

Draft Project Charter – Lean III



Project Name: Annual reporting process for the Karner blue butterfly Habitat Conservation Plan

Date Chartered: September 5, 2013; Rev. October 3, 2013

Expected Completion Date: February 28, 2014

Team Leader: Diane Brusoe

Team Mission: (what is the purpose of the team?)

Analyze the requirements and annual reporting process of the Karner blue butterfly Habitat Conservation Plan. Evaluate from both the internal and external customer's point of view to improve the quality, value and efficiency of annual reporting.

Team Goals:

Reduce DNR staff workload

- Reduce the amount of time staff spends on annual report form data entry
- Reduce the quantity of hard copy annual report forms received, processed and filed

Reduce Lead (delivery) Time

- Reduce the lead time for department staff to submit the annual report to USFWS

Improve Customer Satisfaction

- DNR receives complete and accurate annual report forms from HCP partner 90% of the time
- USFWS receives annual reports from the DNR 90% of the time

Simplify the Process

- Improve the efficiency of the annual reporting process by standardizing the requirements and simplifying the process
- Improve the Department's efficiency for storing, reporting and comparing HCP partner data
- Improve transmission of new Karner records to the Bureau of Natural Heritage Conservation

Ensure Staff and Customer Safety

- All Standard Operating Procedures will incorporate applicable Federal, State, and DNR safety requirements.

Measures to be used to determine success: (how will we quantify our progress?)

- Reduce DNR staff workload related to annual report form data entry by 15%
- HCP partners submit annual reports to DNR by March 1st 90% of the time
- DNR submits annual report to USFWS by May 1st 90% of the time
- Improve customer satisfaction by standardizing the requirements and expectations of the annual reporting process

Team Members:

Diane Brusoe
Jenny Bardeen
Larry Cutforth
Melissa Tumbleson

Consultants:

Pete Fasbender (USFWS)
HCP Partner(s)
IOC member(s)

Issues to be addressed: (what problems or opportunities will the team solve?)

- Understand the tardiness for submitting annual reports to the USFWS
- Evaluate opportunities to streamline the reporting process, and reduce hard copies and data re-entry
- Evaluate the annual reporting requirements to determine whether this step is even still needed

Expected Results: (what will be in place when we are done?)

A streamlined annual reporting process that allows external customers to efficiently report relevant data and fulfill partner requirements; an updated reporting system will also improve the department's ability to fulfill USFWS reporting requirements.

Support/Resource People: (who will we need assistance from besides the team members?)

IT support

Responsibilities and Boundaries: (what areas will the team look at/NOT look at?)

The team will analyze the annual report process from the perspective of HCP partners submitting their annual reports to the DNR as well as the department submitting its annual report to the USFWS. At this point, the team will not evaluate other aspects of the HCP user guide.



DNR Lean Project - Final Report

Project Name: Annual Reporting Process for the Karner blue butterfly Habitat Conservation Plan

Project Team Leader: Diane Brusoe

Project Purpose: Analyze the requirements and annual reporting process of the Kbb HCP. Evaluate from both the internal and external customer's point of view to improve the quality, value and efficiency of annual reporting.

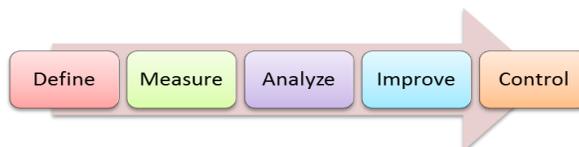
Project Team Members: Jenny Bardeen, Larry Cutforth, Melissa Tumbleson, Rebecca Diebel (Team Sponsor) with special IT assistance from Kevin Wissink and Scott Huelsman

Summary of Improvements:

- Revise the annual report form to be more user-friendly and more specific to USFWS requirements
- Automate the reporting process with required fields to reduce the number of incomplete forms received; automating the process also reduces data re-entry by DNR staff
- Include a tutorial to guide partners through completing the report form and reduce DNR staff time spent assisting/following up with partners to complete reports
- Mistake-proof (poka-yoke) the reporting process to eliminate non-value added steps

Project Results:

Goal	Baseline	Target	Expected After Improvements	Goal Met?
Reduce DNR staff workload.	162 hrs	138 hrs	<100 hrs	To be measured in May 2015
Reduce lead (delivery time).	314 days	157 days	120 days	To be measured in May 2015
Improve customer satisfaction.	From 2008-2012, DNR received 86% of partner forms by March 1 st deadline.	DNR receives complete and accurate annual reports from partners by March 1 st 90% of the time.	DNR receives complete and accurate annual reports from partners by March 1st 90% of the time.	To be measured in May 2015
Improve customer satisfaction.	From 2000-2012, DNR submitted annual report to USFWS by May 1 st deadline 23% of the time.	USFWS receives annual report from the DNR by May 1 st 90% of the time.	USFWS receives annual report from the DNR by May 1st 90% of the time.	To be measured in May 2015
Simplify the process.	10+ steps	3 steps	3 steps	Yes based on pilot project; to be measured in May 2015



Amount of staff time saved per year in hours: 162-138 = 24 hrs

How will that time be reinvested?: identify and develop new landscape scale partnerships

Project Cost:

	Hours	Dollars
Project Team Leader	202	
Project Team Members	84	
Meeting Costs		\$0
Improvement Costs		\$1,000*
Total	286	\$1,000

*Includes costs associated with IS Business Automation staff developing Select Survey.

Recommendations for Future Code/Statute Changes:

No code or statute changes recommended at this time.

Lessons Learned:

- start with a well-defined, limited scope project
- limit the size of the team
- schedule in working sessions into the Lean project team meetings (i.e. we held our lean team meeting first and then scheduled meeting with IT staff once we were clear on our recommendation)
- take advantage of team momentum and working together in-person (it's not as efficient to work via email once everyone heads back to their separate worlds)
- don't underestimate the importance of the communication plan and gaining buy-in along the way
- nothing breeds success like success – celebrate and capitalize on your successes
- institutionalize the improvements to gain Lean credibility and validate the efforts of the team

Secondary Benefits:

- collaborating with DNR Forestry Webdeveloper to redesign Karner blue page to be more user-friendly
- developing SOP of roles and responsibilities associated with Kbb HCP program
- improved process for providing updated Kbb survey information to Bureau of NHC.