Procurement Improvement Plan
Recommendations Dashboard and Scorecard

February 20, 2015

Procurement Improvement Plan
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Establish an Enterprise Procurement Leadership Team to ensure communication and accountability between agency procurement organizations and DTMB Procurement through formalized reporting relationships

Key Action	Timing	Status	Comments
Executive Order establishing formal links.	7/13/14	COMPLETED	
Establish Procurement Leadership Team	5/2/14	COMPLETED	
Finalize Membership of Procurement Leadership Team	5/15/14	COMPLETED	
Finalize Procurement Leadership Team Charter	5/15/14	COMPLETED	
Schedule first Procurement Leadership Team Meeting	4/23/14	COMPLETED	
Signed MOA with all Departments/Agencies	7/15/14	RED	5 out of 26 signatures received for MOA.

Unable to Meet Original Timing | Risk of Not Meeting Original Timing | On Track to Meet Timing

Establish an Executive Steering Committee

Key Action	Timing	Status	Comments
Establish Executive Steering Committee	5/2/14	COMPLETED	6 out of 6 members identified.
Finalize Executive Steering Committee Charter	6/6/14	COMPLETED	Approved by Executive Steering Committee, and signed on 7/17/14.
Schedule first Executive Steering Committee Meeting	6/1/14	COMPLETED	
Executive Steering Committee reviews all related dashboards	8/15/14	COMPLETED	Improvement Plan & Major Project Dashboard sent out weekly (per Committee request). Aligned Objective Dashboard delayed until next Steering Committee meeting, set for 10/7/14.

⬤ Unable to Meet Original Timing   ⬤ Risk of Not Meeting Original Timing   ⬤ On Track to Meet Timing

Establish Implementation Teams

Key Action	Timing	Status	Comments
Establish Implementation Teams (4)	5/9/14	COMPLETED	
Finalize Implementation Teams' Charters	5/9/14	COMPLETED	
Schedule first Implementation Team Meetings	5/9/14	COMPLETED	
Source data analysis functions for the Improvement Team	5/23/14	COMPLETED	

🔴 Unable to Meet Original Timing   🟡 Risk of Not Meeting Original Timing   🟢 On Track to Meet Timing

Begin work on Pilot Category Sub-Teams to demonstrate improvement opportunities (Savings, timing, customer service, etc.)

Key Action	Timing	Status	Comments
Establish 2 Pilot Category Teams (Fuel & Wireless)	5/9/14	COMPLETED	
Provide data needed by the 2 Pilot Category Teams	5/15/14	COMPLETED	
Procurement Core Team reviews Category Plans	6/30/14	RED	FUEL complete from purchasing perspective - business models assessment underway. WIRELESS is being reexamined to better represent the organizational needs to potential vendors. Team will update ESC 3/3/15. Meeting scheduled with MSP 2/10/15 to discuss contract progress.
Evaluate Lessons Learned by the 2 Pilot Category Teams	7/10/14	COMPLETED	Preliminary lessons learned presented 7/1/14. Additional lessons to be presented at the conclusion of the 2 pilots.
Establish 3 Pilot Category Teams	9/30/14	COMPLETED	Next 3 pilots identified: IT Staff Aug., MRO, and Armor Car . Improved plan includes 4 major milestones, and assignment of team champions to monitor done. Roster of each team is complete team.
Provide data needed by the 3 Pilot Category Teams	7/17/14	COMPLETED	Completed 6/30/14.
Procurement Core Team reviews additional 3 Pilot Category Teams' Category Plans (IT Staff Aug., Armored Car Services, & MRO)	9/30/14	RED	IT Staff Aug target 5/31/15; Armored Car Services and MRO - TBD.
Additional 3 Pilot Category Teams finish sourcing work	TBD	GREEN	Based on first 3 pilot categories, original time frame is likely unfeasible, waiting on new timelines from teams status change.
Evaluate lessons learned by the additional 3 Pilot Category Teams	1/30/15	RED	Reviewed lessons learned transferred to core - Phase 1 complete. To be reviewed again 2/11/15.

