

## Project Charter

**Project Name: Legal Opinion File**

**Date Chartered: 2/29/2012**

**Expected Completion Date: July 1, 2012**

**Team Leader: Quinn Williams**

### **Team Goal/Mission:**

What is the purpose of the team?

Review the process used to issue legal opinions and implement improvements that make the process more efficient, timely, and trackable.

The team will implement improvements that accomplish the following:

1. Reduce DNR attorney staff time required to provide legal opinions.
2. Reduce the amount of time it takes for the customer to receive legal opinions.
3. Improve customer satisfaction.
4. Improve access to historical record of BLS legal opinions
5. Simplify the process of providing legal advice.
6. Ensure that all safety requirements are incorporated into the new process.

### **Measure(s) to be used to determine success:**

How will we quantify our progress?

1. DNR legal staff time is reduced by 5%. Will use internal time tracking, numbers of legal opinion requests and form of request to track.
2. Customer receives legal opinion on average in one week or less.
3. Customer focus groups.
4. Overall number of background questions, research emails will be reduced.
5. Will reduce exposure of attorney/client protected issues.

### **Team Members:**

- Cheryl Heilman
- Jane Landretti
- Laura Pleasants
- Edwina Kavanaugh
- Other Division/Bureau staff TBD.

### **Issues to be addressed:**

What Problems or opportunities will the team solve?

1. Where requests come from
2. What is the form of the opinion issued/how is it labeled as such
3. How is it tracked/stored/recovered
4. What are "right now" problems, what are future looking

### **Expected Results:**

What will be in place when we are done?

- SOP for opinion requests/processing
- 5% decrease in overall staff time spent on legal opinions

- 5% reduction in speed of legal opinions delivered
- Updated “library” of opinions
- Knowing where the request is in the process?

**Support/Resource People:**

Who will we need assistance from besides the team members?

- IT
- Other BLS attorneys
- Other program staff TBD

**Who are the customers?**

- Customers
  - Divisions/Bureaus
  - Other staff attorneys/DOJ
  - Secretary’s Office

**Responsibilities and Boundaries:**

What areas will the team look at and what areas will the team NOT look at?

- Performance metrics for pay for performance/HR issues
- All other issues outside the Charter go in the “hopper”



# DNR Lean Project - Final Report

**Project Name:** Legal Opinion File

**Project Team Leader:** Quinn Williams

**Project Purpose:** Review the process used to issue legal opinions and implement improvements that make the process more efficient, timely, and trackable.

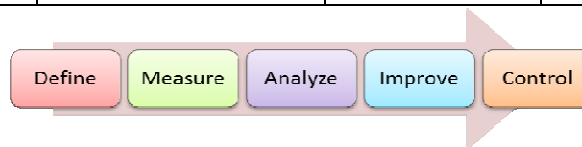
**Project Team Members:**

- Quinn Williams
- Cheryl Heilman
- Jane Landretti
- Laura Pleasants
- Edwina Kavanaugh
- Joe Polich
- Adam Lindsey

**Summary of Improvements:** See attached Project Implementation Plan

**Project Results:**

Goal	Baseline	Target	After Improvements	Goal Met?
Reduce DNR attorney staff time required to provide legal opinions.	19% - Background with client 23% - Writing 23% - Consulting 35% - Research	5% reduction in overall time.	Projected 10% reduction in overall time( 6 month re-run)	Yes
Reduce the amount of time it takes for the customer to receive legal opinions.	63% - > 1 day 32% - 2 to 4 days 5% - 5 or more days	One week or less	Maintain – improve access.	Yes
Improve Customer Satisfaction.	1 – 2 days for simple 1 – 2 weeks complex Need-by date Attys relay priorities Definition of the process	BLS defined process for filing opinions	BLS defined process for requesting opinions	Yes
Simplify the process of providing legal advice.	19% - Background with client 35% - Research	Decrease background requests and research.	Estimated 5% reduction in research time.	Yes
Ensure Staff and Customer Safety for Attorney/Client Privilege.	Training/guidance	Reduce exposure on A/C privileged communications	Opinion file disclaimers with process	Yes



**Project Cost:**

	<b>Hours</b>	<b>Dollars</b>
Project Team Leader	80	
Project Team Members	103.5	
Meeting Costs		\$50
Improvement Costs		\$
Total	183.5	\$50

**Recommendations for Future Code/Statute Changes:** N/A

**Lessons Learned:**

- Data collection is critical
- Harness the power of customers in focus groups
- Anything can be measured, but definition is key
- To be successful, need to commit the resources