

# Strategic Lean Project Report



**For Reporting Period:** July 1, 2015 through December 31, 2015

## I. General Information:

Lead agency name: **Puget Sound Partnership**

Partner agencies: Office of Financial Management

**Improvement project title:** Puget Sound related budget ranking process

**Date improvement project was initiated:** July, 2014

**Project type:** New Project

**Project is directly connected to:**

Results Washington performance measure

Agency Strategic Plan

Other

**If applicable, specify the alignment:**

N/A

Mobilize funding

N/A

**Report reviewed and approved by:** Sheida Sahandy, Executive Director

A handwritten signature in blue ink that reads "Sheida R. Sahandy".

## II. Project Summary:

The Partnership improved the Puget Sound recovery budget request ranking process, resulting in the timely delivery of more meaningful information to the Office of Financial Management (OFM).

## III. Project Details:

**Identify the problem:**

Each year the Partnership ranks state agencies' Puget Sound recovery budget requests based upon how closely they relate to the Puget Sound Action Agenda. The time-frame for ranking those requests for OFM is tight. The Partnership's 2013 ranking process consisted of 7 steps and required Partnership staff to individually review and extract cost/benefit information from more than 100 requests. The budget requests did not always provide sufficient information on Puget Sound recovery costs, or link their proposed recovery actions to the Action Agenda sub-strategies or Near-Term Actions. A shorter more efficient process was needed that provided detailed and accurate cost/benefit information linked to the Action Agenda by the required deadline.

**Problem statement:**

Improve the process for collecting the data needed to rank Puget Sound recovery budget requests, so that OFM receives the required information on time.

**Improvement description:**

Agencies were asked to complete a simple online Smartsheet form containing all information needed for ranking. They filled out the Smartsheet at the same time period they were working on budget decision packages. This improved efficiency because it allowed the proposing agencies to define how their proposals support Action Agenda implementation at the same time they prepare their budget packages. The Partnership no longer had to manually extract information from each

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budget request thus eliminating a process step that could lead to possible error or misinterpretation. One additional benefit, OFM is able to view the data entered by agencies as soon as it is saved in Smartsheet – as a result, OFM can track the budget requests coming in and identify errors or omissions. This redesigned process resulted in a net time saving

**Customer involvement:** The Partnership made the changes in the ranking process in collaboration with OFM, to ensure the new process met their needs. The Partnership also actively reached out to key partners to test the new input system as it was being developed and elicited feedback on how it could be improved.

## IV. Project Details:

Improved process as measured by: <i>(Click those that apply)</i>	Specific results achieved: <i>(Complete the narrative boxes below)</i>	Total Impact: <i>(Actuals; Current Reporting Period)</i>	Results status:
<input type="checkbox"/> Safety			
<input checked="" type="checkbox"/> Cost	Decreased staff effort related to the budget ranking process by approximately 108 staff hours in a biennia, for a total estimated cost savings of \$6,220	Savings related to staff time efficiencies is \$6,220 per biennia	Final
<input checked="" type="checkbox"/> Quality	Improved level of detail and greater accuracy of data needed to rank budget requests, due to the removal of an additional layer of interpretation.	Increased detail and accuracy	Final
<input checked="" type="checkbox"/> Time	It is estimated that the last two budget ranking exercises (biennial and supplemental) have saved 108 hours of PSP staff time.	108 hours saved	Final
<input checked="" type="checkbox"/> Customer Satisfaction	The primary customer for the budget ranking is OFM. As a result of the project, the Partnership is able to deliver more accurate and detailed information to OFM. The Partnership received direct feedback from OFM that they were satisfied with the accuracy and timely submission of the report.	<input checked="" type="checkbox"/> N/A	Final
<input checked="" type="checkbox"/> Employee Engagement	A small team at the Partnership was engaged in developing the new Smartsheet tool and managing the data.	<input checked="" type="checkbox"/> N/A	Final

## V. Contact information:

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## VI. Optional Visuals

1. An example of a spreadsheet containing a ranked list of Puget Sound budget requests, along with financial information for those requests.

