# 2017-2018 Assessment Cycle VPAF_Purchasing (Procurement)

## 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."*
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.

**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 | Create and maintain a department which values customer service, and supports the Strategic Plan of the University.(Imported) |
| Legends | OO - Outcome/Objective (administrative units); |

| Standards/Outcomes | | |
|---|---|---|
| | **Identifier** | **Description** |
| | **Governance SI.Governance SI 1.KPI 3** | Connect each stakeholder to the primary and support activities that drive University performance toward achieving the Vision. |

| Assessment Measures | | | |
|---|---|---|---|
| | **Assessment Measure** | **Criterion** | **Attachments** |
| | 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.(Imported) |
|---|---|
| Legends | OO - Outcome/Objective (administrative units); |

| Standards/Outcomes | | |
|---|---|---|
| | **Identifier** | **Description** |
| | **Governance SI.Governance SI 1.KPI 3** | Connect each stakeholder to the primary and support activities that drive University performance toward achieving the Vision. |

| Assessment Measures | | | |
|---|---|---|---|
| | **Assessment Measure** | **Criterion** | **Attachments** |
| | Direct - Financial and Legal Compliance (Other) | Internal and Legislative Audits. | |

| Goal/Objective | Standardize and combine commodities to realize cost Savings and efficiencies.(Imported) |
|---|---|
| Legends | OO - Outcome/Objective (administrative units); |

| Standards/Outcomes | | |
|---|---|---|
| | **Identifier** | **Description** |
| | **Governance SI.Governance SI 1.KPI 3** | Connect each stakeholder to the primary and support activities that drive University performance toward achieving the Vision. |

| Assessment Measures | | | |
|---|---|---|---|
| | **Assessment Measure** | **Criterion** | **Attachments** |
| | 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.(Imported) |
|---|---|
| Legends | OO - Outcome/Objective (administrative units); |

| Standards/Outcomes | | |
|---|---|---|
| | **Identifier** | **Description** |
| | **Governance SI.Governance SI 1.KPI 3** | Connect each stakeholder to the primary and support activities that drive University performance toward achieving the Vision. |

| Assessment Measures | | | |
|---|---|---|---|
| | **Assessment Measure** | **Criterion** | **Attachments** |
| | 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. | |
| | Direct - Chrome River Traveland Expense Module (Other) | Successful implementation of the Chrome River Travel & Expense Module of Banner | |

**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**

The strategies that currently exist to assess the outcomes are the performance evaluations of the staff in regard to customer satisfaction, performance audits, and compliance with procurement and travel laws, rules and regulations. The implementation of Banner modules and the success of training campus staff will be measured by how many attend the training sessions and the number of help desk tickets we receive. The Purchasing Department expects to achieve an environment of compliance with state laws and an ability to meet the needs of the university community in regard to the purchase of goods and services and the processing of travel. Each year, their are better efficiencies gained from technology and the initiatives of the university to further the education of students as well as increase research opportunities. Purchasing will use the data available within Banner to assess the success of its goals. Data will be available to the state for audit purposes. The improvements that are gained from the implementation of Banner modules for requisitions, travel, and expense reporting will be shared with Finance staff to assist in budget planning.

# Results & Improvements (due 9/15/18)

**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.(Imported)**

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

| Identifier | Description |
|---|---|
| **Governance SI.Governance SI 1.KPI 3** | Connect each stakeholder to the primary and support activities that drive University performance toward achieving the Vision. |

| Assessment Measures | |
|---|---|

| Assessment Measure | Criterion |
|---|---|
| Indirect - Satisfaction | Performance evaluation scores of staff. |
| Indirect - Satisfaction | Number of complaints on purchasing and travel customer service. |

| Assessment Findings | |
|---|---|

| Assessment Measure | Criterion | Summary | Attachments of the Assessments | Improvement Narratives |
|---|---|---|---|---|
| Indirect - Satisfaction | Has the criterion Performance evaluation scores of staff. been met yet? Met | | | |

| | Indirect - Satisfaction | Has the criterion Number of complaints on purchasing and travel customer service. been met yet? Met | | | |
|---|---|---|---|---|---|