🔴 Unable to Meet Original Timing   🟡 Risk of Not Meeting Original Timing   🟢 On Track to Meet Timing

Establish aligned organizational objectives between agency procurement and state procurement

Key Action	Timing	Status	Comments
Set shared vision (Governor's approval of State Procurment Improvement Plan)	4/16/14	COMPLETED	
Set vision of best-in-class success	4/16/14	COMPLETED	
Set goals (Elevator Speech)	7/15/14	COMPLETED	
Draft Improvement Plan Dashboard/Scorecard	5/20/14	COMPLETED	
Approve Improvement Plan Dashboard/Scorecard	5/27/14	COMPLETED	
Publish Improvement Plan Dashboard/Scorecard	5/30/14	COMPLETED	Sent weekly to agency directors.
Set aligned enterprise-wide procurement objectives	7/25/14	COMPLETED	Reviewed and agreed upon by Executive Steering Committee on 7/17/14.
Draft Aligned Objectives Dashboard	7/22/14	COMPLETED	Completed 8/5/14.
Approve Aligned Objectives Dashboard	8/7/14	COMPLETED	Completed 9/16/14.
Publish Aligned Objectives Dashboard	8/15/14	COMPLETED	
Establish clear and aligned objectives within multiple agencies	10/15/15	GREEN	

🔴 Unable to Meet Original Timing   🟡 Risk of Not Meeting Original Timing   🟢 On Track to Meet Timing

Accelerate implementation of e-Procurement

Key Action	Timing	Status	Comments
Study feasibility of accelerating Phase II implementation of e-Procurement	6/23/14	COMPLETED	e-Procurement Team indicated accelerating Phase II is not possible.

Unable to Meet Original Timing

Risk of Not Meeting Original Timing

On Track to Meet Timing

Create Major Projects Dashboard with timeliness to facilitate transparency

Key Action	Timing	Status	Comments
Identify critera for "Major Projects"	5/9/14	COMPLETED	
Identify "Major Projects"	5/16/14	COMPLETED	
Draft Major Projects Dashboard	5/23/14	COMPLETED	
Approve Major Projects Dashboard	5/23/14	COMPLETED	
Provide Major Projects Dashboard to Executive Steering Committee	7/1/14	COMPLETED	Reviewed with Executive Steering Committee at 7/17/14 meeting.
Decide on methodology for bringing agencies into reporting on the Major Projects Dashboard	7/1/14	COMPLETED	Methodology presented to Executive Steering Committee at 7/17/14 meeting.

Unable to Meet Original Timing   Risk of Not Meeting Original Timing   On Track to Meet Timing

Develop comprehensive enterprise-wide recruitment and training programs

Key Action	Timing	Status	Comments
Implement College-to-Hire pilot in DTMB-Procurement	5/1/15	GREEN	Proposal being prepared. Contacts to be identified with MSU and WMU to refine details for relationship.
Recruitment and retention strategy developed and implemented	9/30/15	GREEN	First draft of strategy completed. Meeting held with HR 9/25 and second one set 10/24 to discuss standards.
Develop Enterprise wide training and education strategy	9/30/15	GREEN	Under way within the team. Vision Statement written and approved 9/25/14.
Identify number of new classes that are required	11/15/14	COMPLETED	
Develop one new class available for procurement professionals	9/30/14	COMPLETED	Terms & Conditions training was held on 9/30/14 by AG - Mandatory for all purchasing professionals.
Schedule first new class	8/12/14	COMPLETED	Terms & Conditions training to be held 9/30/14.
Future sessions of the class scheduled	8/12/14	COMPLETED	Second class scheduled for 10/16/14.
Identify and put into production tools to collect and track professional development	TBD	COMPLETED	
Establish tracking and other framework for creating and maintaining metrics and targets for completed training hours	9/30/15	GREEN	Learning management system team to begin search for system to support process and perform a Use, Make or Buy with cost estimates.

