

2017-2018 Assessment Cycle VPAF_Administrative Services: Bursar

Mission (due 12/4/17)

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 / VP and Program / Department Mission

Mission of College or VP-area

Provide the mission for the College or VP-area in the space provided. If none is available, write "None Available in 2017-2018."

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.

Mission of Program / Department

Provide the program / department mission in the space provided. The mission statement should concisely define the purpose, functions, and key constituents. If none is available, write "None Available in 2017-2018."

To provide to our student body, courteous, efficient, and cost effective fee collection and financial aid disbursement procedures.

The University is dedicated to achieving excellence in undergraduate and graduate education. The University has been and will always be committed to diversity and integration. The agency goals will be advanced through this commitment and through instruction, research, and service.

Attachment (optional)

Upload any documents which support the program / department assessment process.

Assessment Plan (due 12/4/17)

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

Assessment List

Goal/Objective	BDM - To develop a more streamlined research and documentation process in digital format that will enable staff members in both the disbursement and the cashier departments quicker access and to create more physical storage in the office. This will save valuable time previously lost when searching for paper documents for AR, as well as accounting. CRV sessions are scanned which allows digital storage of all receipts, deposit slips, etc. Only the current fiscal year's physical files will be in storage and all older years will be shredded.		
Legends	OO - Outcome/Objective (administrative units);		
Standards/Outcomes			
Assessment Measures			
	Assessment Measure	Criterion	Attachments
	Direct - Digital File Storage (Other)	Documents are scanned and placed on a shared drive instead of keeping physical papers in storage for years.	

Goal/Objective	Create and develop PowerPoint instructions for each staff's duties. Make PowerPoints available to each staff to train and/or use in the event the staff member(s) are absent, another staff member can pick up the slack.(Imported)		
Legends	OO - Outcome/Objective (administrative units);		
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	Direct - Cross Training Employees (Other)	PowerPoint of each job, shadow for a few days until employee is well trained. UPLOAD POWERPOINT AND OR INSTRUCTIONS OF EMPLOYEE DUTIES.	

Goal/Objective	Direct Deposit forms have not been a priority in the past. Direct deposit forms were made a priority for 2016 - 2017. The students received mass emails; UL direct deposit forms were stuffed in with their refund checks; and cashiers remind students of the direct deposit option when students request information concerning student refunds.(Imported)		
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	Direct - Direct-Percentage (Other)	Direct Deposit cuts down on paper checks due to less processing of physical checks, including: folding checks, stuffing envelopes, sealing envelopes, and postage.	

Goal/Objective	Automate AG file: Preparation of charges, payments, and comments by term to be posted to the student's account will reduce input time by 5-10 hours per month.		
Legends			
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		Reformat and create formulas for all information to appear on a final page with student's ID, and total payments/charges per term. This process will save approximately six hours of prep time per month. Automation of comments will save approximately 3 hours per month.	

Goal/Objective	Improvements to website.		
Legends			
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		FAQs implemented for prospective students / parents to view thus reducing the website search time, as well as, calls in the office. A survey has also been added so if a	

		student/parent does not find answers in the FAQ database, a question can be submitted to be added.	
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Program / Department Assessment Narrative

The primary purpose of assessment is to use data to inform decisions and improve programs (student learning) and departments (operations); this is an on-going process of defining goals and expectations, collecting results, analyzing data, comparing current and past results and initiatives, and making decisions based on these reflections. In the space below, describe the program's or department's overall plan for improving student learning and/or operations (the "assessment plan"). Consider the following:

- 1) What strategies exist to assess the outcomes?
- 2) What does the program/department expect to achieve with the goals and objectives identified above?
- 3) How might prior or current initiatives (improvements) influence the anticipated outcomes this year?
- 4) What is the plan for using data to improve student learning and/or operations?
- 5) How will data be shared within the Program/Department (and, where appropriate, the College/VP-area)?

Assessment Process

- 1) What strategies exist to assess the outcomes?
Better working knowledge and efficiency of operation errors.
- 2) What does the program/department expect to achieve with the goals and objectives identified above?
Fewer mistakes due to more time to review.
- 3) How might prior or current initiatives (improvements) influence the anticipated outcomes this year?
Decrease of unnecessary physical or manual procedures creates more time to devote to other duties.
- 4) What is the plan for using data to improve student learning and/or operations?
Faster and easier flow of daily tasks.
- 5) How will data be shared within the Program/Department (and, where appropriate, the College/VP-area)?
Discussions in weekly staff meetings.

Results & Improvements (due 9/15/18)

Results and Improvement Narratives

Assessment List Findings for the Assessment Measure level for BDM - To develop a more streamlined research and documentation process in digital format that will enable staff members in both the disbursement and the cashier departments quicker access and to create more physical storage in the office. This will save valuable time previously lost when searching for paper documents for AR, as well as accounting. CRV sessions are scanned which allows digital storage of all receipts, deposit slips, etc. Only the current fiscal year's physical files will be in storage and all older years will be shredded.

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	Direct - Direct-Percentage (Other)		Has the criterion Direct Deposit cuts down on paper checks due to less processing of physical checks, including: folding checks, stuffing envelopes,	Continuously met each semester.		- Policy / Process / Procedural: Meeting this objective will save time when issuing refunds and will also reduce issues related to checks (i.e. check

		sealing envelopes, and postage. been met yet? Met			getting lost in mail).
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Assessment List Findings for the Assessment Measure level for Improvements to website.

Goal/Objective	Improvements to website.				
Legends					
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		FAQs implemented for prospective students / parents to view thus reducing the website search time, as well as, calls in the office. A survey has also been added so if a student/parent does not find answers in the FAQ database, a question can be submitted to be added.			
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		Has the criterion FAQs implemented for prospective students / parents to view thus reducing the website search time, as well as, calls in the office. A survey has also been added so if a student/parent does not find answers in the FAQ database, a question can be submitted to be added. Not met	In process.		- Assessment Process: Continuous monitoring: This is an on-going project to help answer the students' questions without them needing to contact our office. This will help save time for us as well as the students.

Reflection (Due 9/15/18)

Reflection

The primary purpose of assessment is to use data to inform decisions and improve programs and operations; this is an on-going process of defining goals and expectations, collecting results, analyzing data, comparing current and past results and initiatives, and making decisions based on these reflections. Recalling this purpose, respond to the questions below.

1) How were assessment results shared in the program / department?

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?

Frequently (>4 times per cycle) (selected)

Periodically (2-4 times per cycle)

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) Consider the impact of prior applied changes. Specifically, compare current results to previous results to evaluate the impact of a previously reported change. Demonstrate how the use of results improved student learning and/or operations.

Manual operations have been converted to automated processes to the fullest extent possible.

5) Over the past three assessment cycles, what has been the overall impact of "closing the loop"? Provide examples of improvements in student learning, program quality, or department operations that are directly linked to assessment data and follow-up analysis.

Staff's time and resources are used more efficiently.

Attachments (optional)

Upload any documents which support the program / department assessment process.