



## BPA Fish and Wildlife Division

# Process Improvement Initiative Update

Sept 2005 Council Meeting

Spokane, WA



## Today's Presentation

1. **Update on the Process Improvement (PI) effort**
2. **Online status reports and roll-ups to project performance reports**
3. **Project accomplishments via Pisces metrics**
4. **Supporting Project Selection**



## Five Goals for FY05

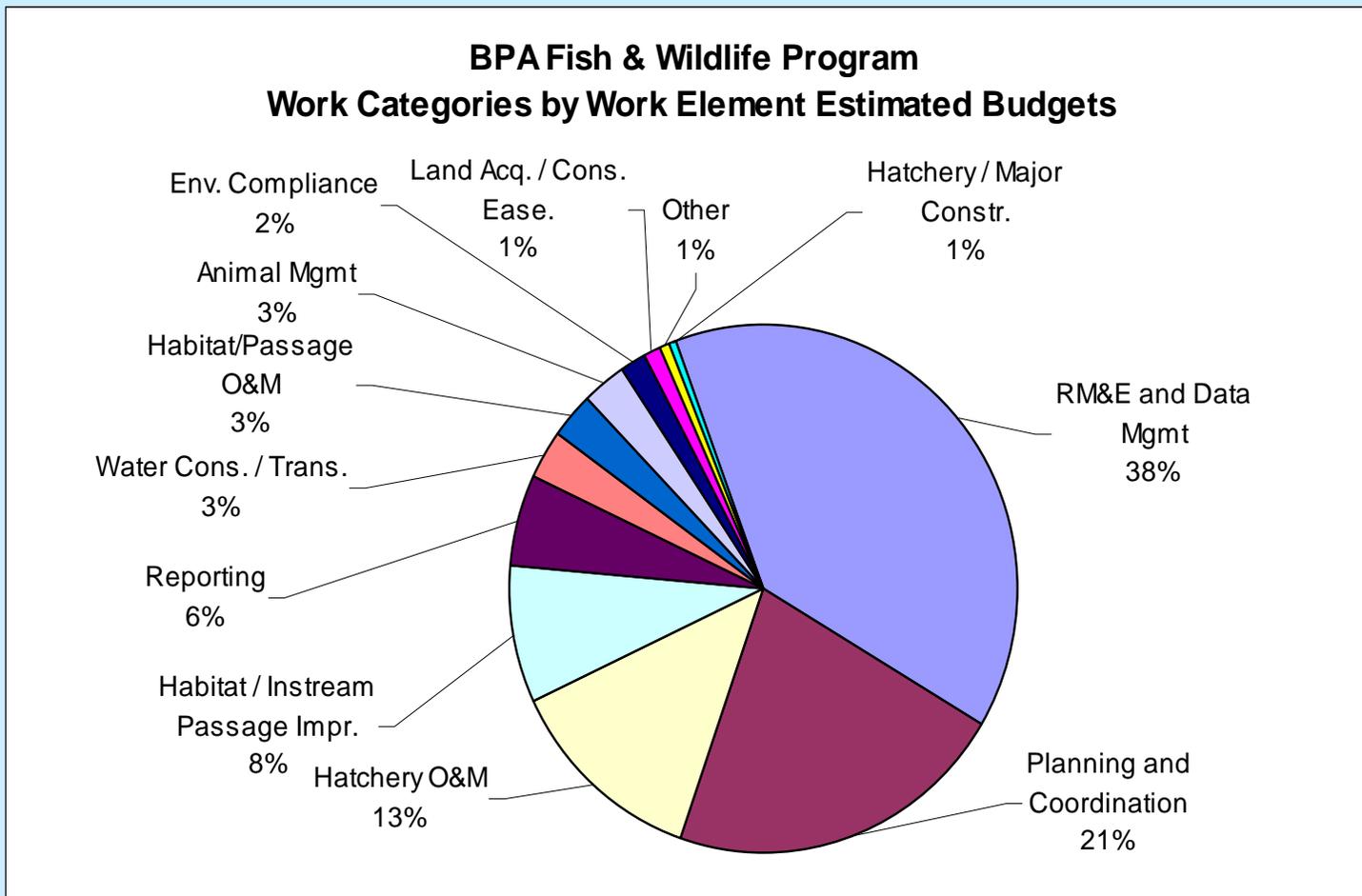
*Process Improvement is in full-swing!*

1	<p><b>Convert all FY'05 SOWs to work element, milestone, and deliverable format.</b></p>	<ul style="list-style-type: none"> <li>✔ Convert all ~400 SOWs to the new work element (WE) format, including milestones and deliverables.</li> <li>✔ Conduct 16 workshops to review WEs and guide contractors through the process.</li> <li>✔ Train BPA PMs to support contractors in converting SOWs into WE format.</li> <li>✔ Release F&amp;W's new website that contains clear guidance for contractors/BPA PMs and WE specific instructions.</li> </ul>
2	<p><b>Enter all FY'05 SOWs into Pisces.</b></p>	<ul style="list-style-type: none"> <li>✔ Enter all SOWs directly into Pisces using BPA "Alchemists" who will accomplish the data entry. (Every BPA PM will enter three SOWs on their own).</li> <li>✔ Rollout Pisces so contractors can review the converted SOW directly on-line.</li> <li>✔ In March, allow contractors to update information directly in Pisces.</li> </ul>
