

PROJECT OUTREACH LEADS TO ADAPTABLE WORKSHOP TIMELINE

Value Management Improvement Approach

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Abstract

Execution of a successful Value Management Workshop requires commitment; however, adaptation is equally essential relative to the circumstances surrounding each project. Every workshop is different depending on the environment. The Value Methodology is achieved, as usual, through the six phases of the job plan whether it is accomplished in five days or a couple of years.

An extended timeline to apply the Value Methodology was recently introduced to a Redstone Alabama Chapter of SAVE International project with the City of Huntsville, AL. The project involved two similar, but separate, workshops and an analysis of the current management information system.

As a Value Management professional supporting the Value Engineering Office at Redstone Arsenal, this author has learned many lessons in adaptability with respect to the workshop timeline. There are some instances that demand the need for an extended period of performance as workshop opportunities are realized. One consideration specific to the RACSI project was the expenditure of time. All team members are fulltime employed and were not able to dedicate five consecutive days to the effort. Yet, RACSI was able to accomplish the same objective with an extended workshop timeline. Another consideration is when all team members are not be able to converge at the same time. The option to meet for discussions and communicate the results to all team members provides the opportunity to come to a consensus over a period of time. This requires an elevated need for a strong project lead.

Using an extended timeline works very well when the environment demands an increased amount of time be applied to the Information and Development phases of the Job Plan. It also works well in research and development when there is long lead time at any point in the six phases of the job plan.



Biography

Ms. Sharon Aldijaili is a Sr. Systems Engineer with SAIC located in Huntsville, AL. Sharon graduated from The University of Alabama in Huntsville (UAH) with a Bachelor's degree in Business Administration, majoring in Management Information Systems in 1992. That same year, Sharon began a career at UAH supporting the Value Engineering (VE) Office at Redstone Arsenal, AL. In 2016, Sharon transferred her employment to SAIC and continues to support the VE Office today. Mentorship, from Mr. Craig Ailles and Mrs. Toni Hamilton-Datcher, continues to offer increased knowledge of the Value Methodology and Contractual Aspects of Value Engineering.

Project Outreach Leads to Adaptable Workshop Timeline

By Ms. Sharon Aldijaili, RACSI Vice President

I. Project outreach: making the connection

The initial meeting between Redstone Alabama Chapter of SAVE International (RACSI) and the City of Huntsville (COH) Officials occurred in January 2016. The purpose of this meeting was to offer Value Management services to the City of Huntsville, which were graciously accepted. The City Manager expressed concern with regard to Fleet Management assets replacement. The chapter accepted the opportunity to apply the Value Methodology with the purpose of optimizing the period of time for replacing Fleet Management assets, specifically with regard to vehicles and equipment.

II. Pre-study: determining workshop timeline

As a professional organization embracing the Value Methodology and abiding by established historical standards for performing Value Management workshops, it is challenging to execute a five consecutive day workshop when the team consists of individuals with full time employment from different organizations, especially when some of those individuals are volunteering their time. RACSI confronted that challenge recently by volunteering time and resources to the City of Huntsville, Alabama Fleet Management Division for the purpose of conducting a series of Value Management workshops.

All members of RACSI are either directly employed by the Federal Government or employed through a support contractor. With this in mind, the majority of members have a long history with performing value management workshops. However, the Fleet Management effort would prove to be vastly different due to the environment in which the effort would be executed. RACSI members that committed to the task decided this workshop would be occurring over an extended period of time; therefore, each member agreed to the objective of learning from the experience. Executing a workshop under these circumstances, in the end, would produce successes and important lessons learned that will be utilized as future projects are initiated.

Traditionally, a workshop occurs consecutively over five days, working approximately eight to nine hours per day. In this case, a modified workshop event needed to be explored in order to accomplish the task while producing successful results. RACSI and Fleet Management departments formed a multi-disciplined team to seek value added improvements for a specific item. RACSI members chose to re-structure the traditional timeline for all six phases of the job plan. As a result, four of the six phases (Information, Function Analysis, Creative, and Presentation) were completed as a non-consecutive one day event; however, the Evaluation and Development Phases were completed through a series of face-to-face meetings and other correspondence. The content for all phases of the Job Plan were accomplished using the SAVE International Value Management Methodology (VEM). The key to performing a Value Management workshop with a modified timeline is communication.

