

Quality Improvement Project

Improving the Receipt & Review of Proposals Process

Jose Cueva

Maritza Recinos

Lucia Romero

Violeta Villalobos



Contracts & Grants Division

February 7, 2019





Can you do another draft of this? There's still a couple of sentences people might actually understand...



PLAN- Initial Stages

- QI Director invited to C&G
 - Reviewed Request for Proposal (RFP) process with Director & Team Leads
 - Found 3 of 12 sections of the RFP Project plan within control of C&G
 - Section 8: Receipt & Review of Proposals
 - Section 9: Disqualification Review Request
 - Section 10: Proposal Evaluation
 - Task: Go through each section of the RFP project plan and look for potential improvements needed

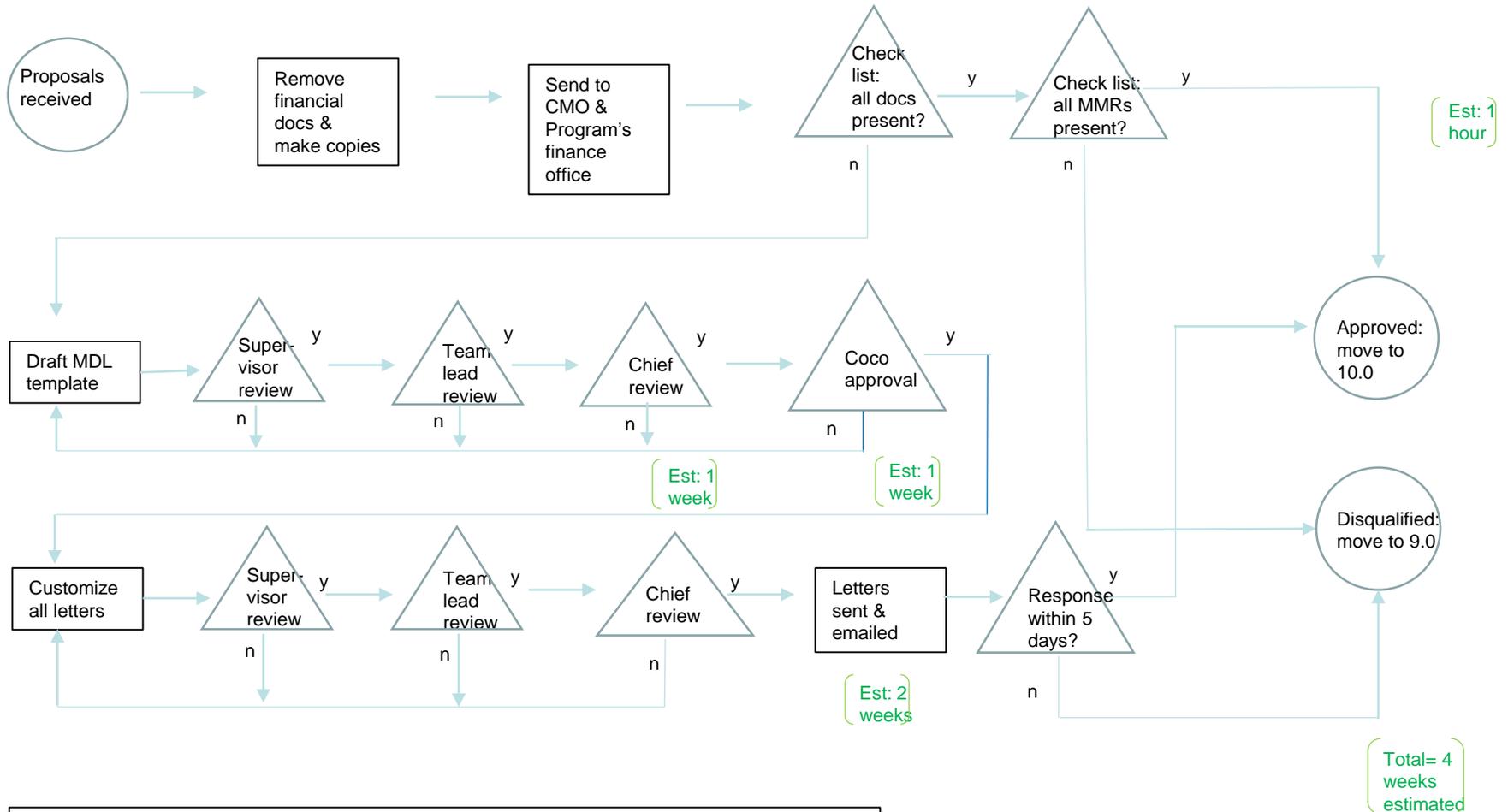


PLAN- What's the Problem?

- First meeting: Brainstorm!
 - What's going well
 - Work well together
 - Transparency
 - Communication to BOS, programs and stakeholders
 - What's not going well
 - Long timelines
 - Constant document revisions and kickbacks
 - Communication within C&G



PLAN- Examine the Current Approach



RFP Project Plan Section 8.0 - Process Map:
Receipt & Review of Proposals

2/22/18



PLAN- Baseline Timestudy

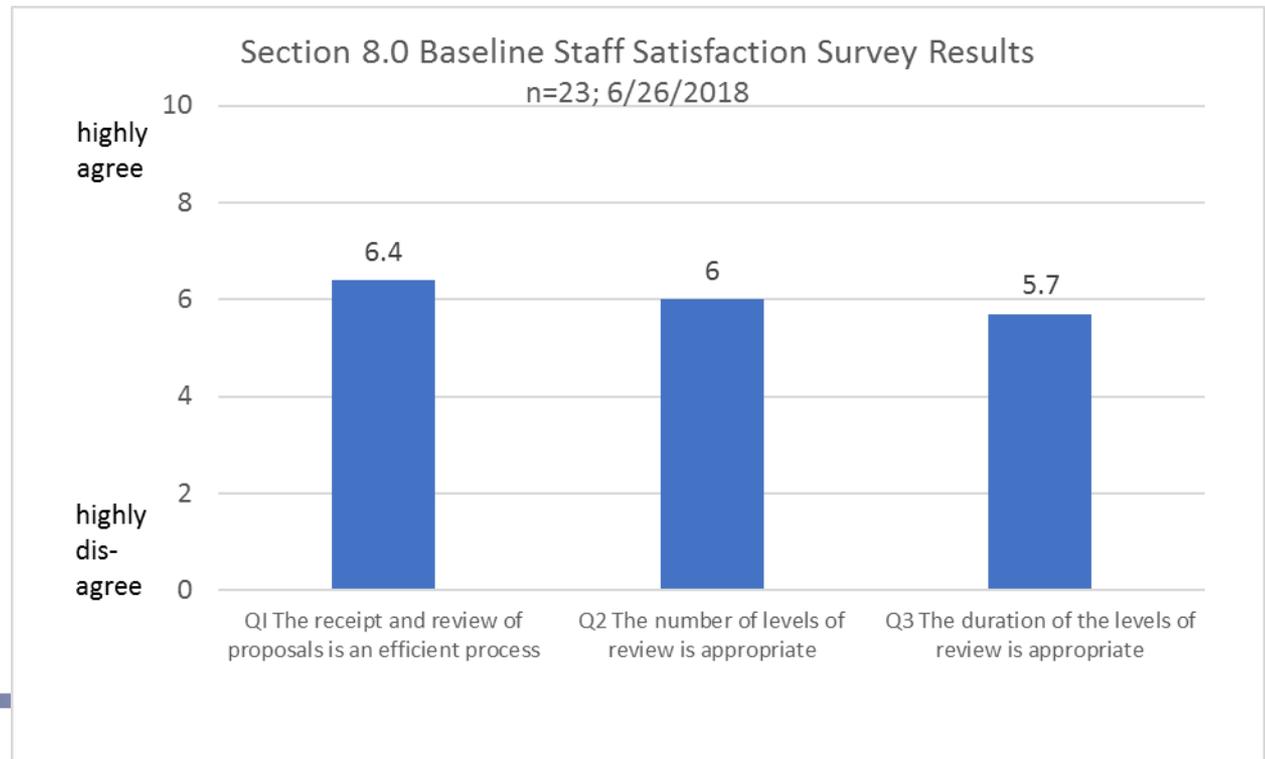
Step #	Step	RFP #1 (2015-003)		RFP #1 (2015-003)**		IFB (2017-003)		RFP #2		average days	Comments
		N= 37	days	N= 37	days	N=6	days	N=10	days		
1	All proposals received	2/11/2016		2/11/2016		5/22/2017		11/3/2016			
2a	Financial pages sent to CMD & Program's Finance Unit	2/24/2016		2/24/2016		6/1/2017		11/4/2016			no value to track this date
2b	Proposal Completion Checklists completed/MMR	2/16/2016	5	4/16/2016	52	5/30/2017	8	11/8/2016	4	17	
3	Missing Document Letter (MDL) template drafted and sent to Coco	2/26/2016	10								date found only for RFP #1
4	Supervisor approves MDL template	2/29/2016	3								date found only for RFP #1
5	CoCo approves MDL template	3/1/2016	1	3/1/2016		couldn't find		Coco had already approved template			date found only for RFP #1
6	Missing Documents Letters (MDL) drafted	3/7/2016	6	4/29/2016	13	6/7/2017	8	11/9/2016	1	7	
7	Supervisor MDLs letter review	3/18/2016	11	5/3/2016	4	6/8/2017	1	11/10/2016	1	4	
8	Team Lead MDLs letter review	3/19/2016	1	5/3/2016	0	6/9/2017	1	11/14/2016	4	2	
9	Chief MDLs letter review	3/21/2016	2	5/3/2016	0	6/9/2017	0	11/16/2016	2	1	
10	MDLs emailed to submitters	3/21/2016	0	5/5/2016	2	6/9/2017	0	11/16/2016	0	1	
11	MDLs U.S.-mailed to submitters	3/21/2016	0	5/5/2016	0	6/9/2017	0	11/16/2016	0	0	
			39		71		18		12	35	