🔴 Unable to Meet Original Timing   🟡 Risk of Not Meeting Original Timing   🟢 On Track to Meet Timing

Develop procurement resource plan

Key Action	Timing	Status	Comments
Evaluate reporting level of Procurement Executives to Agency Directors	9/1/14	COMPLETED	Completed 9/23/14 and reviewed with David Behen.
Assess work load across enterprise	9/30/16	GREEN	Long-term goal depends on roll-out of new training & processes
Develop resource recommendations based on work load	11/30/16	GREEN	
Present resource recommendations to Executive Steering Committee	1/30/17	GREEN	

⬤ Unable to Meet Original Timing   ⬤ Risk of Not Meeting Original Timing   ⬤ On Track to Meet Timing

For key categories, develop and implement business review process with suppliers and business units

Key Action	Timing	Status	Comments
Establish structured Supplier-Leadership framework for category review	9/30/14	COMPLETED	Generic agenda completed 9/25/14.
Launch a pilot structured Supplier-Leadership review	4/1/15	GREEN	Launch of pilot dependent on identification of level 4 category, strategic supplier, and key performance metrics.

Unable to Meet Original Timing   Risk of Not Meeting Original Timing   On Track to Meet Timing

Develop and implement supplier measurement system

Key Action	Timing	Status	Comments
Develop a framework and rationale for a solid measurement system for vendor performance	9/30/15	GREEN	Benchmarking three companies (DTE, Ryder, and Beaumont)
Performance metrics identified and available	9/30/15	GREEN	Timing TBD by Data & Reporting Team. Contingent on measurement role in metrics Framework under development.
Pilot launched to establish and review performance metric with selected supplier	9/30/15	GREEN	
System and process for tracking performance metrics identified	9/30/15	GREEN	
Interim bridge to move measures from current low level of use to integrated into business process	9/30/15	GREEN	Bridge needed to test and refine measures and collection process. It will also establish value of process to bound cost of tools.

Unable to Meet Original Timing

Risk of Not Meeting Original Timing

On Track to Meet Timing

Develop and implement category sourcing plans

Key Action	Timing	Status	Comments
Conduct category segmentation (segments and categories finalized)	6/16/14	COMPLETED	Reviewed with Leadership Team on 5/28/14 (copies given). Reviewed feedback in 6/11/14 meeting. Reviewed with David Behen and Phil Jeffery on 6/9/14.
Refresh Segmentation (to include FY 13 Spend Analysis)	1/16/15	COMPLETED	Completed 12/4/14.
Set roles and responsibilities for Lead Buyer, Subject Matter Experts, and other buyers	9/30/14	COMPLETED	
Draft Category Plan template	5/30/14	COMPLETED	
Determine Categories for FY 15	8/1/14	COMPLETED	Proposed categories submitted to Core Team for review and approval. 8/22 set as last review and approval.
Draft and complete Category Planning Guide booklet	8/22/14 12/18/14	RED	Slides under review with core team and strategy for deployment creation. Jeff Brownlee to set meeting.
Provide initial data needed by the FY 15 Category Teams	7/25/14	COMPLETED	
FY 15 Category Team begins sourcing work based on approved plans and recommendations	9/30/15	GREEN	
Evaluate Leassons Learned by FY 15 Category Team	10/31/15	GREEN	
Determine Categories for FY 16	8/30/15	GREEN	

● Unable to Meet Original Timing   ● Risk of Not Meeting Original Timing   ● On Track to Meet Timing

Study feasibility of greater procurement cooperation with local units of government and educational institutions

Key Action	Timing	Status	Comments
Study feasibility of greater procurement cooperation with local units of government and educational institutions	CYR 2016	GREEN	Genevieve Hayes (lead) and Chris Swartout (facilitator) identified to lead recommendations.

