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Human-Centered Problem Statement:

The administrative team needs a streamlined procurement management process because the current process is time-consuming, complex and prone to errors, leading to frustration, delays, and increased workload for them.

Project Abstract

PPSC is a state college offering vocational training, associate and bachelor's degrees, and industry certificates. Medical Sciences is one of the multiple instructional divisions within the institution, housing all allied health and nursing programs.

The administrative and leadership team for the Medical Sciences Division includes the Dean, two Associate Deans, the Assistant to the Dean, 4 Instructional Coordinators, and two administrative assistants. This team is in charge of creating, managing, and streamlining processes and process-improvement opportunities for the logistical operations and management of the division.

The Medical Sciences Division has room for process-improvements and training/learning opportunities when it comes to their procurement management process. Currently, processes are not organized for optimal organization or efficiency. Additionally, staff skills and experience have a wide range of variance, from brand-new to tenured.

This report brief will highlight data collection and knowledge gained about the learners and their challenges, in addition to review of the recommended learning solution and how it was selected. Finally, a prototype of the learning solution will be demoed, and outcomes of prototype testing will be discussed. Future steps for additional prototype iterations and implementation of the proposed learning solution will be provided.

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Data Collection

When assessing the needs and scope for this project, the learning opportunity for increased proficiency in procurement management was raised for various reasons. Reasons identified included disorganized process, barriers to optimal efficiencies, limitations in staff experiences, and varying goals and priorities of multiple departments. Additional concerns included that workloads are imbalanced between individuals and technology accessibility varies per staff members.

Completion of the empathy report showed frustration amongst administrative staff, who are the identified learners for this project. They identified the current procurement process as frustrating and time consuming, inefficient, and with multiple gaps in processes. Additionally, not everyone is on the same page with correct processes, leading to additional lag times and duplicated work. Their concerns reflected a need for organization, efficiency, streamlined processes, and increased training for consistency.

Using the 5 whys, the root cause of the problem was investigated:

1. Staff are frustrated with the current procurement process. Why?
2. The process is inefficient and time-consuming. Why?
3. There are too many steps and too many people involved. Why?
4. Processes are outdated. Why?
5. Understaffing and resistance to change has prevented implementation of streamlined processes.

Without an overhaul and update to the process, the inefficiencies will remain. A current argument for cause of the issue is understaffing, however, even with more people in the mix, the disorganized and multistep processes will still be time-consuming and error prone. Research of the issue shows that the process needs less people involved and less necessary steps to ensure promptness of processing and increased accuracy. Additionally, simplified

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training on the process, breaking it down into simple steps, is essential. With change and retraining, the administrative team will benefit from decreased stress and workload, less errors in processing, and less delays in receipt of necessary educational equipment and supplies. Additionally, improved processes will ensure that the institution is compliant with regulations regarding federal and state dollar spending, procurement item tracking, and payment processing requirements.

Identified resources needed to assist in the overhaul of this process include the administrative team, department chairs, and the institution's IT Department. The administrative team and department chairs can work together to identify core challenges within the process and brainstorm ideas for improvement, while the IT Department can assist in creating online or e-forms to streamline processing requests and item tracking. The administrative team, along with the chairs, will be able to pilot new system implementations and tweak until efficient and manageable.

Defining potential barriers was a critical step in the define process as well. A key consideration includes the current staff workloads as the primary barrier to success. Staff and department chairs alike, in addition to all individuals in the IT Department, procurement team, and finance office, are understaffed and stretched thin. Finding the time needed for process analysis, ideation and implementation, and prototype testing may be a challenge.

Learning Solution

During the ideation phase of this project, the technique of braindumping was used to consider all solution options and review all angles of the challenges at hand. Similar to brainstorming or mindmapping, this technique allows for constant flow of all ideas without barrier consideration. Ultimately it was decided that the ideal solution to this challenge is to develop a cohesive automated process and provide updated training.

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To streamline the procurement management process, it needs to be made clear and concise. Removal of barriers is key, to include limited opportunities to “choose the wrong path” or form or processing agent. Additionally, combining the efforts into one application will increase efficiency and decrease delay. The overall project goal is to combine current steps (paper forms, inked signatures, multiple office involvement) into one electronic e-routed document. By building the e-form out thoughtfully, errors will be decreased by collecting the right data the first time, routing to the right people, and collecting the right signatures in a timely fashion. With this change, an innovative learning solution will be necessary to bring everyone up to speed and ensure successful implementation. To do this, a microlearning course will be used to aid learners and bridge this gap and upskill the workforce.

