

**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 2009 to February 2010 (December 2009)

Unit Coordinator (Preparer of Report):

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List Other Report Contributors (if applicable):

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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:

Goal 3: Service

Maintain, strengthen, and expand service to all University stakeholders.

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 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 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.

Meeting one on one continues to be the most effective means of teaching/helping FAMIS creators since every requisition may present another situation that the creator hasn't encountered. This individualized assistance is effective since the initial training deals with a lot of information all at one time. Until the creator actually comes across an actual situation they do not understand how the training actually applies.

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 requisitions (University staff and faculty) will be familiar with TAMIU rules and regulations pertaining to the purchasing module FAMIS (Financial Accounting Information System)
3. Communicate the importance of the State of Texas Historically Underutilized Business (HUB) vendors to those responsible for departmental procurement card purchases within the University.

Section I: Planning and Implementation

Outcome(s)

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

1. University staff and faculty will be satisfied with services provided by the Purchasing Department.
3. Communicate the importance of HUB "Historically Underutilized Business" vendors to those responsible for departmental procurement card purchases within the University.

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 2009 Finance & Administration Division Service Quality Survey.
<u>Service Quality:</u> (Error rates, accuracy of information provided, etc)	Y			Annual Reports of Procard Infractions
<u>Client Satisfaction Survey</u> (Student, employer,	Y			Purchasing Department Institutional Effectiveness Survey, Purchasing Department Requisition

alumni, customer, etc.)				Training Rate Form and Procurement Card Training Survey. The 2009 and 2010 Finance & Administration 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			
Staff discussions or evaluations of services to clients	Y			
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.

1. 85% of the creators will be satisfied with the services provided by the Purchasing Department.
3. 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:

Criteria collected for Outcome 1 reflected 44 out of 49 of the Institutional Effectiveness Survey returned stated no delays with their requisitions. The five who reported delays commented three of those were not the Purchasing Department’s fault. Creators/respondents have shown Purchasing has been successful in educating the creators in closing and routing their requisitions. “When you closed your requisition did you check at the top of the screen to make sure it says “document is now at the desk of approver”?” (47 out of 49 respondents replied they now check). Creators have continued to realize that additional trainings/workshops and updates would be beneficial. FAMIS is constantly changing and workshops will be used to keep the creators informed and updated. 29 of the 49 respondents felt a second FAMIS training should be scheduled after the initial one. In addition, the Finance & Administration Service Quality

Survey indicated communication is an area needing improvement. Out of 17 Procurement Card and HUB Training Effectiveness Surveys returned all reported they have an improved understanding on locating HUB vendors. “Do you feel this course has improved your understanding of locating HUB vendors?”

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.tamui.edu/integrate/docs/Minutes-Template.doc>. Once completed, submit the minutes to assessment@tamui.edu.

Purchasing staff review and discuss surveys as they are returned. A comparison analyst’s between the 2009 and 2010 Service Quality Survey was compiled and discussed to identify strengths and areas needing improvement. Although the goal of 85% satisfaction was not met, an increased overall satisfaction of services was attained from (2009=80%) to (2010=82%).

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.

In order to receive goods and services in a timely manner, Purchasing will continue to address the importance of further tracking each requisition to ensure it arrives in Purchasing without any delays. Purchasing will expand the online training manual and how to locate it, along with implementing a vehicle which the University’s Stakeholders can be kept abreast of policy and procedure changes. Communicating over the phone is not always the best practice when it comes to answering questions concerning requisitions; therefore, buyers will request that documentation be forwarded for review before answering questions. Continued communication and conversation between the buyers will allow Purchasing to consistently provide efficient answers.

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. (We have not met our goal of 85% satisfaction.) 2. Creators of requisitions (University staff and faculty) will be familiar with TAMIU rules and regulations pertaining to the purchasing module FAMIS (Financial Accounting Information System) (Communicating of changes in policy and procedures need improvement.)

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:

March 12,2010

Submit completed form to integrate@tamiu.edu.

Updated 9/2009