How Did We Get Here?

Why are we doing this event?

– We are seeking ways to improve the efficiency of our service delivery.

What needs to change?

– The processing time for which it takes us to deliver our services needs to be improved.
Event Scope

• What is the first step in the process?
  – Our process begins when a Division initiates a purchase request.
    • Focus is Non-IT procurement of goods and services

• What is the final step in the process?
  – Our process ends when the Division is notified that the order is placed.
Event Baseline Data

What are the known data points?

- Number of customers: 8 divisions
- Number of incoming items: 1160 (7/1-10/5)
- Number of completed items: 990
- Number in backlog items: 132
- Number of expedites: 101
- Other: 3,000 requests in FY17

*Baseline data is critical to the success of the event*
Process Improvement Goals

- Streamline the purchase request process (i.e. reduce the number of steps)
- Decrease the amount of time it takes to process purchase requests and create benchmarks
- Comply with all laws, rules, and procedures governing the procurement process
Change for the Better

- Customer focused
- Right people changing the process
- A series of meetings that are action oriented
- Necessary resources available immediately
- New process implementation begins right away
Day One

- Level setting
- Scope of event
- Customer identification
- Current state mapping
Day Two

- Finish current state mapping
- Waste identification
- Value added discussion
- Lean Six Sigma training
Day Three

• Brainstorming
• Analysis
• Problem solving
• Process redesign
Day Four

- Future State Process
- Discussion and consensus
- Implementation planning
- Details
Today - Day Five

• More implementation planning
• Sharing results
Simpler

• Budget and supervisor combined approval
• Direct communication with customer
• Less back and forth of review process
• PPOC has ability to send request straight to POC 2-4 to initiate process
• Requestor can provide quotes
• Error-proofed form – less rework
Faster

- Reduced delays
- Reduced number of approvals and increased quality
- Streamlined overall process
- Reduced steps
- Reduced handoffs between functional areas
Better

• Knowledge based responsibility alignment
• More ownership of duties with more clarity of roles and responsibilities
• Customer-friendly form
• Freedom for requestors to assist Procurement with quotes
Less Costly

- Redirected hours per request
- Procedural well-being
  - Improved customer service, reducing vendor declination and frustration
  - Better customer service increases vendor bid participation possibilities
  - Improved internal customer service
## Summary Scorecard

<table>
<thead>
<tr>
<th>Measure</th>
<th>Current Level</th>
<th>NEW</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Steps</td>
<td>130</td>
<td>32</td>
<td>75%</td>
</tr>
<tr>
<td>Decision Points</td>
<td>19</td>
<td>5</td>
<td>77%</td>
</tr>
<tr>
<td>Handoffs</td>
<td>55</td>
<td>14</td>
<td>75%</td>
</tr>
<tr>
<td>Process Time</td>
<td>Simple: 3 to 5 days Complex: 15 days</td>
<td>Simple: 2 to 4 days Complex: 10 days</td>
<td>Simple: 1 day Complex: 5 days</td>
</tr>
</tbody>
</table>

*Note: Contracts are dependent on complexity*
Implementation Plans

- Communication
- Training
- Roles & Responsibilities
- Travel Request Process
Communication Plan

- Team presentation to leadership
- Develop FAQ’s
- PPOC mandatory meetings
- Department-wide email
Training Plan

• Provide training on new purchase request form
• Develop an acronym guide
• Cross-training between Legal and Contract Admin
Travel Request Plan

**Travel**

**Issues w/ Process**
- No education on how to finalize travel expenses in OAKS. → OSS OAK vs Johnline
- Hotels - Suggested hotels per diem amounts.
  - Traveler has to go 45 mins. out in order to stick w/ per diem rate
  - What is the limit? (miles)
    - What if there is no hotel w/ in the 30 miles w/ per diem rates?
- Travel Request Form
  - Add lines to state: hotel name, address, telephone # and comments (3 lines)
  - Add line about conferences (Y/N)

**PPOC**
- Traveler - Travel Reservations
  - Make to copy the PPOC on all emails to the traveler.
- Update Travel Request Form (pages)
- GSA Rates - conferences (over/under)
- Educate Division on Travel Rule (OEOB) as well as Travel Process.
Timeline Tree
Special Thanks to...

Senior Leadership:
Jacqueline T. Williams, Director
Matt Close, Assistant Director

Sponsor:
David Hannan, Chief Financial Officer

Team Leader:
Joy McKee, Agency Procurement Officer

Fresh Perspective / Observer:
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