III. Project inception: establishing project scope

Members from RACSI met with Fleet Management team members to complete a one day training session in order to instruct individuals participating in workshops in the Value Methodology. Subsequently, RACSI began the pre-study work collecting data and information by interviewing each department head within the Fleet Management Division. Data gathered during pre-study work would later be integrated into finalizing the Information Phase. RACSI team members formulated a list of questions to ask each department manager, and/or representative, during the interview. The questions were as follows:

- What is the criteria for disposing of an asset?
- What is your process for requesting a replacement?
- What is the primary function of your department? Other important functions your department performs in addition to the primary?

- What is the overall function(s) of the particular vehicles utilized by your department?
- Who drives your vehicles?
- Which vehicles are multi-driver vehicles or single driver vehicles?
- What is the most important vehicle your department utilizes? Why?
- What is the least important vehicle your department utilizes? Why?
- List all the missions your department accomplishes, the approximate percentage of overall mission activity that activity encompasses and the vehicles involved (if applicable)?
- How does your department handle maintenance (scheduled or unscheduled) with your particular fleet assets?
- Does your department have any problems with the city's fleet management?
- What is best about the city's fleet management?
- Please comment/list/add ANY data you would like to add about your department.
- Does your department vehicles require specific equipment to be attached to the vehicle? Or special parameters to get the job done?
- Do you use SharePoint to communicate with Fleet Management in any way? If so, what is the subject matter?
- Add any information you feel should be asked about your department or any other department.

IV. Pre-Study: gathering information

It took approximately six months to collect the initial data needed to determine the path forward. The following departments were interviewed between July 28, 2016 and February 7, 2017: Animal Services; Fleet Services; General Services; Community Development; Fire and Rescue; Information Tech Services; Planning; Recreation; Cemetery; Landscape; Natural Resources; Public Transit; Department of Transportation; Parking; Traffic Engineering; Public Works/Sanitation; Police; Engineering; Inspection; Finance. As interviews were completed, an analysis of the data collected continued to reveal common opportunities for improvement within all departments. The commonalities among departments included the following:

- No Guarantee of receiving a replacement vehicle/equipment
- Majority of vehicles/equipment have exceeded life cycle
- Need improved communication between Fleet Management and departments
- Communicating a broader view of over-all Fleet Management priorities would assist departments in understanding needs across all departments
- Fleet Services provides timely and excellent maintenance/repairs
- Departmental trading of vehicles has happened successfully in the past

RACSI and Fleet Management set a pre-study scope that delineated departments according to their purpose within Fleet Management. Analysis of vehicle and equipment data revealed similarities among some departments, as well as uniquely different departments. Based on data analysis, departments procuring only cars and small trucks were placed in one category. The second category contained uniquely different types of equipment. Lastly, departments procuring specialty equipment and large vehicles were placed in the third category. In October 2016, two workshops were approved and planned based on information gathered through interviews and each department's willingness to participate.

The first workshop was planned for the Landscape Management department, and the second workshop would commence with the Traffic Engineering department. It was apparent that RACSI would have to be creative in the approach to execute two workshops, as well as objectively meeting the purpose to produce

