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

Unit Name:

Office of Budget, Payroll, Grants and Contracts

Unit Type:
  <u>X</u> **Administrative Unit**   ___ **Educational Support Unit**

Assessment Period Covered:

March 1, 2008 to January 31, 2009

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/Grants and Contracts is committed to accurately preparing the University's annual budgets, preparing and distributing accurate payroll information and monitoring the financial reports of grants and contracts to ensure our employee's accurate and timely 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 will continue to implement improvements in the payroll process. In particular, we have introduced and promoted electronic notification of payroll information. Also, a grant 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.

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, Grants & Contracts provides satisfactory assistance concerning payroll information.
3. Provide grant coordinators with an annual training workshop which focuses on the Post-Award process.
4.
5.
6.

Section I: Planning and Implementation

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

Outcome 3 - Provide grant coordinators with an annual training workshop which focuses on the Post-Award process.

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	
Efficiency: (Turnaround time for filling requests, timely service or prompt response, etc.)			x	
Service Quality: (Error rates, accuracy of information provided, etc)			x	
Client Satisfaction Survey			x	

(Student, employer, alumni, customer, etc.)				
Feedback: (Suggestion box, focus groups, evaluation forms, etc.)	x			Post-Award Grant Training Evaluation Form will be utilized to measure outcome 3.
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.*

A Post-Award Grant Training Evaluation Form will be distributed to all participants at the conclusion of the workshop. The objective is that 95% of trainees will indicate they are satisfied with the post award process.

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:*

Based on survey results, 100% of the respondents indicated an overall satisfaction of good to excellent.

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 at http://www.tamiu.edu/integrate/docs/Minutes-Template.doc. Once completed, submit the minutes to assessment_@tamiu.edu.*

A Post-Award Grant Training Evaluation Form was distributed to all participants at the conclusion of the

workshop. A total of 37 participants attended the Grant Post-Award workshop; however, only 32 surveys were completed. 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.

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
- X 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)

Identify proposed outcomes for the next assessment cycle:

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

New Outcome(s) – (List outcomes below):
Design and implement a training presentation to provide an effective budget process to the University employees.

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

Date Completed:
April 29, 2009

Submit completed form to integrate@tamiu.edu.