(Edited version for privacy)

Efficiency in Motion

Process Improvement of Efficiency at ********
UNCW MIT 502 Spring 2019
by Carrie Wright

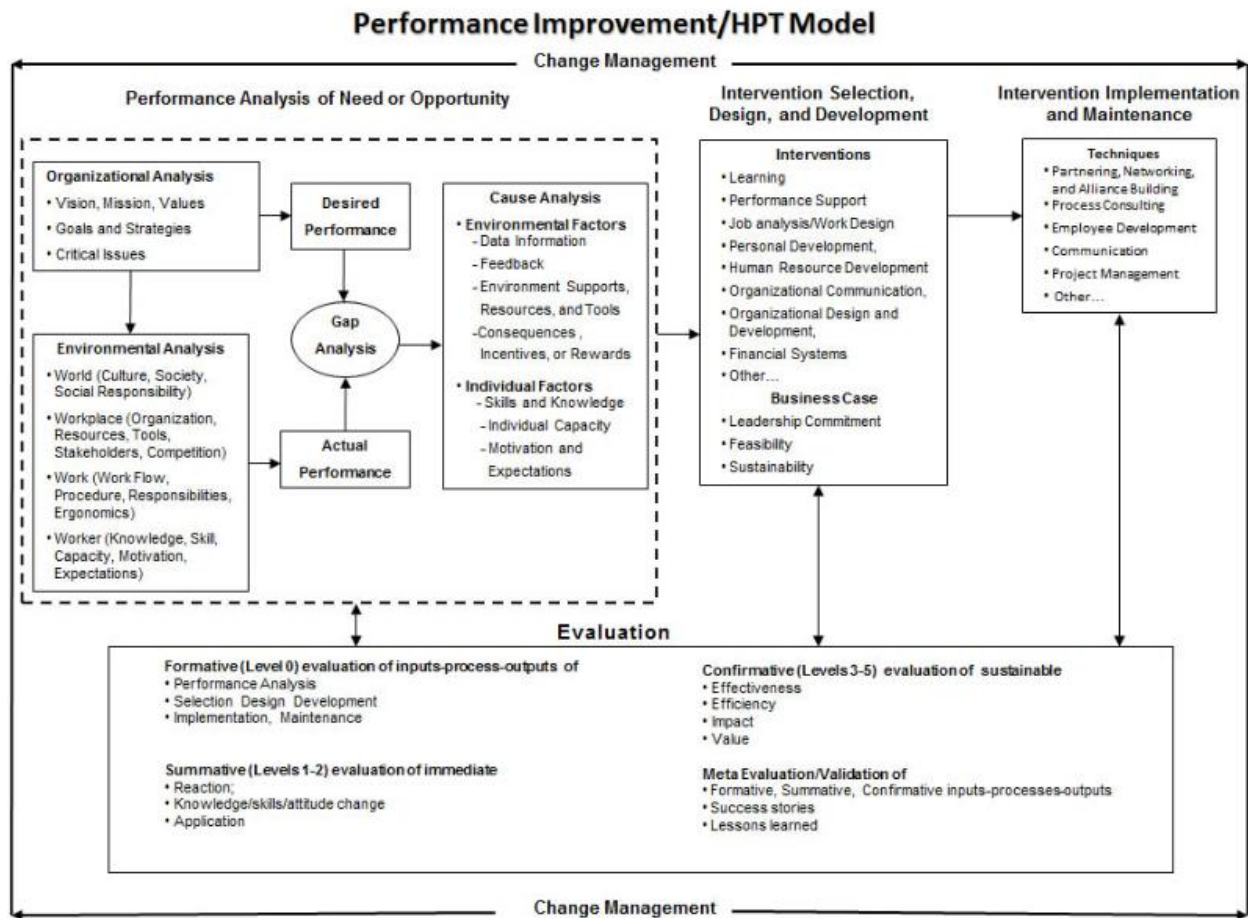# Table of Contents

Executive Summary

This analysis was created for ***************** located at UNCW in Wilmington. They provide executive education, professional development, and economic services for UNCW and clients within the community, mostly in Wilmington, but they do occasionally have clients in other parts of the state of North Carolina. In providing services for these clients, they have a "Topsheet" form of different tasks that are needed to be completed at different stages of the development of the products. This form is placed on the top cover of each client's folder. As this process has many moving parts and a myriad of tasks, key tasks tend to get missed being completed at times. He did not feel this was the best method as tasks are getting missed and wanted another perception on how to tweak their systems and practices in hopes of having a better streamlined process.

HPT Model

The model that was applied in the analysis of this problem was the HPT (Human Performance Improvement) model which was created and expanded upon from the areas of educational technology and instructional technology. The "origins of HPT can be primarily traced back to the work of Thomas Gilbert, Geary Rummler, Karen Brethower, Roger Kaufman, Bob Mager, and Donald Tosti, Lloyd Homme and Joe Harless."