Microlearning – 7taps Micro-Course

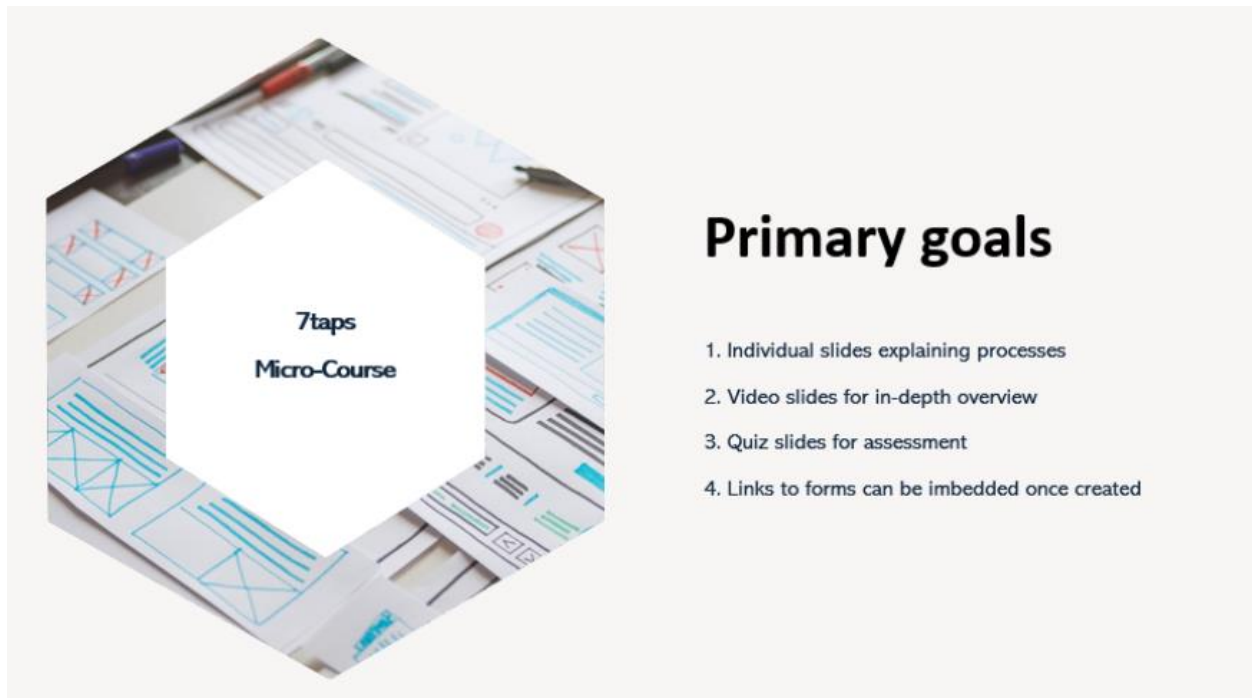
A micro-course using the 7taps platform will be efficient and easy to update as changes need to be made. Additionally, it is something that staff can complete quickly and routinely as needed. While small in size and time commitment, the content can be robust yet specific, target key tasks necessary to learn, and assess learner comprehension. Learning can be done individually or as a group, synchronously or asynchronously, for both new and experienced staff – all of which are key benefits.

This solution aligns with our learners needs because they need something quick and effective. Already overtasked and understaffed, there is not enough time for lengthy classes or coursework, yet training needs to be comprehensive and complete. Additionally, they are frequently interrupted or multi-tasking, requiring a solution that can be paused and revisited on their own time. This solution will be able to meet all of these needs, while offering robust enough content to ensure necessary learning can take place.

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Prototype

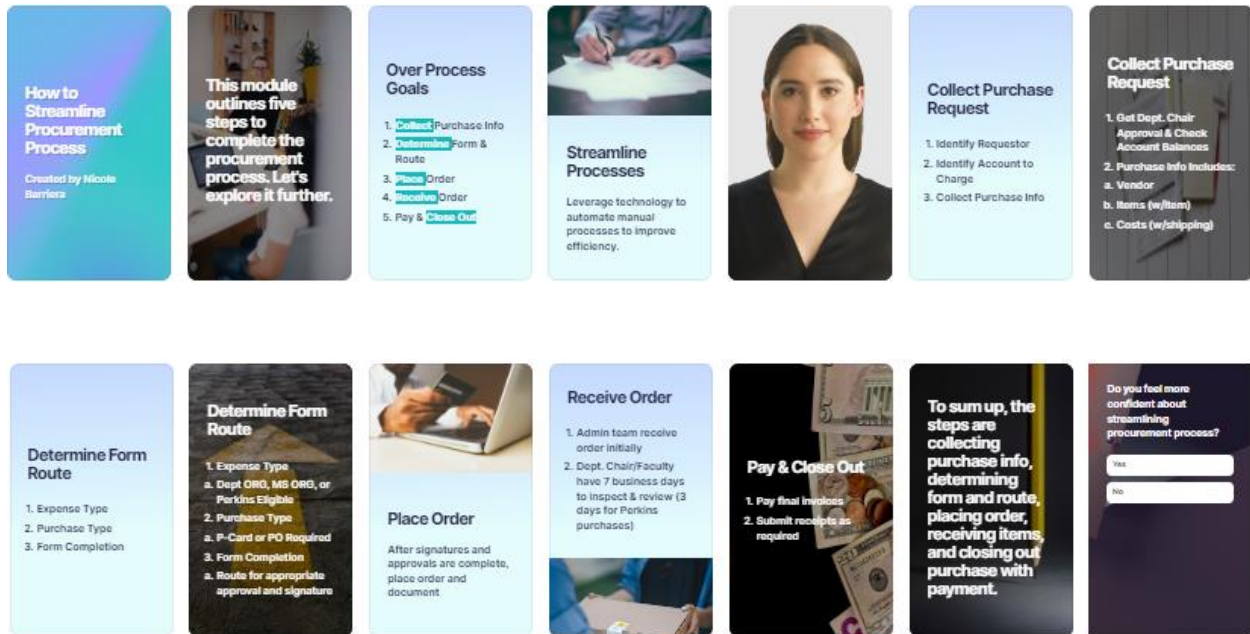
The prototype consists of a 14 slide micro-learning course that can be completed on a mobile device or desktop. The module will outline the steps to complete the procurement process and will have imbedded links to e-forms once they are created. A video overview of initiating the process will be helpful for the learner to have a foundational understanding prior to beginning the step-by-step tasks.



This tool will be used as a follow-up training tool for learners after having completed initial training and accessing the necessary forms. It will also be designed to use as a refresher for staff that do not complete the task frequently and may forget steps, or just need reminder on key pieces.

Prototype here: <https://app.7taps.com/j5JcPeGFML>

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Testing Outcomes and Future Steps

Testing was completed for this first round with only a small panel of end users. Currently the team is unavailable to meet in person as they are working remotely in various states/countries, so testing was completed remotely, asynchronously. An overview of the tool was provided, along with a link to the online micro-course. Testers were asked to provide feedback for the following questions as they completed their assessment:

Questions:

Initial thoughts? How does the tool make you feel?

Do you think this tool is meaningful for the task at hand, or would something else work better?

What can be done better? Improved upon?

Feedback and criticisms?

Feedback was mostly positive, however the tool is lacking in robust content preferred at this level. Detailed feedback responses include:

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	Initial thoughts? How does the tool make you feel?	Do you think this tool is meaningful for the task at hand, or would something else work better?	What can be done better? Improved upon?	Feedback and criticisms?
Assessor #1	<p>Feels efficient, like how quick it is to go through it (start to finish, quick)</p> <p>Good overview and reminder for experienced staff, maybe not enough info for training new personnel?</p>	<p>More details needed, and may feel better once links are imbedded</p> <p>Additional video at the front end for more details that will be covered through course would be helpful, instead of process overview</p>	<p>More video clips throughout – maybe after each step is covered?</p> <p>Competency checks throughout</p> <p>More details/slides</p> <p>A handout or infographic to accompany this</p>	<p>See previous comments</p>
Assessor #2	<p>Like it, easy to use</p> <p>Seems lacking in info, too simplified</p> <p>Doesn't seem to cover one topic thoroughly – a little bit on “streamlining” and a little on “action steps”; maybe 2 separate modules would be ideal, with more on detail on each separate part?</p>	<p>Meaningful for recapping or refreshing, not robust or detailed enough to be the primary or singular training</p> <p>Would work well adjunct to a more comprehensive training, or if made more comprehensive itself</p>	<p>More slides, more info</p> <p>Would prefer be able to see all slides at once (?)</p> <p>Wants justifications and reasoning for detailed steps</p>	<p>“The AI lady was a nice touch”</p> <p>Too simplified</p>
Assessor #3	<p>Easy and simple, fast and efficient</p> <p>Need more explanations of some info as a new hire</p>	<p>Helpful overview, not helpful without thorough initial training first</p> <p>Missing details, maybe there is a video or supplemental module to complete first?</p>	<p>This is great but I just need a little more information – I think this is for people who already have a baseline, while I have a lot of knowledge gaps still, so I am not following all of these steps exactly</p>	<p>Its really cool and I think it will be helpful once I learn more about the foundational pieces</p>

In consideration of the assessors’ feedback, revisions need to be made. Potential revisions for consideration:

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1. Use this training as adjunct and/or completion and refresher training only. Build out a foundation tool for a more robust and comprehensive module – potentially a video or scenario-based model.
2. Split this concept into 2 different micro-courses, one for streamlining and automation training and the other specific to process tasks. Build out each to be more detailed and informational, adding in additional key elements noted in assessor feedback (such as additional videos and links to online resources).
3. Keep this training as a singular source but build it out to be wider and deeper in content and coverages.

Determining which route to take moving forward will require feedback from the client and assessors. Additionally, a review of resources and allocated time for the project will also need to be considered. Once determined, the revised tool(s) can be created and provided to the assessors for additional review and comment.

Next steps include, with potential timeline:

