

Program/Unit Name: Procurement Services

Program Type: Administrative

Start: 7/1/2016

End: 6/30/2017

Academic Program/Administrative Unit Mission Statement

The mission of the Procurement Services is to provide efficient and timely procurement services that maximize the University's resources and promote its instruction, research, extension, and professional services programs.

Unit/School/College Mission

The Division of Business Operations enables the University's mission by providing support through the following means: operating, funding, technological, and physical infrastructure. We work to secure and effectively manage funds necessary to maintain the University's academic programs and support services. We are organized into 11 departments, which provide many fundamental services to students, faculty, and staff.

Assessment Process: The assessment process description should present a clear understanding of how the program/unit utilizes assessment data for continuous quality improvement.

Business Operations carries out a scorecard process in which each department (including Procurement Services) submits a monthly scorecard that outlines areas of assessment supporting the University's strategic plan and Business Operations' goals of excellent service delivery, maintaining a motivated and engaged team, and operational excellence. Goals or targets are approved by the VP for Business Operations. Data is collected from our financial systems and operational plans, compared to prior year's or prior month's data or same period of prior year and determined to be in line with expectations or at risk. Goals and targets are fluid and may be adjusted as necessary based on periodic risk assessments, audits, data analysis, change in priorities, etc. Assessments are used to ensure optimal performance and identify areas needing improvement.

Additional Background:

Procurement Services, as a requirement of State regulations and University policies, must ensure that University personnel is properly using purchasing cards (PCards). In order to certify those using PCards, Procurement Services requires first time applicants to attend a training and pass the PCard test. There is also a requirement to attend a refresher training every two years, but there is no test. Starting in 2011, Procurement Services has endeavored to improve the training and overall resources allocation of the PCard process. There are limited resources for the office and properly using staff time is important. The training sessions take at minimum 1 hour for prep time and 3 hours for the actual session. With such a time commitment per session, Procurement Services is trying to find the ideal balance between offering enough sessions to certify card holders, while not wasting resources by offering too many with low participation. The content of the training is also monitored and adjusted as needed.

Training (Compliance)

1. Outcome: The outcomes are specific, measurable, attainable, results oriented, and time bound. The outcomes are clearly related to the mission and focus on activities of the Program/Unit.

Procurement Services will provide targeted trainings on various procurement methods in order to increase compliance with University procurement policies and state law.

2. Assessment Methods: The measure matches the outcome, uses appropriate direct and indirect methods, indicates desired level of performance, helps identify what to improve, and is based on tested, known methods. Please enter at least 2 measures.

Measure 1: Track the number of PCard training sessions for new card applicants and for refresher training (required every 2 years). This will also include tracking the number of participants per session. A log will be maintained to track the training sessions offered.

Performance Target: 20 new card trainings and 10 refresher trainings will be offered. 100% of session will have at least 5 participants.

Measure 2: Employ use of Turning Point clickers to engage attendees during training to determine if the information provided is being assimilated by the participants. There will be 6 questions throughout the session. Questions 1 and 4, 2 and 5, and 3 and 6 are questions of similar content, but are worded different. This is being used to help session leaders reinforce ideas or procedures, and determine if an improvement is being made over the course of the training. (These question are color coded together in the results section.)

Performance Target: set to baseline.

Measure 3: A test will be administered to all new PCard applicants prior to issuance of card requiring a minimum passing score of 85%. Applicants are allowed a total of 3 chances to score and 85% or better.

Performance Target: 95% of participants will score an 85% or better on the first test.

3. Assessment Results: Reported data are aligned and appropriate to the outcome and the corresponding measure. Sampling methodology, population size (N), and sample size (n) must be provided.

Measure 1: Table 1 shows the number of training sessions and the % of sessions with at least 5 participants. As can be seen, the number of new card sessions has decreased for the past 6 years and the % of sessions with 5+ participants has increased. The number of refresher trainings has been fairly consistent with an average of 13.5; however, the % of sessions with 5+ participants has increased.

Table 1. Training Sessions

	New Card Training Sessions	% of session with 5+ participants	Refresher Training Sessions	% of session with 5+ participants
2016-2017	22	95%	13	97%
2015-2016	25	91%	12	96%

Exercise 3 – Closing the Loop

2014-2015	28	83%	15	90%
2013-2014	30	67%	14	91%
2012-2013	30	62%	---	---
2011-2012	40	55%	---	---

Measure 2: Table 2 shows the percentage of participants that chose the correct answer for each question. Overall, the scores have been fairly similar from 2014-2015 to 2016-2017. What is great to notice, is in all but one circumstance for those questions of similar content, there was improvement from the first to the second.

Table 2. Clicker Feedback

	Question 1	Question 2	Question 3	Question 4	Question 5	Question 6
2016-2017	51%	53%	84%	79%	76%	83%
2015-2016	49%	54%	84%	80%	72%	93%
2014-2015	50%	56%	80%	75%	69%	92%

Measure 3: Table 3 shows the results of the test administration for PCard applicants. As can be seen, there was an initial increase in the number of applicants passing the test on the first go. However, the number has been decreasing since 2014-2015.

Table 3. Test

	1 st Test	2 nd Test	3 rd Test	Total
2016-2017	66%	30%	2%	98%
2015-2016	69%	25%	6%	100%
2014-2015	70%	28%	1%	99%
2013-2014	77%	23%	0%	100%
2012-2013	75%	23%	2%	100%
2011-2012	60%	35%	5%	100%

Exercise 3 – Closing the Loop

**4. Use of Assessment Results: Reflect on the data. What do the data mean for your unit?
What changes/strategies were implemented based on the results?**

Reflection on the data:

Implemented or Recommended Changes: