

Improving the panel evaluation process for professional services contracting

March 2018

A partnership between the City Performance Lean Team and Central Contracts

PROBLEM STATEMENT

Central Contracts is responsible for managing the panel evaluation process for professional services contracting for the Controller's Office. When evaluating proposals, expert panelists score submissions to ensure a fair and transparent contracting process. But panel orientation and evaluation meetings are time-consuming and labor intensive for Central Contracts, panelists, and project teams and can lead to delays in executing contracts.



ROOT CAUSES OF PROBLEMS

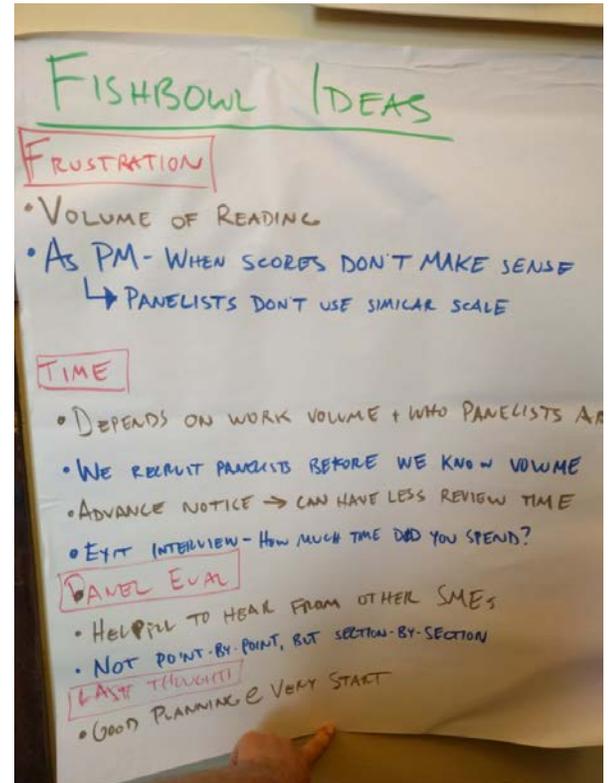
Using a panelist "fishbowl", "fishbone" diagrams, process mapping and other tools, the team determined that:

1. Panelists frequently misunderstand the evaluation rules;
2. Existing standard score sheets are not clear;
3. In-person processes can be replaced by email processes that would save time and costs;
4. Panelists can be given less time to evaluate proposals.

SOLUTIONS

In July 2016, Central Contracts worked with the City Performance Lean Team to develop improved standard score sheets and more efficient panel evaluation procedures. Over a series of several rapid improvement meetings, the project team improved the process by:

- Clarifying the instructions in the panelist score sheets and in the panelist email, which decreased panelist errors in scoring.
- Reformatting the score sheets in Excel to auto-calculate, which decreased the error count in score sheets.
- Using email processes to replace some in-person meetings, resulting in decreased staff touch time.
- Establishing shorter turnaround times for panelists to evaluate proposals.
- Eliminating the Panel Orientation group in-person meeting (when appropriate) to save time for experienced panelists and project teams.



The project team estimated that these improvements reduced the amount of time staff spent working on the Panel Evaluation process by approximately 30%. After implementing their improvement ideas for the panel evaluation score sheets, the project team increased score sheet accuracy from 80% to 95%.

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