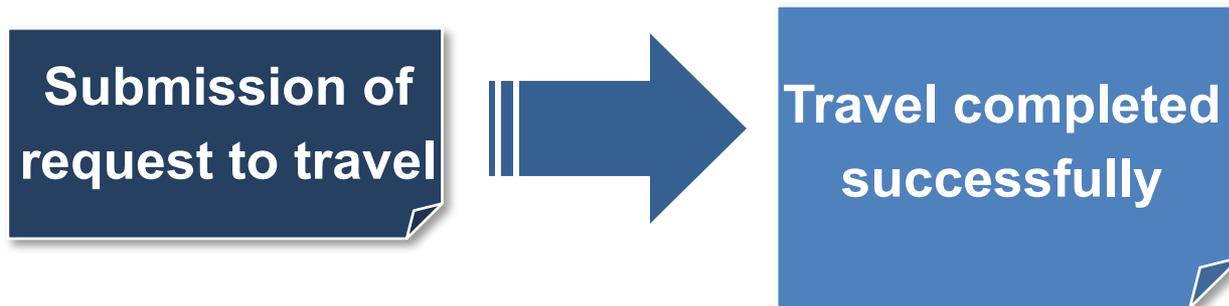
- The ODH Out-of-State Travel (OST) process had historically been a manual, paper-driven process and included several steps and sign-offs by various program areas
- It allowed for a wide variety of travel times which may not have always been the most cost effective option for the agency
- It had been decided that the OST request workflow will be added to an existing ODH electronic workflow system (WISE) but the current, manual process needed to be documented and unnecessary hand-offs and steps removed first

Project Goals

- The goal of this project was to lean up the current process (while considering lowest possible costs) for OST prior to inclusion of the new process in the ODH electronic workflow system (WISE)
- A team of employees and customers utilized Lean Ohio tools to lean up the OST processes, set goals for improving customer satisfaction ratings and measure and monitor improvements implemented

Event Scope

- What is the first step in the process?
 - Our process begins with...ODH program area has submitted a travel request to the Office of Financial Affairs (OFA) for an individual or multiple staff members
- What is the final step in the process?
 - Our process ends with...Travel is complete and post-trip validation has occurred



Performance Metrics

Performance Metrics: What measures will tell you if you are successful.	Performance Metrics			
	Current	Goal	Final	% Change
Amount of time between initial request through Finance Office approval	13-26 days	7-10 days		

Measure	Current Level
Process Steps	24
Decision Points	11
Delays	3

Our goal was to reduce the amount of time, steps, decision points and delays by approximately 50%

Process Improvement Goals

Map current manual process and identify waste, delays and unnecessary steps

Map future state to be incorporated into electronic workflow (WISE)

Increase traveler satisfaction

Change for the Better



- Reducing overall delay from start to end of process
- Quicker processing and handling of change orders
- Reducing redundant forms, unnecessary steps & multiple sign-offs
- Better control of costs and less hand-offs between Finance Staff

Suppliers

- Airlines
- Travel agency
- Traveler
- Approver
- Government agency
- OFA

Inputs

- Pcard
- Travel request form
- Forms – Internal and external (i.e. Conf. registration)
- Preferred flights w/ dates
- Backup documentation
- Agenda
- Budgeted amount
- Policies/rules

Process

Outputs

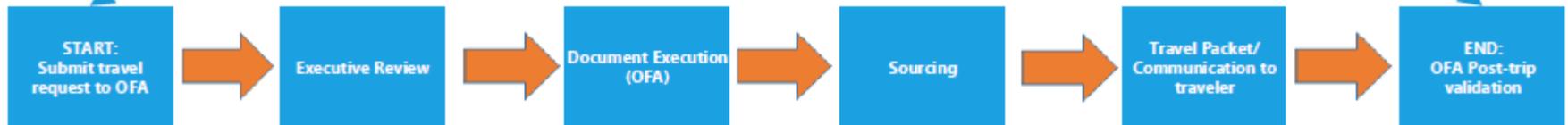
- Travel tickets
- Certifications
- Recognition
- Credibility
- Networking
- Training

Customers

- Travelers
- ODH
- Public
- State of Ohio
- Internal workflow stakeholders
- Other state governments
- OAKS
- Airlines

