

**Texas A&M International University
Annual Institutional Effectiveness Review (AIER)
for Administrative or Educational Support Units**

Unit Name:

Purchasing

Unit Type:

Administrative Unit

Educational Support Unit

Assessment Period Covered:

January 01, 2008 to December 31, 2008

Unit Coordinator (Preparer of Report):

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The annual review is directed at the following goals of the Texas A&M International University 2006-2010 Strategic Plan. Please list goals below:

3.2 Provide service and outreach activities to the University service area in a professional, courteous, efficiently and timely manner.

Institutional Mission

Texas A&M International University, a Member of The Texas A&M University System, prepares students for leadership roles in their chosen profession in an increasingly complex, culturally diverse state, national, and global society ... Through instruction, faculty and student research, and public service, Texas A&M International University embodies a strategic point of delivery for well-defined programs and services that improve the quality of life for citizens of the border region, the State of Texas, and national and international communities.

Administrative or Educational Support Unit Mission

The mission of Texas A&M International University's Purchasing Department is to procure goods and services that support the mission of the University. To facilitate this process, the Purchasing Department shall, in accordance with Federal, State, and System regulations, obtain the best procurement value for the University in a professional, responsive, and timely manner.

Provide summary of the last cycle's use of results and changes implemented

This statement should specify if the outcomes addressed were a continuation of previous ones, new outcomes, or modified versions of previous outcomes. In addition, the statement should include a concise analysis of the assessment data collected during the previous year, a brief explanation of actions taken to address specific outcomes, an evaluation of how these actions contributed to the improvement of the unit, and any recommendations formulated. Assessment data must be viewed and discussed by the unit during this process.

Our Strategic Plan Objective related to Outcome 1-University staff and faculty will be satisfied with services provided by the Purchasing Department, states we will provide service and outreach activities to the University. After reviewing surveys it was determined out of 838 surveys distributed only 108 responded. This reflects a lower percentage of respondents than the previous year, therefore surveys will be distributed after every ten purchase orders and duplications will try to be avoided. Out of the 108 respondents 76% were in favor of attending workshops. The majority of the 76% requested Tuesday or Thursday afternoon workshops with an hour of “hands on” training to include refresher courses in FAMIS, policy and procedures of Purchasing and expenditure codes. Purchasing will continue to work with the creators on a one on one basis. Workshops will focus on this process.

List of unit-level outcomes

It is recommended that units rotate through their entire set of outcomes over a multi-year period. Units may focus on one or two outcomes each year, as deemed appropriate.

1. University staff and faculty will be satisfied with services provided by the Purchasing Department.
2. Creators of requisition (University staff and faculty) will be familiar with TAMIU rules and regulations pertaining to the purchasing module FAMIS (Financial Accounting Information System)
3. Continue to communicate the importance of HUB “Historically Underutilized Business” vendors to those responsible for departmental procurement card purchases within the University Community.

Section I: Planning and Implementation

Outcome(s): *Identify the outcome(s) that will be focused upon this year.*

3. Continue to communicate the importance of HUB “Historically Underutilized Business” vendors to those responsible for departmental procurement card purchases within the University Community.

Methods of assessment to be used:

Identify and describe the type of assessment(s) that will be used and how the data will be obtained. During this assessment period, has your unit used any of the following measures for assessment of outcomes? Indicate “Y” if currently being used; “N” if not currently being used but interested in using; and “NA” if not applicable.

Type of Measure	Y	N	NA	Specify which type of measure was used and what outcome the measure was applied to:
<u>Volume of Activity:</u> (Number of clients served, circulation data, etc.)				
<u>Efficiency:</u> (Turnaround time for filling requests, timely service or prompt response, etc.)	y			Instruments to be used are: Purchasing Department Institutional Effectiveness Survey, Purchasing Department Requisition Training Rate Form, Procurement Card Training Survey, and The 2008 Finance & Administration Division Service Quality Survey.
<u>Service Quality:</u> (Error rates, accuracy of information provided, etc)				
<u>Client Satisfaction Survey</u>	y			Instruments to be used are: Purchasing Department

