Cycle Plan

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| Project Name | Improving Data Management | | |
| Developed by | Tony White | Sponsor | SMWS Board |
| DMAIC Phase(s) | Define | **Cycle No:** | 1 |

1. Plan

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| Objective |
| * Identify the Current Problems (generalised) * To establish an Improvement Plan (Draft the Charter) * Review Options (high-level) |

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| Questions | Predictions |
| 1. What is the Problem 2. What is the Scope 3. What is the timeframe 4. Who will be in the team 5. Who are the stakeholders 6. Who are the Customer(s) and what are the Expectations | 1. Significant gaps in our animal data resulting from poor return rates and/or incorrectly filled out for the animal record form (50% missing info) 2. Replace the current paper-based system with a web-based solution to manage our animal records that members can update themselves 3. Due to the volunteer nature of our Org., at least 8 months required to implement 4. Core team of a few with multiple others providing input 5. Board Members and volunteers using system 6. NPWS for reporting, Members of Public ringing in, Community Groups |

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| Activity | Who | By When |
| Meet Sponsor | TW | Jan |
| Define Team Members | TW | May |
| Identify Current State (KO Meeting)   * Review Current Information   + Strategic Plan (previously brainstormed and workshopped)   + Existing Database   + Interview key members associated with statistics   + Partially developed website * Do we want to change? * Review best option/platform to work towards (high level) | TW,JL,JS |  |
| Draft Improvement Plan | TW | 15/7/13 |
| Assign Roles and Resp. | TW |  |
| Develop Communication Plan | TW | 15/7/13 |
| Stakeholder Mapping | TW | 01/7/13 |

**Reflections / Learning**

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| Observations in carrying out plan (park it notes) |
| Several members have tried in the past to develop either a computer based or web solution to managing animal records. They have developed only the bit they know about the process and done it in a non-collaborative manner resulting in getting off-side with a number of long serving members in the organisation. Feeling within the organisation is “we’ve heard it all before” and frustrations. – Ensure we include key members and bring all along in the journey and provide timely updates etc!  Misconnect between the raw data and what we report to NPWS (data analysed for 2012 year) with verbal confirmation from person responsible for supplying stats |

1. Study

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| Analysis of data |
| 1. **Current Problem**   Working from the previously developed “Our Strategic Plan” a number of key areas to improve on were identified:  A: Procedures and Policies  B: Animal Records Keeping  C: Member Relations and Support  D: Office Improvements  E: Community Partnerships  F: Animal Care  G: Website and IT solutions  Throughout the discussions it was consistently identified that lack of data and poor data management capabilities were causing significant headaches in a number of levels.  This was predominant in B, C, D and G of the Strategic Plan.  Examples:   * Large tracts of unknown data or non-closed animal records resulting in hard to report with any accuracy * Report to NPWS shows low release/rehabilitation rate * Time taken to collect the data (paper call records, then paper animal record – if that was returned, then entering both into the MS Database and reconciling the 2 forms. Amounts to triple handling) * Continual amendments to the Membership list and multiple copies often makes task difficult   It was identified from both conversations and data, that the scope needed to be expanded out further than just managing the data for animal records.   1. **Scope of the Project**   The “*Solutions Desirability Matrix*” tool was used to evaluate options gathered from idea generation.   * 1. Keep existing paper-based process   2. Utilise existing MS Access database and expand it’s circulation   3. Tidy up existing trail web-site to manage animal records and allow members to update animal fates on-line   4. Fully-integrated web-based system   5. App for iPhone/HTC etc   It was identified that the Project should be an fully-integrated solution for our data management based on a web platform and should incorporate but not limited to the following areas:   * Current Office Functions for logging calls etc * Membership Management * Animal Records and Fates * Training Records * Statistical Analysis * Comply to NPWS reporting requirements   An App was considered a valuable add-on in the future but requires a functioning web before becoming reality.  A review of the latest web site, shows some very good ideas in managing animal records and certainly a small sample of members looking at it were enthusiastic about the ability to enter records on-line and not need to do paperwork. Though within a short time of playing in it, it was found lacking detail and functionally not the easiest to use.   1. **Timeframes**   An estimated timeframe and key activities are shown in below, it is expected the website to be up and running by December 2014.     1. **Team, Communication Plan and Stakeholders**   Core Team: Tony White, Trent Reed, Cale O’Brian  Support: Jeff Lynne, Justine Stewart, Helen Kennedy, Nathan Brown  Consult: Various members  Table 1: Stakeholders and Communication Plan   |  |  |  | | --- | --- | --- | | Name | When | Communication Channel | | Project Team | 2 weekly basis | Regular face to face meetings, email | | Support Team | As needed | For gaining consensus, resolving issues outside immediate Project Team | | SW Board | Monthly | Monthly update at Board Meeting | | Office regulars | Testing phase, Training | Feedback for testing mode – select few regulars to trial system | | Members using website | Trial period | Once out of validation and SIT – bring in for UAT | | Organisation updates | Prior to roll-out | Wildlife Matters newsletter, notice board in office, AGM presentation |  1. **Customers**   There are 3 main external customers:   * National Parks and Wildlife Services (NPWS) * Community Groups and Councils * Members of Public (MoP’s)   There are detailed further in the Improvement Plan  **Summary of Findings**   1. Confirmed that working on better managing our Animal data is a valid project and aligns to the organisations needs 2. A significant problem exists with gaps in our records 3. Lack ability to provide a full representation of animal records 4. Scope of project needs to be expanded to take into account a holistic approach of most of the data management functions – bigger than just animal records 5. Desire to transfer paper based system with a web-based platform which is proven technology 6. Will impact all members of the organisation |

1. Act

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| Recommendations |
| Define and Measure: Cycle 2 and 3   * Understand the current records process * Understand the issues with the current system   Define and Design: Cycle 4   * Decision on existing partially developed web-site * Understand the requirements of the Web-Site |

**Checklist for Plan**

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| No rhetorical questions  No questions restated  Questions useful for learning (clear, concise)  No obvious missing questions  All questions related and relevant | Predictions are specific, not general  Predictions include why they believe these predictions (personal experience, data available)  PDSA seems reasonable in size – achievable in a reasonable timeframe |