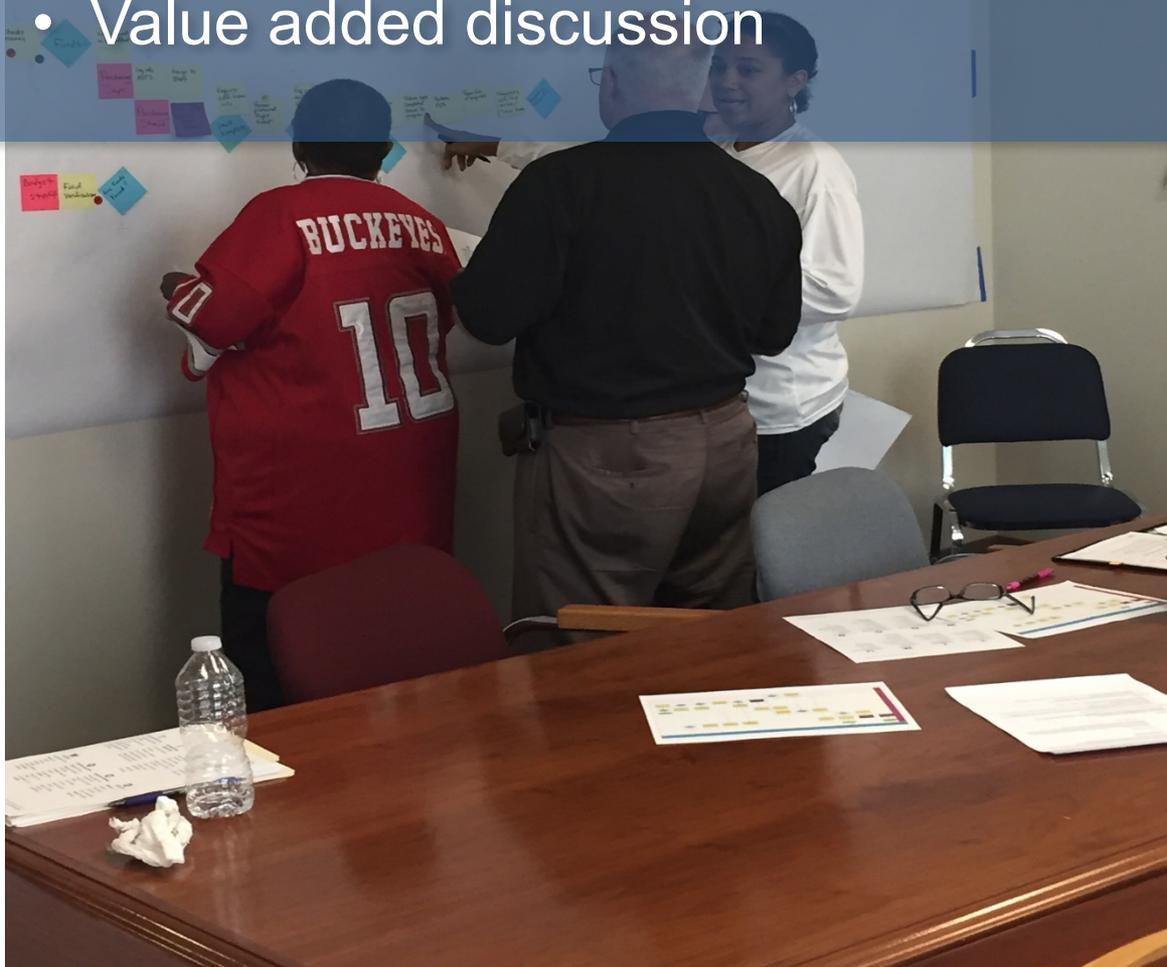
Session 1

- Purpose and goals
- Scope of project
- Lean Ohio methodology discussion
- SIPOC



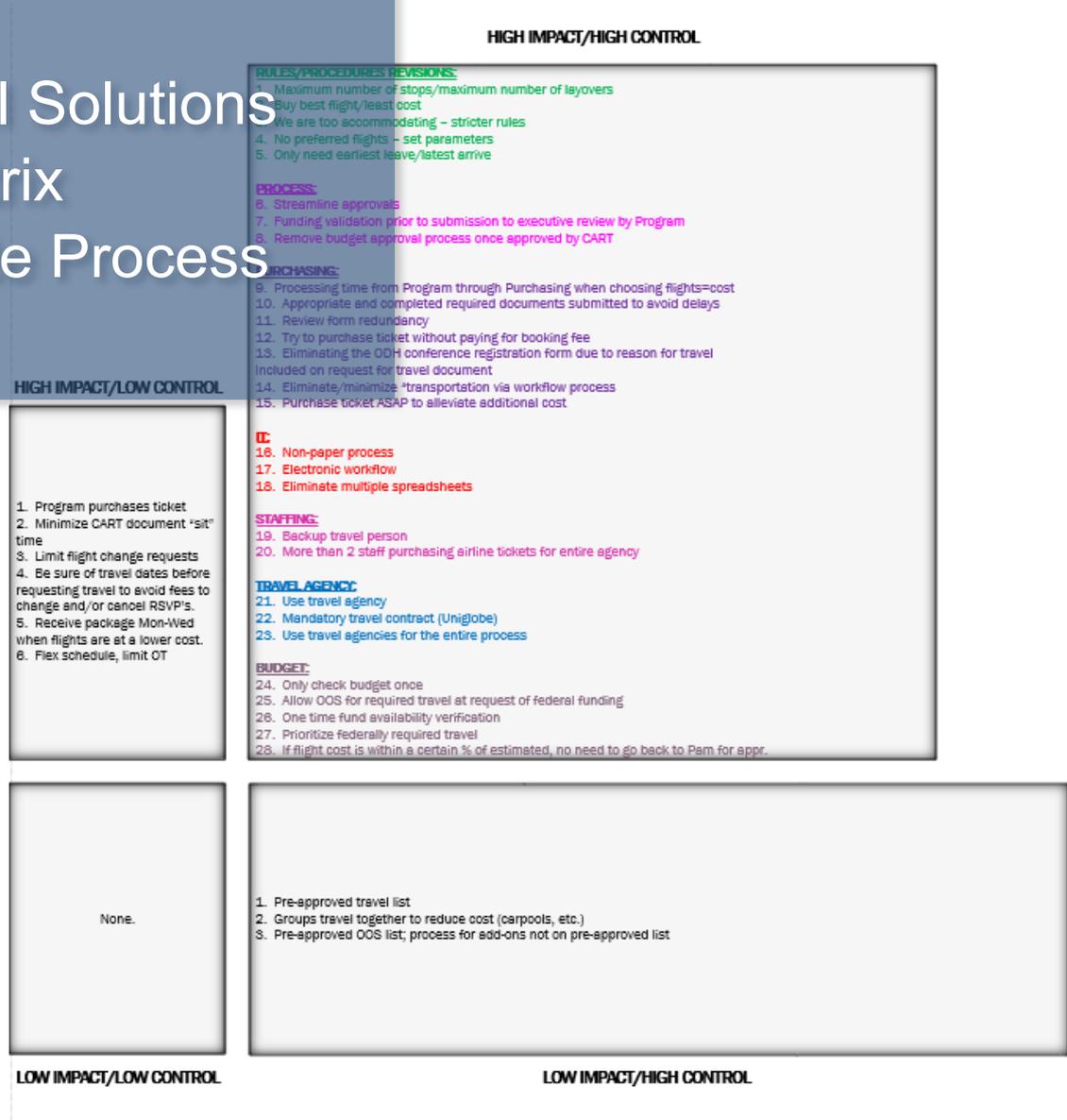
Session 2

- Current state process mapping
- Waste identification (TIM U WOOD)
- Value added discussion

