

University Office of Capital Programs & Real Estate Services Professional Services Consultants Selection Process Improvement [UA]

Business Case

The University Office of Capital Programs & Real Estate Services (UOCP&RES) oversees the Qualifications Based Selection process for Professional Services Consultants who submit letters of interest and pre-qualification documents for a posted advertisement for the University of Illinois. The UOCP&RES would like the Professional Services Consultant (PSC) selection process to be reviewed for opportunities to streamline the business process for efficiencies, reduce the amount of processing and review time, and consider potential sustainable improvements.

Goal

Reduce the number of days to approve a PSC by 10-15% and improve the completed documentation in response to past audit findings.

Approach

The team conducted process mapping sessions to capture the Qualifications Based Selection process. Three main issues were identified in the current process: duplicate information is collected on the Composite form and on the Qualifications Based Selection (QBS) reference material; the current workflow of forms is cumbersome, contains multiple approvals, and results in incomplete documentation; and the Letter of Interest template requests duplicate information and is confusing to complete. The project was structured into three phases based on those themes. During each phase, the team discussed issues and identified recommendations for potential resolutions. The team ranked the potential solutions and determined which solutions should be implemented. They also created an action plan for solution implementation.

Outcome

Identified 42 recommendations for improvement that are expected to result in a 4-7 day time reduction, representing a 10-15% overall improvement to the PSC selection process during the committee approval and shortlist selection stages. Using FY15 numbers, 22 PSC selections were processed. Therefore, with the improvements, there would be an estimated 88-154 day reduction in project timelines. Additionally, 23 of the 42 improvement recommendations began to be implemented prior to the completion of the project.

Key Findings

- **Duplicate information is collected on both the Composite form and in the Qualifications Based Selection (QBS) reference material, resulting in duplication of review effort.**
- **The workflow for the review, selection, and approval processes is cumbersome and requires multiple approvals. An audit finding determined that the documentation is inconsistent and incomplete.**
- **The Letter of Interest template contains requests for duplicate information and is confusing to complete, resulting in duplicate information to review.**

Process Improvement Recommendations

1. **Create “Initial Evaluation” form (electronic, weighted matrix)** – eliminate the collection of duplicate information and provide automated calculation to ensure accurately calculated rankings.
2. **Combine the “Approval for Firms to be invited to Discussion Meeting,” “Approval to negotiate with recommended PSC from Discussion Meeting,” and “Professional Services Approval Request” forms** – eliminate the collection of duplicate information, resulting in improved accuracy and reduced time to complete and review forms.
3. **Modify forms to use table format or bullets to list information rather than use paragraph format** – reduce the amount of time to read and increase visibility of critical information.
4. **Update the project management software to track the workflow** – improve the quality and timeliness of submissions, evaluations, and selection.
5. **Implement the evaluation process in the project management software** – improve workflow for ease of use, collection of complete documentation, and storage of completed documentation.
6. **Update communications in evaluation process** – increase the information provided to committee members required during the evaluation process.
7. **Update the Letter of Interest template** – eliminate the collection of duplicate information.

Implementation of Recommended Improvements

All 23 Action Items are expected to be completed by July 14, 2015. All items are already in progress and some were completed during the project. Status updates for the implementation of recommendations will be requested at 6 month intervals through June of 2016.