

# STAFF PROPOSALS

A **staff proposal** is a written solution to a problem costing the business money, extra work, goodwill, or all three.

It is submitted by an employee to their supervisor for approval to implement or prevent changes in the office, or make purchases for the office. It is a procedure that empowers the staff member with the necessary tools to take responsibility for their area of the clinic.



## WHEN TO USE IT

The office manager or a staff member is often more aware of office procedures and conditions in the practice than the doctor who is busy seeing patients. As a result, they usually know of something that may need to be fixed, changed, or initiated better than the doctor, consultant, accountant, etc. In addition, experienced and responsible staff often have practical information and ideas that can help improve the office.

However, sometimes well-meaning staff can present information or ideas that come across as a problem or confusion to the doctor, or worse, do not get presented at all. For example, during a busy afternoon when the doctor is dealing with many patients, interruptions from employees that "our computer is not working" can disrupt patient care and annoy the doctor. These can be presented as an emergency, an irresponsible complaint, or an unplanned idea. Expecting "hallway decisions" from the doctor/CEO is not good management.

But putting together a complete and logical proposal takes a little work. So asking the doctor/CEO for a new computer or telling them we should execute a new and untried promotional idea *without complete supporting information* is really just giving them a problem.

A good proposal takes time to include specific information that allows the doctor/CEO to make an informed decision and select the best solution as proposed by the staff member based upon the staff member's information.

This empowers the staff member and gives them the responsibility for improving the office.

## PROCEDURE

The Staff Proposal Form has four parts, all of which are explained on the form itself.

1. A clear summary statement of the **issue** that needs to be addressed. Include how it is costing the business financially, or in terms of extra work or goodwill and morale.
2. Include all the **information** necessary to understand why there is a problem, all the needed information to solve it, with 2 - 3 alternative solutions presented.
3. One solution is **recommended**.
4. **Approved or disapproved** by the CEO.

## SAMPLE PROPOSAL

### Proposal

#### Computer Replacement

**Issue:** One of our front desk computers is not working requiring a staff member to stay late entering data which is costing us about \$350 dollars per week in overtime, slows our service to our patients and upsets our staff.

**Information:** The computer that broke is 6 years old and has been upgraded 3 times. Sam, our tech guy, said he can't fix it. He can get a new computer installed and working as a replacement in 3 days for a total of \$1,800. He also guarantees his work.

I have tried to fix it, unsuccessfully. I called two other computer companies and requested quotes on replacement and installations. Their bids are attached with prices. As you can see, their prices are just a bit lower, but they do not include installation.

Sam knows our network and guarantees a seamless transition.

**Solution:** I recommend that we authorize Sam to purchase and install the new computer. It will pay for itself in 5 weeks of staff overtime, improve patient service staff morale.

Sincerely,

*Marge*

To: CEO \_\_\_\_\_

Date: \_\_\_\_\_

From: \_\_\_\_\_

## Staff Proposal

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### Regarding:

1. **Issue:** (A clear summary statement of the issue, problem, or opportunity that this proposal is to remedy or address. Include what this is costing the company financially, or terms of extra work or loss of goodwill and morale.)
  
2. **Information:** (All of the relevant information necessary to describe the nature of the issue, its severity, and consequences if left unresolved and the benefits if enacted. Also, include all the specific data necessary for the solution, with at least two or three alternative solutions with specifics. Use additional paper if needed. Include financial information such as the cost of not implementing this proposal and the profit if it is implemented.)

**Solution: (Needed by: \_\_\_\_\_)** (Recommend one of the solutions described above.)

3. **CEO:** Approved: \_\_\_\_\_ Disapproved: \_\_\_\_\_

**Date:**