Average days= 35



PLAN- Baseline C&G Staff Satisfaction Survey

- 3 questions, Likert Scale 1-10
 - Q1 The receipt and review of proposals is an efficient process
 - Q2 The number of levels of review is appropriate
 - Q3 The duration of the levels of review is appropriate



PLAN- Identifying All Possible Causes

- Process Map Analysis
 - Is each step necessary?
 - Why is it necessary?
 - What can be done upstream to prevent this step?
- Applied 5-Whys QI Tool
 - Why does County Counsel have to review draft letter? Why does it have to be every letter? Why can't they review and approve one standardized letter?
 - Why does both supervisor & team lead have to review each letter before Director signs? Why is it they have to look for old ways of doing things?



PLAN- Strategies Identified

- Application of 5-Whys QI Tool led to testable solutions
 - Have County Counsel approve a standardized letter template for C&G to use
 - Institute a “Log-It” log to capture new policies and procedures by solicitation type
 - Stored on shared drive
 - Review at every staff meeting
 - Remove team leads from review process



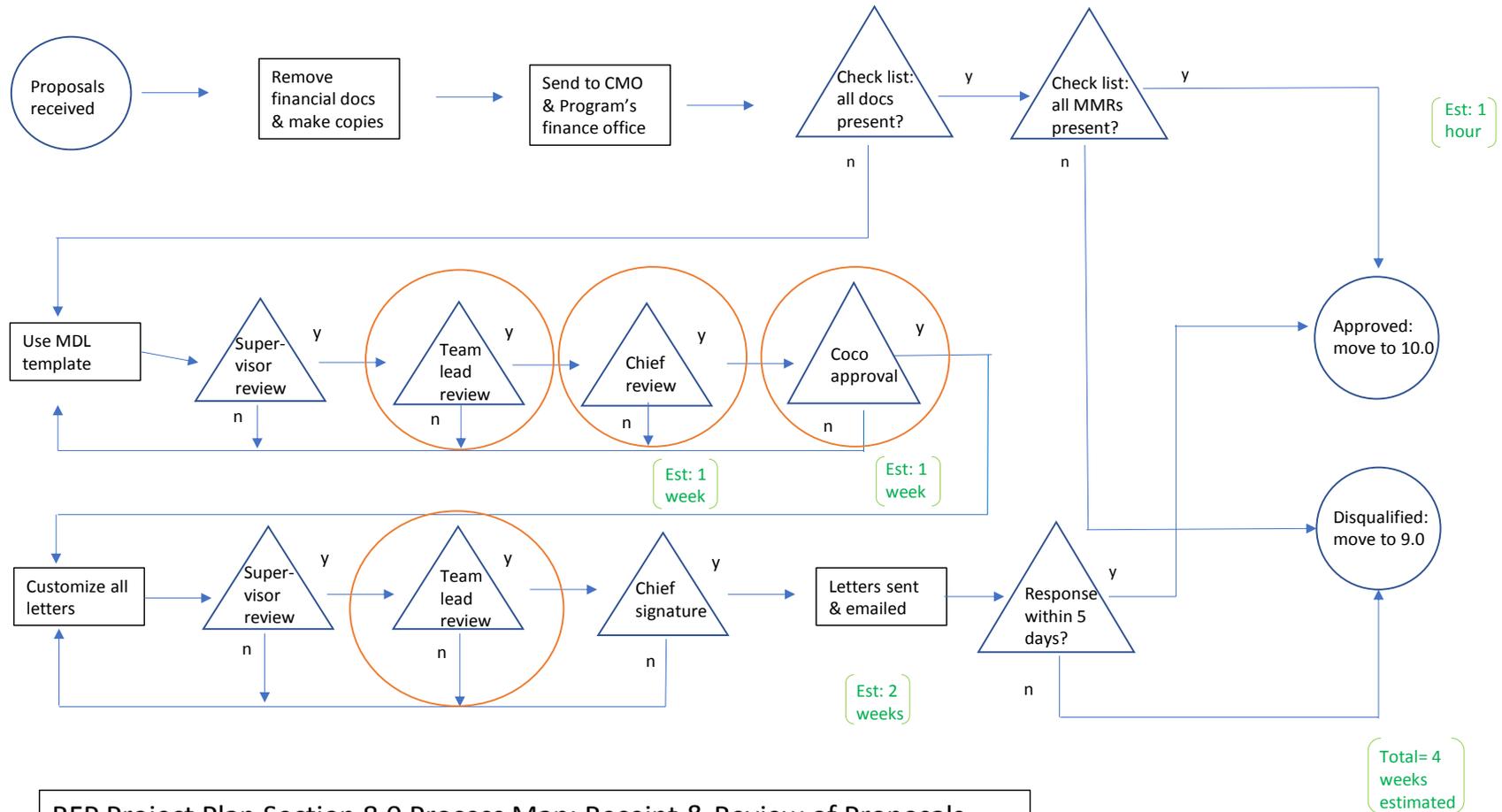
PLAN- SMART Goal

By 8/30/18:

- 1) The # of days to complete Section 8, Receipt of Proposals will decrease from an average of 35 to 30 (14% improvement)
- 2) The staff satisfaction responses will increase by 5% each



DO- Strategy Implemented



Note: red circles indicate steps removed from work flow.

