



How To Do More With Less Time

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Goal...

Demonstrate how an IR office can do more and do it accurately with less time by using

- ▶ Organizational tools
- ▶ Technology
- ▶ Training Aids



Background Information



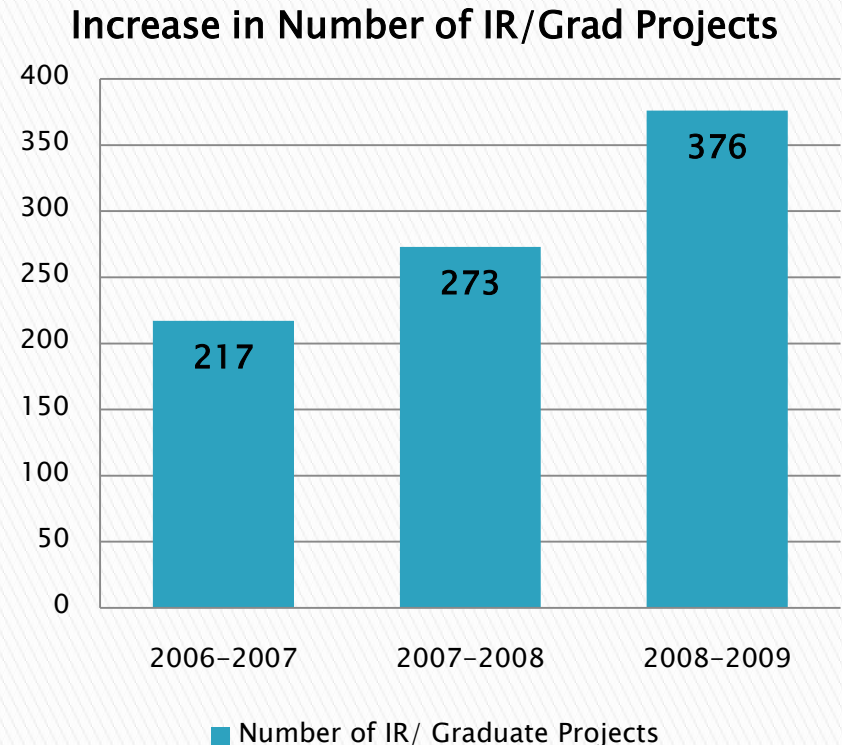
- ▶ UW–Stout is the first **Malcolm Baldrige Award** recipient in higher education (2001).
- ▶ UW–Stout has since worked with educational institutions in 39 states and 25 countries, sharing information and assisting schools that are interested in quality improvement through the application of the Baldrige criteria.

Background Information

- ▶ Office of Budget, Planning and Analysis (BPA)
 - Director
 - Office Manager
 - Campus Planner
 - Budget Analysts
 - Institutional Research Team
 - Applied Research Center (ARC) Staff
 - Student Workers
- ▶ IR Team: Assist staff, faculty and students with their research needs
 - Capture and summarize information that supports institutional planning and decision-making
 - Administer surveys and publish reports
 - Custom data requests

Background Information

- ▶ Amount of projects completed by the IR team has increased.
- ▶ 73% increase in standard IR/Grad projects between FY07 and FY09
- ▶ 38% increase in standard IR/Grad projects between FY08 and FY09
- ▶ This does not include special requests:
 - AQIP
 - Equity scorecard
 - ARC projects
 - External Surveys



Background Information, cont.

- ▶ New problems due to
 - increased number and scope of projects
 - the number of staff did not grow
- ▶ Major effect on two areas ...
- ▶ Project Management
 - Who works on what and when?
 - Project timelines and due dates?
 - Coordinating efforts and expertise?
- ▶ Training New Student Workers
 - How can we help new student workers keep up with increased job load and task complexity?
 - Typical student attrition
 - Addition of more student workers (ARC, etc.)





What to do? >>

Tools for Project Management

- ▶ Coordinating Projects and Timelines by using Job Logs
- ▶ Job log is an electronic file that ...
 - Is a work in progress
 - Keeps track of project tasks and due dates
 - Provides a “big picture” view of the office work and work flow

Job Logs, cont.

How are project logs currently used in BPA office?

