

Project Charter

Project Name: AIS, Lakes, and Rivers Grants - Business Rules and Mapping
Date Chartered: 10/02/2013
Expected Completion Date: 03/31/2014
Estimated Implementation Date: 09/1/2014
Team Co-Leader: Kathy Hanson and Patrick Kirsop
Team Sponsor: Carroll Schaal and Mary Rose Teves

Team Goal/Mission -- Purpose of the Team

Review the current Aquatic Invasive Species (AIS), Lakes, and Rivers grant processes and application. Develop a consistent and streamlined approach for grant application. Streamlined grant process and application/ instructions will implement merged grant application period. At present, grant applications are received Feb 1, May 1 and Aug 1 each year. Team will map processes and identify business rules for all three grant programs, identifying areas of similarity, redundancy, and omissions.

Team Goals -- The Business Rules and Mapping team will:

- 1- Develop a consistent and streamlined approach for grant applications by eliminating unnecessary handoffs, approvals, and process steps.
- 2- Reduce project sponsor time completing AIS, Lakes, and River grant applications.
- 3- Reduce DNR staff time reviewing and processing applications.
- 4- Improve overall customer satisfaction with revised grant application.

Measure(s) to be Used to Determine Success -- How will we quantify our progress?

- 1- Decrease application process steps by 10 %.
- 2- Reduce project sponsor time spent developing applications by 15%.
- 3- Reduce DNR staff time spent reviewing, scoring, ranking and awarding grants by 10%.
- 4- Increase by 15% customer satisfaction with revised application, as determined by survey provided to successful applicants with grant agreement.

Team Members

- Sarah Bradley
- Sandy Chancellor
- Kevin Gauthier
- Diane Hanson – Marathon County
- Kathy Hanson, Co-chair
- Patrick Kirsop, Co-chair
- Jane Malischke
- Greg Searle

Expected Results -- Upon implementation:

- 1- Consistent process across all three grant programs.
- 2- Revised application form(s) and workflow.
- 3- Standardized grant application review, scoring, and ranking.
- 4- Develop Business Rules for easier creation of future on-line system.
- 5- Better use of available technology.
- 6- Reduced workload for project sponsors and DNR staff.



DNR Lean Project - Final Report

Project Name: Aquatic Invasive Species, Lakes, and Rivers Grants

Project Team Leader: Kathy Hanson and Patrick Kirsop, Co – Team Leaders

Project Purpose: Simplify the grant application process for the Aquatic Invasive Species, Lake and River grants for the applicant and DNR.

Project Team Members:

Sarah Bradley (Now with ETF) Sandy Chancellor
 Kevin Gauthier Jane Malischke
 Diane Hanson – Marathon County Greg Searle

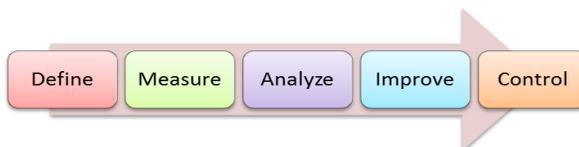
Summary of Improvements:

- Reduce application process steps needed by applicants and DNR staff
- Combine all three main grant program’s application into one application
 - Develop guidance and training materials, reduce DNR staff time spent assisting/following up with partners to complete applications
- Create fillable/savable Adobe pdf file that will allow all grant applicants to fill out common information for any grant type and then information for a specific grant type.

Project Results:

Goal	Baseline	Target	Expected After Improvements	Goal Met?
Reduce DNR staff workload.	78 - 336 hours	Reduce 10%	100 hours avg.	Yes – Track some grants
Reduce lead (delivery time).	~ 300 hours max	Reduce applicant’s time 15%	80 hours avg.	Yes – Ask in Survey 2/16
Improve customer satisfaction.	Survey to determine what problems	Raise 15%	15% or more	Ask in Survey 2/16
Simplify the process.	33 steps (39 Initially)	Decrease 10%	28 Steps	16% Decrease

Amount of staff time saved per year in hours: 336 max. - 226 hours = 100 hours avg.
How will that time be reinvested?: More field time for water staff. Community Financial Assistance staff time to work on other grant programs since all staff work on multiple programs.



Project Cost: As of 3/27/14

	Hours	Dollars
Project Team Leader	626.75	
Project Team Members	449.75	
Meeting Costs		\$1006.46
Improvement Costs		\$ NA
Total	1076.50	\$1006.46

Recommendations for Future Code/Statute Changes: Statute change recommended to allow use of grant program money to pay administrative costs to develop and maintain an online data system. Online data system for both grant applications and related water program data reporting during grant period.

Lessons Learned:

- Start with a well-defined, limited scope project.
 - Watch scope “creep” and adding more to the project.
- In-person meetings critical. Hard to have Live Meetings to show created documents and great discussion between team members.
- Make sure all the technology that you use will work in your meeting location.
- Survey customers, if needed, to confirm what DNR staff thinks problems or issues are.
 - In this case, survey confirmed what DNR staff thought.
- Surveys take more time than anticipated.
- Surveys determine other future improvement areas. For this project:
 - State Lab of Hygiene: How to track individual grants sampling done and lab costs?
 - Public Access: Insure better data from applicants and that DNR can share data to show public access points.
 - Online System: 84% of respondents said they were very or fairly interested in a website to accept grant application material.
- Fall Lean projects at disadvantage with work due to December holidays.
 - Allow fall Lean projects, if start in September, to end in April.
- Ensure that Lean Project staff has some of their normal duties relived.
 - Stressful project and time. Some staff will not want to go through process again.
- Ensure Project Sponsors are active and provide needed input during each project phase.
 - Must educate, get feedback for project direction and gain buy-in along the way.

Future Solutions:

- Lean Lite – How can DNR staff be trained to develop process changes to help save time and money without making the large time commitment for the formal Lean Teams?
 - The lean projects required steps took too much time for some, if in their mind, the needed solution was already known.