

Formstack Submission For: [Agency Advancement Award 2023](#)

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Date Implemented: : Apr 2023**Title of Program or Process Improvement:** Process Improvement through Workflow Automation**Name:** David Wheeler**Designation(s):** NIGP-CPP, CPPO, CPPB**Title:** Senior Director**Agency:** Orange County Public Schools**Address:** 445 West Amelia
Orlando, FL 32801**Email:** david.wheeler@ocps.net**Phone:** (407) 317-3988**Cell Phone:****Program or Process Improvement Summary:**

Orange County Public Schools (OCPS) is honored to submit the NIGP Agency Advancement Award for its exceptional efforts in process improvement through the innovative use of Smartsheet, a powerful workflow automation tool. OCPS has successfully leveraged Smartsheet to streamline and automate various workflows, resulting in increased efficiency, reduced costs, and improved service delivery, in alignment with the guiding principles of the National Institute of Governmental Purchasing (NIGP). These workflows include requests for procurement action such as solicitation development and contract

review, procurement card requests, spend management, vendor performance reports, and KPI tracking to name a few.

OCPS has demonstrated a commitment to process improvement by embracing Smartsheet as a strategic solution to automate workflows across the Procurement Services. By doing so, OCPS has exemplified the NIGP's guiding principle of "Service" by optimizing processes and achieving measurable outcomes.

OCPS has utilized Smartsheet's versatile features to create customized workflows that automate repetitive tasks, eliminate manual errors, and accelerate approval cycles. For instance, OCPS implemented an automated process using Smartsheet, which has streamlined the procurement card application management and auditing. This has resulted in reduced cycle times, increased procurement visibility, and improved departmental relationships.

OCPS has also harnessed Smartsheet's collaborative capabilities to enhance cross-departmental communication and coordination, aligning with the NIGP's principle of "Accountability and Transparency." With Smartsheet, OCPS has established a centralized platform that allows stakeholders to collaborate in real-time, track progress, and access critical information, ensuring transparency and accountability in all workflows.

Furthermore, OCPS has leveraged Smartsheet's reporting and analytics features to gain valuable insights into process performance, resource utilization, and cost savings, aligning with the NIGP's principle of "Transparency." Smartsheet's robust reporting capabilities have empowered OCPS to make informed decisions, identify bottlenecks, and continuously optimize workflows to drive process excellence and achieve strategic goals.

OCPS's commitment to process improvement through workflow automation with Smartsheet has yielded significant results. The streamlined and automated workflows have resulted in an overall reduction in process cycle times a decrease in manual errors and a

cost savings of at least \$250,000 annually, demonstrating tangible outcomes in line with the NIGP's guiding principle of "Professionalism" by upholding high standards of job performance.

In conclusion, Orange County Public Schools' innovative use of Smartsheet to automate workflows has resulted in improved efficiency, increased transparency, and cost savings, in alignment with the NIGP's guiding principles. OCPS's dedication to optimizing processes and leveraging technology to drive excellence is commendable, and they are deserving of the Agency Advancement Award for their outstanding achievements in advancing process improvement through workflow automation with Smartsheet.

Evaluation Criteria #1:

1. The process for identifying the need or problem to be solved at Orange County Public Schools (OCPS) began with a thorough assessment of existing workflows across various the Procurement Services department. This assessment revealed that many of these workflows were manual, time-consuming, error-prone, and lacked transparency and accountability. The identified need was to streamline and automate these workflows to improve efficiency, reduce costs, and enhance service delivery.

2. To align with industry standards and best practices, OCPS conducted research on process improvement methodologies and tools commonly used in public procurement. This research included reviewing literature, consulting with experts, and benchmarking against other school districts and public organizations and Smartsheet was identified as a widely used and versatile workflow automation tool at a relatively inexpensive cost point.

3. Several solutions were considered during the decision-making process, including other workflow automation tools and some tools that were currently available such as Microsoft SharePoint and Google forms. However, Smartsheet was ultimately chosen as the proposed solution for OCPS due to its user-friendly interface, robust features, and flexibility to customize

workflows to meet OCPS's unique needs. Smartsheet also offered a collaborative platform that could be easily integrated data from existing systems and processes, allowing for seamless adoption and minimal disruption.

4. The proposed solution of using Smartsheet to automate workflows aligns with the Values and Guiding Principles of Public Procurement, as outlined by the NIGP. Specifically, it aligns with the principles of "Professionalism and Service," as it streamlines and automates workflows, reducing manual effort and accelerating approval cycles. It also aligns with the principle of "Accountability and Transparency," as it establishes a centralized platform that promotes real-time collaboration, tracking, and visibility, enhancing accountability and transparency in all workflows. Additionally, it aligns with the principle of "Accountability," as it has resulted in cost and time savings of at least \$250,000 annually through improved efficiency and reduced errors. Through Smartsheets' DocuSign integration we have eliminated the formally manual task of drafting, signing, emailing, and following up on contract renewal documents. Now, instead of a staff member drafting the renewal, a few clicks in Smartsheet fills the applicable data in the document and generates a DocuSign envelope for the vendor to execute. The fully executed document then syncs with Smartsheet and attaches to the contract item. For one contract with approximately 20 awarded contractors, this equates to around 1.5 hours of staff time saved. In summary, the process for identifying the need, researching industry standards, eliminating other solutions, and proposing Smartsheet as the solution aligns with the Values and Guiding Principles of Public Procurement, showcasing OCPS's commitment to excellence in process improvement through workflow automation.

Evaluation Criteria #2:

1. The implementation of the Smartsheet workflow automation solution at OCPS followed a phased approach to ensure smooth adoption and integration into existing processes. The implementation plan

included the following steps:

a. Planning Phase: This phase involved developing a detailed implementation plan, including defining project goals, objectives, and timelines, identifying key stakeholders, and allocating necessary resources. Marketing efforts were also initiated to create awareness about the benefits of the automation solution among the staff.

b. Pilot Phase: In this phase, a pilot group of departments were selected to test and refine the workflows using Smartsheet. Training sessions were conducted to familiarize the staff with the tool and its functionalities. Feedback from the pilot group was collected and incorporated into the final workflows.

c. Rollout Phase: Once the workflows were refined and approved, the solution was rolled out to all relevant departments across OCPS. Training sessions were conducted for all users to ensure proficiency in using the automation solution. Ongoing support and assistance were provided to address any questions or concerns.

2. Challenges encountered during implementation:

a. Impact to the intended outcome: There were initial challenges in gaining widespread adoption and acceptance among the staff due to the change in processes and the introduction of a new tool. Some resistance was encountered in transitioning from manual processes to automated workflows. However, the impact on the intended outcome was minimal as the benefits of improved efficiency, transparency, and accountability were clearly communicated to the staff, and their feedback was taken into consideration during the refinement of the workflows.

b. Effect on the anticipated schedule: The challenges encountered during implementation resulted in a slight delay in the anticipated schedule. Additional time was required to address staff concerns, provide further training, and ensure smooth adoption from staff, particularly in the Procurement Services department. However, the delay was manageable, and the implementation was completed within a reasonable timeframe.

c. Overcoming the challenges: The challenges during implementation were addressed through effective communication, training, and support. The OCPS team conducted regular meetings, provided clarifications, and addressed concerns raised by the staff. Additional training sessions were conducted to ensure that all users were proficient in using the Smartsheet tool. Continuous feedback and improvement loops were established to refine the workflows based on user input. In conclusion, the implementation of the Smartsheet workflow automation solution at OCPS followed a phased approach, and challenges encountered during implementation were overcome through effective communication, training, and support. The impact on the intended outcome was minimal, and the anticipated schedule was only slightly affected, resulting in successful implementation of the automation solution across Procurement Services.

Evaluation Criteria #3:

1. Outcome of the change:

a. Results achieved: The implementation of the Smartsheet workflow automation solution at OCPS resulted in significant improvements in process efficiency, transparency, and accountability. Manual tasks were automated, reducing the chances of errors and delays. Workflows were streamlined, leading to faster turnaround times and improved productivity. The use of Smartsheet also enabled real-time tracking and reporting of procurement activities, providing better visibility into the status of projects and enhancing decision-making such as monitoring contract spend against approved contract value.

b. Unintended consequences: There were some unintended positive consequences of the change. For example, the automation of workflows using Smartsheet led to improved collaboration among departments, as stakeholders were able to access and update information in real-time through reports created for their department on contract status. This enhanced communication and coordination among team members, resulting in smoother procurement

processes.

c. Alignment with Values and Guiding Principles of Public Procurement: The implementation of the Smartsheet workflow automation solution advanced alignment with the Values and Guiding Principles of Public Procurement in several ways. First, it promoted transparency by providing real-time visibility into procurement processes, enabling stakeholders, to include the public, to monitor progress and track activities. Second, it enhanced accountability by automating workflows, reducing the chances of errors and delays, and ensuring that procurement processes were executed consistently and according to established procedures. Third, it improved efficiency by streamlining processes and eliminating manual tasks, resulting in faster turnaround times and improved productivity. Additionally, the use of Smartsheet facilitated data-driven decision-making by providing accurate and up-to-date information for analysis and reporting, aligning with the principle of evidence-based procurement practices.

In conclusion, the implementation of the Smartsheet workflow automation solution at OCPS resulted in achieving the expected results, with unintended positive consequences, and advanced alignment with the Values and Guiding Principles of Public Procurement by promoting transparency, accountability, and efficiency in procurement processes. The identified opportunities for alignment were successfully achieved, leading to the successful execution of the change.

Evaluation Criteria #4:

1. Measurable results achieved: The implementation of the Smartsheet workflow automation solution at OCPS resulted in several measurable results, including:

- Reduction in procurement process cycle time by 30%, resulting in faster procurement activities and improved project timelines.
- Increase in process accuracy, with a 40% reduction in errors due to the automation of manual tasks and data validation.
- Enhanced transparency and visibility into procurement processes, with real-time tracking and reporting of

procurement activities, leading to improved decision-making and accountability.

- Improved collaboration among departments, with streamlined workflows and standardized processes, resulting in better communication and coordination among team members.

2. Lessons learned: The following lessons learned from the implementation of the Smartsheet workflow automation solution at OCPS may be valuable to other agencies attempting a similar change:

- Engage stakeholders early: Involving stakeholders, including procurement staff, end-users, and IT personnel, early in the process is crucial for understanding their needs and gaining their buy-in. This ensures that the solution meets their requirements and addresses their pain points.
- Plan for change management: Change management is critical to ensure successful adoption of the new solution. Providing training, documentation, and ongoing support to users, and addressing any resistance to change, can help facilitate a smooth transition.
- Test and iterate: Conducting thorough testing and piloting of the solution before full-scale implementation can help identify and address any issues or challenges early on, reducing risks and ensuring a smooth go-live.

3. Plans for continued monitoring and/or improvements: OCPS plans to continue monitoring and evaluating the performance of the Smartsheet workflow automation solution through regular reviews and assessments. Feedback from end-users will be collected to identify any areas for improvement and make necessary adjustments to optimize the system further. Continuous improvement efforts will be undertaken to ensure that the solution remains effective and aligned with the changing needs of the agency.

4. Transferability of the process: The process followed at OCPS for implementing the Smartsheet workflow automation solution can be adopted by other agencies as a best practice. However, each agency may have unique requirements and considerations, and customization may be needed to suit their specific

needs. It is recommended to conduct a thorough analysis of the agency's existing processes, resources, and technology landscape before implementing any changes, and to engage stakeholders early in the process to ensure successful adoption.

Supporting documents showing the success of the program or process improvement outside your agency? - File #1:

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