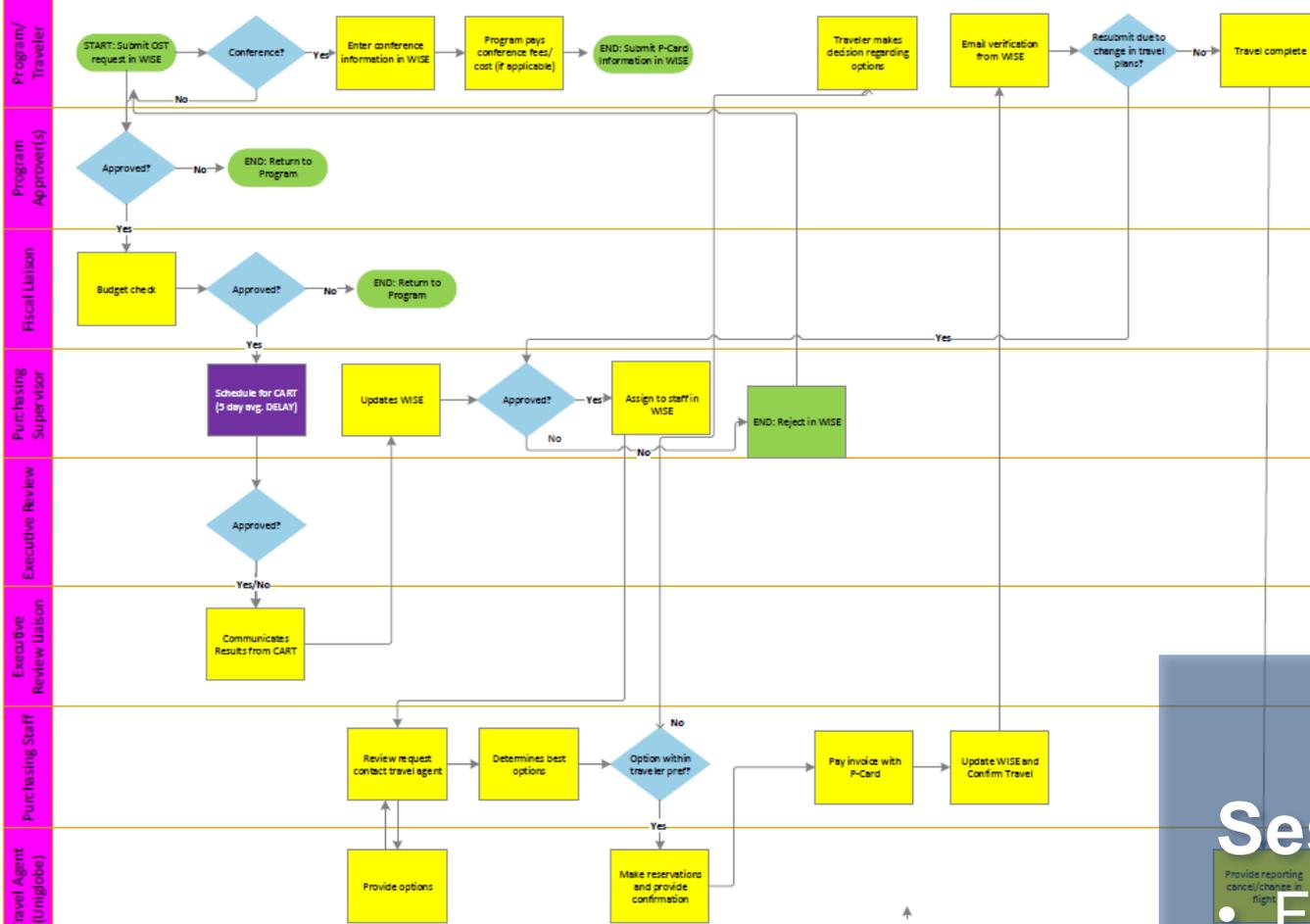


Session 4

- Prioritized Potential Solutions
- Impact Control Matrix
- Started Future State Process Map



ODH Travel Request Process (FUTURE STATE)



Session 5

- Future State Process Map!

END: Purchasing staff reports closing in WISE

Provide reporting cancel/cancel in flight

Summary Scorecard

Measure	Current Level	NEW	Change
Process Steps	24	14	-10
Decision Points	11	6	-5
Delays	3	1	-2

There is slightly greater than a 50% reduction in Steps, Decision Points and Delays between the Current Level the New Level!

Summary of Projected Cost Savings

Statistics gathered by the OFA staff show the following:

- 94 Airline Tickets purchased in SFY 16 = \$37,207.23
- Credits issued = \$5076.71
- **Cancellation Fees = \$1,600.00**
- Credits used = \$739.60
- Credits remaining to be used between 12/18/16-3/1/17 = \$1569.62
- **Credits lost = \$2,767.49**

- Cost of using Travel Agency = \$2,820.00 per SFY
- As of 12/18/16 actual cost savings by using Travel Agent = \$1,547.49
- Intangible costs savings = staff time for processing (not yet calculated)

Final Team Session

- Developed Action Register

ODH Out-of-State Travel Request Process Action Register

What?

Establish rules & procedures for OST Flight Revisions
 Policy for travel that's required by federal grants to ODH
 Determine % of overage we will allow for flight changes before sending request back to program
 check rules used by other agencies
 Prepare proposal fo annual out of State Travel pre-approval list

Structure Electronic Workflow in WISE (see Impact/Control Matrix for details)

Determine Staffing levels needed for future state

Vendor Management

Cost/Benefit Analysis (Current vs. Future State)

Who?

Paul M.

Paul M.

Barb R.

Barb R.

Barb R.

When?

90 Days

120 Days

90 Days

90 Days

90 Days

Next Steps

- Results shared with Agency Leadership on 12/20/16
- Team to re-group in 30 days to review progress on Action Items
- Cost/Benefit Analysis (financial gains due to using Travel Agent)

Special Thanks to...

Senior Leadership:

Nate Huskey

Anthony Perry

Sponsor:

Paul Maragos

Team Leader:

Barb Richardson

Green Belt Project Mentor:

Lawissa Tidrick

Fresh Perspective and Lean Ohio Green Belt:

Kevin Palicki

Subject Matter Experts:

Cathy McCartney – ODH OFA

Robin Wilson – ODH OFA

Quanta Brown – ODH Lab

Kenneth Crnarich – ODH OHAL

Maria Rackham – ODH OHAL

Donald Perone – ODH OHAL

Bridget Smith – ODH OHAL

Sean Keller – ODH OFA