

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

Orange= status change from last months' report. Green= Completed. Blue = Deferred or Canceled.

Update Instructions: By the 5th of each month, each line-of-business manager should update the status and results column for each initiative where there has been a change. See example below

- Keep status notes brief.
- If something has changed from last month—shade the row in light orange. (This will help readers focus on what has changed.)
- If status is the same as previous month—make sure the shading is white.
- When an initiative is complete—Note complete in the column, briefly describe the outcome/results and shade the row green.
- Please let Betty Loy know when you have COMPLETED. the update.

EXAMPLE BUSINESS Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
1. Establish product mix, profit mix model	Product or Service Change-1		COMPLETED. The model helped us decide to drop 5 products, and to re-price 25 products or job components.
2. Develop an internal and external marketing plan	Product or Service Change - 2		Plan under development. Expect first draft to be COMPLETED. December 15.
3. Reduce facility footprint	Product or Service Change - 3		Engineering plans for new space COMPLETED. Analysis for move to new space now underway.

Links to sections

Business Development

Communications

Contracts and Procurement

Engineering and Architectural Services

Facilities Planning & Management

Finance

Fleet Services

Lean Transformation Services

Mail Services

Print and Imaging

Production Services

Real Estate Services

Risk Management

State Building Code Council

Surplus

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Visitor Services

Workforce Support & Development

Business Development Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
1. Develop and implement a sustainable, robust system for collecting, analyzing, and reporting on data related to customers and key stakeholder relationships. Work with business lines to ensure that customer touch points are appropriately placed, and our colleagues have the skills, tools, and information to ensure that customers receive quick and friendly access to the services they seek. Train staff on the new system.	Product or Service Change - 2		Work continued on stand-up of Microsoft Dynamics software - referred to as the "Enterprise Relationship Management System" (ERMS). Pilot teams include CPRM, Business Resources/Print & Mail, Workforce Development Services, and Business Development programs. Training is underway. WaTech will provide support into spring 2016. The tool replaces ESP system for DES data collection and reporting.
2. Develop and implement an agency-wide enterprise business development strategy. Help identify and connect with state agency business areas to improve operating efficiencies by using our services and products.	Workforce - 1		Developing strategies and tools to cultivate a customer-centric and consistent approach to business development. Developing an executive summary for MT review in March for agency marketing plan. Working with EAP, LTS, P&I, and Fleet Services on programmatic marketing plans. Implementing strategies that cultivate a marketing "mindset".
3. Establish feasibility of event planning services and ability to charge for these services outside our agency.	Financial - 1		DEFERRED. Conduct market research in late 2106 and determine feasibility in 2017.
4. Improve customer interfaces to help reduce confusion among customers, improve work processes, and speed delivery of services.	Process Improvement /Design - 3		Planning for a usability study to confirm customer interface with the website in the coming months. Developing recommendations for a change in Governance for agency website, as this is key tool for marketing and customer

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			<p>relations. Are creating an inventory of marketing materials that will be anchored to the new usability studies.</p> <p>As business development strategies are established for programs, we will test the customer interaction points for the product or service to establish readiness for the market.</p>
<p>5. Connecting programs to marketing opportunities to help them grow their business.</p>	<p>Product or Service Change - 2</p>		<p>Business Development team is engaged in marketing activities with these programs:</p> <ul style="list-style-type: none"> • Finalizing brand identity for the new Digital Storefront on-line ordering tool at P&I. Continued work on best practices for sales reporting and revenue forecasting. • Assisted Contracts, Procurement and Risk Management on development of a Value Proposition. Working on key messages, preparing for website updates, and assisting with outreach activities. Developed a new vendor focused flyer and banners for outreach event. Leading efforts for vendor outreach events: Alliance NW, RCF and Business Partnership Forum. • Working on team for EV Initiatives. • Supporting DES Business Diversity outreach.

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1. Implement e-procurement system with contract management module and reporting/tracking capabilities.	Business Change – 1	✓	Will be aligned with the One-Washington project. DES is actively participating in the procurement component of the One-Washington project. Anticipated Date of Completion: TBD.
2. Create a marketing or customer relationship team, and create staff capacity, to grow the contracts business.	Business Change – 2	✓	Contracts reorg created teams where both marketing and customer relationship functions are a focus. Completion date: 2/15/15. Initial meeting to discuss marketing approach outline in an effort to grow the contracts business was held on 3/15/15.
3. Evaluate and set fees based on current and accurate data from common or standardized repositories of information.	Business Change – 3	✓	COMPLETED. Implemented 7/1/13. Result is reduction from 14 fee structures to one. Benefits: Consistency, predictability, administrative efficiencies, and ease of use.
4. Contract staff should be responsible for and empowered to actively manage their dedicated responsibilities or a “book of business,” and should understand their financial contribution to the agency.	Business Change – 4		COMPLETED. Management of book of business model began implementation in 2/15/15. The financial contribution training began on May 28, 2015 and has now concluded. There will continue to be monthly financial updates provided to all staff.
5. Train existing and hire new employees to ensure staff consists of skilled procurement/business professionals.	Business Change – 5		COMPLETED. The new process for hiring employees has significantly reduced the recruitment process, which results in less time a position is vacant. The re-org resulted in weekly workshops for contracting staff, which

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			includes training.
6. Compile a comprehensive inventory of knowledge, skills, abilities, and assets for our agency to aid in strategic decision making.	Business Change – 6		COMPLETED. A survey was conducted in September and the information was used to inform the reorganization, business plan and strategic plan implementation.
7. Make master contracts more easily accessible online.	Business Change – 7		COMPLETED. All master contracts, solicitation documents, bid results, etc. are available online. Completed 2014.
8. Enhance communications vehicles and strategies to better hear from and respond to our customers and potential vendors.	Business Change – 8		COMPLETED. This is included as one of the measures in the updated program strategy map, which went into effect January 2016.
9. Capture for supplier diversity participation data.	Business Change – 9		COMPLETED. Added mini, micro, & veterans business designation in WEBS – completed on 3/2014. AFRS Diversity Participation Report completed on 3/2014 and now available state agencies. Added supplier diversity participation data to contract workload report available on website – completed 1/2015.
10. Develop process(-es) to readily and strategically add contracts to the DES master contract portfolio by, for example, adopting contracts of other agencies or purchasing cooperatives.	Business Change – 9		TBD
11. Include appropriate contracts staff member in the decision to grant an agency additional delegated authority.	Business Change – 9		COMPLETED. Contracts staff are involved in the discussion regarding additional delegation of authority requests. If granted, DES assigns a contracts liaison to the agency.

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12. Encourage the use of P-Card for all purchases, including interagency transactions, and work with contractor to improve reporting.	Business Change – 9		DEFERRED. The P-Card Customer Advisory Group has recommended a Statewide P-Card program development to support this initiative, using the P-Card Incentive #4 rebate. However, the rebate did not come in time to allow timely consideration of the P-Card Program. Therefore, it will be considered for the next fiscal year. <u>9/9/15 update:</u> the P-Card Customer Advisory Group decided to recommend that future Incentive #4 rebates be distributed to the agencies rather than being used for other program support purposes, such as this initiative. However, the contracting staff continues to include contract language to support and encourage the use of p-cards for master contract purchases.
13. Create a procurement customer service/marketing team to grow our business.	Product /Service Change – 1		COMPLETED. Contracts re-org created teams where both marketing and customer service functions are a focus. Completion date: 2/15/15
14. Provide targeted training for customers.	Product /Service Change – 2		COMPLETED. Procurement and Contracting training modules have been delivered in webinar and now available on-line on demand.
15. Develop specialized procurement teams for certain projects, such as large IT purchases, and small agency support.	Product /Service Change – 3		COMPLETED. Contracts re-org developed teams to support this initiative. Complete date: 2/15/15.
16. Develop models for contract staff to own a “book of	Product /Service		COMPLETED. Contracts re-org developed

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business.”	Change – 4		teams to support this initiative. Complete date: 2/15/15.
17. Meet with customers on a regular basis to better understand their current needs.	Product /Service Change – 5		COMPLETED. Currently meeting with PCAG and WSDOT monthly. Additional meetings w/customers will be implemented post re-org. This is included as one of the measures in the updated program strategy map, which went into effect January 2016.
18. Represent the supplier diversity component of our contracts to encourage customer agencies to use those contracts to satisfy their own supplier diversity goals.	Product /Service Change – 6		COMPLETED. Added supplier diversity participation data to contract workload report available on website – completed 1/2015.
19. Consider implementing master contracts for products and services that are already widely used (e.g., anti-virus software).	Product /Service Change – 7		Vacant MA positions filled on 1/2015. Analysis of off contract spend for widely used products/services will begin post re-org.
20. Create opportunities, and provide support, for meaningful training, professional networking/memberships, and certification for every employee.	Workforce - 1		COMPLETED. The current budget and environment supports training opportunities, professional memberships (i.e. all contracting staff are members of National NIGP, active employees are members of the WA NIGP Chapter, and all contracting staff are members of WSCA-NASPO). All staff will be required to complete (or have already completed) the Procurement & Contracting Training program. Contracting staff interested in Professional Certifications, such as CPPB or CPPO are

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			encourage and supported (both in time and funding).
21. Continuously assess staffing levels, employee classifications, and agency-wide capacity in order to establish clear, attainable workloads, responsibilities, and develop PDPs in alignment with appropriate KSAs.	Workforce - 2	✓	<p>COMPLETED. Through the Contracts re-org process, staffing levels, employee classifications, and agency-wide capacity were assessed and built into the new organizational structure. Re-org process implemented 2/15/15. The establishment of clear, attainable workloads, responsibilities, and PDP's in alignment with appropriate KSAs are currently underway with partnership project and reorganization. Development of PDPs in alignment with appropriate KSAs are scheduled to be completed by 8/31/15. As of 8/31/15, the Contracts & Procurement program is currently at 45% completion of PDPs in alignment with appropriate KSAs. Anticipate 100% completion by 9/15/15.</p> <p><u>9/25/15 update:</u> The Contracts & Procurement program is currently at 86% completion of PDPs in alignment with appropriate KSAs. Anticipate 100% completion by 10/9/15.</p> <p><u>10/30/15 update:</u> Contracts & Procurement program is at 100% completion.</p>
22. Establish continuous and working desk manuals for all employees.	Workforce - 3		This project was assigned. Part of the assignment is to create a timeline/project

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			<p>schedule. <u>1/29/16 update</u>: Desk manual is approximately 10% updated; trainings are being scheduled/conducted for specific sections. Anticipated completion date for update – TBD.</p>
23. Foster greater opportunities for promotions without leaving DES.	Workforce - 4		<p>COMPLETED. Through the Contracts re-org process, the new organizational structure supports this initiative. Re-org process implemented 2/15/15. This is addressed as one of the new measures and strategies developed through the updated program strategy map, which went into effect January 2016.</p>
24. Facilitate increased, continuous opportunities for safe, candid communication from staff to managers and between staff members.	Workforce - 5		<p>COMPLETED. Safe, candid communications between staff to managers and between staff members have become part of the program's culture. This is demonstrated by weekly contract huddle, team daily huddles, on-going meetings, and communications.</p>
25. Provide on-the-job training, developmental assignments, formal mentoring and job-sharing.	Workforce - 6		<p>There is no formal program for developmental assignments and job sharing, but the new organizational environment (pod concept) is structured around mentoring and on-the-job training. The Partnership Project will be providing guidance, best practices, and ultimately a template. Completion date unknown.</p>

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26. Expand teleworking opportunities as employee retention, and a carbon footprint reduction strategy.	Workforce - 7		COMPLETED. This has been expanded to numerous within the division, as appropriate to continue to meet business needs.
27. Standardize a continuous recruitment strategy for front-line positions, including outreach events to high school or college students (possible intern program), target timeframes, and appropriate management time commitment.	Workforce - 8		Through the partnership project, a Recruitment Plan has been developed. Completion date: 12/2104. Outreach is a component within the scope of the partnership project – completion date TBD.
28. Compensate employees appropriately based on industry data.	Workforce - 9		COMPLETED. Those in the Contracts Assistants and Contracts Specialists classifications received a 2.5% classification increase effective 7-1-15.
29. Make tablets (e.g., Revolve or Surface) and other mobile devices available for every employee to improve mobility, partnering, mentoring/cross-training, facilitate teleworking, and reduce the use of paper.	Facilities / Equipment – 1		COMPLETED. Request has been made for every program employee to receive a Revolve (or similar) device. The request has been approved. At time of scheduled replacement, each program employee will receive a Revolve. The program's replacement schedule is every 4 years.
30. Standardize more operations through consolidation or reduction of filing systems and software, and development of procurement/contract samples.	Facilities / Equipment – 2		The Policy program is currently developing procurement/contract samples (ETA: TBD). The data migration project, which was completed in July 2015, standardized/consolidated electronic filing.
31. Create a dedicated call center to help customers find answers to both basic and expert level questions.	Facilities / Equipment – 3	✓	COMPLETED. Contracts reorg created a team to specifically support this initiative.

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			Completion date: 2/15/15.
32. Make more conference rooms available for single or small-group work.	Facilities / Equipment – 4		COMPLETED. This request was made to the Seating Committee as they were developing the office space allocation for the physical move. There was one office dedicated to specific projects, such as the Training Broadcast room, on the 2 nd floor.
33. Make designated project rooms available for a project for its duration, including marketing and process improvement efforts.	Facilities / Equipment – 5		Part of re-org seating committee project currently underway. Anticipated completion date: 6/2015. May 2015 Update: Through the program's physical move, the seating committee identified that there were no extra rooms available/allocated to use for project rooms (they struggled to find spaces for all employees). Therefore, this was deferred. 1/31/16 Update: DES is looking at repurposing several office spaces for designated project rooms. Input was due 1/28/16.
34. Study options for improved parking for visitors.	Facilities / Equipment – 6		DEFERRED. Until business plan re-evaluation in Q1 CY 16.
35. Create a more secure process for bid delivery.	Facilities / Equipment – 7		COMPLETED. New bid delivery process implemented on 2/2015. Results = risk mitigation by standardized and secure process.
36. Training in the use of technology tools (e.g., WEBS, PCMS, etc.).	Technology - 1		COMPLETED. PCMS Training conducted on 3/3/15. ECMS Training conducted on 3/26.

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			Several staff attended Excel training offered through LMS. WEBS training provided on 4/23/15.
37. Move all phases of procurement/contracting to electronic form through implementation of an e-procurement system, policies for use of e-signatures, and transitioning to a digital archiving and operations system.	Technology - 2		Tied to One-WA Project
38. Increase use of technology communication tools, such as instant messaging, social media, simplified teleconferencing, and survey/feedback tools, including sharing supplier diversity contract information.	Technology - 3		DEFERRED. Set-up internal blog. Enhanced contracts database to share supplier diversity contract information – completed on 12/2014. 9/25/15 update: Any further increases are deferred until business plan re-evaluation in Q1 CY 16.
39. Single sign-on to access all systems.	Technology - 4		DEFERRED. Until business plan re-evaluation in Q1 CY 16.
40. Redesign and upgrade DES website, WEBS and all internal contract management systems (e.g., PCMS, ECMNS, and SSCD) or replacement contract management system, including supplier diversity information.	Technology - 5		DEFERRED. Until business plan re-evaluation in Q1 CY 16.
41. Provide tools that give an accurate and detailed picture of state spend profile.	Technology - 6		Tied to One-WA Project
42. Provide secure document-sharing space on or off premises so that staff and customers can find and collaborate on contracts.	Technology - 7		DEFERRED. Until business plan re-evaluation in Q1 CY 16.

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43. Establish policy for use of e-signatures.	Technology - 8		DES has drafted an e-signature policy, which is under management review (last activity September 22, 2015). OCIO has developed a guideline, which should be implemented by 3/31/16. Therefore, DES' policy should be implemented shortly thereafter.
44. Transition to digital archiving and operations system.	Technology - 9		DEFERRED. Until business plan re-evaluation in Q1 CY 16.
45. Provide financial training for non-financial employees.	Financial - 1		COMPLETED. The financial contribution training began on May 28, 2015 and has now concluded. There will continue to be monthly financial updates provided to all staff.
46. Partner with Finance to create or acquire a commercial cost-finding and financial reporting system to update a realistic model for rate-setting that reflects the marketplace.	Financial - 2		DEFERRED. Until business plan re-evaluation in Q1 CY 16.
47. Review possible alternative cost-recovery models, such as unique models for small acquisitions and large IT procurements.	Financial - 3		COMPLETED. Developed options for unique contracts. Implementation date 7/1/15.
48. Partner with Finance to create a commercial cost-finding and financial reporting system.	Financial - 4		DEFERRED. Until business plan re-evaluation in Q1 CY 16.
49. Provide DES employees with detailed P&L statements.	Financial - 5		COMPLETED. Detailed P&L statements were provided to staff at the series of financial contribution training, which began on May 28, 2015.
50. Use a collaborative approach to establish a universal	Financial - 6		DEFERRED. Until business plan re-evaluation in

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control numbers and standard nomenclature for financial transactions as required by OFM.			Q1 CY 16.
51. Use management fee funds only for existing or additional contracting staff.	Financial - 7		DEFERRED. Until business plan re-evaluation in Q1 CY 16.
52. Provide training on transactional risk assessment and related legal concepts to foster better understanding and explanations of contract terms (e.g., indemnification clause).	Contract/ Risk - 1		Will be part of the training offered at the DES Training Conference & Tradeshow; and a future subject for contracting staff's weekly training sessions. Target completion date: 11/5/15. 1/29/16 Update – Kim Ward will add to training roster. Training to be scheduled in the near future
53. Streamline contracting and procurement processes through technology, training, and staff input.	Contract/ Risk - 2		On-going
54. Establish a viable succession readiness model that includes outreach, cross-training, and use of temporary employees.	Contract/ Risk - 3		Through the Contracts re-org process, succession planning, cross-training, and outreach were assessed and built into the new organizational structure. Re-org process implemented 2/15/15. In addition, the partnership project will be building in a succession readiness model into the overall retention strategy. Completion date unknown.
55. Increase automation through the use of proven technologies, particularly to access relevant data to fit our business needs.	Contract/ Risk - 4		Tied to One-WA Project
56. Develop and implement a process for the review of work performed to determine if it conforms to	Contract/ Risk - 5		DEFERRED. Until business plan re-evaluation in Q1 CY 16.

