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| Course Administration Processes |  | **ADMIN**(Professional Services - Staff & Educational Development) |
| The RATIONALE What prompted you to participate in the PPR workshop? |
| **Purpose** | The purpose of this participative process review (PPR) was to increase efficiency of the course administration process, which supports the suite of programmes delivered by a staff and educational development department.The department comprised a team of admin staff and staff development officers; by participating in this process, it was also intended to increase cohesion and for the participants to learn how to reproduce PPRs for other processes. |
| **Stakes** | Over several years, individuals had developed their own methods for carrying out their tasks within this process. This caused problems when courses needed to be delivered by someone else and it also hindered additional support at times of high workload. It was important to communicate the purpose of the PPR in advance of the workshop to ensure that the participants were aware they were invited as experts of their part of the process. It was not the intention to “check up on them”. In order to make the most progress possible during the workshop, the participant had to feel they could be critical of the process without threat or judgement. |
| **Objectives** | * To share good practice and develop a core administration process for short courses, which can be used as a standard approach, adopted by all admin team members.
* To create a more efficient and streamlined course administration process which is ‘owned’ by all staff members who contributed.
* To gain a greater understanding of individual roles and responsibilities, as well as sharing experience of challenges and issues.
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| The PROBLEM What was the issue, challenge, opportunity the review focused on? |
| **Context** | Six staff members provide the administration and co-ordination for the academic and professional practice courses on behalf of the department. They are assigned specific courses to arrange.Different approaches to organising these courses have developed over time; staff members also work in different rooms, which had contributed to the difficulty in managing workload. |
| **Need** | To distribute the workload more evenly, it was the aim of the PPR to ensure that there was a single, uniform process through which all staff members would organise courses. During the workshop, the participants identified common elements between individualised processes. The members of the group shared aspects of booking rooms and catering, dealing with applications and liaising with course tutors, resulting in a unified agreed process. |
| **Participants** | * *Head of Centre (process owner/sponsor)*
* *Six support staff (course admin)*
* *Three staff development officers (course delivery)*
* *A course admin database officer*
* *[Client feedback before/after]*
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| The SOLUTION What did participating in the process review achieve for you? |
| **Key understandings** | * Although the processes for organising courses were broadly similar, individual staff members had their own methods for completing tasks within those processes: for example, the participants worked to different timescales when handling enquiries.
* There were initial disagreements over the best method for completing these tasks. The workshop offered the opportunity to debate the merits of alternative methods. These debates resulted in greater consensus and quicker decisions during the design of a new process.
* The workshop provided forum to discuss forthcoming changes to the department that may affect the process, such as the relocation of the department.
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| **Intended outcomes** | * To unify and standardise a common admin process, shared across the department.
* To relieve workload and time pressure by giving staff members the versatility to work on organising other courses.
* To give the manager more scope to deploy staff resources more efficiently and dynamically, responding to need.
* To encourage collaboration, discussion and openness between colleagues.
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| **Light bulb moments** | Differing timescales and tasks within organising courses were found to be unnecessary and did not yield better results. For example:* Although catering needs to be booked 48 hours in advance, some took orders two weeks before and checked the order again a week later.
* Some reminders for courses were sent a week before the event, which was too late for a participant to cancel.
* Because bookings were taken through a variety of methods, some were not recorded or had errors.
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| **PPR techniques** | The SWOT analysis was a useful and productive exercise for sharing experiences of the old process.The process mapping activity was particularly useful for designing the new process.* *“This really got the conversation going; once people started sitting down and sticking those post-it notes down and saying, ‘Well that goes here’, ‘No it doesn’t that goes here’: it's those conversations that were so valuable.”*
* *“I liked that we used a large piece of paper that showed the mapping-out process in its entirety; it highlighted how much work is involved.”*
* *“The visual nature of this really helped everyone understand what was involved in the process [and] what happened when.”*
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| **Actions / next steps** | The participants agreed to take bookings electronically and set uniform timescales. This also offered a standard expectation for customers and a rationale to audit and evaluate the new process.The PPR workshop participants will meet again over the summer to plan the next stages of implementing the new process. |
| The RESULT What are the tangible outcomes & impact? |
| **Immediate changes** | There was an existing database for handling bookings and recording attendance statistics. The PPR highlighted how useful it was and how its use might be extended. One participant suggested improvements that could be made to the bookings system. |
| **Improvements made** | There have been significant improvements to course descriptions, which now contain more administrative details to assist with organising these events. With information pertaining to required handouts, room requests and course presenter contracts, for example, a lot of time is saved from seeking this information every time such a course is run. |
| **Evidence of benefits** | The PPR was focussed on the internal processes that customers do not usually experience. One valued outcome of running the workshop was a renewed appreciation of the the admin staff role in organising the courses. The changes to the process will relate to their efficiency; they will save their time and workload, and reduce stress.Once online booking for courses is implemented, there will be external stakeholders to involve in the process and from whom to obtain feedback.While these changes mean that existing workload could be managed by fewer people, the PPR came at a time of increasing demand for courses and, therefore, there is a greater capacity to organise such courses.  |
| **Unintended & unexpected** | Morale had been quite low in the department due to the pressure that staff members were experiencing at the time. The participants found the workshop empowering and unifying; they felt that progress was being made. They felt more valued and it has prompted more team-building activities. |
| **Longer term impact indicators** | * *Staff performance:* There is anticipation of improved staff performance as a result of increased staff morale.
* *Workload efficiency:* The new process should eliminate peaks and troughs in workload since the burden can be shared and divided more evenly between staff members.
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| Lessons learned - what experience has been gained? |
| **Prior experience** | There have been “LEAN” reviews conducted in the department before. While these examined large, cross-department processes, the PPR was considered simpler and quicker to grasp and use, focussing on a single, internal process. |
| **Participative experience** | The participants learned more about each other and noted the developing interactions between members of the team. It transpired that the team agreed on many issues and were happy for changes to be made.They also observed that some participants were, initially, more willing to engage with change than others. Part of the success of this PPR was due to the management and teamwork in handling these differences; consequently there were stark transformations in the level of engagement as the workshop developed. |
| **Personal skills / application to other processes** | *"The PPR provided a more formalised structure, and crystallised some of the activities/stages involved in process reviews for me."* *"Good refresher on process reviews, and in particular what you need to pay attention to when preparing for a process review, what information you need to elicit etc. in order to really understand the context."* *"I feel very empowered from this. I’ve got a team here who are experienced facilitators anyhow, so it doesn't scare them. But now we've got an ABC for how to do process review in this particular format and all the backup information that's going to be available through the website as well. I’d be very happy to pick up and run it with somebody.*" |
| **Success tips** | * Although it is tempting to make changes to large, complex processes in the first instance, gaining experience by addressing a manageable process change is empowering and provides motivation and experience for those larger processes.
* A PPR might not work so well with processes that depend on external, conflicting processes that are beyond the control of the workshop team.
* Reviewing the Terms of Reference collectively as a group allowed a wider input into the scope of the review and shared ownership of the change. The culture of shared ownership and collaboration made process change enjoyable and constructive.
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