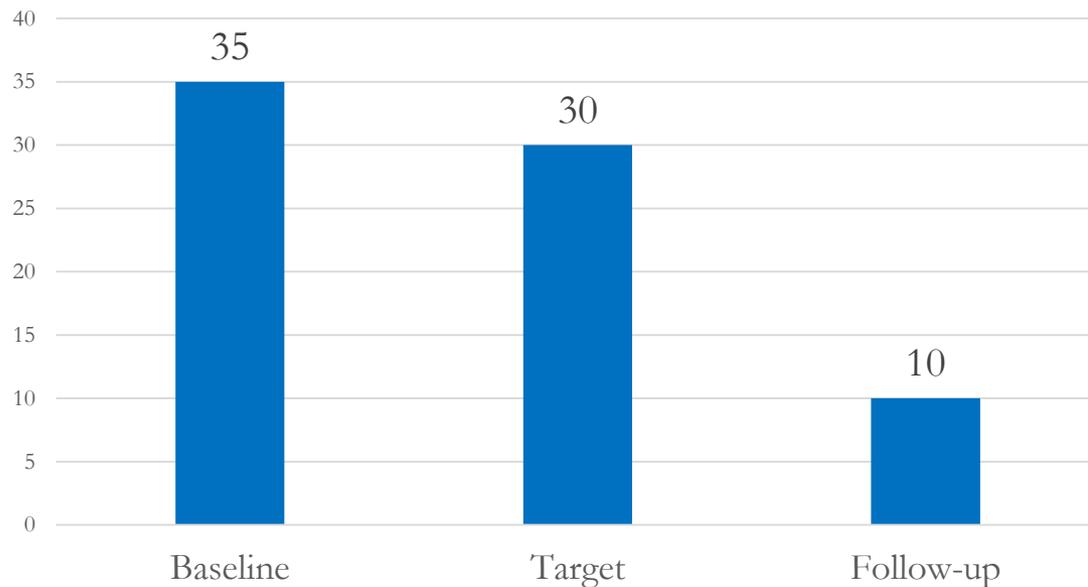
7/10/18



STUDY- Check the Results

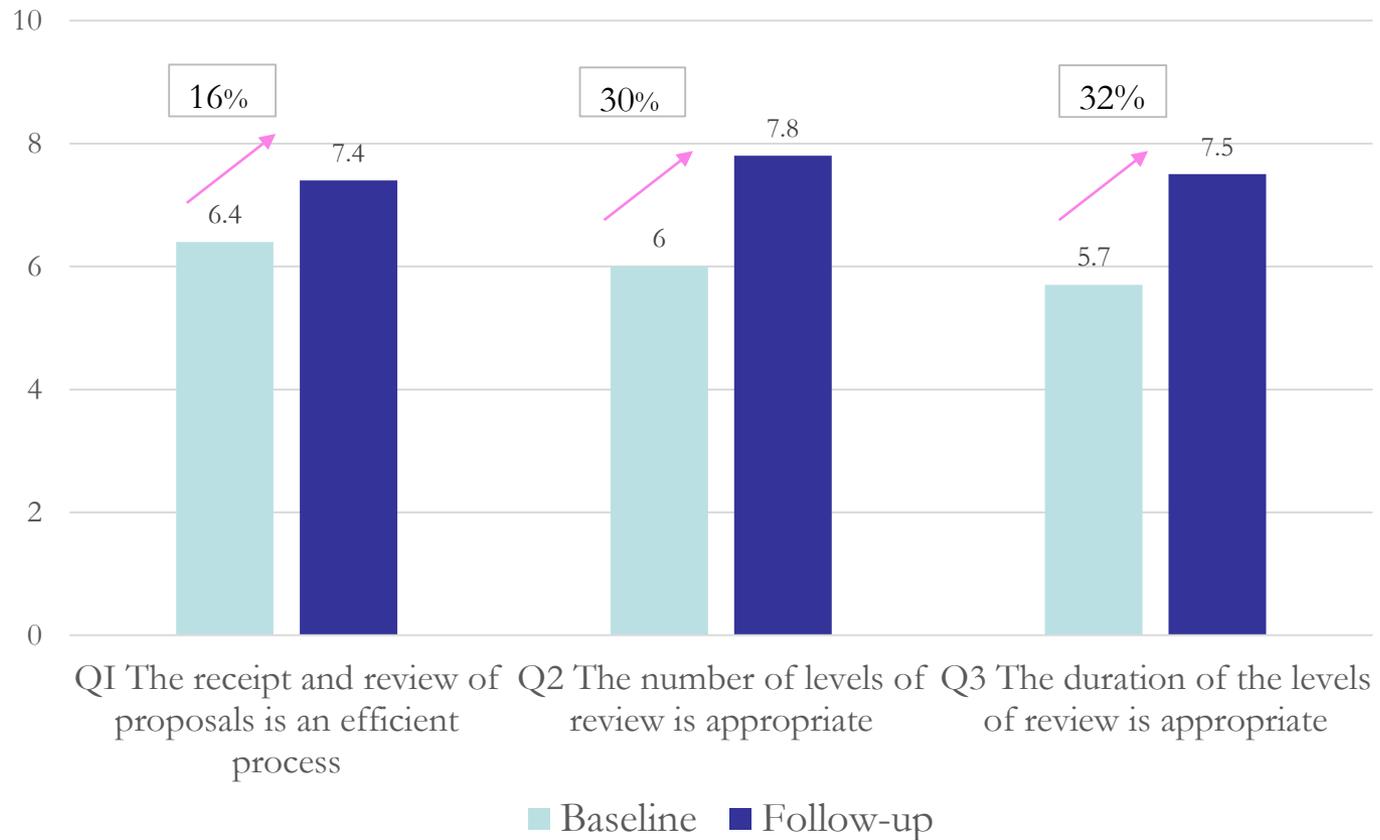
- After 2 months, Section 8 average decreased from 35 to 10 days (71% reduction)