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applicable requirements.			
57. Monitor contractor performance for supplier diversity commitments.	Contract/ Risk - 6		In progress. Working with Business Diversity and Outreach Manager to develop a standard practice and plan on applicable/targeted contracts. This is addressed as one of the new measures and strategies developed through the updated program strategy map, which went into effect January 2016.
58. Adopt an agency-wide perspective on risk identification, assessment, mitigation, control, and avoidance, to include a focus on IT and SaaS.	Contract/ Risk - 7		DEFERRED. Contracts reorg created an Enterprise Procurement Policy Team responsible for implementing strategies and measures to accomplish this initiative. Completion date: TBD 9/25/15 update: Deferred until business plan re-evaluation in Q1 CY 16.
59. Involve affected contracts staff in the risk assessment for customer agency delegation requests.	Contract/ Risk - 7		COMPLETED. The new Policy unit involves affected contracts staff in the risk assessment review for each agency. Contracts staff are also involved in the discussion regarding additional delegation of authority requests. If granted, DES assigns a contracts liaison to the agency.
60. Improve usability of the Vault or replace.	Process Improvement /Design - 1		DEFERRED. Until business plan re-evaluation in Q1 CY 16.
61. Review and optimize the two-tier contracting process.	Process Improvement		COMPLETED. Part of standardization project, which was a result of a Lean project in 2013,

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	/Design - 2		<p>was revisited with a mini-workshop at the end of June 2015. The original Lean project has gone through the Plan, Do, Check, Act cycle and reconvened the Lean group to identify the barriers discovered and new improvements. The mini-workshop recommendation for continued improvement was shared on 6-29-15. The action plan reflects an anticipated implementation date of the new process of October 1, 2015.</p> <p><u>10/30/15 update:</u> The implementation date has been revised to 12/1/15.</p> <p><u>1/29/16 update:</u> The improved two-tier contracting process has been implemented in both the ITPS and Janitorial Services contracts; and is being used for any future two-tier contracting opportunities.</p>
62. Streamline the following processes: price adjustments, Travel/TEMS, procurement/contracting process and approvals.	Process Improvement /Design - 3		<p>Price adjustment process streamlined and implemented on 10/2014. Resulted in 57% time savings.</p> <p>Travel request/approval process has been streamlined and revised to reduce risk. Implemented 4/2015.</p> <p>Procurement/Contracting process is part of the standardization project currently underway.</p>
63. Increase use of electronic documents and records,	Process Improvement		COMPLETED. All master contracts, solicitation

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including posting contract portfolio and status online.	/Design - 4		documents, bid results, etc. are available online. Completed 2014.
64. Establish and follow streamlined, clear guidelines for decision making, including decisions on new and existing 2-tier contracts, prioritizing new contract opportunities, and following through on identified needs/decisions.	Process Improvement /Design - 5		As a result of the 2013 and 2015 Lean projects for improving the two-tier contracting process, guidelines for two-tier contract criteria was one of the outcomes. The action plan reflects an anticipated implementation date of the new process of October 1, 2015. <u>10/30/15 update:</u> The implementation date has been revised to 12/1/15. <u>1/29/16 update:</u> The two-tier improved process has been implemented. The process to prioritize new contract opportunities still needs to be established.
65. Realign units and staff based on activities performed and designate staff for certain activities (e.g., price increases, contract usage reports).	Process Improvement /Design - 6		COMPLETED. Through the Contracts re-org process, the new organizational structure supports this initiative. Re-org process implemented 2/15/15.
66. Increase visibility, sponsorship, and support from designated Lean-team and management for process improvement ideas.	Process Improvement /Design - 7		DEFERRED. The intent of this initiative is unknown, so it may be complete. Deferred until business plan re-evaluation in Q1 CY 16.
67. Continue to refine standardized procurement and contract samples.	Process Improvement /Design - 8		Through the Contracts re-org process, the new organizational structure supports the initiative of developing procurement/contract samples. Re-org process implemented 2/15/15. The Policy program is currently developing procurement/contract samples (ETA: TBD).

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68. Implement new processes for recording new categories of supplier diversity (small business, micro-businesses, etc.) and stop recording self-certified WMBEs.	Process Improvement / Design - 18		COMPLETED. Added mini, micro, & veteran's business designation in WEBS. The micro/mini/minority/women/veteran fields are locked to reduce risk of inaccurate recording of self-identified/certified firms. Completed on 3/2014.
69. Use technology to improve efficiency and effectiveness of customer outreach efforts, including: creating a web link to the Bi-Weekly Bulletin (or alternative); use of a single communication tool; implementing solution for easier customer feedback; increased use of videos (e.g., YouTube); website redesign; mailing lists; and automated price updates.	Communication / Marketing - 1		DEFERRED. Until business plan re-evaluation in Q1 CY 16.
70. Create a marketing plan for each commodity or service, with focus on increasing participation by local political subdivisions.	Communication / Marketing - 2		DEFERRED. Until business plan re-evaluation in Q1 CY 16.
71. Create a dedicated customer service/call center team.	Communication / Marketing - 3		COMPLETED. Contracts reorg created a team to specifically support this initiative. Completion date: 2/15/15.
72. Provide staff with all the information/tools needed to implement changes to their workload.	Communication / Marketing - 4		Currently underway with Contracts re-org. 9/25/15 update: Will be discussed in business plan re-evaluation in Q1 CY16.
73. Coordinate or participate in a government procurement summit to encourage more collaboration between state and local agencies in expanding the breadth of master contracts available for use.	Communication / Marketing - 5		COMPLETED. DES/Contracts actively participated in the Regional Contracting Forum on 3/10/15, which has a heavy focus on local government entities.

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74. Explain to our current and potential customers our capabilities, including supplier diversity participation value of DES contracts.	Communication / Marketing - 6		TBD
75. Provide training and procurement/contract samples for use by customers.	Communication / Marketing - 7	Integrate services	4 Procurement and Contracting trainings now available statewide, the first of the 4 classes launched 1/2015. Q&A portion of training are published on DES' website. Next step is to make all training classes available on-line. Training component of this initiative is completed. The procurement/contract samples initiative is supported through the Contracts re-org process. Re-org process implemented 2/15/15. The Policy program is currently developing procurement/contract samples (ETA: TBD).
76. Create a dedicated marketing team to visit with customers and learn their business and needs, and identify new master contract opportunities and communities of interest.	Communication / Marketing - 8		DEFERRED. Contracts re-org created teams where marketing is a focus. Completion date: 2/15/15. Once the teams complete the implementation phase, a plan and timeline will be developed to identify new contract opportunities. 9/25/15 update: Deferred until business plan re-evaluation in Q1 CY 16.
77. Actively involve the DES Communications division in developing and disseminating our message to customers.	Communication / Marketing - 9		COMPLETED. Communications consultant has been assigned to C&LS. Since the assignment, there have been numerous examples of

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Contracts and Procurement	Category / Priority	Is this one of 5 most critical?	Status and Results
			demonstrated active collaboration between DES Communications and Contracts/Procurement program.
78. Improve communication from management to allow for staff input on decisions that may impact operations and workflow.	Communication / Marketing - 10		COMPLETED. Established blog, use the weekly Contracts team huddle, and daily huddles for communications.
79. Clearly communicate the implications of procurement policy and process changes.	Communication / Marketing - 10		TBD
80. Work actively to identify new master contract opportunities.	Communication / Marketing - 10		DEFERRED. Contracts re-org created teams where marketing is a focus. Completion date: 2/15/15. Once the teams complete the implementation phase, a plan and timeline will be developed to identify new contract opportunities. 9/25/15 update: Deferred until business plan re-evaluation in Q1 CY 16.

Communications Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
1. Develop and implement a customer communications network that enables individuals to self-select the types of information and services they will receive, and	Business Change - 1	✓	COMPLETED. GovDelivery implementation internally is complete. We have been using GovDelivery for sending out Campus Updates, 1063 updates, etc. It weaves Facebook, Twitter

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Communications Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
leverages social media, our web sites, and customer data to deliver timely information to customers relating to our services, products, and events.			and email together, utilizing several important electronic tools at once, saving time and resources.
2. Developing plan to refresh and update DES and HR web sites to enhance the customer experience, and usability ratings of the sites.	Business Change - 3	✓	In process. DES content on the former HR.WA.GOV portal has been migrating to our website. Working with OFM and DES Workforce Support & Development. Anticipate launching a new portal page by 3/31/16.
3. Establish GovDelivery as the hub of customer / social media communications network and new multi-media customer communications network using GovDelivery as hub distributions, social media bursts, and alerts to Web changes and service opportunities.	Product or Service Change -1		COMPLETED. Application is now actively being used to disseminate DES social media messages.
4. Expand and refine use of SharePoint and Web Trends to establish a robust method for collecting data in an automated fashion. This data should be combined with traditional customer data (i.e., surveys, focus groups, etc.) to help us better discern our customers' needs, improve our business processes, and strategically expand our services in areas to best benefit DES.	Product or Service Change - 2		DEFERRED. Work plan being developed and activities to implement this initiative will begin in 2015. <i>NOTE: Work on this initiative is being done in close collaboration with the new Business Develop Division.</i>
5. Recruit and hire a manager to develop and implement an agency-wide enterprise business development strategy. Help identify and connect with state agency business areas to improve operating efficiencies by using our services and products.	Workforce - 1		COMPLETED. Business Development Manager hired in September 2014.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Communications Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
6. Create individual employee training plans to help employees work toward career goals. Ensure these workforce and professional training plans are up to date.	Workforce - 2		COMPLETED. All staff evaluations for review period 11-1-14, through 10-31-15, were done by 12-4-15 – including training plans.
7. Subscribe to Adobe Creative Suite 6 for Communications Team members. This is an annual fee per employee and provides access to all publishing, Web, and video production software in a supportive online environment (Cloud).	Facilities/ Equipment - 1		COMPLETED. Staff that needs the software suite has it.
8. Subscribe to GovDelivery and implement in phases across the agency	Facilities/ Equipment - 2		COMPLETED. DES now using GovDelivery for sending out messages in which we can track metrics.
9. Refresh and update www.des.wa.gov	Technology - 1		COMPLETED. Web redesign has been completed to change home page and landing pages.
10. Establish DES blog site.	Technology - 3		DEFERRED. We need to migrate to new web content management application in 2016. During migration, we will evaluate whether DES blog can be part of new application.
11. Establish feasibility of “communications for hire” services and ability to charge for services outside our agency.	Financial - 1	✓	DEFERRED. It is not feasible, given current funding and staff levels, to explore communications for hire services for other agencies during 2015-17 business planning period.
12. Risk Management news distribution (e-news) to help keep risk management programs at state agencies	Contract/ Risk - 1		DEFERRED. Working with Risk Management Office to determine next best steps.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Communications Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
informed and prepared.			
13. Update Communications matrix for agency emergency exercises and incidents.	Contract/ Risk - 2		Nearing completion. Have developed and loaded template language for potential emergency incidents into GovDelivery. Have established a process regarding how to get and share information about Campus emergencies. Need to memorialize communication roles and responsibilities with B&G Manager, Safety Manager, Risk Manager and Security Manager. B&G has provided two-way radio to help communicate during emergency incidents on campus.
14. Mount agency-wide team to develop new web-content development and posting process that ensures our sites are up-to-date, accurate, and effective.	Process Improvement /Design - 2		In process. Communications is working in partnership with Business Development Program, DES CIO and WaTech to: <ul style="list-style-type: none"> • Migrate current web content to new web management application. • Conduct a new web usability study in spring 2016. • Develop and implement a Web governance approach that incorporates a comprehensive web strategy, better defines roles and responsibilities for the web-content posting process and addresses strategic needs such as a

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Communications Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			formal intake system and a published editorial calendar.

Engineering and Architectural Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
1. Build Project Management capacity to meet project and program deliverables. Right size Staffing levels to meet work load and set people up for success. Revise and update fee schedules to support client expectations, service levels and program deliverables.	Business Change - 1	✓	<ul style="list-style-type: none"> • Completed 13 of 28 interagency agreements for reimbursable work bringing in \$3.7 Million through the end on the 17-19 biennium • Completed 13 interagency agreements for reimbursable work bringing in \$0.9 Million through the end of the 15-17 biennium
2. Re-establish revolving fund in fund 422 to capture fees and expenses for reimbursable work. This is necessary to increase market share of K-12 and local agencies capital project management.	Financial - 3	✓	DEFERRED. To 15-17. Will develop back up information to support DP for 15-17.
3. Purchase integrated construction project management software to replace PTS. Software should facilitate more efficient workflow for invoices, contracts, amendments, change orders, and other paperwork.	Technology - 1	✓	<ul style="list-style-type: none"> • Project Management Software: Received revised estimate and awaiting approval from executive management to move forward. • PW Diversity Tracking Software: Contract has been signed and executed. Project Kickoff scheduled March 9th.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Engineering and Architectural Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
4. Invest in clear and consistent guidance to project managers, contracts and claims staff. E&AS' workforce needs a revised and updated Project Management Manual and the development of internal practices to guide and streamline processes in support of project delivery.	Workforce - 1	✓	Updating Policy and Procedure Manual <ul style="list-style-type: none"> • 19 Policies approved in 2015 • Began revision of Project Manager's Manual - Feb 23 • Reviewed invoice process – Jan-Feb 2016 • LCCT Reviewer Training for PM's – Feb 19
5. Build customer relationships and satisfaction. More active client education. Revise update and develop client orientation, and guidance manuals. Provide regular training, workshops and forums. Educate clients about other potential energy efficiency opportunities.	Business Change - 5	✓	<ul style="list-style-type: none"> • Distributed "Client Roles and Responsibilities" document to OFC Feb 18th. Presented to OFC on Feb 25th.
6. Increase business diversity and inclusion through the development of strategies to remove barriers to small and diverse businesses.	Business Change - 3		<ul style="list-style-type: none"> • Diversity Management Tracking Demo completed. Baseline configuration finalized. Initial meeting to review process and required fields Feb 25. • LCP Tracker Demonstration scheduled March 9th.
7. Build stakeholder relationships to increase effectiveness, specifically with OFM, legislative staff, public owners groups, AEAC, the contracting community, and minority business groups. Partner with the Department of Commerce and the Office of	Business Change - 6		<ul style="list-style-type: none"> • District Energy Meeting – Feb 3 • NAMC Meeting – Feb 4 • POG Meeting – Evergreen – Feb 12 • Washington Construction, Design & Entrepreneurs – Feb 19

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Engineering and Architectural Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
Superintendent of Public Instruction (OSPI) on Energy Efficiency grants. Develop marketing tools and participate in agency workshops and facility/business officer meetings to offer our services.			
8. Electronic bidding, electronic signatures, and a structured bid package distribution system complete with plan holders list.	Technology - 3		<ul style="list-style-type: none"> • On hold pending review of requirements and replacement of PTS system.
9. Work with the OCIO to establish policies and procedures for HB 1841 electronic bidding and signatures of public works projects.	Contract/ Risk - 1		<ul style="list-style-type: none"> • On hold pending review of requirements and replacement of PTS system.
10. Electronic-bidding, Electronic signatures, and bidders lists. Web-based management of project document scheduling and workflow management.	Business Change - 4		<ul style="list-style-type: none"> • On hold pending review of requirements and replacement of PTS system.
11. Revise, update, and develop our manuals and internal guides. Invest in staff training and professional development. Encourage participation in professional organizations. Provide leadership and professional development opportunities.	Business Change - 2		<ul style="list-style-type: none"> • Provided Change Order Training to staff – Feb 5 • Kickoff Meeting for Project Manager’s Manual Revision – Feb 23 • Project Closeout Policy approved by Management - Feb 25
12. Revise, update, and develop the Client Orientation Manual. Revise and update consultant outreach and guidance. Information should provide clear guidance on how to be competitive in E&AS selection and expectations that E&AS is looking for firms who are forward looking, innovative, and dedicated to	Product or Service Change - 1		<ul style="list-style-type: none"> • Completed Consultant Selection Policy. Trained staff - Feb 5th. • Construction Closeout Policy completed. Training scheduled March 4th.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Engineering and Architectural Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
sustainable design.			
13. Increased customer services and outreach with clients. Contact should be made with members from management, contracts, and claims staff, not only by project managers.	Product or Service Change - 2		<ul style="list-style-type: none"> • See #7
14. Increase client education involvement and feedback through an increased frequency of workshops and forums.	Product or Service Change - 3		<ul style="list-style-type: none"> • See # 5 • Requiring Project Managers to hold information meetings during the RFQ process for consultant selections.
15. Assess our website design, content, and how it is structured. Update external website for customers to look at status of projects.	Product or Service Change - 4		<ul style="list-style-type: none"> • COMPLETED. Website updated and published 8/24/15. • Added informational pages to better serve clients. • Receiving feedback from customers and staff and updating weekly.
16. Training in: <ul style="list-style-type: none"> • Project management and internal practices. • Construction expertise (costing, capital project management, scheduling, and hands on experience). • The capabilities and functions of 3-D software such as Revit and BIM. Continued education in sustainable building design and operation to remain current with the building industry. 	Workforce - 2		<ul style="list-style-type: none"> • See #11.
17. Provide opportunities for leadership and professional	Workforce -		<ul style="list-style-type: none"> • See #11.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Engineering and Architectural Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
development of staff. Participate in local and national professional organizations.	3		
18. An assessment of work space needs and locations at 1500 Jefferson. Consider more remote work spaces, and increased telecommuting.	Facilities/ Equipment - 1		<ul style="list-style-type: none"> • COMPLETED. 10 mobile workstations available.
19. Reliable multi-functional devices. More copiers and scanners are needed during bid opening days.	Facilities/ Equipment - 2		TBD
20. Mobile workstations and a culture shift to use effectively. Need access to documents from remote locations. Need online file storage system accessible by clients and project managers.	Technology - 2		COMPLETED. <ul style="list-style-type: none"> • Mobile Workstations: 10 • Plan Center policy completed. User-migration completed. • Using DropBox for large record requests. • Posted many form links, documents and policies to external E&AS website for transparency.
21. Greater access to good video conferencing technology to reduce travel time expense and carbon emissions.	Technology - 4		<ul style="list-style-type: none"> • COMPLETED. Skype and WebEx currently being used. Conference calling being used consistently for All-Staff Meetings.
22. Training in new technology for staff members.	Technology - 5		<ul style="list-style-type: none"> • See #3
23. Training on the capabilities and functions of 3-D software such as Revit and BIM.	Technology - 6		TBD
24. Software licenses and training on how to use AutoCAD lite.	Technology - 7		TBD
25. Adequately staff and budget for leadership	Financial - 1		<ul style="list-style-type: none"> • All-staff meeting twice monthly for process