Performance Improvement/HPT Model

Change Management

Performance Analysis of Need or Opportunity

Intervention Selection, Design, and Development

Intervention Implementation and Maintenance

Organizational Analysis
- Vision, Mission, Values
- Goals and Strategies
- Critical Issues

Desired Performance

Cause Analysis
- Environmental Factors
  - Data Information
  - Feedback
  - Environment Supports, Resources, and Tools
  - Consequences, Incentives, or Rewards
- Individual Factors
  - Skills and Knowledge
  - Individual Capacity
  - Motivation and Expectations

Gap Analysis

Environmental Analysis
- World (Culture, Society, Social Responsibility)
- Workplace (Organization, Resources, Tools, Stakeholders, Competition)
- Work (Work Flow, Procedure, Responsibilities, Ergonomics)
- Worker (Knowledge, Skill, Capacity, Motivation, Expectations)

Actual Performance

Interventions
- Learning
- Performance Support
- Job analysis/Work Design
- Personal Development,
- Human Resource Development
- Organizational Communication,
- Organizational Design and Development,
- Financial Systems
- Other...

Business Case
- Leadership Commitment
- Feasibility
- Sustainability

Techniques
- Partnering, Networking, and Alliance Building
- Process Consulting
- Employee Development
- Communication
- Project Management
- Other...

Evaluation

Formative (Level 0) evaluation of inputs-process-outputs of
- Performance Analysis
- Selection Design Development
- Implementation, Maintenance

Confirmative (Levels 3-5) evaluation of sustainable
- Effectiveness
- Efficiency
- Impact
- Value

Summative (Levels 1-2) evaluation of immediate
- Reaction;
- Knowledge/skills/attitude change
- Application

Meta Evaluation/Validation of
- Formative, Summative, Confirmative inputs-processes-outputs
- Success stories
- Lessons learned

Change Management

Efficiency in Motion

Problem Statement

I am completing this project for ***************** at UNC-W. Their office exists to deliver open enrollment professional education programs, which are marketed to the public, that cover topics in high demand; Project Management Certificate, Business Analytics Series, Emotional Intelligence, Trade & Export Bootcamp, Corporate Responsibility & Sustainability, etc. The ******** works with several subject matter experts to build these programs.

As this process has many moving parts and a myriad of tasks, key tasks tend to get missed being completed at times. Although, they do have a "Topsheet" [see Appendix A (an itemized checklist of the essential needs of each development program)] they do not feel this is the best method and would like another perception on how to tweak their systems and practices in hopes of having a better streamlined process.

Organizational Analysis

The ******** is part of UNCW located in Wilmington, NC. The staff at the ******** consists of ****** who provides economic impact studies ********who works part-time remotely managing the healthcare providers program, and from five to seven work study students/interns which varies throughout the year. They work together with different departments located on campus which consists of facilitators such as college faculty and independent contractors, working professionals, and a variety of public client organizations. They provide executive education and economic services.

Vision. "UNCW will be recognized for excellence in everything it does, for its global mindset and for its community engagement." (UNCW, 2019)

Mission.

******** Mission

The H. David and Diane ******** enhances the effectiveness of organizations through economic services, and executive and professional education. ***** through industry-university connections. UNCW's values of excellence, integrity, diversity, innovation, and community engagement provide the foundation and philosophy out of which flow the aspirations for the ********.

Executive & Professional Education

For over 30 years the ******** has served the business community by connecting our experts with business needs. Our programs reflect the strength of our faculty members in five areas: accounting, finance & economics, marketing, managing & leading, and operations & logistics. Most of our programs are facilitated by UNCW faculty members but we also draw on talented adjunct faculty members and local experts who have significant industry experience.

Economic Services

The center has a long history of providing economic forecasts and impact studies. A regional economist is on our staff. The Economic Outlook Conference, held annually in the fall, is one of our signature events. The year's upcoming regional and national forecasts are released at the conference and a panel of experts provide local insights.

(UNCW, 2019)

Values. UNCW's values of excellence, integrity, diversity, innovation, and community engagement provide the foundation and philosophy out of which flow the aspirations for the ********.

