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 <u>identifies</u> expected outcomes, <u>assesses</u> the extent to which it achieves these outcomes, and <u>provides evidence of seeking improvement</u> based on analysis of the results".

Be sure to SAVE your progress as you work!

Administrative Unit
Procurement Services

Submission Year
2024-2025

Assessment Coordinator Name
Scott Pilgrim

Enter Assessment Coordinator Email
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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 2023-2024

Performance Target for "Met"
Decreased by >=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	**Frequency of Assessment**
Surplus property transfer records	Annually

Data Collected for this Timeframe (Results)	**Score (Met=3, Partially Met=2, Not Met=1)**
None	3

Comments/Narrative
As noted last year, this outcome was not measured in 23-24. Please remove this outcome. We are implementing a new procurement workflow system in 24-25 that will provide us with reporting tools to implement new measurable outcomes.

Resources Needed to Meet/Sustain Results

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 2023-2024

Performance Target for "Met"
Increased by >=5% compared to previous year

Performance Target for "Partially Met"
Increased by between 0-4% compared to previous yea

Performance Target for "Not Met"
Decreased compared to previous year

Assessment Measure Used	**Frequency of Assessment**
Surplus property transfer records	Annually

Data Collected for this Timeframe (Results)	**Score (Met=3, Partially Met=2, Not Met=1)**
None	3

Comments/Narrative
As noted last year, this outcome was not measured in 23-24. Please remove this outcome. We are implementing a new procurement workflow system in 24-25 that will provide us with reporting tools to implement new measurable outcomes.

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
Items donated to local charity

Timeframe for this Outcome
Fiscal Year 2023-2024

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)
None

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

Comments/Narrative
As noted last year, this outcome was not measured in 23-24. Please remove this outcome. We are implementing a new procurement workflow system in 24-25 that will provide us with reporting tools to implement new measurable outcomes.

Resources Needed to Meet/Sustain Results

Explanation of How Resources Will Be Used

Goal Summary

Goal Summary/Comments
As noted last year, this outcome was not measured in 23-24. Please remove this outcome. We are implementing a new procurement workflow system in 24-25 that will provide us with reporting tools to implement new measurable outcomes.

Changes Made/Proposed Related to Goal
As noted last year, this outcome was not measured in 23-24. Please remove this outcome. We are implementing a new procurement workflow system in 24-25 that will provide us with reporting tools to implement new measurable outcomes.

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 2023-2024

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 2023-2024 there was 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 2023-2024

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	**Frequency of Assessment**
An organizational chart is available in the Procurement Services Manual (pg.43):https://www.lander.edu/about/_files/documents/procurement/PROCUREMENT_MANUAL_JUNE_2024.pdf	The organizational chart is reviewed/updated annually

Data Collected for this Timeframe (Results)	**Score (Met=3, Partially Met=2, Not Met=1)**
Organizational chart is updated and current.	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	**Frequency of Assessment**
A training program exists through the State Fiscal Accountability Authority (SFAA):https://training.procurement.sc.gov/files/MMO%20Certification%20Process%202018_0.p	The state program is updated annually

Data Collected for this Timeframe (Results)	**Score (Met=3, Partially Met=2, Not Met=1)**
A training program exists through the State Fiscal Accountability Authority (SFAA):https://training.procurement.sc.gov/files/MMO%20Certification%20Process%202018_0.p	3

Comments/Narrative
The two newest employees have taken all available training courses to date and will continue to do so during 2024-2025

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 2023-2024

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	**Frequency of Assessment**
Records on employee training are maintained both via SFAA and Lander University Procurement Services	Employees' training schedules are adjusted to parallel the state training program

Data Collected for this Timeframe (Results)	**Score (Met=3, Partially Met=2, Not Met=1)**
Two new employees are currently seeking Level 1 certification.	1

Comments/Narrative
Two new employees were hired in late 2023-2024 and continue to train to achieve Level 1 certification.

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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Outcomes

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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 2023-2024

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	**Frequency of Assessment**
Report provided by Bank of America Works Application	Annually

Data Collected for this Timeframe (Results)	**Score (Met=3, Partially Met=2, Not Met=1)**
Dashboard Spend Report Fiscal Year 2023-2024= 5088 compared to 2022-2023=7471 Decrease of 2383 or -32%	1

Comments/Narrative
The use of P-Cards as a procurement method was reduced during 23-24 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 24-25.

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 2023-2024

Performance Target for "Met"
>$2,500 transactions increased at least 10% compared to previous yea

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	**Frequency of Assessment**
Report provided by Bank of America Works Application	Annually

Data Collected for this Timeframe (Results)	**Score (Met=3, Partially Met=2, Not Met=1)**
Bank of America Billing Statement Report 2022-2023=$507,842.81 Compared to 2021-2022=$765,094.91 Decrease of $257,252.10 or -33.6%	3

Comments/Narrative
As noted last year, this has been determined to be a poor indicator and as such was not measured in 23-24. Please remove this indicator.

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 2023-2024

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	**Frequency of Assessment**
Report provided by Bank of America Works Application	Annually

Data Collected for this Timeframe (Results)	**Score (Met=3, Partially Met=2, Not Met=1)**
Dashboard Report Net Account Spend 2023-2024=$1,715,375.68 Compared to: 2022-2023=$2,533,860.00 Decrease of $818,484.32 or -32%	1

Comments/Narrative
The use of P-Cards as a procurement method was reduced during 23-24 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 24-25.

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
8/1/2023-9/31/2024

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	**Frequency of Assessment**
Statement of rebate provided by SC Office of the Comptroller General.	Annually

Data Collected for this Timeframe (Results)	**Score (Met=3, Partially Met=2, Not Met=1)**
We have not currently received the rebate notice on 23-24, however since the overall spend was much less, the rebate will also be less, therefore the score will be Not Met.	1

Comments/Narrative
The use of P-Cards as a procurement method was reduced during 23-24 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 24-25.

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)