



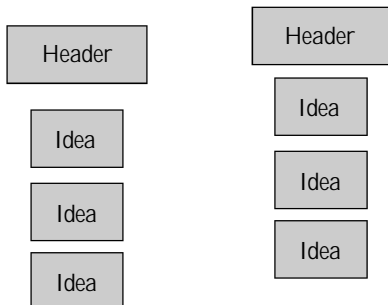
THREE TOOLS FOR PLANNING AND IMPROVEMENT AT PENN STATE

The Center for Quality and Planning uses continuous quality improvement principles and tools to help units assess their needs, develop strategic plans, improve key processes, and develop collaborative team environments. In recent months, Center for Quality and Planning staff members have been facilitating strategic planning retreats and improvement initiatives in a number of units. We asked representatives from three of those units to talk about their efforts at a panel discussion on November 2, 2000 at the Nittany Lion Inn.

Panelists Linda Friend, Librarian and Head, Information Technology, University Libraries; Susan Kennedy, Associate Director for Educational Services, University Health Services; and Sandy Thatcher, Director, Penn State University Press, identified three planning tools that they had found particularly helpful. The purpose of this newsletter is to share these tools with you.

Affinity Diagram

The affinity diagram can help to cluster and focus diffused issues or tasks. Participants begin by writing their answers to a question (for example, "What functions must be performed?" if you are looking at clustering and matching functions to positions, or "How would you like to describe this unit in three to five years?" for planning). Each answer is written, large enough to be read when posted on the wall or an easel, on a 3" by 5" card or sticky paper. Participants are given 10 to 20 minutes to write their responses. They then post them for others to see. Next, without discussion, all participants are free to cluster the individual items into what they see as related categories. This step is completed when there is consensus about the category clusters. The final step is to develop a descriptive heading or sentence to summarize each cluster. In a planning environment, these headers can then be used to develop planning goals and strategies.



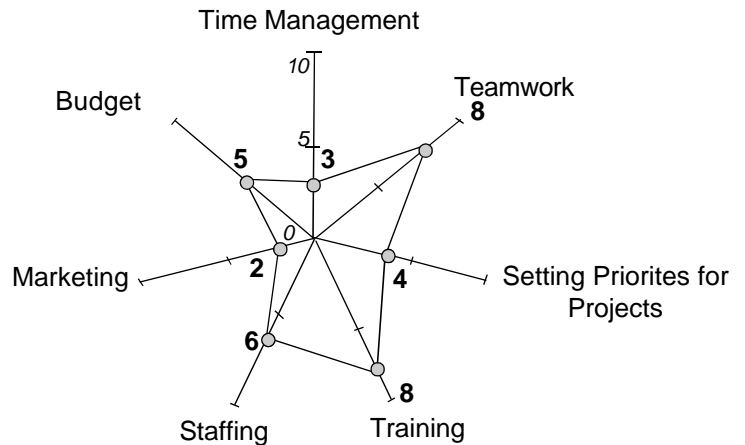
Radar Chart

The radar chart can be used to assess the unit's current status or position on the goals developed via the affinity diagram, or on other goals or issues. Participants are asked to evaluate their unit's current position on each item on a scale of 1 to 10. The average for each goal or issue is calculated, and these summary numbers are plotted on a circular graph that resembles a radar screen. For example, the following data:

Issue	How We're Doing
Time Management	3
Teamwork	8
Setting Priorities for Projects	4
Training	8
Staffing	6
Marketing	2
Budget	5

would be displayed as

XYZ Department Radar Chart



making it easier to see which items were on target (closer to the outside of the circular radar screen) and which could provide the greatest opportunity for improvement (those closer to the center of the circle).

Importance/Satisfaction Survey

The importance/satisfaction survey can be used to determine both stakeholder satisfaction with issues, services, or products, and the relative importance of those issues, services, and products to stakeholders. This is another way to target the highest priority areas

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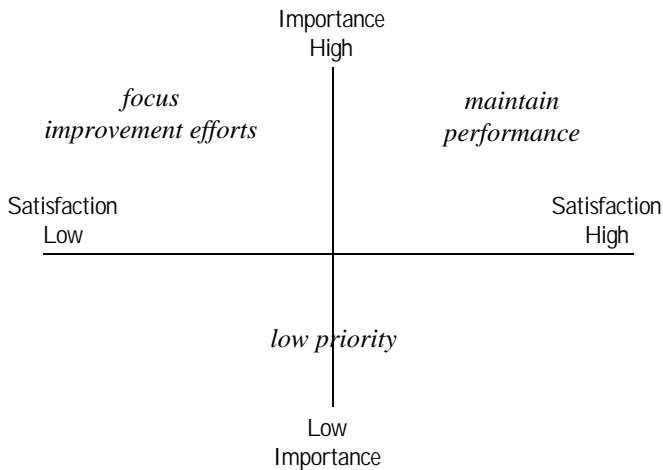
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for improvement. When constructing a survey, allow respondents to provide numerical responses to two questions: "How satisfied are you?" and, "How important is this item to you?" for each issue. For example, the survey might read:

Importance					Issue XYZ Department staff provide.....	Satisfaction				
Not Important				Very Important		Not Satisfied				Very Satisfied
1	2	3	4	5	Timely response to questions	1	2	3	4	5

When responses are compiled, they are plotted in four quadrants, as shown below.

Importance/Satisfaction Analysis Form



Efforts can be concentrated on issues that fall in the high importance/low satisfaction quadrant, while maintaining performance on issues in the high importance/high satisfaction quadrant. Issues in the two quadrants below the satisfaction axis can be placed at the bottom of the planning or improvement priority list, since stakeholders have indicated these are not issues of high importance.

More information on the affinity diagram and the radar chart can be found in *The Memory Jogger II* by Michael Brassard and Diane Ritter.

For assistance in using any of these tools, or for other support with assessment, planning and improvement initiatives, contact:
 Center for Quality and Planning
 The Pennsylvania State University
 405 Old Main
 University Park, PA 16802-1505
www.psu.edu/president/cqi
psucqp@psu.edu
 814-863-8721

JANUARY/FEBRUARY EVENTS AND DEADLINES

January 19, 8:30-10:00 a.m.
 Quality Advocates' Network Meeting:
 Performance Indicators and Benchmarking

January 31
 Deadline for April 12, 2001, Quality Expo Exhibitor's Registration

February 8, 1:30-3:00 p.m.
 Panel Discussion: Integrating Planning and Improvement