

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
2023-2024

Assessment Coordinator Name
Scott Pilgrim

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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 2022-2023

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)

418 total items transferred to state surplus including IT equipment, PEES equipment and one bus compared to 29 items in the prior year.

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

1

Comments/Narrative

This outcome is being retired as it provides little if any indication of performance. This goal will not be measured for 23-24.

Resources Needed to Meet/Sustain Results

We have tried collaboration with other state institutions of higher education to determine best practices, however none that we have spoken with participate in this sort of goal setting program.

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 2022-2023

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)

Total of 112 items compared to 437 items in the prior year.

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

1

Comments/Narrative

This outcome is being retired as it provides little if any indication of performance. This goal will not be measured for 23-24.

Resources Needed to Meet/Sustain Results

We have tried collaboration with other state institutions of higher education to determine best practices, however none that we have spoken with participate in this sort of goal setting program.

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

Items donated to local charity

Timeframe for this Outcome

Fiscal Year 2022-2023

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)

58 items were donated to both Habitat for Humanity and local schools compared to 33 items 2021-2022

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

3

Comments/Narrative

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. This goal will not be measured for 23-24.

Resources Needed to Meet/Sustain Results

We have tried collaboration with other state institutions of higher education to determine best practices, however none that we have spoken with participate in this sort of goal setting program.

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 2022-2023

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 2022-2023 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 2022-2023

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/about/_files/documents/procurement/PROCUREMENT_MANUAL_SEPT_2023.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

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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 2022-2023

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 2022-2023

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

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Financially Stable and Operationally Efficient

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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 2022-2021

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

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

Fiscal Year 2022-2023=7471
compared to
Fiscal Year 2021-2022=8278
Decrease of 807 or -9.75%

1

Comments/Narrative

The use of P-Cards as a procurement method was reduced during 22-23 due to necessary fiscal restrictions and process changes. Additionally we remain concerned that a transactional count is not necessarily a valid performance indicator and as such this will not be measured for 23-24.

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

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

Timeframe for this Outcome

Fiscal Year 2022-2023

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

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

1

2022-2023=\$507,842.81
Compared to
2021-2022=\$765,094.91
Decrease of \$257,252.10 or -33.6%

Comments/Narrative

The use of P-Cards as a procurement method was reduced during 22-23 due to necessary fiscal restrictions and process changes. Additionally we remain concerned that a transactional count is not necessarily a valid performance indicator and as such this will not be measured for 23-24.

Resources Needed to Meet/Sustain Results

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 2022-2023

Performance Target for "Met"

Spend increased at least 10% compared to previous yea

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

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

1

2022-2023=\$2,533,860.00
Compared to:
2021-2022=\$3,249,776.16
Decrease of \$715,916.16 or -22%

Comments/Narrative

The use of P-Cards as a procurement method was reduced during 22-23 due to necessary fiscal restrictions and process changes. Additionally we remain concerned that a transactional count is not necessarily a valid performance indicator and as such this will not be measured for 23-24.

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

8/1/2022-9/31/2023

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)

We have not currently received the rebate notice

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

1

on 22-23, however since the overall spend was much less, the rebate will also be less, therefore the score will be Not Met.

Comments/Narrative

The use of P-Cards as a procurement method was reduced during 22-23 due to necessary fiscal restrictions and process changes. Additionally we remain concerned that a transactional count is not necessarily a valid performance indicator and as such this will not be measured for 23-24.

Resources Needed to Meet/Sustain Results

Explanation of How Resources Will Be Used

Goal Summary

Goal Summary/Comments

Overall reduced P-Card usage has driven down both the transaction count and spend amount.

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, and within the confines of both state and Lander policy, thereby allowing departments more immediate access to goods and services, as well as increasing efficiency and decreasing manual processes through the Procurement Office.

All of the goals listed in this document need to be re-assessed to ensure that they apply to the Strategic Plan of the University and are actually providing valuable insight.

Upload Files (if needed)