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Engineering and Architectural Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
requirements, process improvement development, and core capital project management deliverables.			improvement. <ul style="list-style-type: none"> • Scheduled training - See #11
26. Perform a comprehensive rate and fee structure review: <ul style="list-style-type: none"> • Capital Project Management Programs for core capital budget work. • Reimbursable Capital Project Management Program for off-budget construction management. • Energy Program. 	Financial - 2		Analysis is underway to evaluate rates for all of the EAS lines of business. Data is being collected and initiatives developed in planning for the 17-19 Budget Submittal.
27. Create a knowledge, skills, and ability matrix to determine training and expertise needed in all areas of E&AS.	Contract/ Risk - 2		<ul style="list-style-type: none"> • COMPLETED. Apr. 2015 • Presenting information at weekly E&AS management team meetings.
28. Promote apprenticeship programs to train the next generation of skilled construction labor and ensure workforce availability in the future.	Contract/ Risk - 3		<ul style="list-style-type: none"> • Developed apprenticeship requirements. Demo scheduled with B2GNow/LCP Tracker for an apprenticeship tracking system preview.
29. Create and adapt workflow systems to implement new construction project management software.	Process Improvement /Design - 1		<ul style="list-style-type: none"> • See # 3
30. Update the Project Management Manual <ul style="list-style-type: none"> • Diverse Business outreach, inclusion, verification, and reporting. • Project closeout process. • Emergency contracting. 	Process Improvement /Design - 2		<ul style="list-style-type: none"> • See # 4 • Project Manual determined to be Top Priority issue for E&AS in 2016.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Engineering and Architectural Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
<ul style="list-style-type: none"> Use of Responsibility Criteria. 			
31. Update the Client Orientation Manual <ul style="list-style-type: none"> What is public works? How to access E&AS' services. 	Process Improvement /Design - 3		<ul style="list-style-type: none"> See #4
32. Update E&AS' internal practices.	Process Improvement /Design - 4		<ul style="list-style-type: none"> See #11
33. Improve client agency and stakeholder communications: <ul style="list-style-type: none"> OFM legislative/senate staff. Client workshops and forums. Stakeholder forums (public owners, contractors, and consultants). 	Communications / Marketing - 1		<ul style="list-style-type: none"> See #5 and # 7
34. Invest in marketing materials and event participations.	Communications / Marketing - 2		<ul style="list-style-type: none"> Nov 4 – Client Event & Tradeshow
35. Redesign website for ease of use by clients, contractors, and stakeholders, and to allow electronic request for services.	Communications / Marketing - 3		<ul style="list-style-type: none"> COMPLETED. See #15.
36. Use customer surveys to gain insight and feedback for improvement opportunities.	Communications / Marketing - 4		<ul style="list-style-type: none"> There is no current functionality for a CPPM related survey.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Facilities Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
1. Fully utilize existing condition assessment system (FICAP) to assess building conditions.	Business Change -2		<p>Rapid Assessments:</p> <ul style="list-style-type: none"> • Rapid assessments are complete for all DES owned facilities (outside Thurston County, Thurston County) <p>Training:</p> <ul style="list-style-type: none"> • Training completed Facilities Division staff.
2. Plan and schedule work so that resources can be deployed appropriately and successfully.	Business Change - 2		<p>B&G- M&O PM scheduling is being revised and Tenant Improvement Team has implemented a weekly and one month schedule to deploy resources better.</p> <p>B&G M&O/BA/Card Key working with facilities Business Analyst to develop a workload forecasting tool to enhance resource scheduling.</p> <p>B&G Working with Asset Management to prioritize PM's. Coordinates work with the 15/17 budget and works with the new workload forecasting tool.</p> <p>Custodial- Done – all custodial jobs profiled and scheduled. Refuse/Recycle jobs are scheduled.</p>
3. Continue with Master Planning for the Campus and other buildings in the portfolio. Specifically in regards	Business Change - 3	✓	<p>Asset Management-</p> <ul style="list-style-type: none"> • Working with the CCDAC and SCC to define

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Facilities Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
to sustainability, security, building controls, infrastructure, cultural resources and future opportunity sites for development.			<p>the boundary of the Capitol Campus that the Master Plan applied to. This work is nearing completion.</p> <ul style="list-style-type: none"> • Completed work with the CCDAC to define the principles and policies within the existing Master Plan that need to be revised. • Work on the actual revision has now started.
4. Develop a Capitol Campus Security plan and program.	Product or Service Change - 1	✓	
5. Create a quality assurance program for all services rendered.	Product or Service Change - 2		<p>Asset Management used the site representatives for quality assurance on our Capital Projects for summer and fall 2014.</p> <p>B&G M&O – Quality Control plan in draft. Looking for a final draft by March 31st.</p> <p>B&G M&O – First draft is in review.</p> <p>Custodial- Done. Walkthrough inspection process in place for Custodial Operations.</p>
6. Offer customers consultation services for energy conservation and ways to reduce their agency carbon footprint as users of the Capitol Campus.	Product or Service Change - 3		Asset Management is working with NRB agencies to utilize a cooling configuration in the NRB Computer Room that met their needs but reduced cooling level. Design is underway.

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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<p>7. Develop employee training plans and career ladders for advancement. Provide opportunities for professional development and advancement. Support and encourage participation in national organizations & conferences.</p>	<p>Workforce - 1</p>		<p>Asset Management will use the PDP process to develop staff training plan that will improve their effectiveness in their present job.</p> <p>B&G- Starting discussions with the AFSCME for initiation and development of training plans and professional development.</p> <p>B&G Groundskeeper on a developmental job assignment with the irrigation specialist.</p> <p>B&G M&O – In-training plan to replace retiring irrigation mechanic in final review. Recruitment to be announced early June.</p> <p>Custodial- Process utilizing Employee Development Performance Plan in place encouraging employees to expand career opportunities for Custodian & Refuse/Recycle.</p>
<p>8. Right size work force to align with work load. Regularly assess workforce skillset to ensure employees have what they need to be successful.</p>	<p>Workforce - 2</p>		<p>Asset Management is looking at our workload to ensure that assignments leverage employee's skill sets. For instance, building assignments have been revised.</p> <p>B&G - Reallocated HVAC Tech position to a Plumber/Pipefitter. Work load analysis</p>

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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			<p>determined change in staffing when Zone 3 HVAC Tech retired.</p> <p>Asset Management/B&G – Working with finance to align workload to the facilities and the facilities budget for FY 15-17.</p>
<p>9. Assist internal programs who are not working well together be more collaborative and successful. Be willing to re-structure organization to create more effective teams. Assist programs with cultural shift.</p>	<p>Workforce - 3</p>		<p>Asset Management- Staffs are involved in supporting B&G’s reimbursable work Lean process.</p> <p>The Internal Facilities unit has begun participating in other unit huddles in order to share information more quickly and directly with those of our DES partners who have work that touches our own.</p> <p>Asset Management/B&G – Working together to identify processes and procedures that need to be updated or written.</p>
<p>10. Develop apprenticeship and internship program.</p>	<p>Workforce - 4</p>		<p>Asset Management hired an intern who we are helping to develop. He is helping with producing lots of excellent work products.</p> <p>B&G- Working with Project Next on re-implementation of an apprenticeship program.</p>

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			Custodial Operations representative on the Internship program study team.
11. Identification and construction of a new grounds equipment maintenance shop.	Facilities/ Equipment - 1		Asset Management included a new grounds equipment maintenance shop in the agency's 2015-17 Capital Budget request.
12. Better portable laptops, dock stations/tablets to better enable mobilization in daily operations.	Facilities/ Equipment - 2		Asset Management- Revolve laptop deployed to Asset Managers who work offsite most of the time. B&G- Revolve laptop deployed to the M&O Manager.
13. Provide more space around 1500 Jefferson Building for parking agency business vehicles such as delivery vans and trucks.	Facilities/ Equipment - 3		TBD
14. Facilities Management system and database in order to better manage all aspects of the DES facilities portfolio – buildings, land, equipment, cultural resources, service delivery and invoicing, project management, short and long-range planning, condition assessment and space planning. Support for existing condition assessment system until larger system can be acquired.	Technology - 4	✓	Asset Management- Just completed a major update of our info system (FIMS) to make it more useful for staff. B&G - Working with ETS to compare Mainsaver upgrade from version 10 to version 12 and development of a new front end to replace FMMS. Long-term goal is to compare newest version of Mainsaver to AssetWorks both in cost and maintenance and repair management. B&G M&O – Working with ETS on

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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			<p>implementation plan for Mainsaver 12.</p> <p>B&G – Upgrade to Mainsaver scheduled for the weekend of May 16th.</p> <p>B&G – Mainsaver 12 upgrade completed.</p>
15. Campus building systems need to be updated to be compatible and connected to central campus network. Future capital requests include the additional of “energy analytic” applications and dashboards in buildings.	Technology - 1	✓	TBD
16. Additional support for existing legacy systems and applications for better utilization and efficiency until new database can be procured.	Technology - 2		<p>B&G- Working with ETS on FMMS system enhancements.</p> <p>B&G M&O- Working with ETS on new web intelligence front end to replace FMMS.</p>
17. Mobile workstations and remote access to documents and e-files.	Technology - 3		TBD
18. More training for new technology.	Technology - 4		TBD
19. Firewall issues between DES & L&I	Technology - 5		TBD
20. Identify and establish alternative financing mechanisms for capital renewal, operations, and service delivery such as incorporating community volunteer and donation programs for the preservation	Financial - 1		Asset Management- Secured energy grant from DOC and PSE to update the energy systems in five buildings statewide.

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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of historic and cultural assets			B&G - Received grant for informational signage at west campus historic trees. B&G – Received grant rom Alliance for Community Trees for educational workshops
21. Investigate and develop a model for charging campus tenants for their actual energy use instead of the currently used “uniform charge” (same rate for all no matter usage).	Financial - 2		Asset Management- Discussion has already begun to put financial accounting in place to enable us to implement this next biennium.
22. Build a “total cost of stewardship” model for each asset and develop rental rates that support the costs. Provide staff training in financial and business acumen so that they have more ownership and accountability of the dollars they are spending	Financial - 3	✓	B&G and Property Management gathering data for the total cost of stewardship model. Asset Management/B&G – Working with finance to align workload to the facilities and the facilities budget for FY 15-17.
23. Work to reduce or eliminate the numerous contract obstacles and delays associated with processes for receiving services from internal partners.	Contract/ Risk - 1	✓	Asset Management- Working with ACCO to obtain some purchasing delegation that will make it easier to complete repair projects. Custodial Refuse/Recycle and ACCO working together to develop criteria for basic IAA’s.
24. Reduce the types of “leases” (IAA, PMO, and CCOA) to reduce layers of time and effort.	Contract/ Risk - 2		TBD
25. Ensure that all life/safety building systems are functioning through regular inspections and repairs.	Contract/ Risk - 3		TBD
26. Continue to streamline process and for requesting	Process Improvement		Asset Management is in the process of

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Facilities Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
work and services from customers. Include quality assurance points throughout the process. Documents standards and create policies and procedures for work.	/Design - 1		updating our procedures and best practices in order to improve our effectiveness. B&G- Tenant Improvement Program Lean study in progress.
27. Improve communication with each other, customers, and community partners.	Process Improvement /Design - 2		TBD
28. Improve process for capital project design review with B&G, Asset Management and E&AS.	Process Improvement /Design - 3		TBD
29. Develop alternate fuel implementation guide for agencies	Process Improvement /Design - 1	✓	TBD
30. Redesign Facility Division website for easier access and information	Communications / Marketing - 1		Asset Management- Capital Project updates are now being displayed on agency new website. B&G Work management Center and Grounds pages updated.
31. Issue customer surveys to gain insight and feedback	Communications / Marketing - 2		B&G - Completed tenant leaf blower noise survey. Results analysis in progress.
32. Improve stakeholder/customer communications to share information and create opportunities for partnering.	Communications / Marketing - 3		Asset Management worked with the Communications to develop communication tools that will help us to better communication with our stakeholders.
33. Have performance expectations for managers	Communicati		Asset Management- All Asset Managers are

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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Facilities Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
<p>regarding frequency of customer meetings so they can address issues and improve the agency's credibility.</p>	<p>ons / Marketing - 4</p>		<p>expected to have monthly tenant meetings to address building and tenant issues.</p> <p>B&G- Working to add to managers standards.</p> <p>Custodial- All Custodial management and supervisors have expectations regarding frequency of customer meetings. Supervisor's schedules adjusted to facilitate meetings during business hours.</p>

Finance Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
<p>1. Standardization (some standardization is also found in # 2 Automation and #8 Training)</p> <ul style="list-style-type: none"> A. Standard incoming yield, processes, output B. Payroll C. Standard payroll system for all customers D. Standard use of ESS for all customers E. Direct deposit for earning statements and employee reimbursements F. A/R G. One A/R system H. Standardized invoicing 	<p>Business Change - 1</p>	<p>✓</p>	<p>Several activities improved and standardized. Some COMPLETED, many are in process across the division related to A, B, C, F, J, K, L, P and Q. These include: Desk manuals, standardized, automated monthly financial reports, process for analyzing financial information, moving from paper batch reports to electronic for all small agencies, eight of eleven payroll processes, standard batch logs in Access, small agency profiles, and standard templates and process for each general ledger.</p> <p>Revenue Management is establishing a project</p>

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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<p>I. Cash receipting for Small Agencies done at DES instead of at the agencies (where possible)</p> <p>J. Budget</p> <p>K. A/P</p> <p>L. G/L</p> <p>M. Tech Leasing</p> <p>N. Admin</p> <p>O. Desk Manuals</p> <p>P. Standard documentation of processes, format, storage</p> <p>Q. Financial Tool Kit</p> <p>(The above is internal to Finance – will need help from Lean, Communications, Change Management)</p>			<p>team to standardize the reconciliation for all of the different companies related to A. Hired FA3, within a year we will begin the reconciliations of programs revenues. RM has moved the facilities and services invoicing so that the reports can be run more standardized. Will be testing in September. The section also implemented new GL reconciliation process and tracing (the small agency receivable GLs) related to L. Bien 15-17 chart of account changes are being reviewed against current cashier manual. Working on Revenue Management Report of agency revenue and allotments by PI/Project, related to F.</p> <p>Payroll is developing ideas for the Finance Tool Kit. A member from each work unit is updating the Small Agency Director’s Manual and Executive Director’s Manual. The information will then be transferred into the Financial Tool Kit housed on our internet website. Our goal is to have the Tool Kit posted by January 2016.</p> <p>DES Budget and Revenue Management continue to work on standardizing the form/format of information flow regarding invoicing from the Budget Unit to Revenue Management (H). Standardized CSB billing template. Worked well for fall of 2015.</p>

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Status Report as of February 29, 2016**

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			<p>June 2015 Small Agency Budget standardized the allotment workbook that we present to agencies when working with them to build their biennial allotments. The workbooks contain bill language, expenditure authority, central service costs, salary projections, and fixed and discretionary costs. We had positive comments from many of our small agencies on how they really liked the workbook and how useful it was!</p> <p>In addition, SAFS Budget utilized standard templates with clear narrative, which allows management or other budget analysts to research how the allotments were developed and how the figures were derived.</p> <p>SAFS A/P utilized Delegated Authority letters for reoccurring monthly payments, thereby eliminating the A-45 process for 15% of payments received by agencies monthly as well as reducing the number of accruals necessary on a monthly basis. (K)</p> <p>Created SAFS agency profiles in OneNote, consolidating all agency specific data, uniqueness's, and tips for Payroll, Budget, Revenue Management, Admin, and Accounts Payable in one central location. (B, F, J, K Q)</p>

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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			<p>Standardized the General Ledger Reconciliation process for all SAFS GLs. (B, F, J, K)</p> <p>December 2015 Small Agency Finance is reaching out to the small agencies to see what policies they already have and if they need help creating/writing any so that they maintain compliance with state financial policies.</p>
<p>2. Automation</p> <ul style="list-style-type: none"> A. PAR process B. Imaging/Work Flow Management C. Purchase Orders D. Upgrades to ABS/Computron E. All customers have access to information F. Functionality for multiple agencies G. CARP Revamp <p>(We would work with WA-Tech/ETS, CLS and Business Partners on this section)</p>	Business Change - 2	✓	<p>Improved automation functionality for customers/partners by establishing a Web form process to add users to TEMS for DES and DES SAFS (F).</p> <p>Also, developed criteria and partnered with ETS on the design of a Profit and Loss Report available for proprietary funds statewide (E).</p> <p>A list of CARP changes has been compiled. (G)</p> <p>A meeting with WaTech is scheduled for September to determine what is considered maintenance vs. enhancements. Also, the PAR and PPDS were recently updated to allow for automated flow between HR and Payroll.</p> <p>Three agencies (147, 165 and 227) are in</p>

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Status Report as of February 29, 2016**

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			<p>Computron/ABS and are active. Four agencies (080, 185, 460 and 478) are in ABS/Computron, not yet active. In the upcoming quarter we will be activating these agencies and identifying any others that would benefit from being entered into ABS/Computron.</p> <p>Revenue management is working on ways to get all customers access to our eStatements, currently only state entities can access.</p> <p>Implemented the Capital Budget email box at descapitalbudget@des.wa.gov to ensure that emails and critical/time sensitive documents are addressed in an appropriate manner.</p> <p>The Budget group changed the monthly manual allotment process. By automating the monthly TALS allotment process using formulas and functions in Excel, this information was then uploaded to TALS. The automation is then verified by the Budget Analysts, which resulted in significant time savings. SAFS AP is working with ETS and HP to re-implement imaging/work flow management. This is an ongoing process related to A.</p> <p>TEMS reporting in ER updated to allow for multiple</p>

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Status Report as of February 29, 2016**

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			<p>agencies in one report, in a sortable format, for increased functionality. (F)</p> <p>Developing updated FIT Form that is automated and tracked through SharePoint. By using new tools (InfoPath integrated with SharePoint), we are able to simplify the process while ensuring that all relevant parties are "looped in".</p>
<p>3. Expand our Financial Services/Customer Base</p> <ul style="list-style-type: none"> A. Bring on more small agencies B. Develop modeling and financial consulting capacity for both internal and external customers C. Market our products/quality D. Survey our customers on needs E. Self-promotion and marketing for Finance goals and growth F. Offer services to other state agencies, local governments and school districts G. Internal DES training to improve Finance's ability to connect customers with additional services 	<p>Business Change - 3</p>	<p align="center">✓</p>	<p>Market products/quality by (C):</p> <ul style="list-style-type: none"> a. Interest/Ownership/ER reporting b. On line vendor lookup c. Daily new vendor report d. Agencies can recreate remittance advices e. Tailor SWV form for agencies f. DES Financial and HR Services were featured in the OFM Fall 2014 <i>Connections Newsletter</i> to promote services. <p>In addition, E. Washington Historical Society transitioned to SAFS July 1, 2014 (A).</p> <p>SAFS met with WA Economic and Development Authority (WEDFA) to discuss transitioning their accounting functions to SAFS (A). It was determined that DES wasn't the best fit for WEDFA's needs.</p>