Number of Days for Section 8: Receipt & Review of Proposals



STUDY- Check the Results

Staff Satisfaction with Section 8 Process



ACT- Adopt, Adapt or Abandon?

Strategies were Adopted

Lessons Learned

- 1) Standardizing work improves efficiency
- 2) Keeping staff informed of changes was crucial
- 3) Mapping out the process to fix is SO important!



Next Steps

- In the “Do” phase of second QI project
 - To decrease time to obtain proposer’s references
- C&G will continue their QI journey
 - Lucia Romero will be their first QI Specialist!



QUALITY IMPROVEMENT STORYBOARD



Division/ Program:	Operations Support Bureau/Contracts & Grants Division
Project Title:	Improving the Receipt & Review of Proposals Process
Project Timeline:	January 2018 – September 2018
QI Project Team:	Jose Cueva, Maritza Recinos, Lucia Romero, & Violeta Villalobos

1. Getting Started

The Quality Improvement & Accreditation Program (QIAP) was invited the Contracts & Grants Division (C&G) to lead a QI project to increase efficiencies in the contracting process. Section 8.0 in the Request for Proposals Project Plan (receipt & review of proposals) was identified as an area for improvement by C&G leadership.

2. Assemble the Team

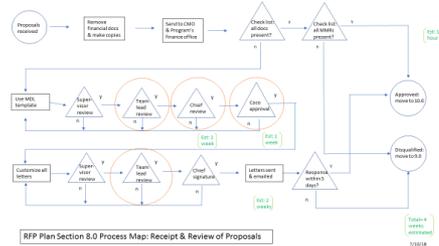
Each C&G section leader found a volunteer analyst to work on this project, for a total of 4 analysts.

3. Define the Problem/ AIM Statement

AIM: To increase efficiency & staff satisfaction with the proposal receipt and review process.

4. Examine the Current Approach

After mapping the process, a baseline timestudy found that on average, this section took 35 days. Using the 5 Whys QI tool found that this was mainly due to the time it took analysts to draft a missing documents letter template, multiple levels of review and re-review of the template, and staff not being up-to-date on changes made in the process



5. Identify Potential Solutions

Solutions identified and chosen include 1) making a “Log-it” tracking sheet of all changes made to this process that would be shared at all-staff meetings; 2) receive County Counsel and C&G leadership approval for a missing documents letter template and begin using it.