(Student, employer, alumni, customer, etc.)				Institutional Effectiveness Survey, Purchasing Department Requisition Training Rate Form, Procurement Card Training Survey, and The 2008 Finance & Administration Division Service Quality Survey.
<u>Feedback:</u> (Suggestion box, focus groups, evaluation forms, etc.)				
<u>Review of existing data:</u> (Routine records or reports, institutional data, audits, etc.)	y			Instruments to be used are: System Monthly HUB Report, Semi Annual and Annual HUB Report.
Staff discussions or evaluations of services to clients	y			Departmental Staff meetings.
Standards/guidelines provided by professional associations				
Standards set by federal, state, county, city or system regulations				
External evaluations or auditors				
Benchmarks or comparisons with peer institutions				
Other				

Criteria/Benchmark(s):

Specify, if deemed appropriate to assess outcome(s). Criteria/ benchmark(s) may be optional, especially if qualitative measures are used for data collection.

100% of those responsible for departmental procurement card purchases will receive training on the availability and usage of HUB vendors.

Section II: Analysis of Results

What were the results attained?

Describe the primary results or findings from your analysis of the information collected. Were the results used to improve the unit services or operations? Please specify:

Staff and faculty are interested in continually improving their awareness of TAMIU's rules and regulations relating to FAMIS and procurement card purchases. Workshops will enable Purchasing to better serve the University community by reaching a greater audience and providing a requested service and open lines of communication. Before receiving cards, card holders are mandated to attend a training on how to locate HUB vendors. The entire staff is cross-trained in providing assistance in helping procurement card holders locate and utilize HUB vendors. In addition, The Texas A&M University System Office of HUB and Procurement Programs requires that all personnel responsible for creating

requisitions and/or making/approving purchases (including account managers, department heads, and procurement card holders) complete the HUB Purchasing Requirements course.

What were the conclusions reached?

Include a brief description of the procedure used for reaching the conclusion(s) based on the evidence collected and describe the process used to disseminate the information to other individuals. For example, if the discussion took place during the annual retreat, include a summary from those deliberations using the Meeting Minutes template found on the Project Integrate web page at <http://www.tamtu.edu/integrate/docs/Minutes-Template.doc>. Once completed, submit the minutes to assessment@tamtu.edu.

Purchasing staff reviewing of surveys as they are returned and discussions held on information gathered from surveys depicted the need of further dissemination of information.

Describe the action plan formulated. (The plan may be multi-year in nature.)

Based on the conclusion(s), describe the action plan to be implemented to improve or maintain unit services and operations, including resources needed and a timeline for implementation.

3. While each outcome is important, all three correlate within each other to produce an overall outcome. The University ranked #2 in HUB expenditures (62.34%) in institutional and procurement card expenditures in the Texas Procurement and Support Services (TPASS) Fiscal Year Annual HUB report of the Top 25 Agencies Spending more than \$5 million with the largest percentage spent with HUBs. The Purchasing Department will continue to play an ongoing role to provide the best service to the University community and strive to convey TAMTU rules and regulations pertaining to the Purchasing module FAMIS. With HUB purchases playing a vital role in the University's commitment to The Texas A&M University System Office and the State of Texas HUB Program, Purchasing will continue to communicate the importance of utilizing HUB vendors in purchase order and procurement card purchases.

Section III: Resources

Resource(s) to implement action plan: *Describe the resources that will be needed to implement the action plan. Also indicate if the resources are currently available, or if additional funds will be needed to obtain these resources.*

Funding

- New Resources Required
- Reallocation of current funds

Physical

- New or reallocated space

Other

- Primarily faculty/staff time
- University rule/procedure change only

Provide a narrative description and justification for requested resources (include linkage to Strategic Plan – or Compact, if relevant)

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Identify proposed outcomes for the next assessment cycle:

Continuation of present outcome(s) – (Indicate reason for continuation):

1. University staff and faculty will be satisfied with services provided by the Purchasing Department. 2. Creators of requisition (University staff and faculty) will be aware of TAMIU rules and regulations pertaining to the purchasing module FAMIS (Financial Accounting Information System) 3. Continue to communicate the importance of HUB “Historically Underutilized Business” vendors to those responsible for departmental procurement card purchases within the University Community. As stated above, the need to continue all three outcomes in order to provide the highest commitment in obtaining the goals of the Purchasing Department.
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New Outcome(s) – (List outcomes below):

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Modification of present outcome(s) – (Indicate reason for modification):

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Date Completed:

January 28, 2009

Submit completed form to integrate@tamiu.edu.