3	<p><b>Begin capturing periodic <a href="#">status reports</a> on-line, through Pisces.</b></p>	<ul style="list-style-type: none"> <li>✔ Allow contractors to submit periodic status reports directly through Pisces, on-line.</li> <li>✔ Use a Green/Yellow/Red approach, make communicating status easy and efficient.</li> </ul>
4	<p><b>Create all FY'06 contracts using Pisces.</b></p>	<ul style="list-style-type: none"> <li>✔ Require that all FY'06 contracts are communicated to BPA through Pisces, instead of email and word processing documents.</li> </ul>
5	<p><b>Capture biological metrics for FY'05 work.</b></p>	<ul style="list-style-type: none"> <li>• Identify metrics and associated roll-up "rules" for all relevant work elements.</li> <li>• Allow contractors to enter metric information in Pisces for FY05 accomplishments.</li> </ul>



# Work Elements Enabling New Insights

Early reports based on Work Elements' Estimated Budgets allow us to better see the work we're funding



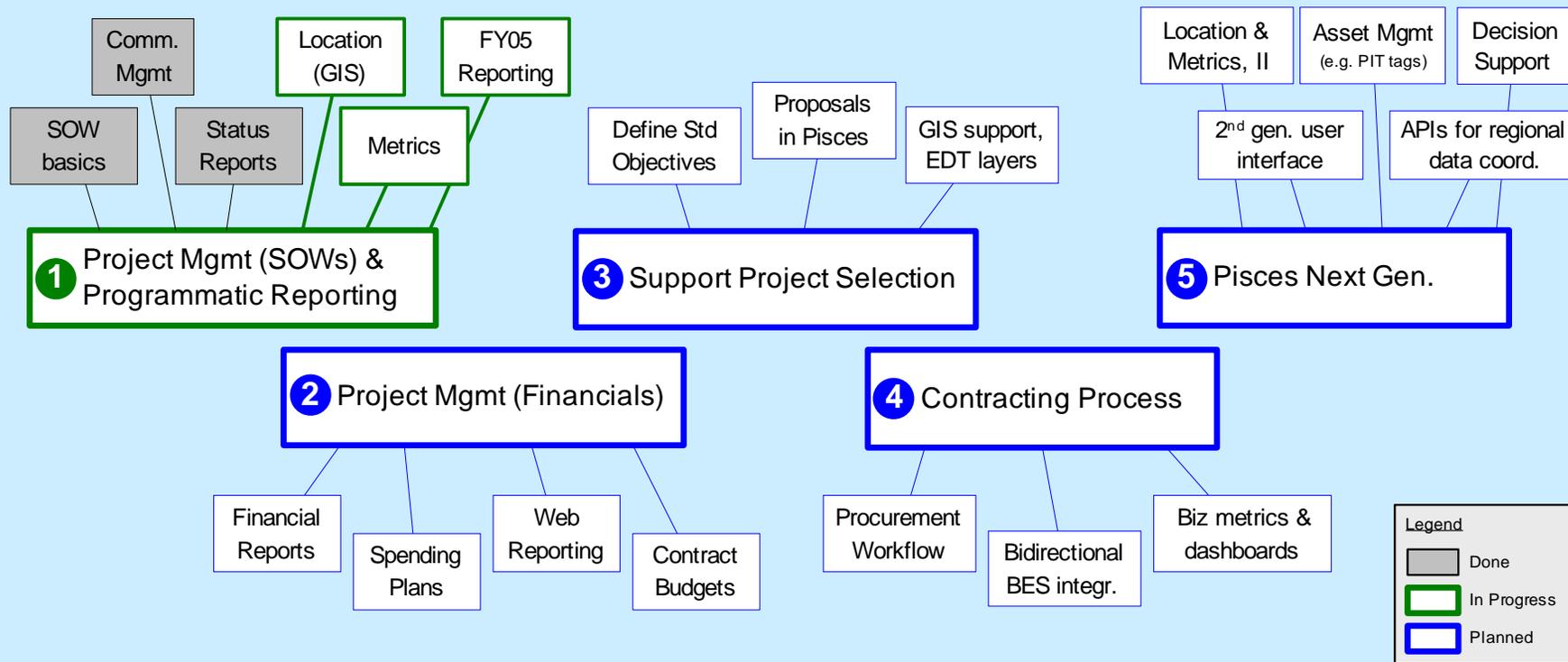
Data used for this chart is a "snapshot in time" and does not reflect year-end summaries, nor does the data correspond to any particular fiscal year.