**Assessment List Findings for the Assessment Measure level for Ensure continued compliance with all state, federal, and University laws, rules and regulations.(Imported)**

| Goal/Objective | Ensure continued compliance with all state, federal, and University laws, rules and regulations.(Imported) |
|---|---|
| Legends | OO - Outcome/Objective (administrative units); |
| Standards/Outcomes | |

| Identifier | Description |
|---|---|
| **Governance SI.Governance SI 1.KPI 3** | Connect each stakeholder to the primary and support activities that drive University performance toward achieving the Vision. |

| Assessment Measures | |
|---|---|

| Assessment Measure | Criterion |
|---|---|
| Direct - Financial and Legal Compliance (Other) | Internal and Legislative Audits. |

| Assessment Findings | |
|---|---|

| Assessment Measure | Criterion | Summary | Attachments of the Assessments | Improvement Narratives |
|---|---|---|---|---|
| Direct - Financial and Legal Compliance (Other) | Has the criterion Internal and Legislative Audits. been met yet? Met | | | |

**Assessment List Findings for the Assessment Measure level for Standardize and combine commodities to realize cost Savings and efficiencies.(Imported)**

| Goal/Objective | Standardize and combine commodities to realize cost Savings and efficiencies.(Imported) |
|---|---|
| Legends | OO - Outcome/Objective (administrative units); |
| Standards/Outcomes | |

| Identifier | Description |
|---|---|

| | Governance SI.Governance SI 1.KPI 3 | Connect each stakeholder to the primary and support activities that drive University performance toward achieving the Vision. |
|---|---|---|

| Assessment Measures | |
|---|---|

| Assessment Measure | Criterion |
|---|---|
| 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 |

**Assessment Findings**

| Assessment Measure | Criterion | Summary | Attachments of the Assessments | Improvement Narratives |
|---|---|---|---|---|
| Direct - Savings and Efficiencies (Other) | Has the criterion Amount of savings from combined contract. been met yet? Not met | We have not been able to analyze the common items purchased to combine the spend. | | |
| Direct - Savings and Efficiencies (Other) | Has the criterion Development and training of negotiation techniques to result in best practices been met yet? Met | | | |

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

| Goal/Objective | Develop, deploy and monitor new procurement and travel policies.(Imported) |
|---|---|
| Legends | OO - Outcome/Objective (administrative units); |
| Standards/Outcomes | |

| Identifier | Description |
|---|---|
| Governance SI.Governance SI 1.KPI 3 | Connect each stakeholder to the primary and support activities that drive University performance toward achieving the Vision. |

| Assessment Measures | |
|---|---|

| Assessment Measure | Criterion |
|---|---|
| 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. |
| Direct - Chrome River Traveland Expense Module (Other) | Successful implementation of the Chrome River Travel & Expense Module of Banner |

| | Assessment Measure | Criterion | Summary | Attachments of the Assessments | Improvement Narratives |
|---|---|---|---|---|---|
| Assessment Findings | Direct - Purchasing Policy Development (Other) | Has the criterion Successful development and implementation of new purchasing policies been met yet? Met | | | |
| | Direct - Banner Implentation of Finance (Other) | Has the criterion Successful implementation of Requisition Entry in Banner Finance. been met yet? Met | | | |
| | Direct - Chrome River Traveland Expense Module (Other) | Has the criterion Successful implementation of the Chrome River Travel & Expense Module of Banner been met yet? Not met | We are continuing to design and implement. | | |

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

**2) How frequently were assessment results shared?**

Frequently (>4 times per cycle)
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.**

Many policy and procedural changes have resulted in best practices in purchasing.

**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.**

We have moved to a more electronic environment in requisition processing.

**Attachments (optional)**
*Upload any documents which support the program / department assessment process.*