Customer Needs Process

Starts with

Customer / End User
- Requests/
- From input

Ends with

Proposed Product and/or Service

GCDD Staff

Prepare statement of need
- Federal / State government mandate?
- 5 Yr State Plan goals & objectives?
- Annual work plan?
- Annual update / reprint cycle?
- Technology breakthrough?
- Other planning objective?

Who is user of design?

Summarize Needs - Requirements - Expectations across groups in terms of:
- Market / orders?
- Delivery?
- Customer service?
- Capabilities?
- See design specifications (list of elements)
Design Team Process

- Identify & recruit Customer/End users
  - Establish design team:
    - Customers/end users
    - Suppliers (Internal & External)
    - Staff
    - Grant Review Committee
    - (Consider Knowledge, Skills, Attitudes of team members)
    - (Check membership against conflict of interest policy)
  - Schedule meeting(s) of design team
  - Review design point and modify as needed
    - Design specifications
      - Ease of use (usability)
      - Ease of access (accessibility)
      - Speed
      - Learning level (3rd - 8th grade)
      - Upgrade capability
      - New technology
      - Operational performance
      - Cost control – user cost
  - Identify & recruit council members/consultants with expertise in the particular fields

Minimum 2 months

Starts with
- Process Participant
- Customers/End Users
- GCDD Staff

Ends with
- Proposed Product and/or Service Design

GCDD Council

9 29 2011
Testing Cycle Process

Starts with

Customers / End Users

Process Participant

Proposed product and/or service design

Ends with

Identify & recruit customer/end users

Establish Test Team
• Product or service users
• Customers
• Suppliers (Internal & External)
• Staff
• Grant Review Committee

(Consider Knowledge, Skills, Attitudes of team members)

(Check membership against conflict of interest policy)

Schedule meetings of Test team

Create test requirements:
• Validate specifications
• Key operational performance requirements
• Timely introduction
• Trouble free introduction
• Back up vendor/supplier
• Beta tests – user tests

• Establish the test schedule

Identify & Recruit council members/consultants with expertise in the particular field(s)

9 29 2011

Minimum 2 months total
Testing Cycle Process cont'd

Starts with:

Customers / End Users

GCDD Staff

Conduct the tests according to the test requirements and test schedule

GCDD Council

Ends with:

Certify product or service as ready for release

Conduct a readiness review to meet all design specifications and test requirements:

- External review
- Objective
- "No strings" or conflicts

Identify actionable items and modify as required

9 29 2011

1 week to run a test
Starts with: Establish product or service life cycle

Forecast number of users by year throughout the life cycle

Business Case Process

Perform the business case process according to:
- Parameters
- Costs to:
  - Design
  - Operate
  - Maintain
  - Upgrade

Ends with: Certify product or service as a viable business case

9/29/2011

5 days total
Supplier Qualification Process

Starts with

Customers / End Users

GCDD Staff

Product or service identified
- Design specifications finalized

Create potential supplier list
Assess capabilities:
- To meet design specifications
- Processes
- Quality system
  - Process Improvement
  - Productivity
  - Defect elimination
- Financial viability
- Experience with electronic government services

Supplier Pass or fail

Add to approved supplier list

Ends with

Process Participant

MMD (?)

GCDD/ Council

9 29 2011

1 month total
**RFP Preparation Process**

- **Starts with**
  - Process Participant
  - Customers / End Users
  - GCDD Staff

- **Prepare the RFP:**
  - Proposed Product and/or Service
  - Design specifications
  - Test specifications (from previous pages)

- **Use the Standard RFP boiler plates:**
  - Federal & State requirements
  - Describe matching funds required
  - Set budget line items
  - Work plan specifications
  - Set evaluation criteria
  - Set proposal deadline
  - State the supplier qualifications
  - Provide list of qualified suppliers
  - Prepare P/T certification form for MMD and/or option to contract with a supplier for an additional year
  - Notice of bidder/responder conference and/or time line for questions and answers

- **Ends with**
  - RFP Ready for review and approval by GCDD/Council
  - Review with Grant Review Committee

**Timeline:**
- 1 - 2 months total

**Date:** 9 29 2011
The RFP Process starts with presenting the documented RFP to the GCDD:

- Proposed product and/or service
- Design specifications
- Test specifications
- Test and readiness review results

Performing the RFP Process involves:
- State Register announcement
- Post on website
- Notice to potential suppliers
- Bidder/responder conference (optional)
- Respond to all questions by deadline

The Council reviews and approves the RFP.

Receiving proposals:

- Completeness
- Conflict of interest

Convening the meeting of GRC:
- Review/evaluate proposals according to criteria based on design specifications
- Score each proposal
- Disclose conflicts
- Determine successful supplier(s) and note any conditions.

The process ends with:

3 weeks—2 months total
RFP Process cont’d

Starts with

GCDD Staff

Facilitate Council approval process

GCDD recommends supplier selection to the GCDD

GRC

GCDD approves supplier selection
- Complete conflict of interest forms
- Record all votes

Notify successful Supplier(s)
Begin contract process

Ends with

Process Participant

Customers / End Users

9 29 2011

1 week - 3 weeks total

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Contract Process

Starts with

Successful supplier(s) notified
- Discuss any conditions or modifications necessary

Boiler plate contract language:
- Set performance goals
- Line item ledger
- Budget narrative
- Due dates for progress/fiscal reports
Final review:
- Supplier design prices
- Specifications
- Process design refinements
- Contract language

Signatures:
- Supplier
- Admin

Authorizes supplier(s) to begin work

FMR encumbers funding

Schedule face-face meetings
- Quarterly reports
- Request for funds
- Fiscal reports
- Match reports

Begin supplier management process

Ends with

3 weeks total
Federal Fiscal Years

FY 2010 starts Oct 1, 2009 - Ends Sept 30, 2010
FY 2011 starts Oct 1, 2010 - Ends Sept 30, 2011

State Fiscal Years

SFY 2010 starts July 1, 2009 and ends June 30, 2010
SFY 2011 starts July 1, 2010 and ends June 30, 2011
SFY 2012 starts July 1, 2011 and ends June 30, 2012

May 11
Sep 10
Jul 10
Oct 10
Nov 10
Dec 10
Jan 11
Feb 11
Mar 11
Apr 11
May 11
Jun 11
Jul 11
Aug 11
Sep 11
Oct 11
Nov 11
Dec 11
Jan 12
Feb 12
Mar 12
Apr 12
May 12
Jun 12
Jul 12
Aug 12
Sep 12

I:\FMR\Timeline FY SFY2012.xls

9 29 2011
Process Improvement goals:

It would help if Congress would pass the appropriations bills by 9/30 of each year.

It would help if SWIFT aligned to federal fiscal years.

It would help if we had more process diagrams for working with FMR to understand work flow.

It would help if electronic signatures would be accepted.

It would help if interagency mail worked better so we did not lose items.

It would help if we could track encumbrances/liquidations in a more efficient manner.