- ▶ BPA Student work log
- ▶ IR
- ▶ Graduate Projects
- ▶ Applied Research Center (ARC)
 - Student work log
 - Projects log
 - Project Checklist
- ▶ Special projects (AQIP, equity scorecard, etc.)

Job Log Specifics

Key components of a successful job log

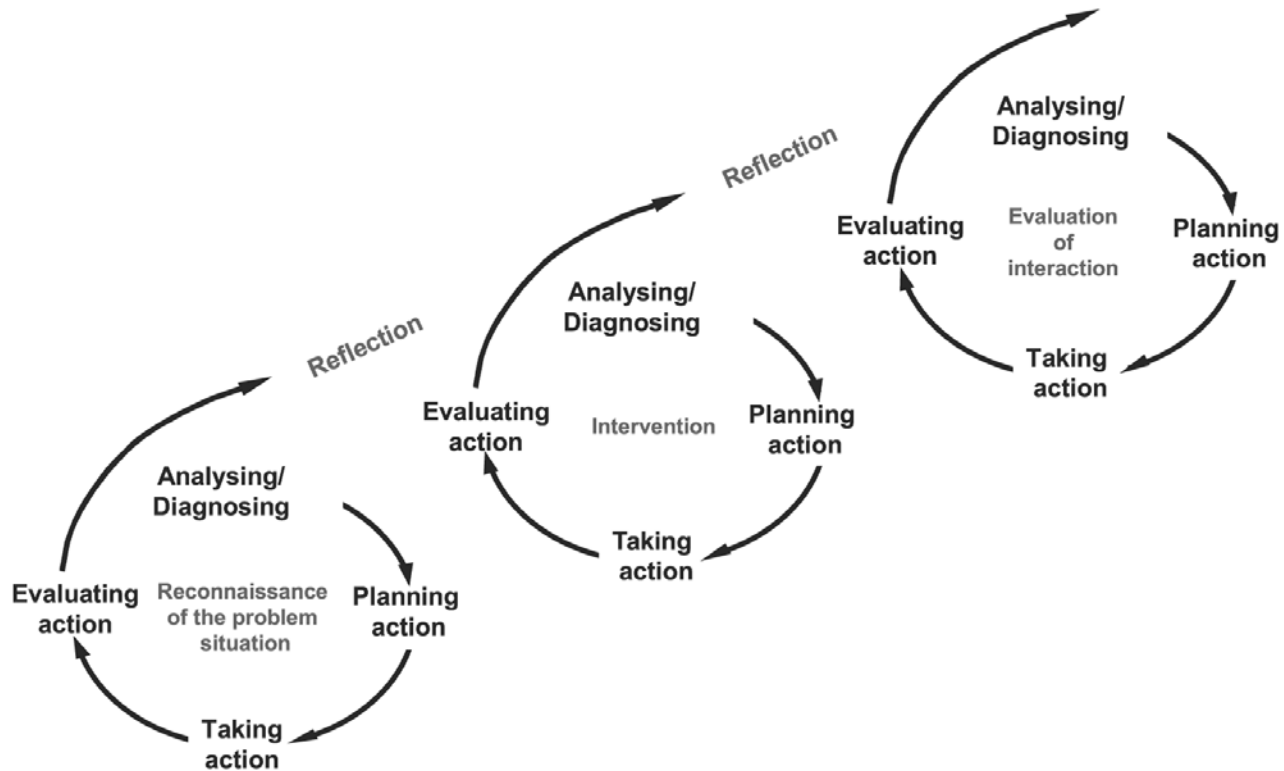
- ▶ Electronic format that is accessible to all in the office
- ▶ Log Format
 - Requested by who?
 - Person assigned to project
 - Project due date
 - **Priority**
 - Additional project information
 - Project progress
 - Completion date
 - When done, task is moved to file of completed jobs

Job Logs, cont.

- ▶ Updated
 - Updated as needed by staff
 - Logs prioritized daily by Director of BPA
 - Every two weeks BPA staff meet and discuss updating and modifying the project logs.

- ▶ Action Research
 - “learning by doing”
 - Input from all

Action Research



Source: Adapted from Coghlan and Brannick (2001), p. 19; Cardno and Piggot-Irvine (1996), p. 19

Benefits of Using Job Log

- ▶ Project Management
 - Everyone knows what to do and when it is due
 - Adjust project flow as needed
 - Coordinating efforts
 - Coordinate expertise
 - Balance workload/work flow
 - Accountability
- ▶ Track amount of Work
 - Requested
 - Completed

Technology

- »» Using Microsoft products to save time

Microsoft Outlook

- ▶ Calendars
 - Staff
 - Up to date
 - Share with staff & students
 - Students
- ▶ Task list
- ▶ Rules and alerts to sort emails
- ▶ Folder structure for project management
- ▶ Flags

Scheduling

Project Management

Microsoft One Note

- ▶ One person use:
 - Use Daily Notes to keep track of overall To Do's
 - Use tags to set priorities, notes, etc.
 - Project Tabs
 - Track communications
 - Import emails
 - Phone call log
 - More formatting versatility than Word
 - Can link to Outlook
 - Attach files
 - Dump information from web pages
- ▶ Sharing

Microsoft Product Shortcuts

- ▶ Embedded Headers / Styles
 - Standardization of report look and feel
 - Easy to create and update table of content
- ▶ Captions
 - Automatically updates figure/table numbers
 - Limits amount of steps to create a table of contents / figures / tables
- ▶ Microsoft word shortcut keys
 - Editing: Cntrl+A, Cntrl+C, Cntrl+V, Cntrl+X, etc.
 - Moving throughout the document
 - Formatting



... small changes for efficiency add up over time

Training Aids

- »» To provide standardization and skill development

Training Aids

- ▶ New Student Orientation for ...
- ▶ Office procedures
- ▶ Where to find files
- ▶ How to use the Job Log
- ▶ Using Outlook

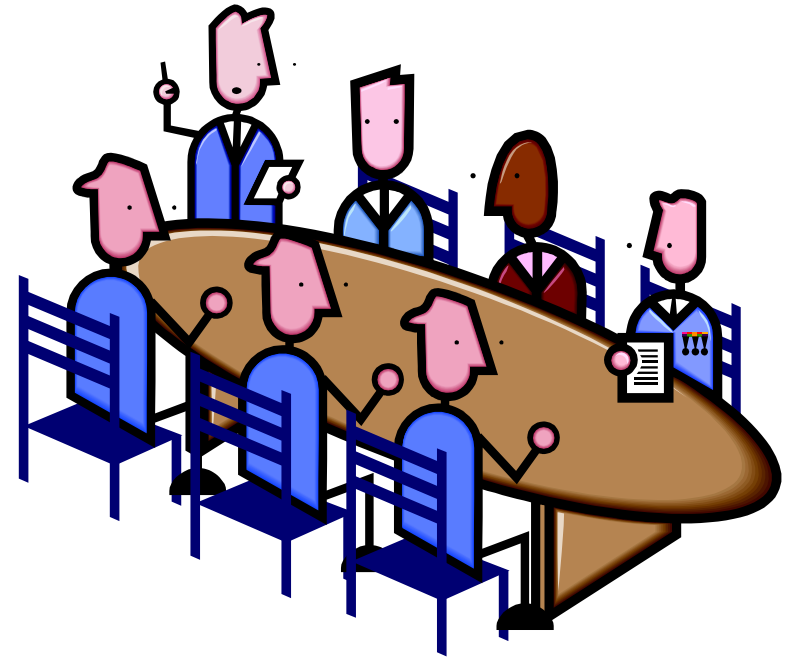


Training Aids

- ▶ Report writing template
 - Cover page
 - Formatting – font, spacing, etc.
 - Report layout
 - Standard table/graph format for quantitative results and qualitative results
 - Standard language for methodology and results
- ▶ Report writing Checklist
 - Final look at the report to make sure correct format, etc.

Training Aids

- ▶ Focus groups
 - Training module
 - Transcription module
- ▶ Qualitative analysis
- ▶ Quantitative analysis
- ▶ Scanning manuals
 - Step by step procedure guides



Discussion and Application

- ▶ How could these practices and tools work for your office/job/project?
- ▶ What methods or tools do you see particularly useful?



Questions?



Thanks!

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