**2015-17 Puget Sound Budget Requests by Puget Sound Partnership Prioritization Governor's Recommended / Final Enacted**

(Dollars in thousands)

\* Denotes requests linked to Puget Sound Action Agenda Strategic Initiatives

PSP Prioritization	Request Title	Agency	Op/ Cap/ Trans	Agency Request	Puget Sound Portion	Governor's Recommended Budget	Puget Sound Portion Gov Recommended	Final Enacted Budget	Puget Sound Portion Enacted Budget
1				\$100,000	\$60,000	\$74,000	\$44,400	\$53,000	\$31,800
2	Puget Sound Acquisition and Restoration (PSAR)*	RCO	Cap	\$140,000	\$140,000	\$50,000	\$50,000	\$37,000	\$37,000
3	Puget Sound Creosote Removal*	DNR	Op	\$1,004	\$1,004	\$1,004	\$1,004	\$1,004	\$1,004
	Salmon Recovery Funding Board Programs*	RCO	Cap	\$100,000	\$44,390	\$100,000	\$44,390	\$66,500	\$29,519
6	Shoreline Property Owner Assistance*	PSP	Op	\$855	\$855	\$0	\$0	\$0	\$0
7	Improving Shellfish Growing Areas & Related Water Quality*	SCC	Cap	\$6,000	\$6,000	\$4,000	\$3,000	\$4,000	\$3,000
8	Implement Septic Recommendations*	DOH	Op	\$155	\$155	\$155	\$155	\$0	\$0
9	Centennial Clean Water Program*	ECY	Cap	\$60,000	\$9,720	\$40,000	\$24,000	\$20,000	\$12,000
10	PS Estuary and Salmon Restoration Program (ESRP)*	RCO	Cap	\$20,000	\$20,000	\$10,000	\$10,000	\$8,000	\$8,000
11	Floodplains by Design*	ECY	Cap	\$50,000	\$35,000	\$25,000	\$17,500	\$35,560	\$24,892
	Puget SoundCorp*	DNR	Cap	\$10,100	\$6,060	\$8,000	\$4,800	\$8,000	\$4,800
13	Regional Stormwater Monitoring Program*	ECY	Op	\$5,181	\$4,145	\$5,181	\$4,145	\$5,180	\$4,145
14	Assessing Recovery	PSP	Op	\$2,722	\$2,722	\$1,004	\$1,004	\$1,004	\$1,004
	Growth Management Act Plan Updates*	COM	Op	\$3,050	\$1,830	\$1,898	\$1,139	\$0	\$0
	Stormwater - Green Stormwater Infrastructure (GSI)*	SCC	Cap	\$1,082	\$1,082	\$0	\$0	\$0	\$0
	Stormwater Retrofit*	DOT	Trans	\$2,703	\$2,303	\$15,703	\$15,303	\$2,703	\$2,303
19	Implement Chemical Action Plans*	ECY	Op	\$3,447	\$2,413	\$2,671	\$1,870	\$0	\$0
	Tracking Puget Sound Fish Health	WDFW	Op	\$1,526	\$1,526	\$1,526	\$1,526	\$1,526	\$1,526
21	Aquatic Lands Enhancement (ALEA)	RCO	Cap	\$6,600	\$3,547	\$3,660	\$0	\$5,269	\$3,811
	Match for Federal RCPP Program*	SCC	Cap	\$24,000	\$12,000	\$24,000	\$12,000	\$28,000	\$14,000
	Public Works Asst. Act. Program 2016 Loan List	COM	Cap	\$200,000	\$55,783	\$69,733	\$24,200	\$0	\$0
	Puget Sound Salmon Recovery*	PSP	Op	\$1,700	\$1,700	\$600	\$600	\$600	\$600
	Reduce Oil Spill Risk-Rail/Vessel*	ECY	Op	\$1,354	\$280	\$1,354	\$280	\$1,354	\$280
	Source ID of Toxics in Stormwater	ECY	Op	\$1,629	\$1,304	\$864	\$691	\$864	\$691
	Washington Wildlife Recreation Grants (WWRP)	RCO	Cap	\$97,000	\$37,954	\$70,000	\$40,284	\$55,323	\$31,811
28	Managing Aquatic Invasive Species*	WDFW	Op	\$2,414	\$1,448	\$800	\$480	\$300	\$180
	Seaweed Cultivation and Collection*	WDFW	Op	\$625	\$625	\$0	\$0	\$0	\$0
	Water Pollution Control Revolving Program	ECY	Cap	\$191,000	\$111,600	\$191,000	\$111,600	\$203,000	\$121,800
31	Native Oyster Resilience*	WDFW	Op	\$620	\$620	\$0	\$0	\$0	\$0
	Recover Puget Sound Steelhead	WDFW	Op	\$800	\$800	\$800	\$800	\$800	\$800
	Resource Specific Improvements*	SCC	Op	\$2,000	\$500	\$670	\$168	\$0	\$0
35	Coastal Wetland Federal Funds	ECY	Cap	\$10,000	\$6,500	\$10,000	\$6,500	\$10,000	\$6,500
	WQ Improvement for Toxics	ECY	Op	\$1,578	\$1,262	\$789	\$631	\$0	\$0
37	Community Forest Trust	DNR	Cap	\$3,442	\$3,442	\$3,442	\$3,442	\$0	\$0
	Fish Passage Barrier Retrofit	DOT	Trans	\$81,801	\$69,975	\$111,801	\$98,975	\$88,322	\$75,496
	Forest Practices Compliance	DNR	Op	\$3,230	\$384	\$707	\$384	\$0	\$0

