# Day 2 – Process Improvement

Review the following business process and identify how you would go about making changes to improve the process.

**Purchase Requisition to Check**

1. Department identifies need to purchase item.  Department researches approximate costs for item.
2. The Department completes gets internal approval to purchase the item from Department head (Email approval)
3. The Department head contacts the purchasing department to discuss the item and determine how to buy the item (RFP, contract, bid, PO, etc.)
	1. If RFP, develop and release RFP.
	2. RFP’s are required for any purchase over $50,000
	3. Department and Procurement develop specifications, apply government’s standard contract terms and publish RFP. Emails are send to all vendors registering with the government under appropriate spending category
	4. Proposals are received and evaluated by both purchasing and the department staff.
	5. Purchasing does initial review (including reviews financials for proposers).
	6. Department selects the finalist
4. Contract terms are negotiated with the government’s attorney and final contract is placed on board agenda (and approve)
5. The Department enters the purchase requisition into the financial system initiating workflow approvals with division director, department head, budget, finance, and procurement.
6. Department logs requisition (to track budget) into Excel spreadsheet and sends to purchasing
7. Purchasing department checks with budget for funds availability
8. Purchasing sends vendor request to officially register with the government using the online self-service module
9. Purchasing department creates purchase order and forwards to Department
10. Department sends purchase order to vendor and updates excel spreadsheet
11. Vendor delivers items and department records receipt on spreadsheet
12. Vendor sends invoice to accounts payable
13. Accounts payable routes invoice to department for approval
14. Departments signs the invoice and forwards back to accounts payable
15. Accounts payable enters invoice information into accounting system
16. Accounts payable processes checks once per week
17. Accounts payable holds checks for vendors preferring manual pick up. Mails checks to other vendors.

Review the process steps listed above and identify areas where the overall process could be simplified or improved?

Respond to following questions at <https://pollev.com/gfoa>

**What changes do you recommend?**

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**How will you communicate those changes to impacted stakeholders?**

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**What challenges do you expect?**

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