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Status Report as of February 29, 2016**

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			<p>SAFS surveyed customers by sending Performance Feedback forms to small agencies. This feedback was used in PDP Evaluations on small agency budget staff.</p> <p>Life Sciences Discovery Fund contacted DES to inquire about SAFS services. SAFS is researching whether the agency will qualify to receive services by SAFS. It was determined that DES wasn't the best fit for LSDF's needs.</p> <p>Small Agency Finance Lean Journey presented at the Lean Conference and Small Agency Finance information presented at the DES 2015 Training Conference & Trade Show.</p> <p>December 2015 Small Agency Budget met with the State Conservation Commission and discussed them potentially becoming a budget customer. They are already a payroll customer.</p> <p>January 2016 Small Agency Finance is wrapping up their recent customer survey results. We received responses from 33% of the people that represented 50% of the agencies surveyed! We are now taking steps to address the issues that came out of the survey.</p> <p>January 2016 Small Agency Finance was contacted</p>

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Status Report as of February 29, 2016**

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			by Legislative Support Service requesting a quote to use DES SAFS for budget and accounting services. With the help of Becky Guyer DES Budget, we were able to get a cost estimate to them within the day.
4. Separate service offerings A. Hourly rates B. Menu pricing C. Define service level agreements	Product or Service Change - 1		DES Budget developed hourly rates for ETS and LEAN Transformation Services (A). DES Budget worked with Visitors Services to develop a rate schedule for events on campus for non-state customers that align with other venues. Awaiting approval (A & B).
5. Provide Financial Consulting Services/Expand our Customer Base – A. Payroll, B. COP Leasing, C. Capital Budget, D. Invoicing, Receivables, E. Payables, F. Travel G. Financial modeling H. Financial consulting I. “Account temps” services	Product or Service Change - 2		E. Washington Historical Society transitioned to SAFS July 1, 2014 (A, D, E, and F). Technology Leasing is in contact with a political subdivision to facilitate their technology needs.
6. Empowerment/Acknowledgement	Workforce - 1		Changed the internal MSFR for the Finance Division to a more collaborative and participatory process.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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<p>A. Acknowledge employees for a job well done; place their names (authorships) for their contribution of solving problems.</p> <p>B. Empowerment vs Disempowerment</p> <p>C. Train managers and supervisors as well as staff on techniques of empowerment.</p> <p>D. Engage line staff in internal MFSR's, they are the experts in the data that is being reviewed.</p> <p>E. Develop an upward evaluation process</p> <p>F. This will give staff the chance to evaluate their supervisor and manager performance as a leader, mentor and manager. The use of a survey approach with a scale could be useful.</p> <p>G. Ensure managers and supervisors share with staff information that is passed down with the intent to be shared. It is important that information be shared with line staff as received. This creates an environment of open communication and transparency.</p>			<p>To engage line staff, SAFS budget now joins with small agency A/P, A/R, and payroll in:</p> <ul style="list-style-type: none"> a. post-close meetings to share information and discuss in each small agency MFSR; and b. Pre-quarterly meetings to discuss topics to review and who should attend the meetings. <p>The General Ledger group:</p> <ul style="list-style-type: none"> a. Forwarded internal MFSR invitations to two line staff. Both attended recent meetings and offered input, as appropriate. (D) b. Include a standard item in their daily huddles to share information that was disseminated the previous day in meetings attended by supervisors and staff. Applicable emails are also being forwarded to staff in a timely manner to ensure information is shared promptly. (G) <p>Invited OFM to attend a weekly Small Agency Business Model Meeting. This showcased the improvements and progress staff have made on reconciling GL's. OFM was very impressed and requested DES staff share their LEAN processes and</p>

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Status Report as of February 29, 2016**

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			<p>tools. Supervisors and Managers rewarded staff at the next Business Model Meeting with treats.</p> <p>Randomly selected teams provided Leadership with staff suggestions for increasing Employee Engagement. The Leadership Team is responding to the suggestions and developing plans to incorporate the staff feedback.</p> <p>Information reported out at the Leadership Meeting about the Extended Management Meeting is shared with Small Agency Budget staff in the morning huddles.</p> <p>To acknowledge the staff for good work on the FY Close and Biennial Budget Open, the CFO, Deputy CFO, Accounting Manager, and SAFS Budget Manager delivered ice cream to staff.</p> <p>Finance Division developed a "Fun" committee and the first event was a Halloween decorating competition between pods.</p>
<p>7. Training Internal training and lack of understanding continue to be a problem. To be successful in the initiatives described in step A we need to do the following things.</p> <ul style="list-style-type: none"> A. Develop our staff technical and soft skills. B. Develop a pool of Subject Matter Experts (SME) within our division. This will help us utilize our 	Workforce - 2	✓	<p>Some budget staff took:</p> <ul style="list-style-type: none"> • A soft skills assessment to work on opportunities for improvement (A). • An assessment for Microsoft Office and identified opportunities for improvement (A).

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Status Report as of February 29, 2016**

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<p>talent in ways we have not in the past, and provide the opportunity for staff to train each other and build relationships.</p> <p>C. Educate our staff on what services DES offers. This will help staff understand how their piece ties into the big picture.</p> <p>D. Develop awareness and understanding across all of the functions of the units in the Finance Division.</p> <p>E. Create/Update all desk manuals</p> <p>F. Electronic format</p> <p>G. Standard format</p> <p>H. Central location</p> <p>I. Develop a change management process so that training is provided on all new systems and applications, or changes made</p> <p>J. Develop on demand training for our employees, customers</p> <p>K. Tutorials, how to, informational, video's etc.</p> <p>L. For all learner types Reader/Seers/Doers</p> <p>M. Implement a training sharing program</p> <p>N. If you take a good training come back and share the highlights with the division.</p>			<ul style="list-style-type: none"> The General Ledger Team attended new OFM sponsored training on reconciling accounts. This was the first training of its kind and was invaluable in helping us develop our standardized processes (A and B). <p>This effort will continue across the division.</p> <p>In addition: 20 staff received specific advanced Excel training to further their technical skills (A).</p> <p>Identified and working toward developing technical skills in the area of Capital Project accounting (B).</p> <p>All managers and supervisors participated in DISC training to learn how to work together to strengthen our leadership team.</p> <p>In Small Agency Financial Services, all relevant sections are now invited to the small agency post-close meetings. This enables staff to share information and discuss each small agency's MFSR (D).</p> <p>The General Ledger group has begun offering training to staff in Accounts Payable and Revenue</p>

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Status Report as of February 29, 2016**

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			<p>Management on reconciliation processes. Lunchtime training has been scheduled to review the Warrant Cancellation process for later this month. In addition, in the weekly large group Accounts Payable huddle that crosses three sections, plans are in the works to provide similar technical training opportunities.</p> <p>The General Ledger group has begun cultivating opportunities to assist new staff in Revenue Management and Accounts Payable to understand transaction codes, and how the General Ledger accounts work together to paint a complete financial picture. In addition, they are training staff on how to look for errors.</p> <p>Small Agency Financial Services staff, along with Payroll, continues compiling 'Agency Profiles' for each of the small agencies. This is proving to be an educational tool for new staff, as well as identifying the high-level items that need to be further refined in a desk manual.</p> <p>DES and SAFS AP staff has developed an expectation for themselves to take at least one training per year and provide that training to their workgroups to share knowledge.</p> <p>Staff that went to the Lean Conference presented</p>

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Status Report as of February 29, 2016**

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			<p>at an all-staff Finance meeting the main topics they learned.</p> <p>The Finance Division formed a training coordination team. This team is responsible for coordinating with subject matter experts to provide training sessions on topics of broad interest to staff in the division. The six classes presented to date were well attended. The class presented in October was Travel guidelines. This class was also presented to the assigned agency travel coordinators.</p> <p>All Finance Division staff received training on the following Lean classes:</p> <ul style="list-style-type: none"> • Problem Solving the WA Way • Coaching the WA Way <p>January 2016 Reducing/eliminating staff turnover is a front burner topic now for Small Agency Finance. From this we have started conversations about cross trainings. Small Agency Budget is developing a cross training plan and will begin sharing knowledge with two A/P staff in mid Feb.</p> <p>February 2016 Small Agency Budget staff is cross training in HR and payroll. Payroll staff is cross training in A/P.</p>

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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<p>8. Workforce Planning To develop our staff and make Washington State the employer of choice as Governor Inslee desires we must:</p> <p>A. Develop staff by:</p> <ul style="list-style-type: none"> (1) Creating both a formal and informal mentorship program. (2) Finding a way to support tuition reimbursement (Scholarships, Grants etc.) (3) Providing flexible work schedules to allow employees to continue their education. (4) Develop a more ridged recruitment process. (5) Focus on conceptual and critical thinking skills vs. technical skills and experience working in the applications. (6) Use behavioral based interview approach 	Workforce - 3	✓	<p>Revised interview questions for accounts payable positions to emphasize critical thinking skills to ensure dynamic, critical thinkers are hired (A - 4, 5 and 6).</p> <p>Partner entry level staff with seasoned staff for mentoring on budget activities and operations (1).</p> <p>In view of anticipated retirements, Informal mentorship has begun in the general accounting section and will continue to be at the forefront for the next two years (A -1).</p> <p>Cross training of budget staff COMPLETED.</p> <p>The Payroll manager continues to meet with staff one-on-one to discuss career paths and future advancements, as well as training staff on areas of interest.</p>
9. Utilize Smart boards with Trello for Kaiben Board	Facilities/ Equipment - 1		The DES Budget section implemented a Trello application that staff has access to for daily huddles.
10. Imaging system across the division – optimize the workflow	Technology - 3		<p>Researching different imaging options as of 10/2015.</p> <p>February 2016 Members from each small agency work unit attended the HRPM/TRIM v.8.3 demo.</p>
11. Upgrade AR system to accommodate additional agencies and incorporate billing and accounts	Technology - 4		TBD

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Status Report as of February 29, 2016**

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receivable in one system.			
12. Purchase order system	Technology - 5		TBD
13. Develop a fee structure for a la carte services	Financial - 1		TBD
14. Develop process for cost/benefit analysis of process improvements Develop financial modeling capabilities	Financial - 2		TBD
15. Process for accepting electronic signatures	Contract/ Risk - 1		
16. Central contract location – master contract database access	Contract/ Risk - 2		TBD
17. Develop online financial tool kit	Process Improvement /Design - 1		<p>A workgroup met and discussed converting our current Executive Director Manual and Executive Assistant Manual into the tool kit. Most of the items we wish to have in the tool kit are in the manuals.</p> <p>Started updating the Director and Executive Director's manuals. Next will be the conversion of relevant data into an online financial tool kit. GOAL: Complete the toolkit up by the end of Jan 2016.</p>
18. Develop and document standard work	Process Improvement /Design - 2		<p>Accounts Payable developed a standardization document for entry into EVF payment processing. Utilizing a Checklist (Green sheet) to help identify completed staff work.</p> <p>The payee unit completed cross training, tasks</p>

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Status Report as of February 29, 2016**

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			<p>documented and reviewed by other members of the team – in process across the division.</p> <p>Small Agency Finance created standard topics to discuss at monthly post close meetings and a standard format to document issues discussed.</p> <p>All units have implemented the use of OneNote to document small agency information and processes to use as a training mechanism, as well as the establishment of desk manuals.</p> <p>Standardized the General Ledger Reconciliation process for all SAFS GLs.</p> <p>Standardized accrual process across all A/P units.</p>
19. Library of online desk manuals	Process Improvement /Design - 3		
20. Develop specialized marketing plans for business areas; identify priorities to designate order of development and implementation.	Communications / Marketing - 1	✓	<p>The Technology Leasing group worked extensively with the agency business development manager to develop a marketing plan and a brochure outlining their services. They have also attended conferences and trade shows where they have directly engaged with potential customers.</p> <p>Additionally, the Technology Leasing group as well</p>

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			as the small agency finance group will be represented at the annual DES Training Conference and Trade Show where they will have an opportunity to discuss their services with potential customers.
21. Refresh and update DES and HR websites and accompanying business processes to improve sustainability, improve usability for customers, educate agency content provider, and maximize business interactions.	Communications / Marketing - 2		<p>Small Agency Finance added workshop handouts and informational links to website for easy customer use/reference.</p> <p>January 2016 Members of Small Agency Finance are meeting with Small Agency HR to review the outside DES website and see how we can make it more user-friendly for our customers.</p> <p>February 2016 Another member of the small agency group has access to update the website more quickly/frequently as changes occur.</p>
22. Increase communication with customer, calls and face to face meetings, portal – increases partnership	Communications / Marketing - 1		<p>Budget (DES and Small Agency) implemented tracking for monthly interaction with partners and customers as a performance expectation.</p> <p>Small Agency Budget received positive recognition from OFM on enhanced communication & efforts to ensure small agencies budgets are closely monitored to ensure there are no budget over-spends.</p>

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Status Report as of February 29, 2016**

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			<p>Small Agency Finance hosts educational workshops sharing information with customer agencies. The most recent workshop reviewed year-end close deadlines and expectations, as well as upcoming budget allotment planning. We emphasized partnering with the agencies to have a successful close and budget allotment build.</p> <p>May 2015 Small Agency Finance created a <u>FY15 Budget Status Update</u> letter to OFM budget and accounting reporting on the status of the agencies on our "Watch List". The letter is updated and re-sent each month (more frequently when needed) keeping our partners informed.</p> <p>Small Agency Finance Lean Journey and process improvement story presented to OFM.</p> <p>December 2015: Small Agency Finance sent a customer survey to all our small agency customers to get feedback on communication, responsiveness, customer service, completing tasks, professionalism, and our contribution to the small agencies.</p>
23. DES Finance Open House – Who we are and what we do. Finance day instead of rate day. Internal and external marketing.	Communications / Marketing - 3		TBD

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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24. Round robin internal training from each of the divisions/programs so we can learn what they do, who they serve, etc. (to better inform and direct our customers)	Communications / Marketing - 4		<p>July 2015, the DES Finance Leadership Team implemented a round table at each meeting. This allows each unit to share what they are working on, or will need to work on in the future. This allows for an understanding of how work is joined or associated across units, and allows for better team work and collaboration.</p> <p>The Small Agency group implemented a round table at each Friday's Team Results meeting. This allows each unit to share what they are working on, or will need to work on in the future. This facilitates understanding of how the work is inter-related, and allows for better team work and collaboration.</p>

Fleet Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
1. Replace existing facility that is overcrowded	Business Change		<ul style="list-style-type: none"> DEFERRED. Completing further research and cost analysis, to identify locations for automated key box facilities for future daily rental locations. Currently working with Stephanie Fuller (DES) to locate a location in Tumwater and Lacey WA.
2. Develop fleet management plans for agencies <ul style="list-style-type: none"> Create fleet assessment template to include utilization, fleet composition, alternate fuel use 	Product or Service Change - 1	✓	<ul style="list-style-type: none"> First Quarterly "Customer Outreach" training for Agency Transportation Officers and agency contacts.

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Status Report as of February 29, 2016**

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<p>and potential, vehicle sharing, fuel use</p> <ul style="list-style-type: none"> Train customer account representatives on fleet management practices and processes 			<ul style="list-style-type: none"> Completed First one 11-12-2014, second 3-31-2015 Next ATO meetings scheduled for June 23rd, 2015, October 6st, 2015, and December 15th. 2015 Annual fuel consumption report sent to 16 top fuel use agencies completed 8/26/2014. 2014's data is being cleaned and verified. Will be sent out in Oct 2015. Submitted a request to build a DES database file to store non-DES vehicle annual mileage. Completed: Dec. 2015
<p>3. Implement automated key dispatch systems in outlying areas</p>	<p>Product or Service Change - 2</p>	<p align="center">✓</p>	<ul style="list-style-type: none"> Automated key boxes (Invers) for DSHS Campus Fleet (17 vehicles) was activated 9/2/2014. Second phase will incorporate the remaining 45 Campus office daily rental fleet. Est. completion - June 2015. Met with Stephanie Fuller (Lease/Fac) to discuss to possible locations in Lacey and Tumwater for satellite. Gathering parking stall pricing and potential lease terms. ATG Tumwater HQ and Seattle office to use INVERS. On-hold

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Fleet Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			<ul style="list-style-type: none"> • Submitted an ETS request to begin the transition to a Web Version of this Invers automated Key Box system. This adds functionality necessary to manage a statewide rollout. • The start date for this migration will be Oct. 1st. Started...est. go-live Feb 1st 2016 • Proceed with the installation of INVERS system for the Blake/Sleater Kinney Office building in Lacey. Est Completion – April 2016(Move back one month) • Completing parking lease
4. Offer fleet AVL and telematics to agencies to track vehicles and better manage their fleets and costs	Product or Service Change - 3		<p>COMPLETED.</p> <ul style="list-style-type: none"> • This item be discussed at the Fleet Compliance meeting, scheduled for 2/2015 • This topic will be incorporated into #8 going forward.
5. Employee training	Workforce - 1		<p>On-going –</p> <ul style="list-style-type: none"> • Training items have been added to employee PDP's. Using the LMS and industry resources to provide employee training. • Employees have started to take the required Contracts and Procurement trainings and will have the required courses

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Fleet Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			<p>completed by 10/15/2015</p> <ul style="list-style-type: none"> • Admin staff attending an EV conference 4/5/16
6. Retention and Recruitment	Workforce - 2		<ul style="list-style-type: none"> • Completed the addition of new Maintenance Supervisor – Completed 7/1/2014 • Hired a new Equipment Tech 1 position to reduce the number of lube, oil, filter change jobs sent to outside vendors – Completed 1/1/2015 • Hired a new MA5 position to provide data analysis and support for the Telematics projects and other specialized reporting requested by customers – Completed 4/1/2015 • Filled PS3 position – Completed 8/17/2015 • Opened recruitment for a Program Assistant position. Est. Completion 10/1/2015 • Opening Transportation Demand Manager position (TDM) – Completed 1/1/2016 • Hiring a third EQ1 based on Team Results Capacity Report data – Completed • Hiring for a replacement MA5. Recruitment closes on 1/10/2016. Est Completion 2/15/2016 • Hiring a new PDI/Dispatcher position to assist with vehicle receiving and deployments.
7. New facility to accommodate the expanded rental fleet	Facilities/ Equipment - 1		DEFERRED. – See #1
8. Automatic Vehicle Location (AVL) and Telematics	Technology - 1		<ul style="list-style-type: none"> • Meeting with Verizon (telematics vendor)

