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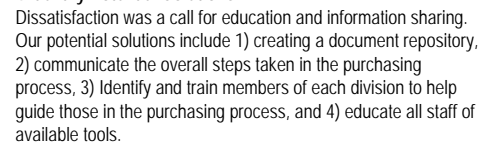
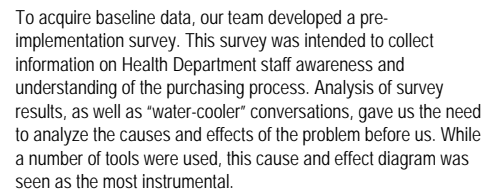
Identify an opportunity and Plan for Improvement

It became apparent that Health Department staff lacked an understanding of the purchasing process. This resulted in staff being frustrated with the process, and a number of Charter 57 violations. These violations were not suspect of ill intentions, so an underlying reason needed to be identified. Many staff supported the need to address this issue, and it was outlined by the QI team as a priority.

A talented group of staff members were assembled to work on this project. Staff included those who work with the purchasing processes regularly and members of the Quality Improvement team. A work plan and timeline were created and regular meetings were scheduled. A Gantt chart was created and added to as new tasks developed.

To develop clear instructions and guidance on the major steps of the purchasing process. All clarification/education actions will be implemented by December 2010. Measurements will be made through a simple satisfaction and knowledge survey of various Health Department staff who deal with major purchases. The target audience for these actions will be staff identified by division directors who have a key role in the purchasing process.

A high-level flow chart was created showing the major steps of the purchasing process, as viewed by Health Department staff. While the purchasing process can be long and tedious, and has many variables in it, our teams' approach was to keep the process as simple as possible. We began by identifying the basic steps, from the point of view of the average Health Department staff member, who is looking to begin the purchasing process.



The team decided to address the first three solutions identified, but instead of educating *all* staff, we focused on specific division representation.

We expect survey results (knowledge and satisfaction) to improve as more staff have a chance to utilize the document repository. Our predictions are the following:

1. If we create a Document Repository, then knowledge of where to turn for clarification will increase.
2. If we share a flow chart and discuss new tools with staff, then more staff will better understand the overall purchasing process.
3. If we identify members of divisions to train in researching purchasing information, then satisfaction with the process will increase.

DO
Test the Theory for Improvement

The process for testing the theory included the actual creation of the Document Repository, along with the education and training of various department staff through division meeting presentations.

Once staff were given time to review the information provided and view the high-level flow chart of the purchasing process, time was allowed to elapse, and they were presented a post-implementation survey. This survey was identical to the previous one. Not everyone who took the second survey was able to attend the educational sessions. There was also error in the data in that more people took the survey who did not regularly participate in the purchasing process.

Study

Use Data to Study Results of the Test

The new survey data was compared against the previous baseline data. The new data showed very few changes in many of the survey answers. We first will look at survey participation. We must note that numbers and division percentages changed, but we still feel the results are valid.

Average number of purchases made per month	Pre-Survey	Post-Survey
Zero	14 43.8%	9 40.9%
1 to 5	16 50.0%	11 50.0%
6 to 10	0 0.0%	1 4.5%
10+	2 6.3%	1 4.5%
Total Responses:	32 100.0%	22 100.0%

The biggest change from the pre survey is found in our attempts to educate and change employee expectation with time-lines, when making purchases. You can see the two different questions below that represent two types of purchases (formal bid and informal bid). Highlighted in red are the acceptable answers.

When you are making \$20,000 purchase, how long do you expect the entire process to take from start (filling out a purchase request form) to finish (item has been ordered and is on its way).

When you are making \$2,000 purchase, how long do you expect the entire process to take from start (filling out a purchase request form) to finish (item has been ordered and is on its way).

Answers	Pre-Survey	Post-Survey	
Less than 1 week	17.2%	9.5%	
1 week	10.3%	23.6%	
2-3 weeks	34.5%	33.3%	Acceptable answers
4-6 weeks	27.6%	23.6%	
2-3 months	6.9%	4.8%	
4+ months	3.4%	4.8%	

We make note that the educational portion of our project was sharing the flow-chart with staff and working on educating them on *why* the purchasing process is confusing. The flow chart was the most essential part in curbing expectations of the process and will continue to be used when staff have questions about the process. There is still much work to do. Overall results showed Theory two to be true, and theory one and three to be untrue. Reasons for this are explained in step 8.

ACT
Standardize the Improvement and
Establish Future Plans

The newly created Document Repository will continue to grow as new information and documents are created. Staff asked for a one-stop location for information and one now exists, however, the information is, at times, still confusing.

The number one lesson learned from the project was our plan to focus on individuals who actively make purchases for both the surveys and the training, was not carried out as we had hoped. If we had been able to narrowly direct the survey to only those who participated in the educational sessions, we believe all theories would have proved true.

The survey results still show that more education is needed for staff, as well as more generic outlines for the process. With the frustrations of many staff members still existing, there are a number of recommendations the team has for future projects. The main recommendation will be to walk a number of purchases through the flow chart to document "issues" that arise, and set up projects to address various items. This was one of the original goals of the team but is a long-term project that requires a lot of outside participation and cooperation.