

## 2016-2017 Assessment Cycle VPAF\_Purchasing (Procurement)

### Mission (due 1/20/17)

#### University Mission

The University of Louisiana at Lafayette offers an exceptional education informed by diverse worldviews grounded in tradition, heritage, and culture. We develop leaders and innovators who advance knowledge, cultivate aesthetic sensibility, and improve the human condition.

#### University Values

We strive to create a community of leaders and innovators in an environment that fosters a desire to advance and disseminate knowledge. We support the mission of the university by actualizing our core values of equity, integrity, intellectual curiosity, creativity, tradition, transparency, respect, collaboration, pluralism, and sustainability.

#### University Vision

We strive to be included in the top 25% of our peer institutions by 2020, improving our national and international status and recognition.

#### College / Department / Program Mission

##### College Mission

*Provide the college mission in the space provided. If none is available, write "None Available in 2016-2017."*

We provide high-quality, cost-effective services in support of the research, education, and service missions of the University of Louisiana at Lafayette.

The Division is responsible for the University's physical environment and business operations that contribute to providing exceptional experiences for our students, faculty, staff, and visitors.

##### Department / Program Mission

*Provide the department / program mission in the space provided. If none is available, write "None Available in 2016-2017".*

The mission of Procurement and Travel is to procure goods and services and process travel expenditures to sustain, foster, and support the administrative, educational, and research missions of the University. Procurement Office is responsible for assuring that the university adheres to state and federal laws, rules and regulations, as well as University policy.

### Assessment Plan (due 1/20/17)

#### Assessment List (Goals / Objectives, Assessment Measures and Criteria for Success)

##### Assessment List

Goal/Objective	Create and maintain a department which values customer service, and supports the Strategic Plan of the University.	
Legends	OO - Outcome/Objective (administrative units);	
Standards/Outcomes		
	Identifier	Description

	<b>Governance SI.Governance SI 1</b>	Establish a shared governance model that facilitates trust, teamwork, and cross-functional collaboration, and aligns all stakeholders to the Vision and Mission.	
Assessment Measures	<b>Assessment Measure</b>	<b>Criterion</b>	<b>Attachments</b>
	Indirect - Satisfaction	Performance evaluation scores of staff.	
	Indirect - Satisfaction	Number of complaints on purchasing and travel customer service.	

Goal/Objective	Ensure continued compliance with all state, federal, and University laws, rules and regulations.		
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	Direct - Financial and Legal Compliance (Other)	Internal and Legislative Audits.	

Goal/Objective	Standardize and combine commodities to realize cost Savings and efficiencies.		
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	<b>Governance SI.Governance SI 1.KPI 3</b>	Connect each stakeholder to the primary and support activities that drive University performance toward achieving the Vision.	
Assessment			

Measures	<b>Assessment Measure</b>	<b>Criterion</b>	<b>Attachments</b>
	Direct - Savings and Efficiencies (Other)	Amount of savings from combined contract.	
	Direct - Savings and Efficiencies (Other)	Development and training of negotiation techniques to result in best practices	

Goal/Objective	Develop, deploy and monitor new procurement and travel policies.		
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	Direct - Purchasing Policy Development (Other)	Successful development and implementation of new purchasing policies	
	Direct - Banner Implentation of Finance (Other)	Successful implementation of Requisition Entry in Banner Finance.	

## Results & Improvements (due 9/15/17)

### Results and Improvement Narratives

**Assessment List Findings for the Assessment Measure level for Create and maintain a department which values customer service, and supports the Strategic Plan of the University.**

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	Direct - Savings and Efficiencies (Other)	Has the criterion Amount of savings from combined contract. been met yet? Met	We are continuing to combine like services and purchases.		- Assessment Process: Continuous monitoring: We have implemented the Banner Finance system and will be able to gather data to assess the purchase of similar commodities. This will be an ongoing process and Banner will greatly help.
	Direct - Savings and Efficiencies (Other)	Has the criterion Development and training of negotiation techniques to result in best practices been met yet? Met	We have not attended classes for negotiation techniques		- Assessment Process: Continuous monitoring: Training of negotiation techniques will be continuous with the changing market and the need to bring savings to the university within a competitive market.

**Assessment List Findings for the Assessment Measure level for Develop, deploy and monitor new procurement and travel policies.**

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	Direct - Purchasing Policy Development (Other)	Has the criterion Successful development and implementation of new purchasing policies been met yet? Met	In progress but new procedures are continuing to be developed.		- Policy / Process / Procedural: The implementation of a new travel and expense model will allow the university to develop new procedures for approving and reviewing travel reimbursement requests. Also the implementation of a Higher Education Procurement Code will allow UL to develop best practices in procurement geared to the higher education environment.
Direct - Banner Implentation of Finance (Other)	Has the criterion Successful implementation of Requisition Entry in Banner Finance. been met yet? Met	We have successfully implemented the Requisition Entry for Banner.		- Assessment Process: Results Discussed / Shared: The implementation of Banner Requisition Entry was very successful with a few issues with approval routing. It will continue to be developed to assist staff and faculty to submit requisitions electronically making the procedures more efficient.	

## Reflection (Due 9/15/17)

### Reflection

#### 1) How were assessment results shared in the unit?

*Please select all that apply. If "other", please use the text box to elaborate.*

Distributed via email

Presented formally at staff / department / committee meetings

Discussed informally (selected)  
Other (explain in text box below)

**2) How frequently were assessment results shared in the unit?**

Frequently (>4 times per cycle)  
Periodically (2-4 times per cycle) (selected)  
Once per cycle  
Results were not shared this cycle

**3) With whom were assessment results shared?**

*Please select all that apply.*

Department Head (selected)  
Dean / Asst. or Assoc. Dean  
Departmental assessment committee  
Other faculty / staff (selected)

**4) What were the measurable or perceivable effects on your current (2016-2017) findings based on prior action plans (created in 2015-2016)?**

No measurable effects since we had not compared to 2015-2016.

**5) What has the unit learned from the current assessment cycle?**

We concentrated on specific goals which help to keep out focus on priorities and future planning.

## Attachments

### Attachments

Upload any supporting documents related to your assessment plans, results, or improvements. Documents may include rubrics, survey questions, reports, etc. There is no limit to the number of documents you can upload.

Click "Select File" to upload document(s)