# PI & Pisces roadmap

Phase one of PI continues to focus on improving project management

We have organized our PI work into Phases. Key areas of focus are called out below:





# Online Status Reporting

We're gathering data at the contract level that we'll use to provide rolled-up Project Performance Reports

- Deployed in late July
- Provides a new communication tool between COTRs and contractors
- A safe place to be honest about where the work is at
- Generating data we'll be able to roll up to Project Performance Reports

**Current Report**  
 Period: Apr-Jun 2005  
 Due: 7/15/2005  
 Submitted: 7/6/2005

**Previous Report**  
 Submitted: -  
 Accepted: -

**Legend**  
 ● will complete by the end date  
 ● may not complete by the end date  
 ● will not complete by the end date

	Start	End	New	Enc	Complete	Apr-Jun	Contractor Comments	COTR Comments
157 - Monitor Biotic and Abiotic Variables								
Mysis shrimp sampling	6/1/2005	7/31/2005			<input type="checkbox"/>	●	45 samples of shrimp have been collected and ar	
Sample zooplankton	5/1/2005	10/30/2005			<input type="checkbox"/>	●	Monthly samples are being collected.	
Monitor water quality	5/1/2005	10/30/2005			<input type="checkbox"/>	●	Monthly monitoring is underway.	
<b>Deliverable: Data on outside factors</b>					<input type="checkbox"/>	●		
162 - Improve Hatchery Stocking Program for Kokanee								
Analyze survival rate of hatchery kokanee	4/1/2005	4/30/2005			<input checked="" type="checkbox"/>	●	Survival rate of hatchery kokanee was calculate	
Hatchery kokanee impact on wild kokanee	4/1/2005	4/30/2005			<input checked="" type="checkbox"/>	●	Regression of hatchery stocking versus wild sur	
<b>Deliverable: Recommendations on # of hatchery</b>					<input checked="" type="checkbox"/>	●	Data will be included in 2004 annual report.	
132 - Annual Progress Report								
Write first draft of annual report	3/1/2005	6/15/2005	8/22/2005		<input type="checkbox"/>	●	First draft of the 2004 annual report is 80% com	
Produce final draft of 2003 annual report	3/1/2005	6/15/2005			<input type="checkbox"/>	●	2003 kokanee report and predation reports are c	
Editing	6/15/2005	8/15/2005	2/1/2006		<input type="checkbox"/>	●	Request a new editing date of Feb 1, 2006	
Produce final draft of 2004 annual report	8/15/2005	1/30/2006	2/28/2006		<input type="checkbox"/>	●	Request a new finishing date of Feb 28, 2006.	
<b>Deliverable: 2005 Annual Report</b>					<input type="checkbox"/>	●	Report should be completed by the new end dat	
161 - Present Project Findings								
Presentation	4/1/2005	2/28/2006			<input checked="" type="checkbox"/>	●	Three presentations were given at the Resident	
Quarterly reports	3/1/2005	2/28/2006			<input type="checkbox"/>	●	Hard copy of Jan-Mar 2005 was submitted. This	
Prepare a publication	10/1/2005	2/28/2006			<input type="checkbox"/>	●	Background literature search has been done.	

**Apr-Jun 2005 Contractor Comments**  
 This status report is for April to June 2005

**Apr-Jun 2005 COTR Comments**

00016828 1994-047-00 -- LAKE PEND OREILLE FISHERY RECOVERY PROJECT Idaho Department of Fish and Game Marcotte, Jay PROD: 1.60.0.0133

5 min Demo



# Project Performance

Phase one of PI continues to focus on improving project management

Project Rating?

- One-two page summary of a project's performance
- Summarizes planned & actual metrics – e.g. how many acres planted?
- Summarizes completed and scheduled deliverables
- Provides Council with new visibility into projects

BONNEVILLE POWER ADMINISTRATION  
DIVISION OF ENVIRONMENT, FISH & WILDLIFE

**Project 2005-019-00**  
Project includes contracts 54672, 39291

Contractors: **Westland Irrigation, ODFW**  
BPA Project Manager: **Sarah Branum**

**Metrics Summary**

Work Element	Planned Metrics	Actual Metrics	Contractor Comments	COTR Comments
40 Install Jones Fence	4.5 miles of fence	4.7 miles of fence	Installation went easier than anticipated	Great news! Also glad to hear costs re...
54 Plant 325 Populars	3.2 riparian miles	2.9 riparian miles	A little short due to shorter planting season	OK. Need your estimate on options for ...
78 ...				

**Deliverables Summary**

Work Element	Milestone	End	Comp.	Dec	Jan	Feb	Mar	Contractor Comments	COTR Comments
40 Install Smith Fence	Deliverable: Second half of F...	6/5/2005		●	●	●	●	Delayed due to material shortage.	Need to talk, I'm concern...
54 Plant 200 Willows	Deliverable: Willows 200+ Planted	3/20/2005	3/19/2005	●	●	●	●	Willows are in the ground, we expect a...	Nice work, let's keep an...
78 ...									

● = will be completed by the end date  
 ● = may not be completed by the end date  
 ● = will not be completed by the end date

**Status Report Summary**

Status Period	Due	Submitted	Accepted
Dec 2004	1/7/2005	1/5/2005	1/9/2005
Jan 2005	2/7/2005	2/7/2005	2/13/2005
Feb 2005	3/7/2005	3/6/2005	3/8/2005



## Metrics & Location

*We're currently working on integrating metrics and location information into Pisces*

### Metrics

- ✓ Pisces will track 60+ metrics. Examples include:

Work Element	Metric
Install Fence	# of miles of fence (0.01 mi.)
Plant Vegetation	# of acres of vegetation planted (0.1 ac.) # of riparian miles treated (0.01 mi.; count each bank separately)
Produce Hatchery Fish	# fish released from program, by life stage and species
Collect Data	Purpose of collecting data (R/M): R = Research/Evaluation, M = Monitoring
Produce Scientific/Findings Report	# of journal articles published

- ✓ Will ask contractors to provide actual metrics for each work element described in their FY05 SOW

### Location

- ✓ Phase I: Keep it simple
- ✓ Will ask contractors to provide location coordinates for most work elements
- ✓ Contractors can use Pisces maps to plot points, or can enter lat./long. directly
- ✓ Pisces users will be able to see where work is occurring by project or contract



## Looking Further Ahead

*There is lots F&W wants to do next...*

After we complete the metrics & location functionality in 2005...

- ✓ **Financials**  
Integrate more of the program's financial data into Pisces and better support budgeting activities. Consolidate disparate spreadsheet data (e.g. spending plans, line-item budgets) into Pisces.
- ✓ **Web-based Program Reporting**  
Supports non-Pisces users to access Pisces information & reports via the internet.
- ✓ **Project Selection**  
We are currently working with Council and CBFWA to ensure compatibility between the FY07 proposal form and Pisces. In the future, we plan to allow sponsors to develop proposals directly in Pisces with the goal of supporting a strategic selection of projects and a streamlined transition to contracting.
- ✓ **Program-wide Annual Report**  
Our long term vision is to work with Council and CBFWA to create an integrated program annual report. Among other things, would include planned and actual accomplishment data held in Pisces.



## **Supporting Project Selection**

*Working collaboratively in the short and long term*

### **Short Term**

- ✓ Working with Council Staff & CBFWA to coordinate FY07 Proposal Form
- ✓ Ensuring downstream compatibility with Pisces
- ✓ The goal is for the new proposal form to pull from Pisces to get BPA Project information, work elements, metrics, target species, etc.
  - saves sponsor time due to efficiencies
  - reduces errors
  - ensures easier aggregation for review & analysis
  - improves translation from proposal to contract

### **Long Term**

- ✓ Use Pisces to enter, store, organize, & analyze proposals.
- ✓ Enable a streamlined and transparent flow from proposal to contract.
- ✓ Work with Council & CBFWA to develop standardized objectives that can be used to categorize & prioritize proposals (synthesizing subbasin plans, regional RM&E plans, etc.).

