

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

Unit Name:

Office of Budget, Payroll and Fiscal Analysis

Unit Type:

Administrative Unit

Educational Support Unit

Assessment Period Covered:

January 2009 to February 2010

Unit Coordinator (Preparer of Report):

Fred Juarez III

List Other Report Contributors (if applicable):

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, efficient 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 Office of Budget, Payroll and Fiscal Analysis is committed to accurately preparing the University's annual budgets and reports as well as preparing and distributing accurate payroll information.

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.

Survey results indicate an increase in customer service satisfaction over the last year. In order to provide better assistance, we have implemented informational sessions for all budgetary unit heads and we will continue to implement improvements in the payroll process. In particular, we have introduced and promoted electronic notification of payroll information. Also, a grant Post-Award training workshop was conducted and a survey was completed by each attendee at the conclusion of the workshop. Based on the survey results, 98% of the respondents provided an overall rating of "good" to "excellent", thus indicating their satisfaction with the post-award process. Additionally, our department's web site continues to provide complete instructions to guide the users on the grant process.

Over the past several years, the University has focused on increasing the number of grant proposals being submitted by TAMIU faculty and administrators. Consequently, there has been a steady increase in the number of grants awarded to the University. Due to the rapid expansion and expected growth in this area, management decided to separate the department into two distinct offices (Budget/Payroll & Fiscal Analysis and Grants & Contracts) effective September 1, 2009. This re-organization will allow each area to focus on their individual responsibilities and to continue to provide excellent customer service to the University community.

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. Design and implement a training presentation to provide an effective budget process to the University employees.
2. The staff of the Office of Budget, Payroll and Fiscal Analysis provides satisfactory assistance concerning payroll information
- 3.

Section I: Planning and Implementation

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

Outcome 1 - Design and implement a training presentation to provide an effective budget process to the University employees.

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:
Volume of Activity: (Number of clients served, circulation data, etc.)	x			List of employees attending the presentation.
Efficiency: (Turnaround time for filling requests, timely service or prompt response, etc.)			x	
Service Quality:	x			2009 Finance and Administration Division Service

(Error rates, accuracy of information provided, etc)				Quality Survey.
Client Satisfaction Survey (Student, employer, alumni, customer, etc.)	x			TAMIU Enrichment Day Presentation “Budget 101” May 15 th , 2009.
Feedback: (Suggestion box, focus groups, evaluation forms, etc.)			x	
Review of existing data: (Routine records or reports, institutional data, audits, etc.)			x	
Staff discussions or evaluations of services to clients			x	
Standards/guidelines provided by professional associations			x	
Standards set by federal, state, county, city or system regulations			x	
External evaluations or auditors			x	
Benchmarks or comparisons with peer institutions			x	
Other			x	

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.

Outcome 1 - Training workshop attendees will respond to a survey indicating their satisfaction with the budget process. Criteria for success will be "good" to "excellent" with a combined rate of 90% from the information that has been provided.

Outcome 2 – Users will respond to a survey indicating their satisfaction with the assistance they receive concerning payroll information. Criteria for success will be "good" to "excellent" with a combined rate of 90% from the information that has been provided.

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:

Outcome 1 -Based on survey results, 96% of the respondents indicated an overall satisfaction of good to excellent.

Outcome 2 – Based on survey results, 89% of users indicated satisfaction with the assistance they receive concerning payroll information.

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.

Outcome 1 -A “Budgets 101” Training Evaluation Form was distributed to all participants at the conclusion of the workshop. A total of 41 participants attended the Budgets 101 workshop; however, only 35 surveys were completed. Responses to all questions were reviewed and survey results were compiled.

Outcome 2 – The 2009 Finance and Administration Division Service Quality Survey was distributed University wide. A total of 233 participated on the survey; however, only 216 participants completed questions related to payroll information. Responses to all questions were reviewed and survey results were compiled.

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.

Outcome 1 -Based on survey results, the benchmark outcome was met.

Outcome 2 - Based on survey results, the benchmark outcome was met.

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)

No funds are being requested at this time.

Identify proposed outcomes for the next assessment cycle:

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

Outcome 2 will continue. Benchmark was not meet by 1%.

New Outcome(s) – (List outcomes below):

Possible: Employee Personnel Action (EPA)

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

None

Date Completed:

March 4, 2010

Submit completed form to integrate@tamiu.edu.

Updated 9/2009