Lean Project Charter

Project Name: NHC Grant Management
Date Chartered: September 3, 2013
Expected Completion Date: March, 2014
Team Leader: Tim Reneau-Major/Matt Wykle

Team Goal/Mission:
The Bureau of Natural Heritage Conservation is heavily dependent on grants to fund core work. Consequently, the bureau manages a large number of grants from many different sources. The goal of the project is to develop a process for NHC staff that addresses grant submission, approval and management.

The team will implement improvements that accomplish the following:
1. Reduce DNR staff workload.
2. Reduce lead (delivery) time.
3. Improve customer satisfaction.
4. Simplify the process.

Measure(s) to be used to determine success:
How will we quantify our progress?
1. NHC staff time tracking grant expenses will be reduced by 15%.
2. The time between grant related personnel expenses being incurred and expense data available to grant managers will be reduced by 15%.
3. Customer satisfaction for bureau grant managers will increase by 25%.
4. There will be one documented NHC grant submission, approval and management process with clear roles and responsibilities.
5. The number of earned grants will increase by 15%.

Team Members: Tim Reneau-Major, Matt Wykle, Ryan O'Connor, Matt Zine, Tara Bergeson.

Issues to be addressed:
What Problems or opportunities will the team solve?
1. The program lacks clear instructions for staff regarding grant submissions, approvals and management.
2. Historically the program has problems earning grants, documenting match, and sending in timely reports.

Expected Results:
NHC staff will have templates to use and an approval process articulated. There will be a significant decrease in the support needed from FN, and there will be more timely submission of projects to the Secretary's Office for signature.

Support/Resource People for Consultation: Gabe Nankee, Carol Bentzler, Patrick Dragert, Jane Riley, Ryan Marty.

Responsibilities and Boundaries:
The team will address the grant process within the bureau in consultation with FN, MB and the Land Division. It will not address grant processes outside the bureau.

Project Name: NHC Grants Management

**Project Team Leader:** Tim Reneau-Major & Matt Wykle

Project Purpose: The Bureau of Natural Heritage Conservation is heavily dependent on grants to fund core work. Consequently, the bureau manages a large number of grants from many different sources. The goal of the project is to clearly define and simplify the process NHC uses for grant submission, approval and management.

Project Team Members: Tara Bergeson
Ryan O'Connor
Matt Zine

Summary of Improvements: Provide training and resource documents to staff to help them through the grant application and management processes. Develop standardized spreadsheets and databases to reduce time between expenses being incurred and staff being able to track expenses.

Project Results:

Goal	Baseline	Target	Expected After Improvements	Goal Met?
NHC Staff time tracking grant expenses will be reduced by 15%	46.83 Hours/year per grant manager (~702 hr/year)	39.81 Hours/year per grant manager (~597 hr/year)	7 Hours/year per grant manager (~105 hr/year)	Yes
The time between personnel expenses being incurred and expense data available to grant managers will be reduced by 15%	**Labor:** DNR staff - 17 days Contract staff – 32 days	**Labor:** DNR staff -14.5 days Contract staff – 27.2 days	**Labor:** DNR staff – 3 days Contract staff – 3 days	Yes
	Fringe: DNR staff- 50 days Contract staff – 32 days	**Fringe:** DNR staff- 42.5 days Contract staff – 27.2 days	**Fringe:** DNR staff- 3 days Contract staff – 3 days	Yes
Customer satisfaction for bureau grant managers will increase by 25%	18.52% Customer Satisfaction	23.15% Customer satisfaction	75% Customer satisfaction	Yes
There will be one documented NHC grant submission, approval, and managemet process with clear roles and responsibilities.	Many processes	One process	One process	Yes

Define Measure Analyze Improve Control
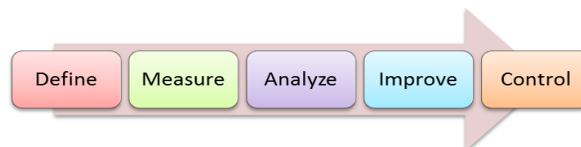
Amount of staff time saved per year in hours: 39.83 hours per year for each grant manager. With ~15 grant managers this is 597.45 hours per year.

How will that time be reinvested?: Time saved by grant managers can be reinvested into work planning and applying for additional grants.

Project Cost:

	Hours	Dollars
Project Team Leader	257	███████████
Project Team Members	71.5	███████████
Meeting Costs	███████████	$0
Improvement Costs	███████████	$0
Total	328.5	$

Recommendations for Future Code/Statute Changes: None

Lessons Learned:

- A narrow focus is important to make the best use of Lean 6 Sigma tools.
- Data takes time to collect especially when your process is large and variable.
- It is a big help to have team members with different perspectives of the process.