

Administrative Unit Assessment Report

Assessment is a term commonly used to encompass the process of gathering and using evidence to guide improvements.

SACSCOC requires that "The institution identifies expected outcomes, assesses the extent to which it achieves these outcomes, and provides evidence of seeking improvement based on analysis of the results".

Be sure to **SAVE** your progress as you work!

Administrative Unit
Procurement Services

Submission Year
2021-2022

Assessment Coordinator Name
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Unit Goal

Goal

Goal 1

Unit Goals are broad statements that describe the overarching long-range intended outcomes of an administrative unit. They support the Institution's Mission/Goals.

Unit Goal

To demonstrate efficient use, transfer, and disposal of state property

Pillar of Success Supported

Financially Stable and Operationally Efficient

Outcomes

Outcome 1

Outcomes are specific, **measurable** statements that reflect the broader goals. They will primarily describe what the unit is going to do and what its impact will be on students and other key stakeholders (alumni, parents, employers, etc.).

Most administrative units measure **Operational Outcomes** which describe the level of performance of an operational aspect of a program or office (ex. number of services provided, timeliness of a process).

Some units may measure **Student Learning Outcomes** which describe knowledge, skills, and values that students are expected to gain as a result of their educational experiences (ex. Student Wellness Program may measure student knowledge of healthy habits.)

What type of Outcome would you like to add?

Operational Outcome

Enter Outcome

Transfer of surplus property to State Surplus or other state entities

Timeframe for this Outcome

Fiscal Year 2020-2021

Performance Target for "Met"

Decreased by $\geq 5\%$ compared to previous year

Performance Target for "Partially Met"

Decreased by between 0-4% compared to previous year

Performance Target for "Not Met"

Increased compared to previous year

Assessment Measure Used

Surplus property transfer records

Frequency of Assessment

Annually

Data Collected for this Timeframe (Results)

18 items were transferred to state surplus 2020-2021

Score (Met=3, Partially Met=2, Not Met=1)

3

Comments/Narrative

As of this moment, the development of this measurement has been delayed indefinitely. We are abandoning this metric for the foreseeable future in search of a better measurement tool.

Resources Needed to Meet/Sustain Results

We are planning collaboration with other state institutions of higher education to determine best practices.

Explanation of How Resources Will Be Used

Outcome 2

Outcomes are specific, **measurable** statements that reflect the broader goals. They will primarily describe what the unit is going to do and what its impact will be on students and other key stakeholders (alumni, parents, employers, etc.).

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What type of Outcome would you like to add?

Operational Outcome

Enter Outcome

Items recycled or sold via state approval

Timeframe for this Outcome

Fiscal Year 2020-2021

Performance Target for "Met"

Increased by >=5% compared to previous year

Performance Target for "Partially Met"

Increased by between 0-4% compared to previous year

Performance Target for "Not Met"

Decreased compared to previous year

Assessment Measure Used

Surplus property transfer records

Frequency of Assessment

Annually

Data Collected for this Timeframe (Results)

55 electronics items were recycled in 2020-2021
(unknown pallet count)

Score (Met=3, Partially Met=2, Not Met=1)

2

Comments/Narrative

As of this moment, the development of this measurement has been delayed indefinitely. We are abandoning this metric for the foreseeable future in search of a better measurement tool.

Resources Needed to Meet/Sustain Results

We are planning collaboration with other state institutions of higher education to determine best practices.

Explanation of How Resources Will Be Used

As previously noted, additional and/or dedicated surplus space would aid in this metric if we are to continue measurement. Additional dedicated space (either indoor areas or outdoor covered areas) would prevent items from being damaged by the elements, and/or the elimination of "stored" items in the surplus area that consume the limited space we have would address these issues.

Outcome 3

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What type of Outcome would you like to add?

Operational Outcome

Enter Outcome

Items donated to local charity

Timeframe for this Outcome

Fiscal Year 2020-2021

Performance Target for "Met"

Increased by $\geq 5\%$ compared to previous year

Performance Target for "Partially Met"

Increased by between 0-4% compared to previous year

Performance Target for "Not Met"

Decreased compared to previous year

Assessment Measure Used

Surplus property transfer records

Frequency of Assessment

Annually

Data Collected for this Timeframe (Results)

22 items were donated to the Habitat Store in 2020-2021.