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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Fleet Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
system implementation on a pilot program			<p>scheduled for 11/13/2014. Reviewing cost analysis and potential pilot project.</p> <ul style="list-style-type: none"> • Finalizing proposal to implement a 6-month pilot project. • Sample size(350), identify various vehicle applications(assigned for 12months and less than 4ys old), and communicate with agency customer(top 10 agencies) • Working with Union to develop telematics policy • Presented draft proposal and project plan. • WSCA pricing updated 4/1 • Demand to Bargain Local 17 PTE, WSFE, WFWA, IBEW – Have all been completed • Demand to Bargain UA(LNI) – Scheduled 6/15 • Pilot Agencies will receive weekly updates on the Telematics Pilot going forward • Submitted a comprehensive telematics plan to Bob Covington for review. Once approved, the plan will be distributed to pilot agency contacts. • Committees are actively working to resolve agency concerns.
9. Automated dispatch/key manager for outlying areas	Technology - 2		TBD - See #3

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Fleet Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
10. Vehicle replacement optimization analysis	Financial - 1		<ul style="list-style-type: none"> • Upgrades to our Fleet Management System will enable us to complete this using an automated process. The upgrade will be completed on 12/8/2014. –Completed • Next Steps: Test and analyze system data for usability and functionality vs previous process. • MA5 will be assisting with moving this forward
11. Accident management reduction program for agencies	Contract/ Risk - 1	✓	<ul style="list-style-type: none"> • DEFERRED. We need to work with DES Risk Mgmt., DES training, and agency customers to develop a statewide training curriculum. • George Carter will be presenting an overview of the Telematics Pilot and desired outcomes at the next Risk Mgrs. Mtg. on 3/26. - Completed
12. Market services Fleet Operations can provide to agencies to better manage their vehicles and reduce costs	Communications / Marketing - 1		<ul style="list-style-type: none"> • Attending the next WA State Colleges Safety/Security/Emergency Management Council meeting to present an overview of Fleet Operations services. Attending next annual meeting in April 2015 • We are also using the quarterly ATO meeting as a platform to communicate the benefits of using our services. • First two meetings completed in Nov. 2014 and March 2015. Our next is scheduled for

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Fleet Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			<p>June 2015 (See #2)</p> <ul style="list-style-type: none"> • A new Fleet Operations newsletter will be sent out April 2015 – Target audience will be Agency Transportation Officers and fleet contacts • Due to a recent increase in small agency vehicle requests, we are developing a standardized on-boarding protocol for new small agency clients (i.e. welcome packets, centralized DES email box, small agency specific reports, etc.). This is to provide better customer service to the growing number of small fleet customers, who tend to have a high turnover with their internal fleet contacts. • Scheduled regional EV trainings and ATO trainings in eastern WA – Jan 2016
13. Implement Alternative Fuel Vehicle Program	Product or Service Change - 4	✓	<ul style="list-style-type: none"> • 23 Nissan Leafs are currently in use at our daily rental and permanently assigned fleets • Installation of six (6) 240v chargers at the Capital Campus & Fones Rd Location - Completed • EV training for Agency Customers <ul style="list-style-type: none"> ○ DES Communications is completing a short training video

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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Fleet Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			<ul style="list-style-type: none"> ○ Fleet Operations Customer Account Representative are communicating the cost benefits of EV/PHEV's ○ First training completed March 2015; 2nd EV training course completed 4/20/2015; 3rd being scheduled for June 2015 ○ Completed a Ride & Drive event during the 1500 Jefferson Building sustainability event – Completed 4/30/2015 ● Currently look at available options to add LPG bi-fuel vehicles to our Daily Rental location. ● Complete LNI EV trainings for their staff
14. Branding of Fleet Operations and Parking Services			<ul style="list-style-type: none"> ● Develop brand identification for Fleet and Parking services. ● Attending the 2015 Trade Show in November. Presenting an overview of the Telematics pilot project and providing staff to assist at the DES booth ● Met with Kari Q and staff are to develop a robust Fleet/Parking/CTR marketing summary for Fleet, Parking, and CTR services. A rebranding plan will be developed based upon the final marketing

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Fleet Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			and strat map planning.
15. 20% Electric Vehicle Initiative	Product or Service Change - 1	✓	<ul style="list-style-type: none"> The goal is to have EV's account for 20% of annual vehicle replacements. A multi divisional and agency team has been created to establish a work plan and timeline for completion.

Lean Transformation Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
1. Re-organize and re-align Lean Program resources to attract and retain talent and focus on developing Lean mindset and skills for employees, leaders, facilitators, and peer coaches, on strengthening huddles, and on facilitating improvement projects.	Business Change - 1	✓	COMPLETED. Hired 3 new Senior Lean Consultants. Ari Wood started 12/1/2014, Eden Teachout started 1/16/2015, and Paul Houle started 3/30/2015.
2. Partner with HR to embed Lean culture in every PDF, PDP, search guidance, promotion guidance, and training requirements.	Business Change - 2	✓	Revised PDF and PDP Lean language is ready for MT to review. Envision this will happen after the MT leadership retreat later in the fall.
3. Expand number and type of consulting services and training products offered first to the rest of state government, and eventually to other public sector organizations.	Business Change - 3	✓	Now offering 4 standardized state classes: Lean Facilitation Training, Problem Solving the Washington Way, Coaching the Washington Way (pilot), and Daily Lean Practices. Finalizing contract to complete the eLearning course "Introduction to Problem Solving." Needed to shift from internal eLearning support

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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Lean Transformation Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			<p>to a vendor to complete the project. Pilot getting ready to launch in April for "Practicing gPDCA Problem Solving." Marketing "workplace learning" approach to clients that includes eLearning concept introduction, classroom guided skill building, and workplace practice with coaching to fully develop skill. Adding DiSC and 5 Behaviors of a Cohesive Team to our offerings.</p>
<p>4. Learn to conduct remote facilitation, training and coaching to meet needs of remote teams.</p>	<p>Business Change - 4</p>	<p align="center">✓</p>	<p>All team members now have Lync. A few team members will be early adopters to work out the bugs with using and model the way for rest of the team.</p>
<p>5. Offer more Lean culture learning and development options to DES employees, leaders, facilitators, and peer coaches, starting with Lean mindset, scientific problem solving, facilitation, coaching, consulting skills, and community of practice.</p>	<p>Product or Service Change - 1</p>		<p>Consultant's assigned to intensive work, coaching or projects with: B&G, Fleet, CMS, RES, CPR, LDP, P&I/FIN, SBCC, COMM, WSD, and Custodial. DES classes open to all employees and regularly offered in rotation: Introduction to Lean Culture, Daily Lean Practice, Problem Solving the Washington Way, Coaching the Washington Way, Strategy Maps and Measures. Planning under way for 2016 DES culture development strategy. Seeking targets from Assistant Directors for</p>

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Lean Transformation Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			Lean learning and skill-building goals for 2016.
6. Grow our consulting and training infrastructure and options offered to enterprise clients.	Product or Service Change - 2		COMPLETED. Approval for up to 4 Senior Lean Consultant positions to be hired by March 2015. Three hired and on board. Holding 1 position open.
7. Offer remote facilitation, training and coaching options.	Product or Service Change - 3		Classes now being successfully offered in Vancouver, Yakima, Spokane and Bellingham. Expanding offerings to include follow up coaching sessions to develop applied skills and experience in problem solving.
8. Expand Lean program organizational structure to recruit and retain top talent, and to expand agency skill sets through DJA's, peer coaches, and process improvement facilitators.	Workforce - 1		30 DES employees trained as Lean Facilitators; 20 remaining in agency after attrition.
9. Closely partner with HR to rapidly recruit and hire Senior Lean Consultants to respond to requests for consulting and training across state government.	Workforce - 2		COMPLETED. 3 hired.
10. Partner with HR to embed Lean culture in every PDF, PDP, search criteria, promotion criteria, and training requirements.	Workforce - 3		See #2
11. Recruit or train technically savvy staff who can skillfully facilitate, coach, and train remote groups.	Workforce - 4		TBD
12. Develop Lean staff to meet more sophisticated agency demands.	Workforce - 5		Completing new Lean Results Model "menu" for consulting work and identifying needed skills and knowledge to deliver this menu. Development plans will be constructed from

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Lean Transformation Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			this.
13. Ability to access adequate training space for classroom training and facilitation.	Facilities/ Equipment - 1		COMPLETED. Beginning July 2015, Learning Delivery is dedicating one room exclusively for LTS courses. The room will remain set-up in the format used for all LTS Courses. This will save LTS staff an estimated 15-20 hours of set up and tear down time each month when the room is in full use. When we do not have training scheduled, Learning Delivery will offer the room to other groups.
14. Dedicated office and meeting space suitable for large, collaborative consulting staff (Currently 8 FTE and 1 DJA's; potential to add 3-5 more FTE who could utilize hoteling as they will primarily work off-site.	Facilities/ Equipment - 2		COMPLETED. Move has been completed with space for newly added staff and for anticipated growth.
15. Need for technology to support remote facilitation and training strategies.	Technology - 1		TBD
16. Mobile office needs for consulting staff.	Technology - 2		COMPLETED. SLC's who work offsite all use Revolves now. Staff members regularly work remotely.
17. Multiple financial models and rate structures to meet growing and diverse service models and product offerings.	Financial - 1		COMPLETED. Rate structure to recover costs for consulting and training state agencies was calculated by Finance. Provides highly competitive rates and flexibility in approach. Rates for billing are for one Senior Lean Consultant plus overhead and program costs. Annual rate: \$184,545

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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Lean Transformation Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			Monthly rate: \$15,379 Daily rate: \$1,310 ½ Day rate: \$655 Hourly rate: \$164/hour (Comparable average hourly rate for Lean Master Contract vendors is \$200/hour; the most frequently used Lean MC vendors average \$233/hour)
18. Increased AR and AP support for external services.	Financial - 2		COMPLETED. New relationship established and Finance is providing regular budget reports; LTS is testing a parallel financial tracking in order to have access to detailed job costing information for business analysis. Regular monthly MFSR meetings with Finance will begin in March.
19. Simplify and expedite internal contracting support for supply chain efficiency (2nd tier contracting) and responsive contracting with clients (IAA's).	Contract/ Risk - 1	✓	Re: IAA's - We are tracking our internal IAA status and billing per our standard work to insure efficiency and accuracy. We now submit all IAA request through the standard method so that they can be tracked and visible to us. Re: 2 Tier Master Contracts - CPRM has delayed implementing the new 2 tier contracting model for the Lean Master Contract while they complete the pilot on the IT contract and finalize implementation and lessons learned. In the interim the old Lean Master Contract will be renewed as it is expiring January 30, 2016.
20. Marketing plan, expertise and ongoing market assessment and feedback.	Communications /		Marketing materials developed and used for Lean Conference. Website updated.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Lean Transformation Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
	Marketing - 1		
21. Increased creative and dynamic internal communication to support Lean culture transformation including intranet and internet	Communications / Marketing - 2		2016 DES plan will include internal communication strategy deployed by LTS.

Mail Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
1. Create mail hubs through either internal expansion or partnerships with other agencies to pursue and implement additional efficiencies for existing mailstreams to advantage the best postage discount possible. Examine opportunities to optimize routes through the use of satellite operations.	Business Change – 1 and Product or Service Change - 1	✓	DEFERRED. Customer list is complete and we are drafting the script for the planned outreach. Deferred (short-term). Competing priorities; peak production season will supersede progress at this time.
2. Standardize tracking offerings with improved, more accessible reporting capabilities.	Business Change – 2 and Product or Service Change - 2		Vendor research began in Feb. with one demonstration completed. Three more demonstrations in March. Gathering cost information to develop cost/benefit analysis.
3. Imaging incoming mail, expanded data-acceptance methods, and linked processes with other DES programs can broaden the customer base and amplify the efficiency of current service.	Business Change – 1 and Product or Service Change - 3		DEFERRED. As business plans for CMS, P&I, and Production Services are updated these services will be re-evaluated as part of program and service delivery integration.

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Mail Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
<p>4. Market the published Mail Guidelines and statewide standards and employ them as a basis for new mailings or a goal for any redesigned mailings. Partner with Printing & Imaging and Production Services to optimize mailings at either the inception point in initial design or the entry point through re-engineering software. Further convert File-Based insertion of mail, providing opportunity to combine multiple printing/ mailing jobs into larger, unified inserting runs</p>	<p>Business Change – 2 and Product or Service Change - 4</p>	<p>✓</p>	<p>Current efforts include:</p> <ul style="list-style-type: none"> • HCA 1095 tax mailings completed March 1st; • WSDOT toll billings; • L&I conversion to file-based; • ESD UTAB (Unemployment Tax and Benefits); • DOR “Atlas” system implementation; • DOL-PRFT Phase 2; • City of Lacey utility statements; • Marketing new services as the opportunity arises with completed speaking points. <p>Availability of print specialist resources is delaying progress for optimizing existing or bringing in new work.</p>
<p>5. Explore the use of CMS’s existing state distribution network for the “last mile delivery” for 3rd party package vendors such as UPS and FedEx.</p>	<p>Business Change – 3 and Product or Service Change - 5</p>		<p>DEFERRED.</p>
<p>6. Provide opportunities for agencies to reduce or eliminate vehicles and the associated environmental impact through absorption into existing DES routes.</p>	<p>Business Change – 3 and Product or Service</p>		<p>As of February 1, 2016, CMS is servicing the DSHS King Co. /Seattle locations formerly serviced by a DSHS driver.</p>

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Mail Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
	Change - 6		
7. Working with DES's Fleet Operations; modernize the CMS fleet with smaller, more fuel-efficient, or hybrid/electric vehicles.	Business Change – 3 and Product or Service Change - 7		5 half-ton vans replacing 1-ton vans and a mini-van ordered to replace a step-van are in service at CMS. Met with Fleet Ops to begin planning for a stand-alone deployment of telematics at CMS.
8. Complete activities in progress: <ul style="list-style-type: none"> • AMTS/ERR initiative started in FY13. • Replacement of our outdated phone system delayed from FY10. • Replacement of postage metering equipment and our oldest inserter both planned in FY16. 	Facilities/ Equipment - 1	✓	AMTS – complete ERR – complete Phone system replacement – complete Postage metering and Inserter equipment – Determined to postpone meter equipment replacement until later 2016 to allow time for review of options that provide USPS postage savings for packages. Replacing our 13-year-old inserter is planned for later this year, prior to the next busy season.
9. Complete the analysis, review, and updating of and the transition to a relevant rate structure for FY15 and beyond. This should be followed by periodic, targeted rate assessments and adjustments backed by historical tracking and benchmarked comparisons to parallel businesses. Note added 11/18/14: Include a review of the current survey billing methodology for campus and incoming for alternatives in anticipation of the 17-19 biennium.	Financial - 1		Action plan developed for campus/incoming rate methodology; met with Finance to discuss plan and get their assistance; continuing research of similar entities; met with Finance and Communications to develop survey. Initiated CMS team to plan for developing recommendation for adjustments to CMS

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Mail Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			outgoing services rates. Currently gathering data.
10. It would be advantageous to both customers and internal programs to unify the tracking and billing of communications. The integrity of both creation and invoicing of a document from data to print to mail is best preserved in a combined enterprise system. Ability to report complete costs to our customers for specific print/mail jobs.	Process Improvement /Design - 1	✓	In February, CMS and P&I met to review the updated crosswalk. More work is needed to further line up GAMS with Monarch so we can eliminate the custom billing.
11. Streamline the state's use of mail permits will reduce accounting overhead for customers.	Process Improvement /Design - 2		DEFERRED.
12. Explore ways to meet a possible 6:30 pm USPS submittal time for our co-mingled automated discounted mailings.	Process Improvement /Design - 3		Continuing to monitor through the upcoming peak season along with expected new volumes.
13. Completion of process improvement initiatives already in process; standard operating procedure development; mail equipment reviews, inserting errors, and inventory control management.	Process Improvement /Design - 4		SOP development – in progress Mail Equipment Reviews – project complete; however, on-going improvements to analysis forms and reporting will continue. Inserting errors – project complete Inventory management – nearing completion
14. Assistance to create and implement a robust marketing and sales plan will be necessary to sustain and expand our service capabilities. <ul style="list-style-type: none"> • Outreach assistance for new customers, be it 	Communications / Marketing - 1	✓	Held initial meeting with Business Development, Communications, P&I, and PS to discuss what an integrated marketing and sales plan might look like.

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Mail Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
<p>communications tools or engagement opportunities.</p> <ul style="list-style-type: none"> • Each new proposed service offering outlined herein will depend upon effective marketing tools to establish demand. • Expertise to transform our business content into an optimized website that informs, educates, and markets our services. • A social media presence could be explored to enhance tutorials, updates, promotions, and general customer connections. <p>Enhanced customer surveying is needed to guide and support our process improvement initiatives.</p>			
<p>15. Every major program initiative identified herein will likely require adjustments to and support of our workforce:</p> <ul style="list-style-type: none"> • Mail Hubs – An expansion of the staff base to potentially include drivers, operators, and supervisory roles may be required for establishment of satellite locations. Flexibility with allocation of current staff may also be needed. • Digital Mailrooms – Refocused and repurposed staff, possibly combined with additional staff, would be needed to reengineer the current Incoming mail operation to include an imaging 	Workforce – 1		This item is not a stand-alone initiative but is a DES shared service resource placeholder for items 1 through 7 above, as needed.

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Status Report as of February 29, 2016**

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Mail Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
<p>line of business.</p> <ul style="list-style-type: none"> A shift in emphasis towards data-driven mail services will require a corresponding shift in our employee knowledge base and specialization. Additional training and potential reclassification of supervisory staff may be necessary to conform with the increased emphasis on mail integrity. 			
<p>16. Reclassify, restructure and properly train existing or incumbent FTE's to meet the needs of proposed new lines of business.</p>	Workforce - 2		This item is not a stand-alone initiative but is a DES shared service resource placeholder for items 1 through 7 above, as needed.
<p>17. Every major program initiative identified herein will likely require adjustments to our facilities or equipment:</p> <ul style="list-style-type: none"> Leasing or purchasing assistance for a secure hub location and vehicles to service it. This can be either program-led or in partnership with another agency. Additional mail processing equipment, supplies and adjustments to maintenance contracts would be needed for operation. A digital mailroom component may require capable equipment and adequate housing for work stations. Existing security measures may need to be bolstered. In the long term, investment in secure data processing machinery may be needed. Assistance from Fleet Operations will be essential 	Facilities/ Equipment - 2		This item is not a stand-alone initiative but is a DES shared service resource placeholder for items 1 through 7 above, as needed.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Mail Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
as we modernize our leased fleet to reduce its carbon footprint.			
<p>18. Every major program initiative identified herein will likely require adjustments to or support of our technology needs:</p> <ul style="list-style-type: none"> • Networked communication and data access for both proprietary and third-party software systems. Extending the existing tracking systems will be needed to maintain accountability. Mobile accessibility to certain sections of -and reports from- our database. • Any digital mailroom solution will require a significant investment of technological support, the degree to which being dependent on the method chosen. • Emphasizing the use of data-driven mail services requires a strengthened tracking mechanism and potentially support for end-user access. We will be leaning much harder on server and software-related resources as our business further digitizes. 	<p>Technology - 1 and Technology - 2</p>		<p>This item is not a stand-alone initiative but is a DES shared service resource placeholder for items 1 through 7 above, as needed.</p> <p>Also, merged former item "Mobile accessibility to certain sections of -and reports from- our database" into this item as they are both linked to networked communication and data access needs for expanding our services.</p>
<p>19. Every major program initiative identified herein will likely require adjustments to our fiscal substructure. Rates may need to increase or decrease in certain activities to appropriately reflect cost of shifting focus to digital and intellectual production or investment in satellite locations. Initial transfer or acquisition of</p>	<p>Financial - 2</p>		<p>This item is not a stand-alone initiative but is a DES shared service resource placeholder for items 1 through 7 above, as needed.</p>

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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Mail Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
materials, technology, or service is needed in nearly every proposal outlined.			
20. Every major program initiative identified herein will likely require contract or risk management support: <ul style="list-style-type: none"> • Contract negotiation or adjustment will be required for establishing satellite locations and their associated services. This includes facility and equipment acquisition and related maintenance. • Creation of an imaging operation will necessitate significant risk management consideration to ensure the security and integrity of confidential information scanned and stored. • Tracking, transmission, and retention software will be needed for pushing mail towards more data-driven methods. • Disaster recovery plans must be adjusted in consideration of new locations, new forms of data retained, and the sustainability of their integrity. 	Contract/ Risk - 1		This item is not a stand-alone initiative but is a DES shared service resource placeholder for items 1 through 7 above, as needed.
21. Acquisition support of equipment listed above.	Contract/ Risk - 2		This item is not a stand-alone initiative but is a DES shared service resource placeholder for item 8 above, as needed.

Print and Imaging Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
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**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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Print and Imaging Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
1. Establish product mix, profit mix model & continue Product mix planning	Product or Service Change-1		<p>The cost comparative analysis showed our competitiveness within targeted product lines. Next step includes further analysis to strategically link to marketing efforts. Evaluate opportunities to adjust pricing and BHR relationships.</p> <p>Working with Finance to establish an accurate crosswalk between Monarch and AFRS – Currently working on a model to appropriately distribute revenues and costs to appropriate cost centers. Partial finished goods have been moved to COGS, thus allowing more accurate distribution of costs and revenues to cost centers.</p>
2. Develop an internal and external marketing plan	Product or Service Change - 2		On-going. A comprehensive business development strategy is being updated for the 15-17 Biennium for both printing and mail services. This includes P&I, CMS and PS.
3. Reduce facility footprint	Product or Service Change - 3		<p>Currently evaluating 3 bids and will schedule site visit to evaluate forklift/roll grab capable of handling a 50” roll of paper used on the web press (Same paper that is produced for Production Services and other customers). This equipment has potential to save, time, money, and plant floor storage space.</p> <p>P&I are currently evaluating options.</p>
4. Provide bulk email distribution	Product or Service Change - 4		COMPLETED. Bulk email is a digital version of bulk mail. This service is currently available.
5. Good working machines/devices w/onsite technicians	Product or		COMPLETED. Maintenance is done on a routine

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Print and Imaging Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
	Service Change - 5		basis or when time allows. Data Center has on-site technicians.
6. Maintenance education/ Develop internal maintenance training program	Product or Service Change - 6		COMPLETED. Ongoing for repair of production equipment – as provided by technicians and experienced staff.
7. Copy Center study	Product or Service Change - 8		DEFERRED. Placement of a copy center @ Jefferson is not feasible at this time. 80% of machines in place now have lease expirations in 2016. Volumes do not support the expense and rent is too high.
8. Targeted audience through variable print including digital distribution	Product or Service Change - 9		Print consultation and forecasting opportunities are ongoing with customers. This activity is addressed in the marketing plan.
9. Align printing and mailing with multiple customers that share common recipient mailing lists	Product or Service Change - 2		This is an opportunity to help multiple customers combine their communication efforts into one mailing when they are targeting a common audience.
10. Maximize the use of all state printing facilities through consolidation	Product or Service Change - 13		DEFERRED. This effort has been thoroughly explored. Collaboration between in-plant print shops exists. Consolidation requires executive level decision making. Consolidation of print shops was a recommendation of the state auditor in 2011. No action pending at this time.
11. Align staffing and equipment with production needs	Product or Service Change - 14		Ongoing. This is done on a daily basis at P&I to manage workflow prioritization.
12. Job or shipment tracking - external	Product or Service Change - 15		External tracking is done through FEDEX, UPS etc., at P&I. Additional opportunity to integrate the

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Print and Imaging Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			shipment tracking used by CMS and Production Services will be part of the future implementation plan for the integration efforts.
13. Co-locate services	Facilities/ Equipment - 2		COMPLETED. Completed - Installation of new Production Services equipment is complete; testing is complete as of mid-October. Official Move date is November 7, 2015. Post co-location analysis of server(s) capacity pending as well as Disaster recovery options for P&I, jointly with WaTech.
14. Develop an equipment plan	Facilities/ Equipment - 4		Equipment replacement is addressed in 15-17 Budget and allotments with an updated inventory of all equipment completed in June.
15. Implement Print re-engineering	Technology - 1		On-going Print re-engineering opportunity is in place now. Further efforts are underway to expand utilization. Offering services to additional customers is on-going such as WSDOT and DOL.
16. Create Digital Storefront to replace PRT Online	Technology - 2		Project is progressing and additional intern staff on board in January to assist in design of customer product information. A customer Usability Study is planned for the beginning of March.
17. Engage ETS to assume full support role	Technology - 4		COMPLETED. 8/3 ETS/WaTech has agreed to provide support for P&I applications.
18. Consultation Services to Customers Seeking Print Needs	Product or Service Change		ongoing

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Print and Imaging Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
19. Utilize Advisory Committee	Communications / Marketing - 2		The purpose of this group is currently under review.
20. Open house – demo machines, history to future	Communications / Marketing - 6		COMPLETED. December 10, 2014. Nearly 50 customers attended the open house. Customers from state agencies and organizations attended. Tours of the main plant were provided. Speakers from P&I and DES Admin Provided insight to the recent challenges and successes of the program. New business was garnered from the City of Lacey and the Port of Olympia.
21. Partner with Communications and Business Development Teams	Communications / Marketing - 7		Collaboration is frequent and ongoing.
22. Provide appropriate signage for the program	Communications / Marketing - 8		New signs internally and externally are under development with an ETA of February 2016 to incorporate the co-location of Production Services to the Tumwater Modular building.
23. Develop an aggressive sales plan to increase new business and increase awareness from new, existing, and lost customers.	Business Change - 2	✓	This is an on-going effort. Customers that have reduced business have been identified and are targeted for outreach and partnership. Results are reported the 4th week of the month at the staff meeting.
24. Co-locate all DES print and mail services	Business Change - 5	✓	DEFERRED. 8/31 Topic will be explored as part of integration process.
25. Work with other programs that provide services to understand interdepartmental relationships	Workforce - 1		On-going Integration of CMS, PS and P&I are underway.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Print and Imaging Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
26. Incorporate LEAN workplace/production principles	Workforce - 2		Ongoing – demonstrated in weekly all-staff meetings.
27. Collaborate with CMS and Surplus to provide mail transportation services to selected mail distribution hubs to receive reduced postage rates.	Workforce - 3		COMPLETED. Coordinated with CMS to provide needed mail transportation to USPS HUBs in Federal Way, Seattle and Tacoma to reduce the postal costs to customers. Also, identified costs for transport, identified cost savings per piece, capacities and pickup and delivery schedules.
28. Training requirements – Industrial Safety, Driving, Forklift, First-aid, Sales	Workforce - 4		COMPLETED. All listed training. Additionally DES required training is up to date.
29. Provide staff opportunities for personal growth & training related to job specific functions	Workforce - 5		DEFERRED. Ongoing Currently utilizing the performance evaluation process to explore opportunities for cross training staff and assessing their aspirations and additional training needs.
30. Generate revenue – develop a comprehensive strategy to negate revenue loss	Financial - 1	✓	Ongoing through cost center evaluations, outreach and marketing and space leasing opportunities. Recently developed forecasting will enable staff to identify revenue needs for cost recovery.
31. Provide sustainable pricing structure – evaluate BHR	Financial - 5		Adjusted BHR's were adjusted went into effect on January 1, 2016.
32. Review and improve estimating and billing – employ LEAN principles w/ Finance	Financial - 6		Met with finance, CMS and P&I staff to determine how the project should be re-scoped. Internal controls have been adopted to decrease billing time. Staff resources continue to be a challenge in reconciling billing.
33. Develop, release, and analyze Printing and Imaging's services as directed by Office of Financial Management	Contract/ Risk - 1		COMPLETED. This report was provided to OFM on July 30, 2015.
34. Develop a standard process for the implementation of	Contract/		COMPLETED.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Print and Imaging Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
Bulk Print. The process must minimize risks while also insuring our customer expectations are met.	Risk - 2		
35. In the event of a disaster, ensure the needs of the program are covered in the agency's continuity of operations plan.	Contract/ Risk - 3		COMPLETED. 8/31 COOP Plan was updated in 2015.
36. Partner with Consolidated Mail Services and Production Services to address integration opportunities	Contract/ Risk - 5	✓	Ongoing as part of the integration effort. This includes sharing information and working with the Federation and the Coalition unions.
37. Develop a load sharing methodology within the agency	Process Improvement /Design - 2		Ongoing. Staff is shared within the program on an as needed basis. Union rules are followed within the program. Agency programs are utilized routinely to assist when needed.

Production Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
1. Attain and maintain new equipment (hardware+software) that can handle multiple file formats coming from different platform	Business Change -1		COMPLETED. The new equipment (hardware+software) are installed and are operational.
2. Develop an aggressive marketing plan and customer outreach program to solicit new business for print and mail	Business Change – 2	✓	Production Services will continue to collaborate with P&I and CMS to educate customers and market the service. Planning and brainstorming for a more extensive and aggressive customer outreach with the help and guidance of the Enterprise Business Development team is on-going.
3. Reduce rates	Business		COMPLETED. Production Services implemented the

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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Production Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
	Change – 3		new tiered print rate effective November 7, 2015. Customers printing more than 20M pages annually will see a reduction of \$02.3 per page on print cost and customers printing between 5M and 20M per year will also see a reduction of .006 per page. Customers printing less than 5M pages per year will not see any change on their print rate.
4. Co-location (print & mail)	Business Change – 4		COMPLETED. Production Services' "Went Live" in the Tumwater location on November 7, 2015. P&I and PS are now in the same building. Co-lacating CMS with PS and P&I will be revisited in the future.
5. Evaluate impact of new equipment to business, shift and workload, and customer requirements	Business Change – 5		The impact of the new equipment to business, shift and workload, and customer will be evaluated now that Production Services' transition to the Tumwater building is complete. It will require a several months of data before the impact can be fully evaluated.
6. Training on new equipment	Workforce – 1		Staff continues to train with shift supervisors on the new printers and pre/post devices, including pallet jack operations within The Tumwater Modular Building.
7. Establish and maintain career paths as part of official DES initiative to retain good employees	Workforce - 2		COMPLETED. The agency is now offering Development Job Assignment opportunities to internal employees to develop professional knowledge, skills, and abilities that would not otherwise be available through normal work activities. This will provide employees opportunity to learn and explore career interests with assignments that will allow them to grow professionally and

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Production Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			provide DES with readily available resources to accomplish future initiatives. Staff will closely monitor every opportunity and will sign up if they are interested.
8. Replace aging printers and install them in a secured (HIPAA and IRS 1075 compliant) location.	Facilities/ Equipment - 1	✓	COMPLETED. The new equipment (hardware+software) are installed in the new PS space in Tumwater.
9. Reduce lease and support cost	Facilities/ Equipment - 2		Lease and support cost reduction will be realized a few months after PS goes live in Tumwater.
10. Integrate work between Production Services and P&I	Facilities/ Equipment - 3		Production Services, P&I, and CMS are working collaboratively on the Good To Go project for WSDOT. This is the initial step for integration between the 2 programs. The work/print will be shared between continuous feed printers (PS) and cut-sheet printers (P&I).
11. New printers and pre/post devices	Technology - 1		COMPLETED. The new printers and pre/post devices have been delivered.
12. Server based (windows, Linux platform) printer systems/software	Technology - 2		COMPLETED. The new software and server was installed and configured. Network connectivity from the server in Tumwater to the mainframe and vice versa has been tested successfully.
13. Develop an automated and accurate billing process	Technology - 3	✓	COMPLETED. Data for invoicing is being gathered through the Prisma Production software except for a few jobs that still have to go through the mainframe process. As of February 1st, the adjustment made to the data source ensured that data gathered for the

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Production Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			purpose of invoicing is accurate.
14. Disaster Recovery Plan that includes DR site and equipment options for print and mail	Technology - 4		The current DR service with Mailgard through WaTech will be extended to June 30, 2016. An intake form is submitted to CPRM to procure a DR service that will meet the requirements for print and mail. The new DR agreement will have to be in place by June 30, 2016. PS, P&I, and CMS will work with the contracts office to establish the requirements.
15. Fast network response time (e.g. SharePoint)	Technology - 5		COMPLETED. Worked with Share Point administrator to fix the bugs and enhance capabilities to meet PS' needs.
16. Complete the establishment of a node site for the SMON at P&I.	Technology - 6		DEFERRED – the decision has been made to acquire encryption software rather than establishing a node site at P&I.
17. Provide alternative to the current CD/DVD software	Technology - 7		COMPLETED. Due to customer's shrinking demand for CDs and DVDs, the program will decommission its CD service effective JULY 2015. Only a few customers were still using CDs. They now access reports online at no additional cost.
18. Study the feasibility of receiving print jobs from anywhere on the SGN and IGN (from the security perspective).	Technology - 8		The encryption and compression software has been installed on the WaTech mainframe, ACES mainframe and Prisma server. PS is currently receiving print files via SFTP server. However, no print files have been sent over the IGN yet.
19. Recalculate/analyze rate when new equipment is operational	Financial - 1		COMPLETED. Production Services implemented the new tiered print rate effective November 7, 2015. Customers printing more than 20M pages annually will see a reduction of \$02.3 per page on print cost

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Production Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			and customers printing between 5M and 20M per year will also see a reduction of .006 per page. Customers printing less than 5M pages per year will not see any change on their print rate.
20. Develop an automated and accurate billing process	Financial - 2		COMPLETED. Data for invoicing is being gathered through the Prisma Production software except for a few jobs that still have to go through the mainframe process. As of February 1st, adjustment made to the data source ensured that data gathered for the purpose of invoicing is accurate.
21. Finalize CSA contract for new equipment	Contract/ Risk - 1		COMPLETED. The contract has been finalized on September 30, 2015. Cherrie signed the equipment acceptance document on the same day.
22. Develop a comprehensive Disaster Recovery Plan for print and mail	Contract/ Risk - 2		The current DR service with Mailgard through WaTech will be extended to June 30, 2016. An intake form is submitted to CPRM to procure a DR service that will meet the requirements for print and mail. The new DR agreement will have to be in place by June 30, 2016. PS, P&I, and CMS will work with the contracts office to establish the requirements.
23. Integrate work between Production Services and P&I	Contract/ Risk - 3		Integration effort among the 3 programs (PS, CMS, & P&I) is in progress. Judy is heading the collaboration and brainstorming sessions to come up with the best concept and ideas for integration. The effort will be on-going.
24. Integrate work between Production Services and P&I	Process Improvement /Design - 1		Integration effort among the 3 programs (PS, CMS, & P&I) is in progress. Judy is heading the collaboration and brainstorming sessions to come up with the best

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Production Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			concept and ideas for integration. The effort will be on-going.
25. Develop an automated and accurate billing process	Process Improvement /Design - 2		COMPLETED. Data for invoicing is being gathered through the Prisma Production software except for a few jobs that still have to go through the mainframe process. As of February 1st, adjustment made to the data source ensured that data gathered for the purpose of invoicing is accurate.
26. Integrate work between Production Services and P&I	Process Improvement /Design - 3		Integration effort among the 3 programs (PS, CMS, & P&I) is in progress. Judy is heading the collaboration and brainstorming sessions to come up with the best concept and ideas for integration. The effort will be on-going.
27. Marketing and customer outreach to educate customers about our services. Let customers know about the new and different types of printing that will be available with new equipment. This will potentially attract more and new business.	Communications / Marketing - 1		Production Services participated in the IPMA. PS, P&I, and CMS did a presentation regarding the services that DES provides. The 3 programs will also participate in the Trade Show in November to share information. Production Services will continue to collaborate with P&I and CMS to educate customers and market the service.
28. Combined marketing for printing, mailing and print re-engineering services.	Communications / Marketing - 2		Currently working with P&I and CMS to market print re-engineering services. WSDOT is the first "new" customer that will utilize this service.
29. Consulting Services– assist customers in the development of print applications (e.g. print re-engineering, barcoding)	Communications / Marketing - 3		COMPLETED. PS and P&I acquired re-engineering software. The service is currently provided to ESD and is available to all other customers.
30. Offer print re-engineering service	Product or Service Change - 1		COMPLETED. The service is currently provided to ESD and is available to all other customers.

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Production Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
31. Utilize new printer capabilities to replace pre-printed forms if it makes good business sense	Product or Service Change - 2		After testing and acceptance period is completed and when the new printers are in production use, options for flashing pre-printed forms on plain white paper will be explored. The reduced costs of flashing pre-printed forms will be discussed with customers.
32. Develop an aggressive marketing and customer outreach plan	Product or Service Change - 3		Production Services will continue to collaborate with P&I and CMS to educate customers and market the service. A more extensive and aggressive customer outreach plan will be developed with the help and guidance of the Enterprise Business Development team.

Real Estate Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
1. Streamline, standardize and simplify how we do business.	Business Change- 1	✓	COMPLETED. Internal and external training completed on renewing leases and acquiring new space for agencies.
2. Real Estate Data Management System (Merging #2 and #26) <ul style="list-style-type: none"> • Purchase, implement, and maintain a real estate management system • Enable RES to conduct business more efficiently • Support continuous improvement of LEAN process improvement activities, as well as 	Business Change - 2 Technology - 1	✓	<ul style="list-style-type: none"> • Implementation is 95% complete. • Staff user training continuing

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Real Estate Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
<ul style="list-style-type: none"> Provide information on performance metrics for lease negotiations for RES' 12 million square feet portfolio 			
3. Implement a new approach to assigning staff, similar to how OFM's Facilities Oversight group is deployed (by agency categories), instead of geographically. (Previously #4)	Business Change - 4		<p>COMPLETED. Given our limited resources, a different approach has been implemented—“embedding” staff in a major customer agency—DSHS as a pilot-which is a major success.</p> <p>Assigned staff to ESD and experimenting with engagement with other major customers, such as DOC and DOL.</p>
4. Provide more active customer orientation and regular training, both workshops and forums. Educate customers about policies, procedures and processes. (Previously #5)	Business Change - 5	✓	<ul style="list-style-type: none"> Workshops have been conducted in the charter process, new space lean results, and space allocation standards, with small group meetings with large customer agencies, with individual agencies and as discussion at Stakeholders Forum. Regular curriculum and training schedule is under exploration. Need to reach out to Workplace Support and Development to look into LMS and E-Learning
5. Increase engagement with customers (merging #3 with #6)	Business Change - 6 merged with Business Change	✓	<p>COMPLETED.</p> <ul style="list-style-type: none"> Embedded team with our largest

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Real Estate Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
<ul style="list-style-type: none"> Engage customers early in their own strategic planning efforts. Increase efforts to support customers and identify their current and future needs to more effectively anticipate opportunities for saving on occupancy costs. 	- 3		customer-DSHS. <ul style="list-style-type: none"> Assigned staff to ESD and DOC. Continuing to increase engagement with other major client agencies. Will evaluate at end of Fiscal Year
6. Develop a toolbox of strategies that can be customized for each agency. (Previously part of # 6)	(Previously part of Business Change – 6)		DEFERRED.
7. Increase our involvement in the development of individual projects and the Six Year Facilities Plan.	Business Change - 7		<ul style="list-style-type: none"> Working with OFM to enhance partnership by increasing involvement and timing of involvement in the development of Six Year Facilities Plan. MOU in development to memorialize DES participation in OFM processes Engagement with OFM on new Modified Predesign document and Space Data Sheet.
8. Identify how we can initiate a state-wide portfolio management approach for leased and owned properties, in collaboration with Property Management. (Previously #11)	(Previously Product or Service Change 1)		DEFERRED.
9. Implement a portfolio approach to leasing—examining each customer’s total portfolio to identify undervalued and underutilized assets and identifies opportunities to increase value and utilization.			DEFERRED.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Real Estate Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
10. Leverage our prime position in the market to strengthen buying power and reduce costs through access to a greater assortment of real estate market rates, trends and related indicators. (Merging #8 and #17)	Business Change - 8 Product or Service Change 7		COMPLETED. Subscription of market data currently received from Co-Star will be expanded to include listings and market information on the Commercial Brokers Association website.
11. Build capacity to meet RES program and project deliverables and “rightsized” workload to set staff up for success.	Business Change - 9		DEFERRED.
12. Revise, update and develop training manuals and guidance materials. Invest in staff training and professional development.	Business Change - 10		Plan under development. Training manual is in first phase.
11. Add brokerage services to support transactional activities in Olympia, Seattle, Spokane, Tacoma, Tri-Cities and Vancouver and to expand on strategic portfolio analysis & planning.	Product or Service Change - 2		COMPLETED. Created a pool of eligible brokers in each designated region who will compete for each potential project in that region that may be assigned to brokers.
12. Space Management (merging #13, #14 and #25) <ul style="list-style-type: none"> • Increased efforts and scope of space planning and programming to assist agencies in increasing space efficiency in existing space and planning for future operations. • Development of a toolbox of workplace strategies, from more efficient use of space to working outside the office and being able to customize for each agency. • Assessment of work space needs. RES is uniquely 	Product or Service Change - 3 merged with Product or Service Change – Facilities/ Equipment - 3		<ul style="list-style-type: none"> • On hold pending outcome of OFM Space Use Study

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Real Estate Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
placed to provide advice on revising the current space layout as well as the introduction of alternative workplace strategies.			
13. Energy Assessment (merging #15 with #18) <ul style="list-style-type: none"> • Increased energy use assessment and development of a toolbox of strategies for reducing energy costs. • Fully implement the procedures to effectively implement Governor's Executive Order 12-04: Achieving Energy Efficiency in State Buildings. 	Product or Service Change – 5 Product or Service Change - 7		Identifying which sites are eligible under RCW 19.27A as reporting facilities that have less than 75 points under Energy Star. Developing energy-specific training module. Real Estate Management System (Tririga-IBM) also has an Energy Management Module but this will not be implemented until more effective procures and data collection is worked out. Collaborating with OFM and WSU to develop a coordinated approach to applying legislation and executive orders relating to energy.
14. Building Condition Assessment, to include building condition data, update of floor plans to reflect current configurations and seating capacities	Product or Service Change - 6		DEFERRED.
15. Staff Training (Merging #19 with #20) <ul style="list-style-type: none"> • Continue to train RES staff in commercial real estate competencies, cost/benefit of applying differing space strategies, and current practices to 	Workforce – 1 and Workforce - 2		COMPLETED. Continuing training program and budget for professional industry certifications in order to enhance employee skills.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Real Estate Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
<p>evaluate and improve on energy consumption.</p> <ul style="list-style-type: none"> Train and recruit for skills that support identifying opportunities for reducing occupancy cost, reporting on performance, and tracking appropriate metrics in support of continuing Lean process improvements. 			
16. Train staff to employ and oversee brokerage component to RES services. (Previously #22)	Workforce - 4		Developing training module.
17. Investigate opportunities for sharing expertise within Facilities. Both cross-training and job experience will enhance the division's capabilities.	Workforce - 3		Opportunities have been investigated; gaps in skill sets are prevalent. For example, a training plan and resources would need to be developed for EAS architects for interior design, space management as well as leasing process.
18. Equipment (merged #23 and #24) <ul style="list-style-type: none"> Technical upgrades to existing equipment Acquiring new equipment such as laptops or pads that facilitate staff to be more "mobile", both in terms of teleworking or field work. 	Facilities/ Equipment - 1		COMPLETED. Staff provided with laptops for mobility/teleworking and field work.
19. Leverage technology to increase effectiveness. (Merging #18, #23, #24) <ul style="list-style-type: none"> Utilize technology to access to documents and files from remote locations. Utilize technology to reduce space needs through vigorous implementation of alternative workplace 	Technology - 2		<ul style="list-style-type: none"> Technology re-alignment in process, all leasing agents/architects have laptops and VPN's. New real estate management (software) system currently in implementation which will help facilitate going electronic.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Real Estate Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
strategies, such as teleworking.			<ul style="list-style-type: none"> RES participating in discussion with Deputies group and OFM to guide statewide workplace strategies and change management.
20. Training in new technologies.	Technology - 3		Training in Tririga/IBM system in process.
21. Implement electronic filing and e-signatures.	Technology - 4		Using E signatures as part of an ESD pilot to sign IAA's with ESD
22. Conduct a comprehensive fee and funding structure review to identify appropriate options to current situation. Develop and implement a revenue approach that supports and is compatible with the new business model. (merged with 23)	Financial - 1	✓	The current state is DES has submitted a proposed change in funding structure to OFM. But OFM will not consider it until its review of outsourcing study has been completed
23. Implement the new boilerplate standard lease document to reduce risk to the state.	Contract/ Risk - 1		New standard lease completed and approved by AGO. However, only some elements incorporated and implemented while other elements under review.
24. Eliminate the IAAs procedure.	Contract/ Risk - 2		
25. Implement the new LEAN process for seeking "new space".	Process Improvement /Design - 1		COMPLETED. Implementation of the New Lease Lean Process
26. Explore either embedding staff with another client agency with a large portfolio similar to DSHS and/or explore implementing assigning staff to a set of	Process Improvement /Design - 2		<ul style="list-style-type: none"> Embedded staff with largest customer DSHS. Assigned staff to ESD and to DOC (short

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Real Estate Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
agencies as described earlier.			of embedding). <ul style="list-style-type: none"> Additional assignments etc. will be determined based on additional staff.
27. Improve the efficiency and effectiveness of our services through developing or improving guidance documents such as internal practices, Client Orientation Manual, Leasing Procedures Manual etc.	Process Improvement / Design - 3		In development
28. Provide leadership and new processes and initiatives to guide customers towards space efficiency and energy efficiency.	Process Improvement / Design - 4		<ul style="list-style-type: none"> Revision of Space Allocation Standards and Manual on hold. OFM conducting space studies.
29. Evaluate current RES webpage design and content and update as appropriate, using customers for feedback. Redesign website for ease of use by stakeholders.	Communications / Marketing - 1		DEFERRED. No resources
30. Establish a marketing team in coordination with the DES Customer Service team and Communications.	Communications / Marketing - 2		DEFERRED. No resources
31. Develop marketing approaches and materials to use to explore expanding into new markets.	Communications / Marketing - 3		DEFERRED. No resources
32. Continue to distribute customer surveys to gain insights and feedback for improvement opportunities.	Communications / Marketing - 4		DEFERRED. No resources

Risk Management Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
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**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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Risk Management Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
1. Information from agency customers about loss prevention incidents (this is in addition to claims filed)	Business Change - 1		TBD
2. Provide option of mediation to settle claims	Business Change - 2		TBD
3. Early resolution of auto claims-as soon as we get the SF137, if state is liable, we call citizen	Business Change -3		DEFERRED. This would require additional FTE. Until/unless another staff member can be hired, we will not be implementing this initiative.
4. Automatic customer survey at close of claim	Business Change - 4		COMPLETED. Based upon customer survey, this is not something our customers want/need.
5. Risk Manager training	Product or Service Change - 1		In progress and ongoing. The Risk Management Basics manual has been updated. Monthly webinars and quarterly meetings are offered for the purposes of risk manager training. In addition, one-on-one trainings are offered to new risk managers to orient them to the Office of Risk Management and to the principles of enterprise risk management.
6. State driver improvement program	Product or Service Change -2		COMPLETED. Risk held a forum for risk managers regarding driver safety on 3/26/15 to provide them with information and tools. DES Safety has prepared a DES driver safety program.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Risk Management Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
7. Incentivize good risk management, loss prevention review and safety program	Product or Service Change - 3		TBD
8. PDPs for everyone every year	Workforce - 1		COMPLETED. With the assistance of Howard Cox, Risk Management completed/updated all Risk Management PDPs, evaluations and expectations.
9. Cross-training staff	Workforce -2		COMPLETED. Cross training has taken place for most staff and is ongoing.
10. Recognition/appreciation initiative for employees	Workforce - 3		Employee suggestions on how they would like to be recognized/appreciated have been received and reviewed. Based upon those suggestions Team Recognition Cards on which employees can list those preferences for their supervisors have been provided. Report should be completed by March 31, 2016.
11. Someone to handle subrogation's	Workforce - 4		COMPLETED. Hired staff member to handle subrogations.
12. Recruitment and retention incentives	Workforce - 5		TBD
13. "Revolve" laptops for designated staff	Facilities/ Equipment - 1		COMPLETED. Designated staff has received Revolves, which has enabled them to work remotely when activated for emergency response, in mediation and meetings. And with data plan, has allowed LGSi to meet with customers on site and complete reviews while maintaining client information in a secure

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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Risk Management Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			paperless environment.
14. Dedicated room/equipment for emergency management activations	Facilities/ Equipment - 2		Having discussions with WaTech on using space in the Data Center that would have emergency power connected to it solving our problem of generator power during an emergency. Also, discussing alternate options with Wright Runstad. Doing a walk through of B&G conference room 3/10/16.
15. Dedicated Risk Management printer	Facilities/ Equipment - 3		DEFERRED. Unlikely to occur due to facility limitations. Not a priority so will not pursue it.
16. Updated database system	Technology - 1	✓	As of 3/9/2016 – ORM has selected the replacement for iVOS. We are working with the DES CIO to document our need for WaTech support and preparing required request documentation for DES management review and prioritization. We have also begun the process of preparing for a required WaTech Security Design Review.
17. Enable claimants and state drivers to submit claims and accident reports	Technology - 2	✓	COMPLETED. In addition to paper filing, now state employees can report Vehicle Accident online and the public can submit Tort Claim online. This online submission saves paper, saves staff time scanning paper and ORM receives better quality of information.
18. Portals for insurance and Loss Prevention	Technology - 3	✓	COMPLETED. Insurance and Retrospective Rating portal developed and rolled out to

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Risk Management Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			agency risk managers.
19. Customer information management system to capture agency information that is not claim specific (insurance, risks, contacts, loss prevention etc.)	Technology - 4		DEFERRED. After additional review, we have decided to drop this idea in favor of looking for CRM features in the new RMIS database system we intend to get.
20. Implement risk-based allocation of cost for cyber liability	Financial - 1		DEFERRED. This is a long-term idea. We do not yet have good enough risk data to support this cost allocation approach.
21. Allow DOT to upload document images directly to iVOS	Contract/ Risk - 1		COMPLETED. DOT has stopped emailing images to ORM and is uploading them directly into iVOS.
22. Non-profit self-insurance risk pools need additional legislation which limits the risk of re-assessments for past years and ensures the pool and its members both flexibility and financial soundness.	Contract/ Risk - 2		COMPLETED. Legislation was passed this session allowing nonprofit risk pools to add members from all states. This will help pools currently operating to grow and allows additional pools to form. The State Risk Manager continues as the regulator for these pools.
23. One claim per form	Contract/ Risk - 3		DEFERRED. Would require legislative change that is unlikely to occur. Not a priority so will not pursue it.
24. Provide "collection" services to agencies/fleet for damage to state vehicles and property	Contract/ Risk - 4		DEFERRED. After additional review, we have decided to drop this idea in favor of using existing CEI contract.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Risk Management Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
25. Provide services to claimants (MVA claims) to provide estimates / appraisals / towing / salvage / total	Contract/ Risk - 5		DEFERRED due to staffing limitations.
26. Limit frequent filers	Contract/ Risk - 6		DEFERRED. Would require legislative change that is unlikely to occur. Not a priority so will not pursue it.
27. Statutory privilege for investigators	Contract/ Risk - 7		DEFERRED. Would require legislative change that is unlikely to occur. Not a priority so will not pursue it.
28. Develop standard form for use by public when requesting public records.	Process Improvement /Design - 1		DEFERRED. This would be an agency-wide process, not just Risk Management.
29. Optimize process to achieve as "paperless" of an office as possible	Process Improvement /Design - 2		COMPLETED. Risk Management has successfully implemented a scan & toss program. In addition to enabling claimants to file electronically, this initiative has significantly reduced the number of staff hours spent scanning, photocopying and creating file folders. This has eliminated the need to purchase file folders. All documents are now stored electronically in one place that is accessible by all ORM staff.
30. Increase PDR copy fees, add cost for electronic records	Process Improvement /Design - 3		DEFERRED. This would be an agency-wide process, not just Risk Management.

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Risk Management Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
31. Better connection with clients in the field. We need to know their business in order to know what they need/want	Process Improvement /Design - 4		In progress. Loss Prevention Coordinator has met with 17 client agencies, colleges and universities between now and March 30 to discuss insurance needs, risk finance, loss prevention, enterprise risk management, claim history etc. A summary of the feedback has been shared with staff and discussions are underway to improve service and communication.
32. Better communication with agency partners regarding how forms/incident reports are processed. I.e. duplicate forms sent via email and US mail	Communications / Marketing - 1		COMPLETED. Customer Service Specialist coaches client agencies and responds immediately to any training issues. Clarifying that duplicate copies need not be submitted has streamlined the process both for agency partners and ORM staff.
33. Investigator resolution reports to agencies	Communications / Marketing - 2		DEFERRED. Until after Customer interviews (see #31) are completed to find out what the agencies want/need from us.
34. External Portal for collection of statutorily required annual reports for Local Government Self Insurance program	Technology - 3	✓	As of 3/9/2016 – Testing has begun on the new LGSI web portal and expanded Property & Liability features.
35. Higher Education Risk Managers Meeting			COMPLETED. This meeting was held September 30, 2015.
36. Consistent Investigator Process	Process Improve		Investigators have met to discuss investigation process. They will meet again to determine

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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Risk Management Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
	nt /Design -- 3		how best to track these stages in order to obtain consistent quality data upon which to measure if our goals are being met. Should be completed by March 31, 2016.
37. Put Risk Managers Meeting materials and policies on SharePoint			COMPLETED.
38. ORM host PRIMA webinars for agency Risk Managers when topics are of interest to our state			Ongoing. PRIMA webinars are reviewed and offered to Risk Managers when relevant.
39. Continue to look at reporting requirements to determine if they are really necessary. If they do not add value and ORM is not doing anything with the information, don't ask agencies to report it			TBD
40. Allow investigators more opportunity to get out in the field. Sometimes there are things that cannot be seen and people you will not know to talk to if you make a claim determination from a desk. Some claim determinations would benefit from field observation.			COMPLETED. Investigators have been advised to bring to their supervisor's attention any claim where they feel the investigation would benefit from a field visit. The supervisor reviews that request and where appropriate authorizes the field visit.
41. Provide a place to "Policy Shop" where other agency risk and safety policies can be placed on the SharePoint site to provide ideas in policy			All commercial insurance policies are on our SharePoint site and all agency Risk Managers can access them.

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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Risk Management Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
development.			
42. Develop a process map for all types of claims and the interaction between agencies, ORM (roles if necessary), and AGO (and AGO divisions)			TBD
43. Provide more one on one time. Annual consultations would be extremely helpful.			TBD
44. Find a risk analysis tool and provide a statewide license for all risk managers.			Continuing to research a cost effective tool.
45. Recent legislation permitting non-profit risk pools requires adopting new rules for non-profit pools, and updating of the local government risk pool rules to remove them from that chapter			COMPLETED. Hearings were held and Rules were adopted as WAC 200-150, which became effective 11/22/2015.
46. Rules for self-insured local government employee benefit programs need updating due to recent regulatory changes in the healthcare environment.			Rules were submitted to our rules coordinator in February to begin the rulemaking process.