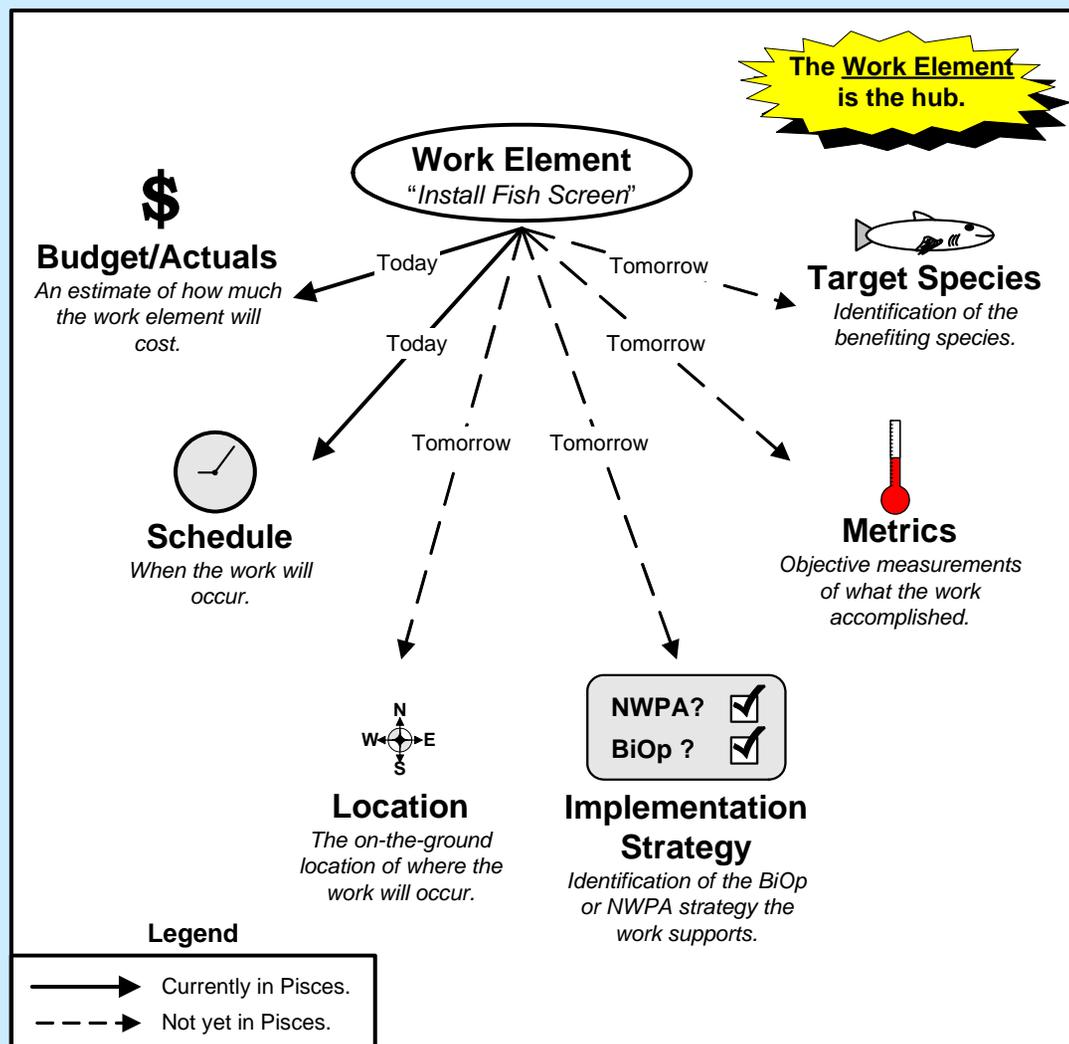


# Supplemental Slides



# Reporting & Work Elements

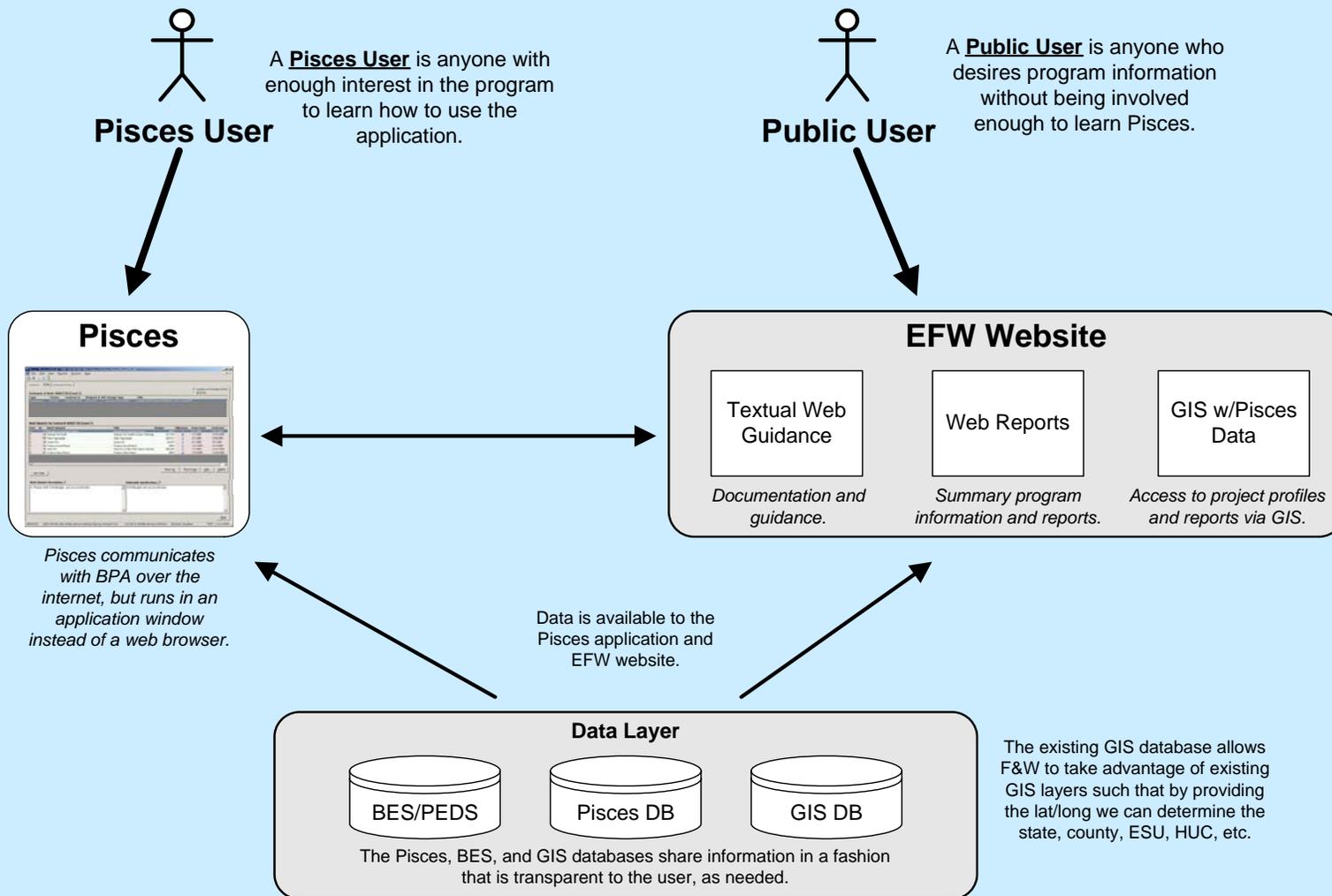
- Most project information is organized around the **work element**.
- Detailed reports are driven by work elements. For example, if you want to be able to report on a project action, it needs to be identified in the SOW as a work element.





# Where Reporting Will be Available

Reports will be accessible through Pisces or the web.





## Examples of Reporting that Pisces will support

Below is a partial, sample catalog:

<p><b>Project Cost Reporting</b></p>	<ul style="list-style-type: none"> <li>• Budget/spending by geographic area, such as state.</li> <li>• Budget/spending by target species group, such as Anadromous, Resident, &amp; Wildlife.</li> <li>• Budget/spending on O&amp;M and environmental compliance.</li> <li>• Budget/spending on type of work such as passage improvements, planting vegetation, etc.</li> <li>• Budget/spending by specific contractor or type of organization such as state, federal, tribal, etc.</li> <li>• Budget/spending to accomplish specific metrics such as miles of habitat accessed or acres of vegetation planted.</li> </ul>
<p><b>Biological Metrics Reporting</b></p>	<ul style="list-style-type: none"> <li>• Metrics accomplished by geographic area, such as state.</li> <li>• Metrics accomplished by target species group.</li> <li>• Metrics accomplished by specific contractor or type of organization such as state, federal, tribal.</li> </ul>
<p><b>Deliverable &amp; Status Reporting</b></p>	<ul style="list-style-type: none"> <li>• Percent of deliverables met across the program for a given fiscal year.</li> <li>• Project Performance reports showing planned/actual metrics and met/unmet deliverables.</li> </ul>
<p><b>Geographical Reporting</b></p>	<ul style="list-style-type: none"> <li>• For a geography, total budget/spending.</li> <li>• For a geography, target species group addressed.</li> <li>• For a geography, type of work such as passage improvements, planting vegetation, etc.</li> <li>• For a geography, work by specific contractor or type of organization such as state, federal, tribal, etc.</li> <li>• For a geography, metrics accomplished such as miles of habitat accessed or acres of vegetation planted.</li> </ul>
<p><b>Any Other Spoke of the WE Hub</b></p>	<ul style="list-style-type: none"> <li>• <i>Reporting the cross-references any subject matter area that is organized by work element.</i></li> </ul>



## Pisces Data Limitations

### Current Limitations to the data displayed in Pisces include:

- ✓ **Pisces shows *approved* and *closed* projects, NOT *proposed* projects.**  
We plan to support Project Selection process in FY06.
- ✓ **Project/contract data comes from BES, which is still the “system of record”.**  
Upshot: Projects that ended before 2001 are not in BES, therefore not in Pisces; also, data that is wrong in BES will show up wrong in Pisces.
- ✓ **Financial data beyond a total Contract Value not yet available.**  
We plan to support the display of project/contract FY budgets later this year. Over time we will add in support for spending plans, actual spending, and contract line item budgets.
- ✓ **Location data today is only at Province-Subbasin level.**  
We plan to release phase 1 of Pisces-GIS integration by end of year.
- ✓ **Old contracts will not have Pisces formatted SOWs, and thus not reportable**  
We have converted 400+ SOWS attached to active F&W contracts. All new SOWs created since April 1 are managed natively in Pisces. We have no plans to convert older, closed contracts.
- ✓ **External access to Pisces is limited to direct program participants in order to control support costs and until application has more data and more ways to view that data.**