



Quality Improvement Story Board

Purchasing Process Team Members:
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PLAN

Getting Started—(Understanding the Problem)

QI training was held in September 2015 for leadership and program management staff. QI ideas were generated and prioritized by participants. Two teams were formed to address the top 2 identified issues.

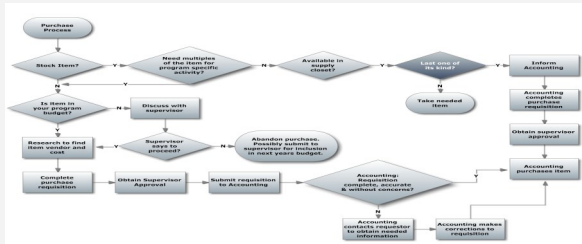
Aim Statement

An opportunity exists to improve the supply purchasing process beginning with the need of a supply and ending with the purchase of the most cost effective supply. This effort should improve program costs and employee knowledge of the process for the health department and staff. This process is important to work on now to increase efficiency and consistency.

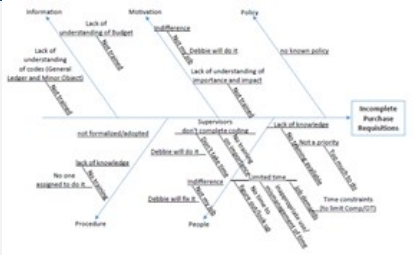
Baseline measurement: decrease in # of incomplete purchase requisitions submitted to accounting.

Examine the Current Approach

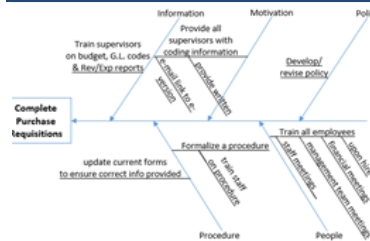
Looking at the current approach, the team found that there was inconsistency in following the process and purchase requisitions were often submitted incomplete.



Identify Potential Solutions



Improvement Theory



If staff are trained on proper purchase requisition (PR) procedure then complete & accurate PR's will be submitted to accounting, thereby increasing efficiency.

DO

Test the Theory

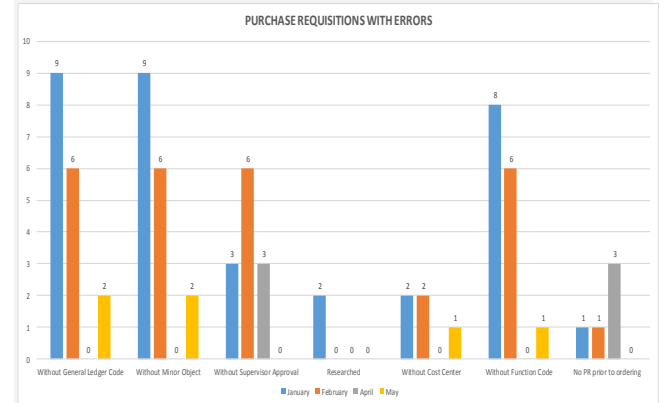
Baseline data was collected during the month of January 2016. On February 3, training was provided to staff during the management meeting on completion of purchase requisitions, proper coding and how purchases are reflected in the revenue/expense report. Several staff members commented on the training being beneficial and learning new information. Data was collected during the month of February following the training.

CHECK

Study the Results

The team compared the pre and post training data. Minimal improvement was noted and results actually worsened in requisitions having supervisor approval. Unfortunately, data was not collected on the total number of requisitions received and the number correct/incorrect. The team felt that retraining was needed due to the information not filtering down from management

to their staff. Results were presented at the next management meeting and retraining was done with each supervisor during their financial meeting. Data was collected during the month of April and May (thru the 24th). This time the total number of requisitions received and number correct was included in the tracking. The results of the data collection from each month can be seen in the table below.



86% of purchase requisitions were submitted correctly in April and 95% May 1st—24th.

ACT

Standardize or Develop New Theory

Based on the results, the team's improvement theory was correct. The issues in this area were due to a lack of training of staff on the proper process. To standardize the process the flowchart developed by the team will be distributed to management staff to share with their staff. A suggestion will be made to the Director to incorporate the flow chart into the purchasing policy upon revision.

Future Plans

Include training in new supervisor training. If accounting notices a decline in complete requisitions being submitted, data will be collected and shared in management meetings with issues addressed as indicated.