AQIP Action Project Report

An AQIP Action Project Report should be submitted at the completion of an action project, and annually for projects that are not completed in one year. AQIP Action Project Team responses keep the Steering Committee up to date with the project’s progress and provide the information needed to complete the required HLC/AQIP documentation for action projects.

Reports should be completed and submitted to the AQIP Steering Committee by email (aqip@southcentral.edu) at the conclusion of a project and, when appropriate, annually from the project’s start date.

Type of report (check the appropriate box): ☐ Annual ☒ Final

Action Project Name: Large Capital Equipment Purchase Request Process

Action Project Purpose – Please give a brief summary of the project purpose.
The primary purpose of the project is to establish a process for data-driven decision-making in regards to the purchase of large capital equipment.

Action Project Membership – Please list the names of the project team members and their role at the college.
Karen Snorek: Vice President of Finance and Operations; Kelcey Woods-Nord: Grant Writer; Karen Metz: Faculty; Donna Sampson: Business Office; Tom Kammer: Customized Training

Action Project Start Date: Click here to enter text.

Action Project End Date: May 5, 2015

Please address the following questions regarding your project.

1. List the project goals along with the metrics/measures you used for assessing the goals.
   There were three main objectives for this project: 1) Use LEAN tools to develop a standardized, documented process for submitting purchase requests for large capital equipment. The process must align with SCC’s existing budget processes. Measure: Review developed process for efficiency and effectiveness. 2) Develop tools that allow requesters and reviewers to actively engage in the large capital equipment purchase process. Measure: Survey individuals
participating in the pilot equipment request. 3. Develop a framework for reviewing the submitted requests with the centralized goal of creating a prioritized capital equipment inventory list which can be used to coordinate multiple funding sources across the college. Measure: Pilot a minimum of one capital equipment request to look for inconsistencies, redundancies, and reviewers’ ability to successfully implement the framework.

2. Describe what was accomplished, referring to the quantifiable results that show progress. (If necessary, clarify how the original goals and anticipated outcomes may have shifted.)

LEAN tools were used to examine the current process for purchasing capital equipment. Based on this process, we created an Action Register which laid out all of the steps for the project and who would accomplish them. In addition, although there was an informal process in place, as a result of the AQIP project, we established a formal, written process and the tools to support that process: capital equipment request form, scoring rubric, request summary template, capital equipment committee, and a webpage to host these documents and post awards.

3. Describe how members of the SCC community participated in this project. (Show the breadth of involvement over the project’s duration.)

The committee represented a wide range of offices, positions, and unions at the college. Anyone who was interested in participating, was welcome to do so. Additional areas that would be affected by the process were asked to give input on the new process; specifically the request form, to ensure that it asked all of the necessary questions. Finally, several areas were involved in the pilot process by either participating on the new Capital Equipment Committee or by acting as liaisons to the award process; for example, the college’s Foundation Director.

4. Describe the effect this project has/will have on the institution, students and/or others. What can be identified as good practice from which other institutions may benefit?

As a result of this project, the college has a clear, transparent, documented process for awarding capital equipment funds. All faculty and staff are eligible to apply and have access to the information. Both the process and the tools developed to support the process are good practices that other institutions could choose to implement.
5. Describe the challenges the college might encounter when successfully completed for institutionalizing the project’s goals. Challenges that occurred during the pilot project were ensuring that enough information was collected about the bids and the program’s plans to implement the equipment. As a result, it was decided that programs should develop a 3-5 year plan for their capital equipment so that the Capital Equipment Committee can make strategic decisions about which requests to award and if there are other possible funding sources (foundation donations, grants, etc.) that might be able to support requests. This is especially important as the number of requests are sure to increase as more people better understand and adopt the process. This results in another challenge of having too many valid requests and not enough funding to support them.

6. In light of the project goals, current circumstances, institutional learning from the project, and anticipated challenges, what are the next steps that must be taken to complete or institutionalize the results of this action project? Can you provide a recommended timeline? Next steps include finalizing the process and tools. This will be done by July 2015. These will then be posted to the capital equipment website (www.southcentral.edu/capitalequipment) and given to the Capital Equipment Committee. From there, the committee will need to set up a FY16 funding timeline and continue to update the process and tools as needed. The intent was to create a dynamic, documented process so that it changes in response to challenges and best practices identified in each round of funding. This will help ensure continuous quality improvement in this area for the college.

7. Provide an additional information or concerns that reviewers and others should understand about this project. No additional concerns. This was a good project—lots of input and hard work from all team members and a solid process was developed.