

Water Quality Program Financial Assistance Council Meeting



Time	Item	Presenter
10:00	Welcome and Introductions	
10:05	FMS Staff Updates	Jeff Nejedly
10:10	Budget update	Kim Wager
10:20	SRF Discussion - Administrative Charge Bill	Jeff Nejedly
10:50	Funding Cycle Update-Applicant list	Daniel Thompson/Dave Dunn
11:20	SERP Update	Alice Rubin
12:00	Lunch	
1:00	Stormwater Grants Update	Pat Brommer
1:15	Ecology Lean: Grants and Loans and EAGL (Ecology Administration of Grants and Loans) Update	Shelly McMurry
2:10	Marketing Plan Development	Shelly McMurry
2:30	Roundtable updates from members	All

Ecology Lean Grant and Loan



**IMPROVING CONSISTENCY AND
STREAMLINE AGENCY GRANT AND LOAN
MANAGEMENT PROGRAMS**

Background



Lean event: Objectives and Measures



Objectives	Performance Measures
Identify standard work	Standard work identified
Document standard work	Standard work documented
Eliminate Waste <ul style="list-style-type: none">• Reduce idle time by 20%• Reduce the number of steps by 5%	<ul style="list-style-type: none">• Idle time• Number of steps
Identify project management points in the process	Project management points in the process identified
Establish standard process measures.	Establish standard process measures.

The Team



Bernadette Williams, ITSO

Cathy Hubbard, SEA

Al Josephy, WR OCR

Brandy Campbell, Fiscal

Lydia Lindwall, W2R

Gerald Tousley, Thurston County

Debbie Iness, Fiscal

Taisa Welhasch, W2R

Nicki Upson, Thurston County

Sophal Espiritu, Fiscal

Jessica Moore, W2R

Melody Tereski, Lower Columbia Fish
Recovery Board

Leslie Edwards, Fiscal

Alice Rubin, WQ

Steve Baruso, King County

Mark Gaffney, Fiscal

David Dunn, WQ

Cecilia Gardener, Commerce

Cheryl Witt, AQ

Tammy Riddell, WQ

What we heard from our clients!



- **What works**
- **What's not working**
- **What would they like to see**

The Process



Action Items - Application Phase



- **Create an on-line application portal (EAGL).**
- **Create a standard base application format.**
- **Build “pre-screening” for eligibility and completeness into the online application (EAGL).**
- **Automate reviewer/scorer work flows (EAGL).**

Action Items – Agreement Phase



- **Standardize program work flows/routers using lean principles.**
- **Automate routing and eliminate face sheets (EAGL).**
- **Develop standard agency and program specific agreement templates.**
- **Automate the creation of the agreement document. (EAGL).**

Action Items - Progress Reporting and Payment Phase



- **Standardize payment request and progress report forms.**
- **Electronic submittal of payment requests and progress reports (EAGL)**
 - Automate reminders/past due notifications
 - Provide for electronic signatures

Action Items – Close Out Phase



- **Standardize close out process**
- **Standardize reporting**
 - Final Progress Report – Recipient documents achievements
 - Final Closeout Document– Ecology evaluates recipient performance under the agreement.

Action Items (All Phases)



- Store grant and loan documents in one central electronic repository (EAGL).
- Evaluate all “shadow systems” and determine what data needs to be included in EAGL.
- Create a consistent glossary of terms.
- Develop a communication plan and evaluate web presence.
- Formalize EGG (Ecology Grant and loan Group)

Future State – Critical Success Factors



- **Management support and focus.**
- **Time, budget, and resources.**
- **Fiscal participation and leadership.**
- **Clear policies and procedures.**
- **Follow through on the implementation plan**
- **Engaged Lean participant team**
- **Get buy in**
- **Implement EAGL.**

Future State - Benefits



- **More effectively meeting the needs of our clients**
- **Better cross program communication and collaboration**
- **Streamlined process**
- **More accountability**
- **Ecology would set a good example**

Next Steps



- **Convene implementation teams**
 - Cross programmatic
 - Create detailed work plans
- **Track progress**
 - 30:60:90 day progress reports
- **Implement**

Ecology Administration of Grants and Loans (EAGL)



- **In Scope**

- Online applications, payment requests and progress reports
- Automated generation of documents
- Workflow
- Fund allocation management
- Canned and ad-hoc reporting
- Integration with CGP

- **Out of Scope**

- No **CONTRACTS**
- Financial transactions processing
- Generation of amortization schedules
- Interface with AFRS

Who to Contact?



- **Lean implementation lead**
 - Shelly McMurry, WQ, shelly.mcmurry@ecy.wa.gov or 360-407-7132
- **EAGL project lead**
 - Bernadette Williams, ITSO, bernadette.williams@ecy.wa.gov or 360-407-6887

SRF Marketing Plan Development



- **Why a marketing plan?**
- **Develop strategies by project types**
 - Wastewater Facilities
 - Stormwater low impact development
 - Septic repair and replacement
 - Agricultural practices (Irrigation efficiency, direct seed/no till)
 - Riparian restoration and protection
 - Land acquisition for water quality protection

Marketing Plan Outline



- Who is our potential client?
- What are their attitudes/beliefs towards SRF?
- What are their barriers to applying for or receiving loan funds?
- What is the competition?
- How do they get their information? What associations are they part of?
- Strategy to reach them: