

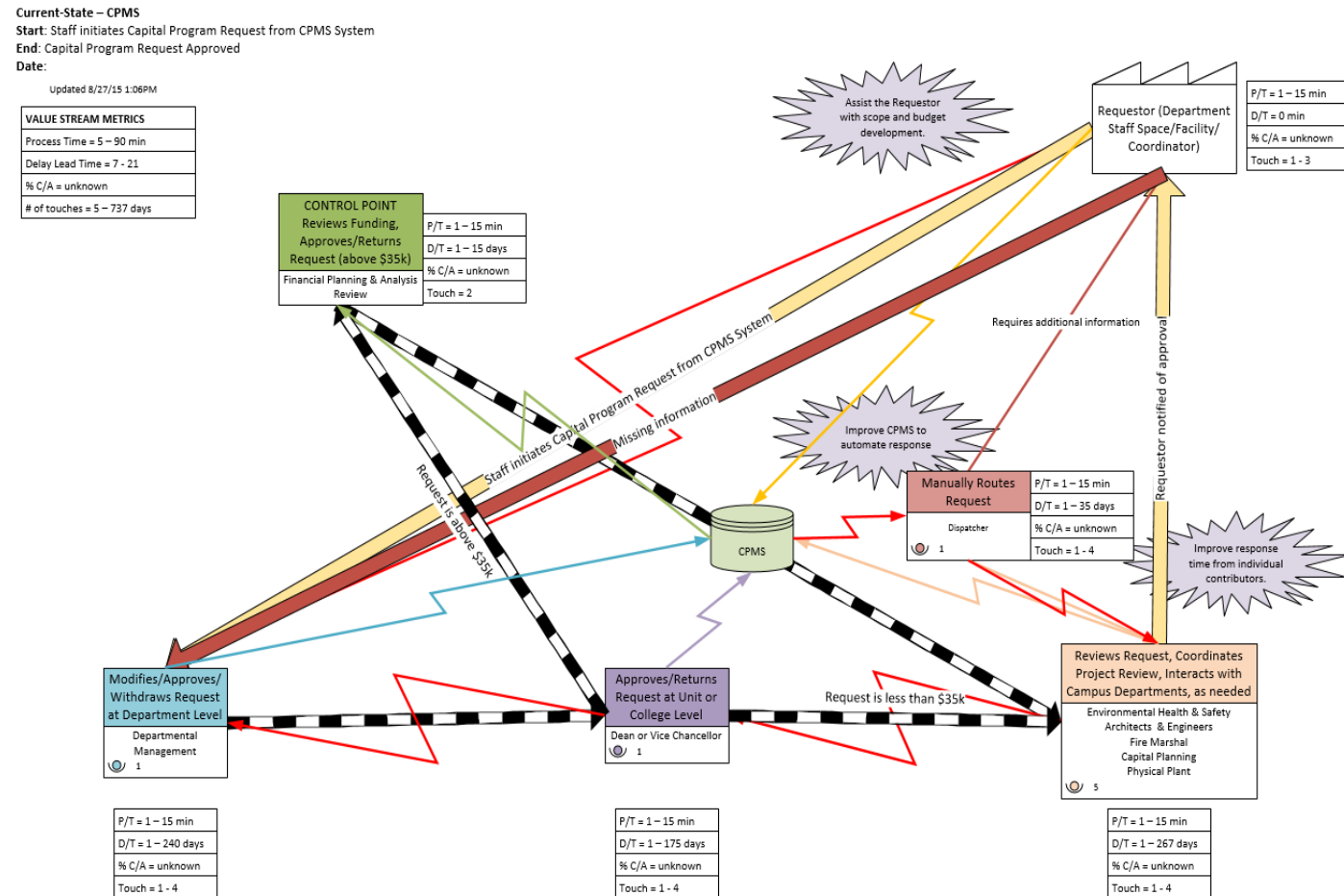
Date: 8/27/2015	Owner: CPMS Kaizen Group
Approval Date:	Manager Approval:

BACKGROUND

CPMS was developed to streamline capital initiatives requiring project scope, associated timeline, and funding requirements and sources; providing a framework that could be clearly understood by all stakeholders. The Customer (department, organization, and/or Campus Leaders) enters the initiative or request into CPMS, request routes for Organizational Approval and is queued to the FP&A if >\$35K for fund source approval then routed to Dispatcher role. Depending on the project and if request is complete including funding, the Dispatcher routes the request to the appropriate Supplier (A&E, CAS, or Physical Plant). At this point CPMS must be queued manually between roles for scope development, additional funding and approvals.

CURRENT CONDITIONS

- Key factors: no auto routing, system is passive, no prompting unless request is “opened” to specific individuals, huge time lags, unless communication occurs outside of system no awareness to address request occurs, system is not intuitive, and no training/definitive guidance.
- % Complete & Accurate: Long Delay Time (D/T) plus amount of Process Time (P/T) = Total Lead Time (L/T) in Capital Programs suggests that requests are not 100% complete and ready for routing, e.g., incomplete scope, budget, funding source not identified, multiple approvals required, etc.
 - Capital Programs: D/T = 91 Days from 10/2014-4/2015
 - Capital Programs: P/T = 1-10 Minutes in CPMS to enter data/add comments.
 - Capital Programs: 10 Minutes P/T + 91 Days D/T = 91 days, 10 minutes L/T
 - Capital Programs Touches: = 26% Touch Time (Greatest share compared to all other Constituencies)



ROOT CAUSE ANALYSIS

- System designed to be data/document repository and budget/funding tool.
- Requests being returned for information, scope development, funding, FAU identification/correction, and re-approval between customers and suppliers.
- Long wait time in queues also due to defining/redefining scope, funding decisions, FAU can only be changed/updated by request owner; if central funding is approved, request must route back to original department to enter central FAU and amount. (System flaw).
- Data gathered during interviews with Stakeholders (Customers, Suppliers, Processors, etc.) indicated actual “Touch Time” ranged from 1-10 minutes in CPMS.
- Processes do not match capabilities of CPMS; further definition, examination, and process mapping should occur for each process, e.g., Major, Minor, Maintenance/Repair, Alteration/Renovation, etc.—then determine system needs (CPMS modification or other?)
- Why doesn't CPMS work? CPMS designed for specific purpose with a limited scope; current state demands do not match.
 - Why no match? Current state not clear, lacking full customer involvement during scope development.
 - Why no customer involvement? System expectation was to control funding, rather than facilitate project completion.
 - Why did expectations change? Volume of projects, types of projects, and customer needs have evolved.
 - Why evolved? Campus vision and strategy, technology, complexity, funding constraints, and demand.

COUNTER-MEASURES

- As a campus, examine and clearly define and outline the capital business process including funding, scope, schedule, stakeholders, customers and goals to ensure streamlining, efficiency, goal achievement and continuous improvement.
- Provide assistance to users in the form of a Customer Service Rep. Streamline processes can eliminate delays.
- Streamline the estimating process to ensure: correct estimates based on accurate project scope. Rapid decision making opportunities for users (such as initial ballpark estimate to allow a “go” or “no go” decision). Early inclusion of necessary teams (CAS, A&E, and Physical Plant). Comprehensive and complete estimates without the need for multiple site walks.
- Suggest processes should be mapped “outside of” or “without consideration” of CPMS to determine whether CPMS modification or consideration of other system is appropriate. Replace or revise current software system.
- Rather than “ad hoc” or all at once demand for work/projects, develop strategic plan for project requests with specific frequency, i.e., annually, allowing suppliers/processors to schedule work strategically, adjusting resources to meet demand, allowing Campus Leadership to budget strategically.

TARGET CONDITIONS (GOALS)

- Customers want communication, need answers and assistance. They are not experts, they are seeking experts.
- Customers want assistance to prepare the “right” documentation in order to make the correct request.
- Requests route from customer for approvals, to supplier for scope/budget estimation, approvals, budgeting occurs, so that work begins within a reasonable timeframe.

IMPLEMENT PLAN

- What exactly needs to be done? Map/define all processes, compare to CPMS or other.
- Who needs to be involved? Stakeholders, Customers, Suppliers, Processors, Dispatchers, etc.
- How will this be attempted at first? TBD
- Where will it be attempted? TBD
- When will it be attempted? TBD
- What preparations must be made? TBD
- How will progress be evaluated? Pilot project examples and compare Current and Future State statistics.
- When will the reviews for follow-up be held? TBD