Unable to Meet Original Timing

Risk of Not Meeting Original Timing

On Track to Meet Timing

Customer Satisfaction Focus

Key Action	Timing	Status	Comments
Customer satisfaction feedback (end users)	12/31/14 4/1/15	RED	Framework developed. DTMB-wide team dependent. DTMB OPM lead. PWC selected. Jenni Riehle now on the OPM team to set questions. Five questions drafted.
Enterprise-wide purchasing feedback	9/30/15	GREEN	Developed Framework and is working to integrate with DTMB. PWC will work with team to support program.
Establish feedback mechanism for high-level agency input	9/30/15	GREEN	
Develop Purchasing Team Survey	12/16/16	GREEN	
Develop Field Customer Survey	12/16/16	GREEN	Develop Framework beginning detail feedback process
Ad Hoc Feedback - Event Driven	On Going	GREEN	Develop Framework beginning detail feedback process

Unable to Meet Original Timing   Risk of Not Meeting Original Timing   On Track to Meet Timing

Supplier Relationship Engagement

Key Action	Timing	Status	Comments
Define a framework to strengthen supplier relationships	6/6/14	COMPLETED	
Establish Supplier Advisory Council	TBD	ON HOLD	Procurement Core Team has decided that this action is best tabled for the time being.
Hold Supplier Summit	5/31/15 8/31/15	GREEN	Reviewed with Executive Office for Governor's available date.

Unable to Meet Original Timing   Risk of Not Meeting Original Timing   On Track to Meet Timing

Process Improvement

Key Action	Timing	Status	Comments
Define the process flows for "I want to buy something"	12/10/14 12/17/14	COMPLETED	
Statement of Work (SOW) creation process	11/15/14 11/26/14 12/10/14 12/17/14 02/17/15	RED	Integration work shifted to separate group. On timeline for 2/17/15.
Define the process flows for "Prequalification"	12/23/14 2/25/15	RED	Integration work shifted to separate group. On timeline for 2/25/15.
Create new process and procedures	09/30/15	GREEN	Procedures dependent on key actions above. First step is benchmarking public and private entities (4 states, 3 businesses).
Create new Policy Manual	09/30/15	GREEN	Outline draft complete.
Circulate Policy, Procedures, and Process for comment	09/30/15	GREEN	
Approve and publish process and procedures changes	09/30/15	GREEN	

Unable to Meet Original Timing

Risk of Not Meeting Original Timing

On Track to Meet Timing

Change Management

Key Action	Timing	Status	Comments
Engage external experts to asses and assist our change process	12/15/14 01/05/15	RED	RFP Complete only one respondent -- Vendor meeting due 11/20 proposal returned for rework. DTMB will redefine requirements and look for new vendor. PWC selected, contract details TBD.
Gage organizational impact of collective- and single- change events	3/1/15	GREEN	Pending consultant onboard. TBD as to when PWC can work on it.

Unable to Meet Original Timing

Risk of Not Meeting Original Timing

On Track to Meet Timing

Continuous Improvement

Key Action	Timing	Status	Comments
Develop a continuous improvement program and mindset throughout the organization. Personally promote and believe in continuous improvement and quality of work product	3/1/15	GREEN	Project Kick off 1/9/15 - Lean and 6 sigma base information analysis target 6 wks with recommendation to Procurement Leadership Team.

🔴 Unable to Meet Original Timing   🟡 Risk of Not Meeting Original Timing   🟢 On Track to Meet Timing

Financial Savings: Definition and Tracking

Key Action	Timing	Status	Comments
Define, document, and track savings for Procurement	9/30/15	GREEN	Team formed with Tyler Tulloch and DTMB. First meeting held 12/8/14.
Create framework to recognize teams for their effort in savings made across the organization	10/1/15	GREEN	
Operational savings, soft- and hard-savings defined and tracking put into place	10/2/15	GREEN	

🔴 Unable to Meet Original Timing   🟡 Risk of Not Meeting Original Timing   🟢 On Track to Meet Timing