Goals. As stated in the ******** Catalog, "UNCW's ******** for Executive Education connects university experts with industry needs. We design our program to stay ahead of global business trends so that you leave equipped to drive positive change across your organization." (Center, 2018)

Strategies. According to *Fundamentals of Performance Improvement*, "Strategies are the organization's plan for growing the business. Strategies are needed to determine a market position, identify and nurture customers, compete in the global environment, focus on competitive advantage, achieve broad goals and objectives, and so on." (Van Tiem, 2012, p. 134)

Products and Services:

Provides executive education, professional development, and economic services with open enrollment and custom training programs. The open enrollment courses are offered twice a year in the spring and fall and are available to the public. Examples of the open enrollment programs are:

- Project Management Certificate
- Business Analytics Series
- Leading with Emotional Intelligence
- Managing Intercultural Conflict
- Leadership Essentials for Nurses (Online)
- Salesforce Administrator Certificate
- Export Bootcamp

Customer Groups or markets:

The ******** builds relationships by connecting industry leaders throughout the region with the wealth of knowledge at the **** at UNCW. The building of these relationships are vital to the success of the ******** in building custom tailor-made programs for the variety of companies and their workforce. "We endeavor to make our partnerships long-term investments with our clients so that together we monitor and evaluate the efficacy of our programming (********)." Some of the clients that they market to are:

- New Hanover Regional Medical Center
- Wilmington Health
- Thomas Construction Group
- Cape Fear Farm Credit
- New Hanover County
- Live Oak Bank
- NC Bankers Association

In addition to these customers, the ******** also provides economic services to:

- State of North Carolina by providing economic forecasts and impact studies
- Economic scorecards with various organizations
- Economic Fellowship with undergraduates majoring in economics

Competitive Advantage:

The only real competition they have locally is CFCC's Professional & Continuing Education, who mostly tailor to a different caliber of customer than the ********. So, the ******** has the competitive advantage locally. They face greater competition in other areas such as Raleigh-Durham area and the Research Triangle Park with NC State, UNC, and Duke. They have had some success in those areas though as they have contacts with Alumni from UNCW.

Product and market priorities:

Their emphasis when it comes to product and marketing strategies is with the online market, and they are searching for more opportunities to deliver programs with content that is not seen elsewhere online. They recently completed an online Leadership Essentials for Nurses program. One of the goals moving forward is to build long-term relationships with larger organizations in order to create repeat business opportunities. They not only focus on providing great products but also monitoring the positive effects of the programs they deliver. Following up with the customers and letting them know they are there and they care will enhance the relationships and provide greater business volume in the future.

Critical Issues. One critical issue that is hindering their goals at this time is that tasks are getting overlooked. When you are entertaining clients, you do not want to miss any steps such as letting them know the location of the meeting, where to park, making sure the catering has been arranged, etc.

Another critical issue I have assessed from my research interviews is not having enough full-time staff and a high turnover of part-time temporary workers. ******* both have an overfull load on them at this time and no matter how much they try to monitor every task to see that they are complete, you can only do so much.

Environmental Analysis

The world around the ******** is very diverse as it is part of UNCW and has many clients from a variety of workplaces located throughout North Carolina and on campus also. The

******** is located at UNCW in Wilmington, NC and they rely on the facilitators (the college's faculty and independent contractors), working professionals who attend their open enrollment courses, and client organizations who purchase custom executive education programming from the ********.

They provide executive education and economic services at UNC-W. Their office exists to deliver open enrollment professional education programs, which are marketed to the public, that cover topics in high demand such as; Project Management Certificate, Business Analytics Series, Emotional Intelligence, Trade & Export Bootcamp, Corporate Responsibility & Sustainability, etc. The ******** works with several subject matter experts to build these programs.

Gap Analysis

Desired State. The desired state is to have an office that is efficient where they do not miss accomplishing any of the tasks that are of great necessity to not only them but also to their clients.

Actual State. The actual state is that tasks are being missed, although according to ******** is not always the same thing each time. Listed below are some missed tasks that were mentioned by him.

- Room reservations
- Catering orders
- Failure to acquire temporary computer access for participants in time
- Designating parking areas
- Requesting temporary Epasses
- Ordering supplies in time
- Flip charts
- Easels
- Preferences for room setup
- AV requests

Performance Gap. The gap here is that 100% all tasks are not being completed which I have gathered may be due to several factors according to the information that was collected in examining the stated issue. The named tasks and number of tasks being missed varies from project to project so it is not feasible to measure it quantitatively or qualitatively. My suggestion would be for the ******** to have a way to collect this data to see which tasks are getting missed the most and focus on eliminating these problems one at a time, the tasks being missed the most first.

Purpose

The purpose of this project was to analyze why tasks were not being completed in hopes of improving the efficiency of the ********. These tasks which are mentioned above in the "actual state" are important factors in catering to their clients. To my knowledge through the information gathered from interviews with ********, these tasks vary in their frequency and there is not a way to measure which task is getting missed the most. Their office exists to deliver open enrollment professional education programs which are marketed to the public. They are part of a very diverse community embedded in a university setting and have clients not only on campus but also throughout the state of North Carolina. When they have scheduled meetings with clients, it is important that all the necessary tasks are completed such as parking, catering, venue, etc. to avoid disorder and confusion and to build confidence with the customers. In the next section, I will discuss the possible causes for the tasks not being accomplished 100% efficiently.

