

Texas A&M International University Annual Institutional Effectiveness Review (AIER)

Date Submitted 02/10/2007

Assessment Period Covered (2006)

Academic Program/AES Unit Business and Comptroller's Office

Person(s) Preparing Review Elena Martinez

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

Provided improved timeliness of accounting information to departments and fiscal offices allowing for better analysis. Improved department's communication and consistency of information to university faculty, staff and students.

Section I: Planning and Implementation
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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.

Academic Program or Administrative/Educational Support Unit Mission

The mission of the Comptroller/Business Office is to support University programs and services, by providing accurate and timely reporting of the University's financial activities in a courteous and efficient manner; to provide timely payment of goods and services received by the University including University travel; to provide accurate and efficient receipting of University funds; and the timely processing of student refunds.

Identify outcomes and the relationship to Strategic Plan

Outcome 1

Is this outcome related to writing (QEP)?

Provide monthly financial reports to the departments in an electronic format.

Identify Strategic Plan Goal related to Outcome 1

Goal 3 Service

Identify Strategic Plan Objective related to Outcome 1

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

Identify methods of assessment to be used

2006 Finance and Administration - Service Quality Survey.

Indicate when assessment will take place

Annual

Criteria/Benchmark

We will achieve an 80% or better rating on the question regarding the overall services provided by the Business Office.

Outcome 2

Is this outcome related to writing (QEP)?

Student refunds will be disbursed fast and efficiently with the implementation of the program "Higher One".

Identify Strategic Plan Goal related to Outcome 2

Goal 3 Service

Identify Strategic Plan Objective related to Outcome 2

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

Identify methods of assessment to be used

Program enrollment statistics.

Indicate when assessment will take place

Annual

Criteria/Benchmark

Students will receive their refunds within 48 hours of disbursement.

Outcome 3

Is this outcome related to writing (QEP)?

Maintain current information concerning policies and procedures, forms and travel procedures on the Comptroller/Business Office University web page.

Identify Strategic Plan Goal related to Outcome 3

Goal 3 Service

Identify Strategic Plan Objective related to Outcome 3

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

Identify methods of assessment to be used

2006 Finance & Administration Division- Service Quality Survey

Indicate when assessment will take place

Annual

Criteria/Benchmark

Receive an 80% or better rating on survey question #4 regarding the communication by the Business Office about policies and procedures and proper use of forms.

Section II: Analysis of Results

When (term/date) was assessment conducted?

Outcome 1
Spring 2006

Outcome 2
Fall 2006

Outcome 3
Spring 2006

What were the results attained (raw data)?

Outcome 1
80% of those surveyed responded that they were satisfied with the overall services provided by the business office.

Outcome 2
91% of refunds were delivered electronically within 48 hours of disbursement.

Outcome 3
67% of those surveyed responded favorably on survey question #4 regarding the communication by the Business Office about policies and procedures and proper use of forms.

Who (specify names) conducted analysis of data?

Outcome 1
Elena Martinez and Maria Elena Hernandez.

Outcome 2
Elena Martinez and Alberto Chavez

Outcome 3
Elena Martinez and Maria Elena Hernandez

When were the results and analysis shared and with whom (department chair, supervisor, staff, external stakeholders)? Submit minutes with data analysis to assessment@tamiu.edu (Please use Minutes Template located on the [Project INTEGRATE web page.](#))

Outcome 1:
Met with top management of department to analyze results at the beginning of the Fall session.

Outcome 2:
The results were (are) shared with the VP and Associate VP for Finance and Administration and the department head's during the Division's weekly meeting in January 2007. The results

were (are) also shared with the Division of Student Success at the monthly "Money Meeting" also in January 2007.

Outcome 3:

The results were shared in a meeting with top management of the department to analyze the results at the beginning of the Fall session.

NOTE: Submit all assessment documentation (i.e., surveys, rubrics, course exams with embedded questions, etc.) to the Office of Institutional Effectiveness and Planning.

Use of Results: Indicate whether criteria were met/not met and what changes, if any, have been identified based on the data collected?

Outcome 1

Met Not Met

Provide narrative: A need to focus on friendlier and increased customer service.

Outcome 2

Met Not Met

Provide narrative: Increased enrollment into the Higher One refund program.

Outcome 3

Met Not Met

Provide narrative: The Business Office web page has been reformatted in an effort to improve ease of use.

How have these data-based changes improved your program/unit?

Outcome 1: The survey and the analysis of the results provided for a renewed focus on the importance of providing good customer service. We also have made some personnel changes that have benefited both the employees and the department.

Outcome 2: By providing refunds electronically, the speed in which students receive their refunds has improved by 2-7 days, therefore providing improved customer service. Additionally, because a refund file is submitted electronically, the department has experienced a savings in the cost of postage, the cost of envelopes and checks and processing time.

Outcome 3: When the information on the Business Office web page is easily found and understood, the department personnel will spend less time answering questions and spend more time productively performing their duties.

Section III: Programmatic Review

Are resources affected by the changes identified in Section II? Yes No

If so, specify the effect(s) using the chart below:

Funding	Physical	Other
<input type="checkbox"/> New resources required	<input type="checkbox"/> New or reallocated space	<input checked="" type="checkbox"/> Primarily faculty/staff time
<input type="checkbox"/> Reallocation of current funds		<input type="checkbox"/> University rule/procedure change only
		<input type="checkbox"/> Other: Enter text here

Provide a narrative description and justification for requested resources (include linkage to Strategic Plan)

Enter text here

Identify proposed outcomes for the next assessment cycle:
Continuation of present outcome(s) – (Indicate reason for continuation): Continue to work on Outcome 3: Maintain current information concerning policies and procedures, forms and travel procedures on the Comptroller/Business Office University web page. Maintaining current information provides an important link between the Business Office and it's customers. When more Business Office customers adopt researching the web page for information it will allow for more time within the Business Office to address its day to day operations.
New Outcome(s) – (List outcomes below): Increase collections on outstanding funds due to the University.
Modification of present outcome(s) – (Indicate reason for modification): Enter text here

****** This section to be completed by dean/director/vice-president ******

Are resources requested a priority for the academic program/AES unit?

Yes No

Comments:

Enter text here

If funding, physical or other resources were requested, what is the impact of the budget decisions on the academic program/AES unit?

Enter text here