Score (Met=3, Partially Met=2, Not Met=1)

1

Comments/Narrative

COVID-19 pandemic circumstances impacted the ability of Lander surplus, state surplus, and local charities to coordinate donations. As previously noted, we are developing other outcomes to measure that will better represent how we are managing surplus and will no longer be counting individual items being donated as this quantitative measurement provides little insight into the effectiveness of surplus property management. These measures and the development of this metric was also impacted by pandemic and remote working realities and as such has not been implemented.

Resources Needed to Meet/Sustain Results

We are developing other outcomes to measure that will better represent how we are managing surplus and are concerned that this quantitative measurement provides little insight into the effectiveness of surplus property management.

Explanation of How Resources Will Be Used

Goal Summary

Goal Summary/Comments

We are currently exploring other methods to better reflect efficiencies in the processing of surplus property.

Changes Made/Proposed Related to Goal

We are currently exploring other methods to better reflect efficiencies in the processing of surplus property.

Upload Files (if needed)

Goal 2

Unit Goals are broad statements that describe the overarching long-range intended outcomes of an administrative unit. They support the Institution's Mission/Goals.

Unit Goal

To have all Procurement staff complete the 3 Levels of State Procurement Training

Pillar of Success Supported

Financially Stable and Operationally Efficient

Outcomes

Outcome 1

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What type of Outcome would you like to add?

Operational Outcome

Enter Outcome

Budget to allow for training

Timeframe for this Outcome

Fiscal Year 2020-2021

Performance Target for "Met"

There is an adequate budget for training

Performance Target for "Partially Met"

There is a budget for training but it is inadequate

Performance Target for "Not Met"

There is no budget for training

Assessment Measure Used

We have an adequate budget for continued training

Frequency of Assessment

The departmental budget is reviewed/updated annually

Data Collected for this Timeframe (Results)

We have an adequate budget for continued training

Score (Met=3, Partially Met=2, Not Met=1)

3

Comments/Narrative

For fiscal year 2020-2021 there as an adequate budget for necessary training.

Resources Needed to Meet/Sustain Results

Explanation of How Resources Will Be Used

Outcome 2

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What type of Outcome would you like to add?

Operational Outcome

Enter Outcome

Organization chart exists for area

Timeframe for this Outcome

Fiscal Year 2020-2021

Performance Target for "Met"

An organizational chart for the area is available

Performance Target for "Partially Met"

An organizational chart is currently being updated but it is incomplete

Performance Target for "Not Met"

There is no organizational chart available

Assessment Measure Used

An organizational chart is available in the Procurement Services Manual (pg.43):https://www.lander.edu/sites/default/files/Documents/Procurement/PROCUREMENT_MANUAL-Revised_February%202021.pdf

Frequency of Assessment

The organizational chart is reviewed/updated annually

Data Collected for this Timeframe (Results)

Organizational chart is updated and current.

Score (Met=3, Partially Met=2, Not Met=1)

3

Comments/Narrative

As significant changes are made in procurement policy and organization, edits are made to this document.

Resources Needed to Meet/Sustain Results

Explanation of How Resources Will Be Used

Outcome 3

Outcomes are specific, **measurable** statements that reflect the broader goals. They will primarily

describe what the unit is going to do and what its impact will be on students and other key stakeholders (alumni, parents, employers, etc.).

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What type of Outcome would you like to add?

Operational Outcome

Enter Outcome

Training plan exists

Timeframe for this Outcome

Fiscal Year 2020-2021

Performance Target for "Met"

An ongoing training plan exists

Performance Target for "Partially Met"

We are currently updating our training plan

Performance Target for "Not Met"

We currently do not have a training plan in place

Assessment Measure Used

A training program exists through the State Fiscal Accountability Authority (SFAA):https://training.procurement.sc.gov/files/MO%20Certification%20Process%202018_0.p

Frequency of Assessment

The state program is updated annually

Data Collected for this Timeframe (Results)

A training program exists through the State Fiscal Accountability Authority (SFAA):https://training.procurement.sc.gov/files/MO%20Certification%20Process%202018_0.p

Score (Met=3, Partially Met=2, Not Met=1)

3

Comments/Narrative

COVID-19 continues to impact in-person training via SFAA. We will continue to attend virtual training as offered and applicable.

Resources Needed to Meet/Sustain Results

Explanation of How Resources Will Be Used

Outcome 4

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What type of Outcome would you like to add?

Operational Outcome

Enter Outcome

Number of staff trained annually

Timeframe for this Outcome

Fiscal Year 2020-2021

Performance Target for "Met"

All employees in Procurement Services have earned Level II Certification

Performance Target for "Partially Met"

All employees in Procurement Services have earned at least Level I Certification

Performance Target for "Not Met"

All employees in Procurement Services have not earned at least Level I Certification

Assessment Measure Used

Records on employee training are maintained both via SFAA and Lander University Procurement Services

Frequency of Assessment

Employees' training schedules are adjusted to parallel the state training program

Data Collected for this Timeframe (Results)

One new employee is working towards Level I Certification and another is working towards Level II. All others are Level II or above.

Score (Met=3, Partially Met=2, Not Met=1)

2

Comments/Narrative

One new employee is working towards Level I Certification while another is working toward Level II. All others are Level II or above. COVID-19 pandemic has affected the training opportunities offered by the state of South Carolina. As such no further training has been completed.

Resources Needed to Meet/Sustain Results

Explanation of How Resources Will Be Used

Goal Summary

Goal Summary/Comments

The limiting factor on training is the availability of courses from the State of SC and from NIGP.

Changes Made/Proposed Related to Goal

Adequate training budget and ample opportunity to attend training must remain a priority. No changes necessary.

Upload Files (if needed)

Goal 3

Unit Goals are broad statements that describe the overarching long-range intended outcomes of an administrative unit. They support the Institution's Mission/Goals.

Unit Goal

To increase agency use of the Purchasing Card

Pillar of Success Supported

Financially Stable and Operationally Efficient

Outcomes

Outcome 1

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What type of Outcome would you like to add?

Operational Outcome

Enter Outcome

Increased number of P-card Transactions

Timeframe for this Outcome

Fiscal Year 2020-2021

Performance Target for "Met"

Number of P-card transactions increased at least 10% compared to previous year

Performance Target for "Partially Met"

Number of P-card transactions increased between 0-9% compared to previous year

Performance Target for "Not Met"

Number of P-card transactions decreased compared to previous year

Assessment Measure Used

Report provided by Bank of America Works Application

Frequency of Assessment

Annually

Data Collected for this Timeframe (Results)

Dashboard Spend Report
 Fiscal Year 2019-2020=7960
 Fiscal Year 2020-2021=7655
 Decrease of 305 or -3.8%

Score (Met=3, Partially Met=2, Not Met=1)

1

Comments/Narrative

Again, numerous staff changes have brought new Pcard users that must get accustomed to the terms of small purchases with Pcards. Also numerous vendors are beginning to charge processing fees when using a card, or refusing credit card payments, therefore preventing the use of the Pcard. Additionally we remain concerned that a transactional count is not necessarily a valid performance indicator.

Resources Needed to Meet/Sustain Results

We continue to re-evaluating this outcome as a logical metric for the Pcard program's performance.

Explanation of How Resources Will Be Used**Outcome 2**

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What type of Outcome would you like to add?

Operational Outcome

Enter Outcome

Increased dollar amount of P-card purchases >\$2,500

Timeframe for this Outcome

Fiscal Year 2020-2021

Performance Target for "Met"

>\$2,500 transactions increased at least 10% compared to previous year

Performance Target for "Partially Met"

>\$2,500 transactions increased between 0-9% compared to previous year

Performance Target for "Not Met"

>\$2,500 transactions decreased compared to previous year

Assessment Measure Used

Report provided by Bank of America Works Application

Frequency of Assessment

Annually

Data Collected for this Timeframe (Results)

Bank of America Billing Statement Report
 2018-2019=\$639,631.35
 2019-2020=\$750,666.14
 2020-2021=\$781,576.40
 Increase of \$30,910.26 or +4.1%

Score (Met=3, Partially Met=2, Not Met=1)

2

Comments/Narrative

We attribute this increase to a better education of Pcard users as to what they are allowed to use their card for, as well as reminding those users to check with vendors about the possibility of using Pcards to pay invoices rather than issuance of purchase orders and/or checks. Due to these circumstances we have determined to retain this outcome as a measurement tool.

Resources Needed to Meet/Sustain Results

We are exploring replacing this goal with one that measures the effectiveness of our Pcard training program. For example, we are developing a Pcard Usage test that users will be required to pass in order to be assigned a Pcard. We would like to measure the 1st time pass rate on this test.

Explanation of How Resources Will Be Used**Outcome 3**

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What type of Outcome would you like to add?

Operational Outcome

Enter Outcome

Increased annual P-card spend

Timeframe for this Outcome

Fiscal Year 2020-2021

Performance Target for "Met"

Spend increased at least 10% compared to previous year

Performance Target for "Partially Met"

Spend increased between 0-9% compared to previous year

Performance Target for "Not Met"

Spend decreased compared to previous year

Assessment Measure Used

Report provided by Bank of America Works Application

Frequency of Assessment

Annually

Data Collected for this Timeframe (Results)

Dashboard Report Net Account Spend

2018-2019=\$2,799,919.01

2019-2020=\$2,829,916.48

2020-2021=\$2,834,685.70

Increase of \$4,769.22 or +.01%

Score (Met=3, Partially Met=2, Not Met=1)

2

Comments/Narrative

As previously noted, new Pcard users coupled with an increasing number of vendors charging processing fees or declining the acceptance of Pcard as a payment option have reduced the transactions compared to previous years. We will continue to measure this at least one more year.

Resources Needed to Meet/Sustain Results**Explanation of How Resources Will Be Used****Outcome 4**

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What type of Outcome would you like to add?

Operational Outcome

Enter Outcome

Increased annual P-card rebate Aug-July

Timeframe for this Outcome

8/1/2020-9/31/2021

Performance Target for "Met"

Rebates increased at least 10% compared to the previous year

Performance Target for "Partially Met"

Rebates increased between 0-9% compared to previous year

Performance Target for "Not Met"

Rebates decreased compared to previous year

Assessment Measure Used

Statement of rebate provided by SC Office of the Comptroller General.

Frequency of Assessment

Annually

Data Collected for this Timeframe (Results)

rebate for the period 8/1/19-7/31/20 was \$15,986.56 compared to the prior year at \$17,146.65 or a 6.7% decrease. Rebate for the period 8/1/20 to 9/31/21 was \$20,463, and increase of \$3,316.35 and +19% increase.

Score (Met=3, Partially Met=2, Not Met=1)

3

Comments/Narrative

Statement of rebate provided by SC Office of the Comptroller General and was previously only available for the range of August 1 thru July 31 Annually. As of the new contract, the range will be adjusted to cover October to September, therefore the reporting range assessed by the state is from August 2020 to September 2021. This increase in rebate is attributed to the adjusted date range which essentially added two months.

Resources Needed to Meet/Sustain Results**Explanation of How Resources Will Be Used**

Goal Summary

Goal Summary/Comments

We will continue to educate new users as well as re-educating existing users, encouraging them to process applicable small purchases with their Pcard, thereby allowing departments more immediate access to goods and services, as well as increasing efficiency and decreasing manual processes through the Procurement Office.

Changes Made/Proposed Related to Goal

We will continue to educate new users as well as re-educating existing users, encouraging them to process applicable small purchases with their Pcard, thereby allowing departments more immediate access to goods and services, as well as increasing efficiency and decreasing manual processes through the Procurement Office.

Upload Files (if needed)