Cause Analysis

After speaking to **** about the problem he stated they were having, I decided to send him some follow up questions by email to assess this stated problem further to assist in getting down to the root cause of why important tasks were getting missed (See Table 1).

I then conducted a one-hour interview by phone with ******** to also obtain her input on the issues ******** had given, her opinion on the tasks being incomplete at times and what the possible causes could be, and more information on the flow of the work and the day-to-day processes at the ******** (See Table 2). This was followed up by a few more questions through email and text correspondence. She had also referred to another form they use called "Handoff to Operations" (See Appendix B). According to what is included on the form, it seems to be a list of tasks that they need to be handled by operations and is intended to eliminate any questions on what is needed.

As I gathered information on what was contributing to the problem of tasks getting missed, the main causes of this issue that stood out to me were there is not enough time or staff to handle the myriad of tasks that need to be accomplished. This results in a breakdown in correspondence because there is not enough time to follow up i.e., check emails, make phone calls, etc.

Causes
Not enough time
• follow up on correspondence   • conduct/follow up on all the tasks that are needed
Lack of resources
• full-time employees   • support for events
Poor communication between team and facilitators

- Due to having lack of time and resources to follow up on emails, phone calls, etc.

Workload is too heavy

- ******** is doing two jobs:
  - Interim Director
  - Client Relations
- ******** wears multiple hats
  - Operations Manager
  - Also performing Human Resources with constant training and management of 3 to 6 work study students and interns
  - Setting up for events; tables, chairs, etc.

Interventions/Feasibility

In researching ways to help manage the tasks and manage time at the ********, I searched for possible solutions on the internet for managing project tasks and also researched UNCW Campus Life Events to see if this was a possible option the ******** could use as a resource for events they arrange with clients. I also consulted two SME (subject matter experts) to obtain their recommendations.

This first SME I interviewed was Tom Baynes, who has been employed at Campus Life as a Technical Coordinator for 4 years. He is also two-thirds of the way through the Masters of Instructional Technology graduate program at UNCW, so he not only has knowledge of managing

Welcome to Campus Life Events and Reservations!

Are you looking to reserve space in Warwick, Burney, the Student Center or the Union? The Events and Reservations office can help you find the right location, provide the technical support appropriate for your needs, and connect you with the resources to ensure a successful event.

events but also managing projects in instructional technology/design. I was aware that this service existed on the UNCW campus and wanted to obtain more information from Tom as I

knew he had been employed there for several years. He stated that they do provide facilities for reservation which would include the set up of the room, i.e., chairs, tables, etc. This would be a great service for the ******** to utilize as I believe that most of the services would be free or low-cost and it would free up a lot of valuable time that can be used on other tasks. Amanda Johnson is the Assistant Director and you could set up an appointment with her for more details on the services offered. Links to more information are provided in the table below. He also suggested the use of e-learning modules for training and job aids to assist with training of work study and intern students.

The second SME I interviewed was Misty Mangiacapre. She obtained her master's in data analytics at NC State and a master's in chemistry at UNCW. She also has experience in teaching chemistry lab classes at UNCW. She is currently employed as a data analyst at Live Oak Bank in Wilmington. I was aware that her experiences involved teamwork and multitasking numerous projects at a time. She highly recommended using "asana", a project management software program. This is the tool that they use to manage their projects and she considers it a highly effective tool. Listed below are some of the features she likes about using Asana:

- Data driven allowing the ability to analyze where projects are being bottlenecked
- Content can be organized into teams
  - Projects
  - Tasks
    - Can be assigned to a specific team member with a set due date
    - When task is complete the team member checks it off
    - It has a mobile app allowing team members to keep track of tasks that have been assigned to them

After taking in all the information that was reviewed into consideration including the input from the SME's, the interventions I suggest are listed in the table below.

Interventions		
Selected Interventions	**Suggestions**	**Feasibility**
Learning Intervention • Online/e-Learning	• Create self-directed eLearning training modules for part-time workers such as work-study students and interns. • I would suggest having an evaluation at the end of each module before they can move to the next subject. • I would also encourage them to have a notebook to take notes. **Results:** ➢ Frees up time so that emails/correspondence are answered resulting in tasks not getting missed. ➢ Reduces workload	100% due to being part of an elite education system. An administrative assistant is in the process of being added to the team who can help assist with this and can free up time for the other office staff.