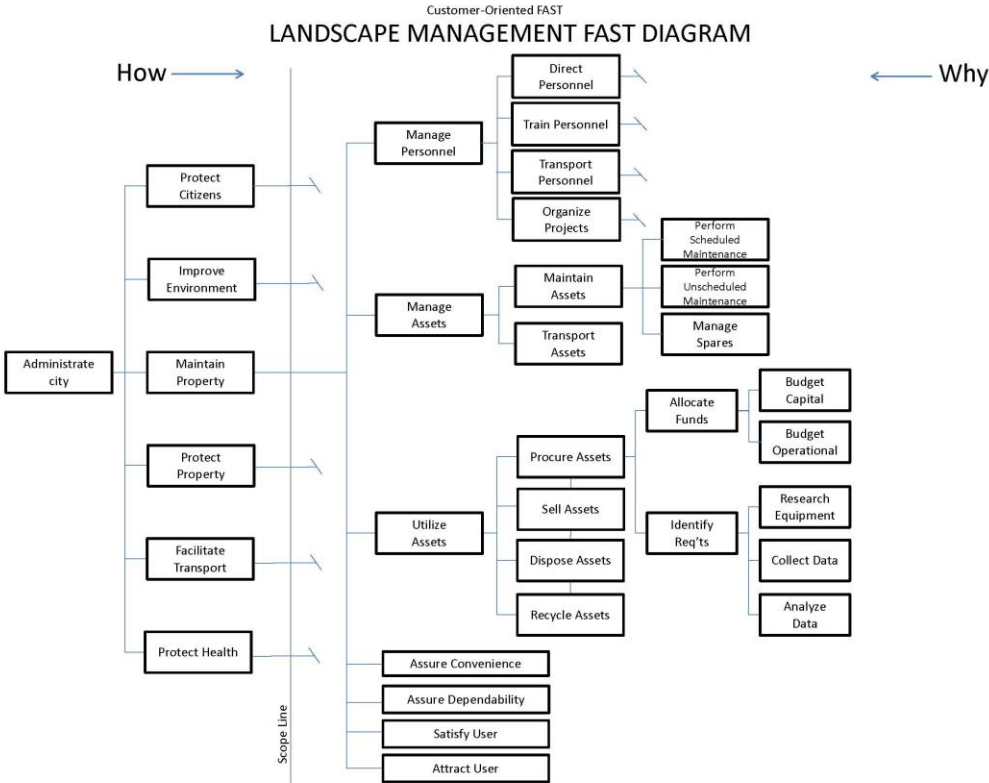
implementable results. Project work and the application of the Value Methodology with Fleet Management needed to occur outside the forty hour work schedule for RACSI team members. The chapter decision was to modify the five consecutive day workshop into an altered timeline.

RACSI and Fleet Management discussed the options available to continue the pre-study work and integrate into the Information Phase. The team decided to pursue two workshops with separate objectives that would accomplish one purpose: bring value to the business process at Fleet Management. Executing the Value Methodology for two separate objectives, and with two separate departments, allowed team members to approach each workshop from diverse perspectives. The first workshop applied the Value Methodology to improve the longevity of existing vehicles and equipment. The second workshop sought a solution to improve the process utilized for acquiring new vehicles and equipment. The team agreed to a workshop focused on equipment usage and maintenance with Landscape Management and a workshop focused on the acquisition process with Traffic Engineering. The expectation for each workshop was to produce implementable results throughout Fleet Management using both workshop results as an example for all departments.

V. Workshop #1: Landscape and Cemetery, Technical

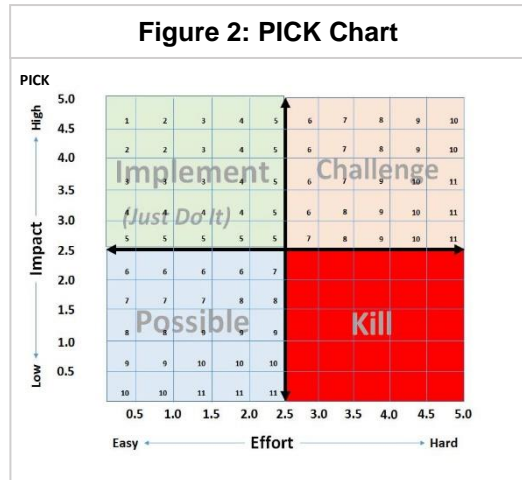
The multidisciplinary team included RACSI members and personnel from Fleet Services and Landscape Management. The team agreed the problem statement for this workshop would be, "Perform Landscape Management functions at the lowest life cycle costs consistent with best value to the City". The workshop began in November 2016 by completing the Information Phase prior to the second meeting, which occurred January 2017, that began the Function Analysis Phase. Identifying and classifying functions provided the team with the necessary information to develop the customer-oriented FAST (Figure 1).

Figure 1: Landscape Management



The Function Analysis Phase was completed in one day, and was followed by another one day event to complete the Creative Phase. Ideas were generated for functions following the Manage Assets path and the Utilize Assets path shown on the FAST. In all, 220 ideas were generated. Each idea was then combined with similar ideas to eliminate repetition. The team prioritized the combined ideas by categorizing each idea into highest, high, low, lower, lowest priorities generating a final list of ideas. Subsequently, the team met two additional days, one day in February and one day in March, to continue evaluating ideas and to begin developing alternatives.

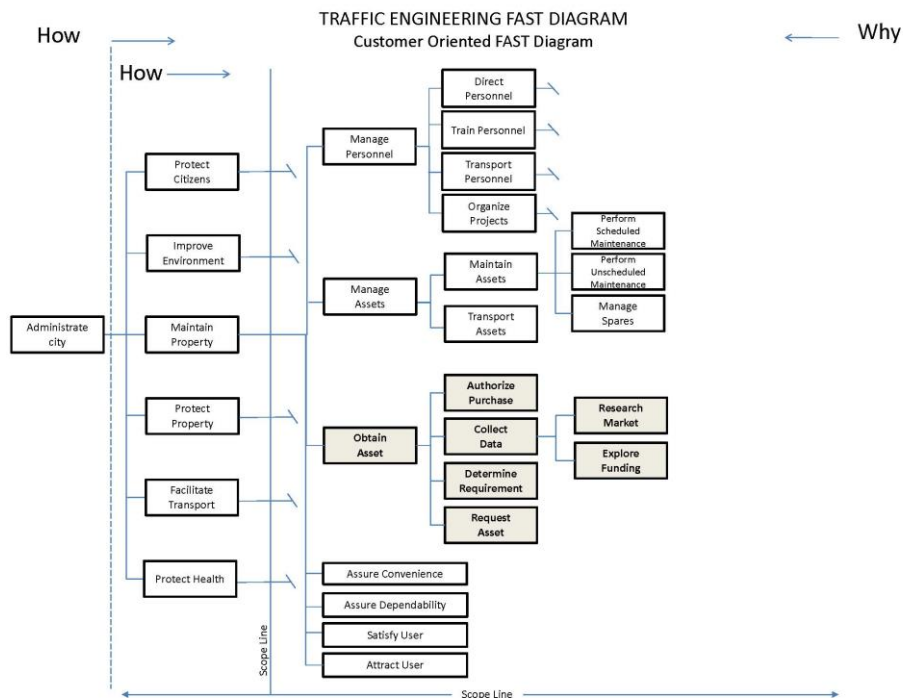
In February, evaluation of remaining prioritized ideas was accomplished utilizing the Possible, Implement, Challenge and Kill (PICK) Chart (Figure 2). In March, team evaluation generated a list of alternatives that would be developed by the team over a three-month period of time. During development, the team decided to focus on planning a path forward and implementing the short-term alternatives. Implementing long-term alternatives would be performed by the Fleet Management at their discretion.



VI. Workshop #2: Traffic Engineering, Process

The Traffic Engineering workshop was scheduled to begin in March 2017. At that time, the Information Phase work was completed by the team prior to the second meeting in April that began the Function Analysis Phase. Job plan phases were accomplish in a manner similar to the Landscape Management workshop; however, this workshop focused on the process of obtaining assets as shown in the customer-oriented FAST (Figure 3). Ideas were generated for functions following the Obtain Assets path.

Figure 3: Traffic Engineering FAST



VII. Data Analysis: Fleet Services, managing information

The third service provided to Fleet Management was an analysis of Fleet service's data management system. This analysis occurred as workshop one and two were being accomplished. Information gathered during the Landscape and Traffic Engineering workshops was integrated into the analysis. During the information phase, the team determined that the availability of data was limited. RACSI had first planned to utilize a process model, created for a government customer, to determine the optimal time in the life cycle to sell assets. However, data provided to RACSI from Fleet Services could not be applied to the model due to corrupt and unreliable data. RACSI addressed Fleet Management's need to upgrade their process for managing information by researching fleet management software packages. As a final recommendation, RACSI provided Fleet Management with the name and contact information needed to begin the process of obtaining technical support from the software company. RACSI also recommended that Fleet Services employ a full-time, well-qualified analytics manager with a management information systems background and training.

VIII. Presentation: final meeting

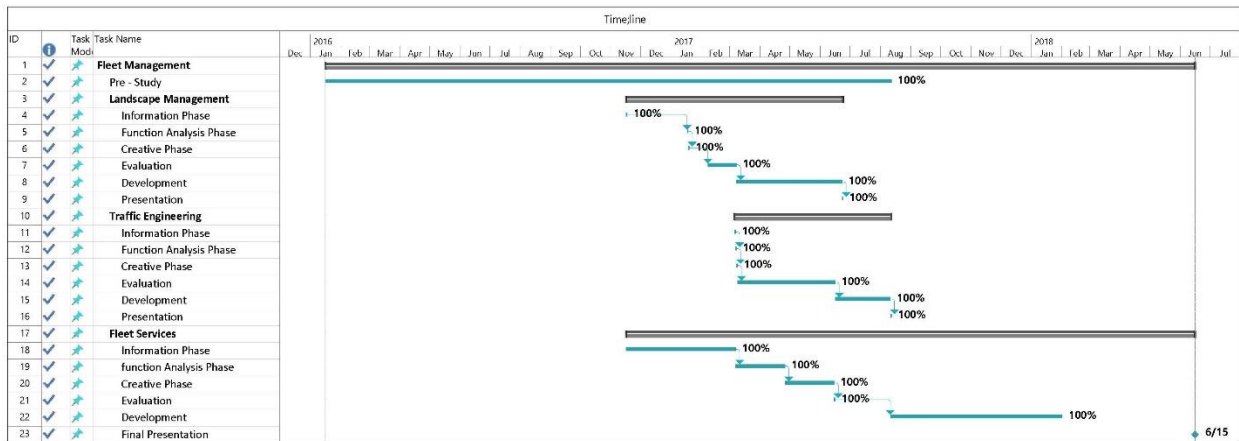
The final presentation to the COH Manager included results from the two workshops and Fleet Management data analysis. RACSI and Fleet Management were represented at a round table discussion with a description of the Short-term alternatives that had been implemented at the department level within Landscape Management. There were two alternatives presented on behalf of Traffic Engineering and both required City Manager approval. A summary of overall top recommended alternatives were as follows:

- Fleet Management
 - Increase fleet capital account (used to replace assets at the Fleet Management level)
 - Dedicate an analytics manager and team to Fleet Management
 - Obtain technical support to resolve current fleet software challenges
 - Track operator neglect and hold personnel accountable
 - Improve fleet utilization by establishing a motor-pool
- Traffic Engineering
 - Develop procedures to track & review dead-lining equipment before End-of-Life
 - Streamline approval process
 - Develop standard procedures to objectively request purchase of assets
 - Establish timely leadership and department head budget meetings
- Landscape Management
 - Develop enhanced storage/housing for equipment, parts, and spares
 - Demonstrate, Lease short term, and/or Rent to gather data on equipment before purchase
 - Utilize manufacturer warranty until expired and purchase/utilize extended warranty for larger equipment
 - Track operator neglect issues and report to the appropriate personnel; develop a tracking system for documenting daily checks; develop asset training for the user at Landscape Management
 - Original Equipment Manufacturer (OEM) involvement
 - Improve communication, possibly to include city-wide or with other municipalities making existing assets available through options

IX. Successes: benefits to extended workshop timeline

One benefit to using an extended timeline for a Value Management workshop is the opportunity for all team members to absorb information as the workshop proceeds. It gives participants the opportunity to add to or take away information that didn't make it into the first day of the Information Phase. Also with the time extension team members are given the chance to have detailed discussions, in-between phases, regarding all aspects of the current phase being worked. The Fleet Management project was a large undertaking and required an extended time to successfully complete. There is also the facet of volunteering time and resources, which demands an extended project timeline (Figure 4). One last significant benefit is that, as the project progresses over a period of time, relationships are formed and trust is established among team members.

Figure 4: Fleet Management Timeline



X. Lessons learned: Project improvements

In hindsight, RACSI learned several key lessons that can be utilized in future projects. One might ask, "Why was there an extensive amount of time that passed before the Landscape Management workshop commenced"? The answer to that question rests in the fact that, at the inception of the project and when RACSI members decided to move forward with the effort, there was no clear project lead. As time passed and some members inquired about progress, the effort started to take shape and a leader arose from the RACSI group. Another lesson learned pertains to the level of commitment among team members that agreed to work the effort. As time passed, it was difficult to keep volunteers engaged in the process due to either personal or professional distractions. Once leadership was established on the RACSI side of the equation, Fleet Management became very committed and remained engaged. Lastly, the decision to try to apply a government solution to a city endeavor does not always work. This demands that all team member keep an open mind as the project progresses, and not remain committed to their paradigm.