State Building Code Council Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
1. Technology improvements: All open public meeting participation available on the internet	Business Change -1	✓	COMPLETED. All open public meeting participation available on the internet. WebEx

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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State Building Code Council Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			employed and improving. Successfully used internet connections for 5 technical meetings. Conducted 10 technical group meetings using the internet in January.
2. Marketing and Outreach: Strengthen partnerships with public and private stakeholders	Business Change -2		DES communications issues press release on SBCC rule making public hearings. Article published in the Daily Journal of Commerce
3. Realignment of Resources: Adjust cycle schedule to include additional opportunity for public review building code amendments.	Product or Service Change - 1		DEFERRED. Current 2015 cycle maintained on cycle pending final action on November 20.
4. Recruit a code development expert.	Workforce -1		DEFERRED.
5. Provide opportunities for internships	Workforce -2		Staff recommends recruitment of an intern. Director Liu suggests recruitment of an intern. Staff assigned to begin search.
6. Improved sound isolation/quiet work areas	Facilities/ Equipment -1		DEFERRED.
7. Improved meeting room infrastructure for audio/video capability	Facilities/ Equipment -2		COMPLETED. Increased use of agency meeting rooms. Use of meeting infrastructure collocated with cities and trades allow greater access.
8. Make improvements to telecommunication equipment to support webinars, internet meetings, and teleconferences	Technology - 1	✓	COMPLETED. New equipment improves audio for internet connection. Continued improvement on use of WebEx to conduct 3-5 technical group meetings per week. Considerable savings in travel costs.
9. Provide additional training opportunities for web	Technology - 2		TBD

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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State Building Code Council Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
based meeting functions			
10. Increase SBCC building permit fee	Financial -1	✓	Temporary fee increase in HB2841 not concurred by Senate. Possible budget options being explored. Reduction in force possible if no resolution.
11. Deploy LEAN project improvements for building code development	Process Improvement /Design -1		Evaluating past adoption cycle ending in 2015 with current data. Identifying progress on LEAN initiative to reduce the number of last minute decisions. Preparing conclusion for report out in March.
12. Schedule and deploy community forums to get out our message	Communications / Marketing -1		DEFERRED.

Surplus Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
1. Identify and implement incentives for agency to agency direct transfers	Business Change - 1		TBD
2. Update acceptable payment methods (Amex, credit card limits)	Business Change - 2		Now accepting Visa, MasterCard, American Express and Discover
3. Create operating reserve for capital purchases and ongoing foreseeable and unforeseen expenses	Business Change - 3		TBD
4. Updates for request form:	Product or Service		TBD

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Surplus Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
<ul style="list-style-type: none"> • online tutorial for submitting request • Photo upload, quality/condition • More intuitive system • Statewide applicability • Prohibited items, special considerations (let customer know about reimbursement impact) • Special requirements for certain items such as cell phones, computers 	Change - 1		
5. Advertising; storefront, online (including kiosk on site for online previews and bidding) interagency	Product or Service Change - 2		COMPLETED. A second online kiosk was added in November
6. In house cross training	Workforce - 1		ongoing
7. Additional staff	Workforce - 2		New position created, filled February 2016
8. Communication	Workforce - 3		TBD
9. "Captains"	Workforce		New workgroup established for process improvements.
10. Additional warehouse and yard space for Federal program	Facilities/ Equipment - 1		Expanded, with additional space identified.
11. Heating/cooling for warehouse	Facilities/ Equipment - 2		Working with real estate service to identify and implement facility improvements
12. Additional warehouse and yard space at other location(s)	Facilities/ Equipment - 3		Possible warehouse expansion in Medical Lake, DSHS facility Additional parking identified near existing location
13. Inventory management system which works with point of sale system	Technology - 1	✓	POS being evaluated by WaTech, RFI being developed

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Surplus Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
14. Auction site updates	Technology - 2		Alternatives being explored as additional options for certain sale types
15. iPad-ish type of tool for drivers, offsite, online; speech to text	Technology - 3		TBD
16. Update SRMS to offer more complete range of features	Technology - 4		In process
17. Storage fees (eval, possibly increase)	Financial - 1		TBD
18. Operating reserve (needs to exist separately from cost recovery operation)	Financial - 2	✓	TBD
19. Transfer of property fees (monthly limits, per piece, minimums, available items)	Financial - 3		TBD
20. Transportation fees (eval, possibly increase)	Financial - 4		TBD
21. We have several service contracts which may be up during the period	Contract/ Risk - 1		COMPLETED. Metals contract awarded
22. Building lease (current agreement through 2016)	Contract/ Risk - 2		COMPLETED. Met with owner to discuss
23. Auction site for sales	Contract/ Risk - 3		Pilot to evaluate on line/in person options begun March 2016
24. Direct transfer of property from current location to new location	Process Improvement /Design - 1		COMPLETED. Always explored as a possibility when initial request submitted, now SOP
25. Explore donation options in lieu of transporting and distributing from warehouse	Process Improvement /Design - 2		TBD
26. Offsite listings; sell on location, avoid transportation, reduced time for listing and reimbursement	Process Improvement /Design - 3	✓	COMPLETED. Always explored as a possibility when initial request submitted, now SOP

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Surplus Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
27. Free stuff	Process Improvement /Design - 4		TBD
28. Communication tool to get messages to wide range of agencies, geographic areas	Process Improvement /Design - 5		TBD
29. Establish criteria for low income schools (% reduced lunch etc.)	Process Improvement /Design - 6		TBD
30. Update for email contacts to connect with current staff	Process Improvement /Design - 7		In process. New staff updating contacts
31. Customer (agencies) education, outreach regarding program, current inventory, eligibility issues	Communications / Marketing - 1	✓	Reviewed Communications previous analysis
32. General advertising on site and on line, real time updates	Communications / Marketing - 2		Monitors on store floor now showing on line auctions
33. Signs for building	Communications / Marketing - 3		COMPLETED. New signs on building
34. Radio	Communications / Marketing - 4		TBD
35. Budget for advertising	Communications / Marketing - 5		TBD
36. Coupons for repeat service, day sales	Communications / Marketing - 6		COMPLETED. Weekly product specials. Repeat customer reward being implemented
37. Partnership	Communications / Marketing - 7		TBD

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Surplus Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
38. Bumper stickers, license plate frames for State vehicles and customers, cars we sell, trucks, t-shirts with purchase of \$xxx	Communications / Marketing - 8		TBD
39. Wi-Fi in warehouse			COMPLETED. Equipment installed, up and running
40. Change of hours	Communications / Marketing - 9		COMPLETED. New hours as of Sept. 1
41. Cell phone signal booster in warehouse			Scheduled for install
42. Create Advisory Board for stakeholders			Potential participants identified, invitations to be sent
43. Review and update service goals	internal		Began in December

Visitor Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
1. The program needs to restructure to fully implement the use of volunteers in achieving program goals and redeploying FTE's to manage critical components.	Business Change - 1		COMPLETED. Job descriptions are updated and the Hiring process is complete. Implemented a robust volunteer recruitment strategy to fill our volunteer ranks. Brought on 13 new volunteers to sit at the desk, give tours, and opened a new desk at the Temple of Justice - used newspaper ads and local media to reach out. Deploying these volunteers in a new way and supporting the current volunteer roles more robustly. This is

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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Visitor Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			meeting program goals of helping customers and being visible as well as expanding the operation. Recruited and Hired a new Tour Supervisor. Moved all tour operations under the supervision of the one Tour Supervisor. Instead of having volunteers and session employees under two separate supervisors we now have one to oversee all of them.
2. Additional funds are required by refining the rate structure (see below, rates)	Business Change - 2		COMPLETED. The rate schedule has been updated and approved by all parties OFM, and DES Executive. Launch expected Dec. 1, 2015
3. Offering more products and services as a kit or a rental package (podium, projector, etc.).	Product or Service Change - 1		COMPLETED. Visitor service has completed all purchases and upgrades before the end of the biennium. 17 round tables and an additional podium for outside use. These items complete the user upgrades and kit products that can now be rented out to users as per the rate schedule. Last Update: Visitor Services has purchased additional sound capacity in the form of 6 speakers and a wireless system. In addition, time was allocated to modified/integrate existing equipment with the new purchase(s). These are exceptional upgrades to the user experience and provide much more diversity

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Visitor Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
			to users. The sound platform will be available for a rental charge outside or inside. Visitor Service had a custom podium made that will be rented to users as well. 100 chairs we also acquired from surplus to be rented for outside venues—something we did not have before.
4. Create a list of preferred contractors for campus events to choose from (tent vendor, caterer, etc.) so that the management work load would be reduced and our facilities are better protected.	Product or Service Change -2	✓	
5. The tour program needs to align tour content with OSPI instructional standards. This “alignment” will help teachers to justify and support classroom activities at the Capitol. An endorsement by OSPI, to include clarity as to specific educational criteria achieved by a tour, would help teachers draw clear educational paths to the classroom from the Capitol and bring additional credibility to the program.	Product or Service Change - 3	✓	Additional meetings with OSPI have occurred. Social Science cohort meeting developed additional interest from OSPI educators and mapping process forward is in progress. OSPI verification expected 2017.
6. As campus users increase we will need to modify the contract with the Washington State patrol so they can provide additional Troopers to support activities on Campus	Workforce - 1		DEFERRED. This task is outside the Visitor Services’ spectrum for advancement—a recommendation to the facilities AD and physical security manager will be sent.
7. Visitor Services needs to modify the rate structure regarding rental equipment to support upgraded equipment in our facilities. We need portable AV equipment that we can loan to customers for a rental	Facilities/ Equipment - 1		COMPLETED. The rate schedule has been updated and approved by all parties OFM, and DES Executive. Launch expected Dec. 1, 2015

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Visitor Services Initiatives	Category / Priority	Is this one of 5 most critical?	Status and Results
fee.			
8. The tour and event scheduling portal needs to be updated and upgraded to provide the most user friendly and efficient scheduling of campus facilities.	Technology - 1	✓	Changes have been made to the tour scheduling system. This has proven to be a time saver and we are able to do more with the system than before and we have eliminated several manual processes. We are now testing the changes and will have this COMPLETED next month.
9. Visitor Services believes that two rate structure changes are needed. <ul style="list-style-type: none"> • The first revision to the rate structure is for equipment rentals. Visitor Services should charge for podium, microphone, and projector rentals. We would be able to upgrade our equipment to provide the equipment we are in need of replacing. • Change the rate structure for all commercial and private activities that generate revenue. Visitor Services should charge 5% gross revenue from all activities that generate revenue held on campus grounds. 	Financial - 1	✓	COMPLETED. The rate structure has rates for rentals. The second item to charge contractors a 5% fee for service delivery will be discarded from the rate structure plans. There are no further actions on this proposal.

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

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Workforce Services and Development	Category / Priority	Is this one of 5 most critical?	Status and Results
1. Implement a customer satisfaction feedback system, metrics, goals and gap-closing processes. Embedded in this initiative are: <ol style="list-style-type: none"> a. Customer interview training/expertise. b. Lean problem-solving training for all employees and clear expectations for lean tool usage. c. Standard tracking and report out expectations. 	Product or Service Change-1		COMPLETED. 9/2015
2. Institute a time tracking system.	Product or Service Change-1		<ul style="list-style-type: none"> • Planning underway 9/2015 • Will have tracking system implemented by end of January 2016
3. Establish a shared governance model to be used throughout the division.	Product or Service Change-1		Planning underway 9/2015
4. Clarify enterprise vs. marketplace services. This will provide clarity and inform customers of the services they receive for paying into the Personnel Services Rate as well as clarity on fee-for-service activities. Embedded in this initiative are: <ol style="list-style-type: none"> a. Clear processes for starting new marketplace services. b. Small Agency HR services funding/additional services. c. "Right-size" fees for all marketplace 	Product or Service Change-1		

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Workforce Services and Development	Category / Priority	Is this one of 5 most critical?	Status and Results
services.			
5. Analyze and clarify a different model for providing EAP services to the state – such as a call-center model.	Product or Service Change - 2		EAP Business Transformation Project launched 11/2015
6. Provide infrastructure to support Governor's Executive Orders regarding Workforce initiatives.	Product or Service Change - 2		
7. Leadership development as a cooperatively governed, enterprise service.	Product or Service Change-1		Planning underway 9/2015
8. Statewide personnel investigations as a marketplace service.	Product or Service Change - 2		DEFERRED. Planning underway 9/2015 1/2016 DRAFT Business Model Framework completed. Collecting Investigation spend data in order to provide recommended service approach 1/2016 This has been put on hold for now.
9. E-learning development as a marketplace service.	Product or Service Change - 2		
10. Establish a plan to develop measure and assess outreach to educate customers about WSD services (current and new).	Product or Service Change - 3		
11. Analyze, clarify and make decisions about the enterprise/marketplace opportunities for: a. Succession planning – not only for internal DES purposes but a model for statewide use	Product or Service Change - 3		

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Workforce Services and Development	Category / Priority	Is this one of 5 most critical?	Status and Results
<ul style="list-style-type: none"> – may involve training curriculum and coaching. b. Providing assistance to agencies in team building. c. Curriculum development for external agencies. d. Organizational mapping (i.e., EAP “coaching model”). e. Internship support – model and assistance. f. Health and Wellness support. g. Vocational counseling. 			
<p>12. Implement a team member satisfaction feedback system, metrics, goals and gap-closing processes. Embedded in this initiative are:</p> <ul style="list-style-type: none"> • Team member& customer interview training/expertise. • Engaging every team member in customer interviews. • Improved processes for hiring team members that ensures culture fit and job fit. • Improved employee onboarding. • Team member-engaged PDF development process resulting in clear roles and responsibilities. • Team member-engaged PDP development process, resulting in development consistent with customer 	Product or Service Change-1		<p>COMPLETED. Underway 9/2015 First Problem Solving day was 9/17</p> <p>All activities completed by 12/2016</p>

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Workforce Services and Development	Category / Priority	Is this one of 5 most critical?	Status and Results
<p>and team member satisfaction expectations.</p> <ul style="list-style-type: none"> • Lean problem-solving training for all employees and clear expectations for lean tool usage. • Standard tracking and report out expectations. 			
13. Provide adequate funding, clear expectations and goals for team member development.	Product or Service Change-1		
<p>14. Establish action plan and metrics for clear communication with team members across lines of business. Embedded in this initiative is:</p> <ul style="list-style-type: none"> ○ Establish expectations for visual management to communicate: <ul style="list-style-type: none"> ▪ Progress in closing gaps with both team and customer satisfaction. ▪ Status/progress of core outcomes. ○ Improve team results meeting, including clear expectations for team report outs. • Establish intra-division communication mechanisms (e.g., newsletter, social media). 	Product or Service Change-1		<p>COMPLETED. Underway 9/15 Division wide visuals completed.</p> <p>Completed all by 12/2015.</p>
15. Complete development of effective systems for mobile and telework and establish clear goals and expectations for implementation.	Product or Service Change - 2		Underway 9/15
16. Provide opportunities for employees to job share in other disciplines of the division and/or	Product or Service Change - 2		

2015-17 Business Plan Initiatives Status Report as of February 29, 2016

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Workforce Services and Development	Category / Priority	Is this one of 5 most critical?	Status and Results
experiential developmental opportunities.			
17. Continue to develop/innovate on space use/storage in work areas. This initiative includes: <ul style="list-style-type: none"> Expansion of innovative office space utilization. Establishment of "focus rooms" for employees who work in cubes but sometimes need space for privacy/focus. Establishment of team rooms to facilitate team engagement/problem-solving. 	Product or Service Change-1		COMPLETED. Underway 9/15 Completed by 11/2015
18. Create/establish multimedia production room.	Product or Service Change-1		COMPLETED. Underway 9/2015 Completed 11/2015
19. Close the customer satisfaction gap on parking issues for training participation.	Product or Service Change - 2		
20. Determine future housing and location for EAP.	Product or Service Change - 3		Underway 9/15
21. Finalize training classrooms enhancements.	Product or Service Change - 3		
22. LMS analysis/governance and potential replacement to meet current statewide needs.	Product or Service Change-1		Underway 9/15 Recommendation due to Executive Sponsor 2/2016 Recommendation accepted 2/2016. System Stabilization is underway for 3 months.
23. NeoGov analysis/governance and potential	Product or		Project underway 11/2015

**2015-17 Business Plan Initiatives
Status Report as of February 29, 2016**

Orange= status change from last months' report. Green= Completed. Blue = Deferred or Canceled.

Workforce Services and Development	Category / Priority	Is this one of 5 most critical?	Status and Results
replacement to meet current statewide needs.	Service Change-1		12/2015 Vendor implanted our enhancement requests. Renewed NeoGov contract for 1 year. 2/2016 Working with Vendor on enterprise job board service offerings
24. Equip designated team members for mobile/telework.	Product or Service Change-1		
25. CaseWare update or replacement.	Product or Service Change-1		Analysis underway 9/15 Developed DRAFT IT Intake Request. Due to review with AD by 2/2016. IT Intake request due to complete 4/2016. IT Security design review underway. EAP specific scenarios to be run with EAP team, Finance and vendor 3/2016.
26. Class Track update or replacement.	Product or Service Change - 2		
27. Development of HIPAA compliant technological support services to increase real time access, including the use of social media to meet customer needs outside of traditional service delivery.	Product or Service Change - 2		
28. Electronic solutions (Personnel Action Request, other HR documents).	Product or Service Change - 2		IT intake request work session scheduled for 2/2/2016.

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29. Social media/online resources for WSD services.	Product or Service Change - 3		
30. Redesign content on HR.wa.gov for inclusion on DES site.	Product or Service Change - 3		Underway 9/15 EAP Content moved to production 1/2016 Classroom training content in process 1/2016 WSD division completed our portion 2/2016
31. Establishing fees for marketplace services.	Product or Service Change-1		
32. Rate structure review for existing marketplace services and Personnel Services Fee.	Product or Service Change-1		
33. Appropriate staffing levels.	Product or Service Change -1		
34. Competitive salaries.	Product or Service Change - 2		
35. Timely contract process (Lynda.com, provider network, LMS, renewals, IT security).	Product or Service Change-1		
36. Section 508 compliance (Rehabilitation Act); Policy 1000-G OCIO.	Product or Service Change-1		Underway 9/15 ELTA project launched 2/2016
37. Insure due diligence is done before starting a new line of business (sustainability).	Product or Service Change-1		

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38. Legal consultation as needed.	Product or Service Change - 2		
39. Strong risk management and safety program.	Product or Service Change - 2		New Safety Manage hired 8/15
40. Data collection and reporting methods.	Product or Service Change-1		
41. EAP business model (call center/integrating internal staff/private providers).	Product or Service Change-1		EAP Business Transformation Project underway as of 11/2015 Business and marketing plan set to be finalized 6/2016. Significant progress to identify and onboard new network providers with DES CPRS 3/2016
42. Partnership processes (use collective power of the state)/cooperative governance.	Product or Service Change-1		Planning underway 9/15
43. Increase onsite services.	Product or Service Change - 2		
44. Event calendar for statewide services.	Product or Service Change - 2		
45. Branding, marketing and outreach.	Product or Service Change-1		6/15 EAP and eLearning underway. 9/15 WSD analysis underway

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46. Customer satisfaction initiatives.	Product or Service Change-1		COMPLETED. 7/19 Program areas are working with customers based on their interview feedback Operationalized as on 10/2015
47. Updated, robust websites.	Product or Service Change - 2		