Human Resource Development
• Staffing
• Retention
• Health and Wellness
	• "Staffing is a critical talent management function, and both the organization and the employee benefit from careful planning…As Drucker, the management guru, said: "No other decisions are so long lasting in their consequence or so difficult to unmake…" (Van Tiem, 2012)
	   ○ It is important to make sure that you have and retain full-time quality staff to maintain a lucrative business.
	      ▪ Reduce high turnover
	      ▪ Competitive pay
	      ▪ Maintain a healthy workload, i.e., stress factors
	• Health and Wellness – It is critical to have enough staff to handle the workload efficiently at the ********. This will eliminate overtime hours and decrease the workload on employees which will result in less
		This is mostly an organizational/HR issue that the ******** may not have control over.
		   • High Turnover
		   • Competitive Pay
		
		There are two new employees coming on board; Interim Director, Administrative Assistant.
		
		The extra employees being added and dividing the workload evenly can help to reduce the workload and stress of the employees.
		
		Employing the FREE resources of the UNCW MIT Dept. grad students on analyzing problems, creating eLearning

	stress, happier healthier employees, and increase efficiency. **Results:** ➢ Frees up time so that emails/correspondence are answered resulting in tasks not getting missed. ➢ Reduces workload/spreads it out between added employees/grad students	Modules, Flyers, etc. would help in solving problems and time. They have projects every semester.
Performance Support Tools • Job Aids	• Job aids to assist staff and work study students/interns such as a guide book. **Results:** ➢ Frees up time for employees so that they can focus on tasks that need to be completed, have time to answer emails/correspondence.	I give this a 100% feasibility rating. Extra resources for assisting with creation: • Administrative Assistant • Intern • MIT Grad Students • Possible other resources at UNCW
Job Analysis/Work Design Interventions • Quality Improvement o Continuous improvement o Preventive maintenance	• Utilize the services of the instructional technology students (their may be other departments also). This is FREE. It not only helps the students learn but also provides great analytical services to businesses/schools. • Benefits: o Use of instructional technology/design techniques to analyze processes/problems which provide recommended interventions, resources, updates on technology, etc. o creation of learning modules, posters, redesigns of webpages, PowerPoints, Articulate Storyline, etc. **Results**:	100% feasible as there are free resources with the UNCW MIT Dept and the multiple projects that grad students must create every semester. You may reach out to Dr. Raymonde Pastore or Daisyane Barreto for more information.

	➢ Continuous analysis of processes and creation of free educational materials by MIT students at UNCW will free up time for employees so they can focus on their jobs and tasks resulting in 100% efficiency.	

Organizational Communication Interventions
 	
• Content Management
• Information System
   o Project Management Software
	As suggested by Misty Mangiacapre, data analyst at Live Oak Bank, a project management software would help significantly in managing the tasks. I believe this would be a positive way to manage tasks so that tasks are not getting missed. She recommended using the software program asana. (asana, 2019)
	
	(Asana, n.d.)
	
	## Option 2:
	
	Microsoft Project
	
	(Microsoft, 2019)
	
	Results:
	
	➢ Reliable and efficient way to manage projects and tasks. This would allow that tasks are not being missed as it would send you alerts to not only your email but also your phone.
		Asana
		  • Pricing
		  • Compared to other tools
		
		Microsoft Project
		  • Pricing
		  • Get the free eBook

	➢ The project database will allow you to run reports, so you can further analyze where problems are happening and at what stage of the process they are happening.	

Organizational Design & Development Interventions
• **Empowerment**
   o **Team Strategies**
   o **Problem Solving**
• **Organizational Pro-Action**
   o **Strategic Planning**
	Campus Life
	
	Conferences, Events, and Reservations
	• UNCW's Facilities Use Policy (UNCW, 2019)
	• Events and Reservations Policies and Procedures
	• Fee Schedule
	
	(UNCW, 2019)
	
	Results:
	
	➢ Will free up time and workload by letting another facility handle task that are necessary for catering to your client's needs when having meetings, events, etc.
		100% feasible as Campus Life is a great resource and is part of UNCW which is convenient and adheres to the same values. This resource can be used strategically to handle a lot of the issues with arranging facilities, setting up tables, obtaining needed equipment, etc. Some services are free, and some are low-cost.

Recommendations

In review of the previous table of interventions suggested, it seems that one of the most important factors for improvement have already or is in the process of being implemented, and that is, the hiring of additional staff. As the causes of the problem found in the analysis were having a heavy workload due to lack of resources (employees) which lead to not having enough time to perform all the tasks that are required which also lead to poor communication, the hiring of additional staff was a great move. As the business grows at the ********, it will be an important factor to retain well-trained staff and pay them a competitive wage to reduce high

turnover and make sure you have enough employees. Take steps to eliminate overtime hours and decrease the workload on employees which will result in less stressed, happier, healthier employees and increase efficiency. One way to decrease this workload is to take advantage of the free/low-cost resources at UNCW's Campus Life Events and the free resource of instructional technology students who are seeking clients for projects every semester. It may be a good idea to seek out these students for your work study and internship positions. They are involved in learning how to design and develop with multiple projects such creation of eLearning modules, PowerPoint presentations, video productions, and using various instructional technology modules to analyze and create training and process improvements.