2. A summary spreadsheet containing rolled-up financial information related to Puget Sound budget requests by fund source. Prior to the improvement project, the Partnership was not able to produce this report for OFM in a timely manner.

### Snapshot of 2015-17 Puget Sound Recovery Funding

Agency Requests / Governor's Recommended / House Floor Passed / Senate Passed / Final Enacted

June 30, 2015

(Dollars in thousands)

	Agency Requested	Governor Recommended	House Recommended	Senate Recommended	Final 2015-17 Enacted
Capital	\$ 761,791	\$ 559,099	\$ 478,289	\$ 442,097	\$ 468,448
Transportation	\$ 82,448	\$ 125,448	\$ 110,473	\$ 68,044	\$ 88,371
Operating	\$ 41,750	\$ 30,473	\$ 25,355	\$ 21,752	\$ 21,066
<b>Total</b>	<b>\$ 885,989</b>	<b>\$ 715,020</b>	<b>\$ 614,117</b>	<b>\$ 531,893</b>	<b>\$ 577,885</b>

### Final Enacted Recommendation Detail

Type of Project or Program	Budget Type	GF-S	MTCA	SBCA	Other	TOTAL	% of PS Total
Strategic Initiatives	Capital	\$ -	\$ 25,800	\$ 105,516	\$ 33,695	\$ 165,011	29%
	Transportation	\$ -	\$ -	\$ -	\$ 2,303	\$ 2,303	0%
	Operating	\$ -	\$ 1,004	\$ -	\$ 6,756	\$ 7,760	1%
Other Priorities	Capital	\$ -	\$ 89,710	\$ 24,961	\$ 188,766	\$ 303,437	34%
	Transportation	\$ -	\$ -	\$ -	\$ 86,068	\$ 86,068	10%
	Operating	\$ 5,894	\$ 3,908	\$ -	\$ 3,504	\$ 13,306	2%
<b>Total by Budget Type</b>	Capital	\$ -	\$ 115,510	\$ 130,477	\$ 222,461	\$ 468,448	81%
	Transportation	\$ -	\$ -	\$ -	\$ 88,371	\$ 88,371	15%
	Operating	\$ 5,894	\$ 4,912	\$ -	\$ 10,260	\$ 21,066	4%
<b>Total by Account</b>		\$ 5,894	\$ 120,422	\$ 130,477	\$ 321,092	\$ 577,885	100%
		1%	21%	23%	56%		