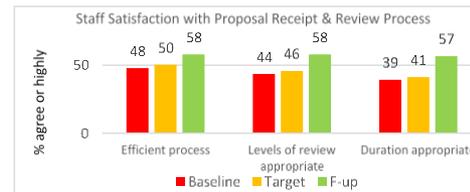
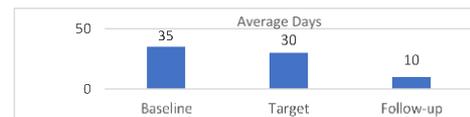
6. PLAN

The team developed a SMART goal that if we implement these strategies, then the average number of days for the receipt and review of proposals will decrease from 35 to 30 by September 15th. They also created a staff satisfaction survey to assess satisfaction with this process before and after implementation.

7. DO

The strategies were implemented.

8. STUDY



9. ACT/Next Steps

The team decided to adopt the three strategies.



Acknowledgements

The C&G QI Project Team would like to thank:

Our Program Director (Patty Gibson)

& Team Leads

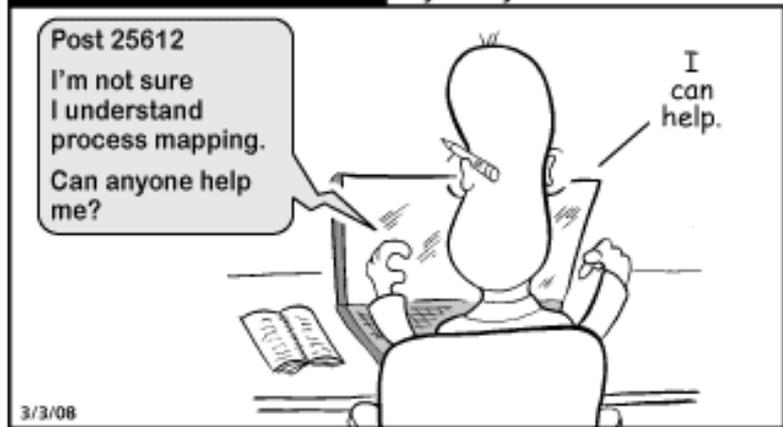
(Karen Buehler, Judith Robb, & Maria Agosto)

for their willingness to apply the PDSA model of quality improvement in the Contracts & Grants Division!

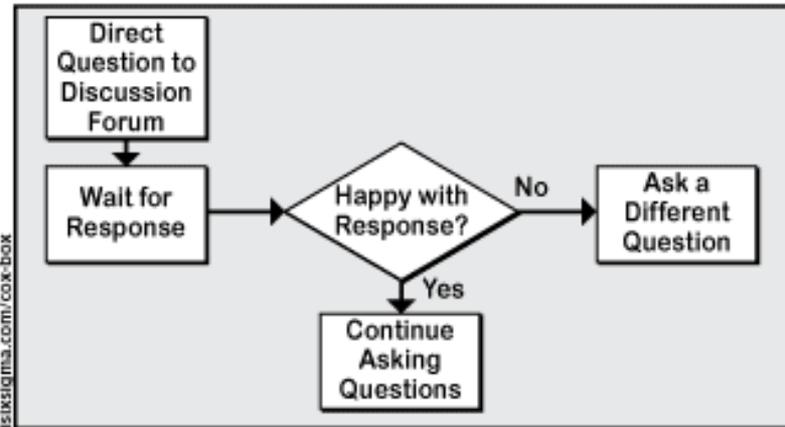


Any Questions?

The COX-BOX by Gary P. Cox



The Cox-Box © 2008 iSixSigma LLC and Gary P. Cox



Send comments and stories to Cox-Box@iSixSigma.com