The process improvement recommendation from this analysis would be to implement a project management software system such as Asana or MS Project. These data-driven software programs are low cost and would be a great way to manage the multiple tasks that are necessary to be implemented and will allow the ******** the ability to analyze projects to see what processes are being bottlenecked and at what stage so that improvements can be made quickly. This change will also show your customers that you are well organized and running an efficient business.

Appendices

Appendix A: Topsheet

Program: _____   Staff Assigned: _____   Facilitator(s): _____

	Date(s)	Time(s)	Location	Enrollment
				From _____ To _____
				Final # Registered:

Tabs needed for folder (circle): Proposal, Facilitators, Invoices, Materials, Roster, Class Correspondence, Evaluations

Initial First column when completed & 2nd column → in process

Program Description
		1 page flyer (open enrollment) or proposal

Facilitator
		Facilitator(s) confirmed by email
		Facilitator Agreement SIGNED received
		Calendar appointment sent with location & times
		Debrief meeting scheduled w/ facilitator post program
		Sent participant roster (names, organizations, title)

Technology
		Webpage & plasma slide created
		ACEWARE registration is live or private
		Needed: Certwise WebEx Blackboard Hawkwifi
		Shell created
		Access requested for participants
		Access given/provided to facilitator
		Participant logins are prepared
		Content added
		Special kits requested for participants

Reservations
		Room reserved, confirmation received.
		Parking reserved, confirmation received.
		Catering ordered, confirmation received.
		Tables reserved, confirmation received.
		Housekeeping request to clean UNCW rooms

Invoice/Pay/Cost
		Client invoiced. Multi dates list here:
		Pay action processed for facilitator
		Manual registrations/payments entered in ACEware

Marketing
		Marketing: On-campus
		Marketing: Flyers, Brochures, and Internal ads

Content
		Textbooks or Materials are ordered or printed
		PPT/handouts received from facilitator
		Roster obtained for custom program
		Tent cards: _____ Printed (or) _____ Dry-Erase
		Welcome packets for participants/facilitator prepared
		Sample packet in program folder file
		Parking email sent to participants
		Facilitator/Swain class emails filed in program folder
		Swag packed (list here):

2 weeks out from program:
		Qualtrics Evaluation automated for participants
		Print course roster/check-in sheet from ACEWARE
		Equipment packed (list here):
		Case Prepared with materials(map, agenda, faculty bios)

Day of
		Classroom & Check-in set up
		Attendance taken & filed

5-10 days post event
		Program budget report completed
		Record actual attendance in ACEWARE
		Print & review evaluation results
		Summarize debrief meeting actions.

Appendix B: Handoff Template

Handoff to Operations
Goal is to provide sufficient information to reduce questions from operations

Today's Date: Person Completing Form:

Program Name & Type		
Program Date(s) / Times		
Program Location	On / off campus	*Note preferences*
Room Setup	Workgroup Classroom Lecture	Min & Max Participants:
Swag *(reflected in attached budget)*	List here	
Facilitator(s) Name(s) *Email non UNCW facilitators. If multiple then who is doing what*		
Facilitator Pay	/hr for facilitation /hr for prep	Prep paid only if materials are delivered on time. $ planning hours for materials on time.
Meetings to set-up	Client:	Facilitator:
Learning Outcomes for Facilitator		
Facilitator Expected Deliverables		*Additional:*
ACEWARE	Private Public	*Notes: See below*

Notes:

Tables

Table 1. *Interview with ********

Interview with ********	
Questions Asked	**Answers**
Who are the stakeholders? Additional information he shared: Each staff member plays equally vital roles in prepping for a course/workshop. Our facilitators have a role as well, particularly with delivering their content to us on time, so we have opportunity to review before delivering a course.	• Interns • Student Workers • Facilitators (UNCW faculty & independent contractors) • Working professionals who attend our open enrollment • Client organizations who purchase custom executive education programming from ********
Are there any funds to pay grad assistants/work study or implement a new paid position?	• Funds are paid to our work study students. • Interns are not paid as their experience typically is accompanied by course credit. • We are currently working on opening a new paid position for administrative support.
How many projects are worked on monthly?	• This varies drastically depending on the time of year. • On an average month, we probably are working on the planning portion of about a dozen programs.

How long does each project usually take to accomplish?	• Prepping for a program also varies drastically:
	   o Some programs are multiday sessions carried out over weeks or months
	   o Other programs are 3-4 hours and are a one-time offering
	• On average, at least 2 months are needed to allot appropriate amount of time for planning.

Does your team work on each project individually or always as a team?	All programs and projects are accomplished collectively as a team.

Are individual tasks split up among the team? If so, are they always divided the same for each project?	• Individual tasks are usually split up amongst the team members. • Each team member typically oversees the same tasks for developing and planning a program.

