

Understanding OPRE Planning Process

Division Director Perspective

Tentative Submitters

- CORs
- Team Leaders

Tentative Approvers

- Division Directors

Questions

Intro

- Can you tell us a little about yourself and what you do at OPRE?
- What is your division?

Current Process

- How do you currently review/approve agreements to become a part of the OPRE budget?
- How do you receive agreements to review?
 - Who usually submits agreements to review?
- Are there other people involved in reviewing/approving an agreement?
 - What happens if the Division Director is unavailable to review/approve (traveling, sick, etc)?
- How do you notify someone an agreement has been approved?
 - Who needs to be notified?
- Are there any other communications that need to take place?
- How do you request updates or edits when needed? And how do you track changes (if needed)?
- What information is necessary to approve an agreement?
 - If we look at our current design for creating an agreement, is anything missing?
- What do you look for when approving an agreement?
 - What information do you need to check or validate? How do you do that?
- What is the most challenging part about reviewing/approving agreements to become a part of the budget?

Future Process

- What would be your ideal process for reviewing/approving an agreement?
 - What parts should stay the same and what could be improved?

- What checks/validation would you want to be automated?
 - For example: checking amounts against available funds in a CAN and showing the amount remaining (+/-) or showing what other agreements OPRE staff are managing so you can balance people's time
- Are there any timelines we should put in place? (submissions due before x)
- What notifications or alerts do you think would be helpful?
- How would you like to receive notifications of agreements awaiting approval?
- Are there any metrics you would like to see related to approving agreements?
 - For example: % budget allocated, \$ funding available, trends in money being allocated (increase or decrease week over week), etc...

Closing

- Anything else you think is important for us to consider?