What key pieces/tasks are being overlooked?
 	
Is it always the same things being overlooked for each project?
	• Tasks overlook vary between projects, so it is not always the same things being missed.
	    ○ Room reservations
	    ○ Catering orders
	    ○ Failure to acquire temporary computer access for participants in time
	    ○ Designating parking areas
	    ○ Requesting temporary Epasses
	    ○ Ordering supplies in time
	• Poor communication between our team and facilitators has caused facilitator request to be missed
	    ○ flip charts
	    ○ easels
	    ○ preferences for room setup
	    ○ AV requests

What technology/tools do you use now? I believe you mentioned these:
 	
• Google Drive
• OneDrive
• MS Teams?
• Excel?
	• We use all the proprietary software programs the University uses:
	    ○ AiM
	    ○ Canvas
	    ○ Aceware
	    ○ Sammy drive
	• We also use:
	    ○ Microsoft Word
	    ○ Publisher
	    ○ Excel
	    ○ Google Drive
	    ○ OneDrive
	• I don't believe we have ever used MS Teams.
	• HubSpot is our CRM

What have you tried in the past that did not work?	We have historically used the "top sheet" affixed to the program folder as the means of tracking what has been done and what needs to be done, and as simple of a process this is, things get overlooked frequently.

Do you receive feedback from the customers?	We always do a program survey at the end of a program. Sometimes we deliver it electronically using Qualtrics, but we regularly use hard copies as well.

Table 2. *Interview with ********

Interview with ********	
Questions/Comments	**Answers**
What are some performance drivers that are now blocking or aiding performance or might do so in the future?	- Internal changes - Organizational changes - Work changes - Performance changes - Social responsibilities - External changes - Competition
What reasons do you think are contributing to tasks are getting missed?	- Matt is doing the job of two people which takes up all his time. - Interim Director - Client Relations - She is receiving last minute requests which results in her having to: - Drop what she is working on - Might not have enough help at the time - Drop other duties in the office - Throw together training modules really quick - Organizational Issues - High turnover rate - Lack of support/time/employees - Organization was restructured in 5/2016 resulting in: - her having more responsibilities - Sales for custom programs - Custom programs/companies training - On top of having a full load of projects that I am working on, I also spend time doing HR: - Responsible for 6 part-time people at this time (would be better to have 2 full-time workers) - training and re-training interns/grad assistants/student

	workers and managing/following up on their work
	   o Tasks are not getting completed sometimes by the part-time help/support
	   o making/managing schedule
	• Have had temporary workers which sometimes were:
	   o Not dedicated
	   o Not consistent
	• She works 40+ hours every week
	• The overload of work and lack of support results in her creating one-pager new proposals and invoices.
	• She has to leave the office empty at times because there is no one to stay there to keep it open while she has to run out and handle issues.

Additional staff being added	• New Interim Director hired (Matt can focus on Client Relations now) • Administrative Support full-time position
Suggestions for Improvement	• Full-time office person who can be there all the time • If a new project management software is implemented, it would need to be *user-friendly*.

Table 3. *Causes*

Causes
Not enough time
- follow up on correspondence   - conduct/follow up on all the tasks that are needed
Lack of resources
- full-time employees   - support for events
Poor communication between team and facilitators
Due to having lack of time and resources to follow up on emails, phone calls, etc.
Workload is too heavy
******** is doing two jobs: - Interim Director   - Client Relations   ******** wears multiple hats   - Operations Manager   - Also performing Human Resources with constant training and management of 3 to 6 work study students and interns   - Setting up for events; tables, chairs, etc.

Table 4. *Interventions*

Interventions		
Selected Interventions	**Suggestions**	**Feasibility**
Learning Intervention • Online/e-Learning	• Create self-directed eLearning training modules for part-time workers such as work-study students and interns. • I would suggest having an evaluation at the end of each module before they can move to the next subject. • I would also encourage them to have a notebook to take notes. **Results:** ➢ Frees up time so that emails/correspondence are answered resulting in tasks not getting missed. ➢ Reduces workload	100% due to being part of an elite education system. An administrative assistant is in the process of being added to the team who can help assist with this and can free up time for the other office staff.

Human Resource Development
• Staffing
• Retention
• Health and Wellness
	• "Staffing is a critical talent management function, and both the organization and the employee benefit from careful planning…As Drucker, the management guru, said: "No other decisions are so long lasting in their consequence or so difficult to unmake…" (Van Tiem, 2012)
	    ○ It is important to make sure that you have and retain full-time quality staff to maintain a lucrative business.
	        ▪ Reduce high turnover
	        ▪ Competitive pay
	        ▪ Maintain a healthy workload, i.e., stress factors
	• Health and Wellness – It is critical to have enough staff to handle the workload efficiently at the ********. This will eliminate overtime hours and decrease the workload on
		This is mostly an organizational/HR issue that the ******** may not have control over.
		    • High Turnover
		    • Competitive Pay
		
		There are two new employees coming on board; Interim Director, Administrative Assistant.
		
		The extra employees being added and dividing the workload evenly can help to reduce the workload and stress of the employees.
		
		Employing the FREE resources of the UNCW MIT Dept. grad students

	employees which will result in less stress, happier healthier employees, and increase efficiency. **Results:** ➢ Frees up time so that emails/correspondence are answered resulting in tasks not getting missed. ➢ Reduces workload/spreads it out between added employees/grad students	on analyzing problems, creating eLearning Modules, Flyers, etc. would help in solving problems and time. They have projects every semester.
Performance Support Tools • Job Aids	• Job aids to assist staff and work study students/interns such as a guide book. **Results:** ➢ Frees up time for employees so that they can focus on tasks that need to be completed, have time to answer emails/correspondence.	I give this a 100% feasibility rating. Extra resources for assisting with creation: • Administrative Assistant • Intern • MIT Grad Students • Possible other resources at UNCW

Job Analysis/Work Design Interventions
• Quality Improvement
   o Continuous improvement
   o Preventive maintenance
	• Utilize the services of the instructional technology students (there may be other departments also). This is FREE. It not only helps the students learn but also provides great analytical services to businesses/schools.
	
	• Benefits:
	   o Use of instructional technology/design techniques to analyze processes/problems which provide recommended interventions, resources, updates on technology, etc.
	   o creation of learning modules, posters, redesigns of webpages, PowerPoints, Articulate Storyline, etc.
	Results:
		100% feasible as there are free resources with the UNCW MIT Dept and the multiple projects that grad students must create every semester.
		
		You may reach out to Dr. Raymonde Pastore or Daisyane Barreto for more information.

	➢ Continuous analysis of processes and creation of free educational materials by MIT students at UNCW will free up time for employees so they can focus on their jobs and tasks resulting in 100% efficiency.	
Organizational Communication Interventions • Content Management • Information System o Project Management Software	As suggested by Misty Mangiacapre, data analyst at Live Oak Bank, a project management software would help significantly in managing the tasks. I believe this would be a positive way to manage tasks so that tasks are not getting missed. She recommended using the software program asana. Another option: Microsoft Project **Results**: ➢ Reliable and efficient way to manage projects and tasks. This would allow that tasks are not being missed as it would send you alerts to not only your email but also your phone. ➢ The project database will allow you to run reports, so you can further analyze where problems are happening and at what stage of the process they are happening.	Asana • Pricing • Compared to other tools Microsoft Project • Pricing • Get the free eBook

Organizational Design & Development Interventions
• **Empowerment**
    o **Team Strategies**
    o **Problem Solving**
• **Organizational Pro-Action**
    o **Strategic Planning**
	Campus Life (Conferences, Events, and Reservations)
	
	• UNCW's Facilities Use Policy
	• Events and Reservations Policies and Procedures
	• Fee Schedule
	
	Results:
	
	➢ Will free up time and workload by letting another facility handle task that are necessary for catering to your client's needs when having meetings, events, etc.
		100% feasible as Campus Life is a great resource and is part of UNCW which is convenient and adheres to the same values. This resource can be used strategically to handle a lot of the issues with arranging facilities, setting up tables, obtaining needed equipment, etc. Some services are free, and some are low-cost.

References

Asana. (n.d.). Retrieved from https://www.youtube.com/watch?v=IMAFWVLGFyw

asana. (2019, May 1). Retrieved from Make more time for the work that matters most:

https://asana.com/

Center, U. S. (2018, 5 13). ******** *Catalog 2019*. Retrieved from https://issuu.com/uncw-

swain/docs/swain-center-catalog-2018

Microsoft. (2019, May 1). *Microsoft*. Retrieved from Microsoft Project:

https://products.office.com/en-us/project/project-and-portfolio-management-software

UNCW. (2019, May 1). Retrieved from

https://uncw.edu/policies/documents/02_140_faciltypolicy_jan2010.pdf

UNCW. (2019, March 28). *About UNCW*. Retrieved from University of North Carolina:

https://www.uncw.edu/aboutuncw/mission.html

UNCW. (2019, March 14). ******** *for Executive Education*. Retrieved from University of

North Carolina Wilmington: https://uncw.edu/swain/mission.html

UNCW. (2019, May 1). *Welcome to Campus Life Events and Reservations!* Retrieved from

Campus Life: https://uncw.edu/campuslife/services/reservations.html

Van Tiem, D. M. (2012). Fundamentals of Performance Improvement. In D. M. Van Tiem,

Fundamentals of Performance Improvement (p. p.134). San Francisco: Pfeiffer.