



Planning and Evaluation Tracking

College Year: 2009-2010

Division of: Finance and Adm. Services
 Department of: Purchasing/Records Retention

Person Responsible: Terry Berg
 Person Responsible: Vickie Shelton

Purpose Statement: Purchasing: Assure the procurement of goods and services for AC in an ethical and legal manner while utilizing best practices. **Records Retention:** To lawfully maintain an active and ongoing records management program.

Goal Statements	Objectives/Outcomes (including assessment tools and standards)	Results	Use of Results (including improvements and revisions)
1. Reduce the length of time for vendors to be paid by assuring that employees with purchasing privileges comply with purchasing procedures.	1.c After notifying AC departments within 2 weeks of material delivered, AC departments will submit receiving copy of PO to purchasing 95% of time, for timely payment of invoices as measured by the central receiving log. (revised 12/08)	1.c Apr 09 – August 09 @ 14 days-N=293/312 averaged over 5 months = (95%)	1.c. The data shows: 1) We had a 63% increase in total volume over last year. 2) August does not follow the normal trends,(we will eliminate August from future data sample). 3) When the data from April thru Aug. is <i>averaged</i> the result is a 95% rate of compliance for paperwork returned on time. This is consistent with last year's results based on a 14 day turn around and it meets our objective. We have revised our schedule and will track data March thru July 2010. If an average of 95% compliance is achieved again next year, we will be satisfied with the results and see no further need to measure this activity.

1.b After notifying AC departments within 2 weeks of material delivered, AC departments will submit receiving copy of PO to purchasing 95% of time, for timely payment of invoices as measured by the central receiving log.
(revised 12/08)

1. b. Sep 07-Jan 08
@ 7 days-N=159/200 (79.5%)
@ 10 days-N=181/200 (90.5%)
@ 14 days-N=192/200 (96%)

1. b. Our results indicated that compliance was not set up to expectation. We felt this was due to the 1 week turn around time. Our results proved that when individuals were given 2 weeks to turn in their PO, 96 % were compliant. We have revised our outcome based on these results and will allow a 2 week turn around on PO. We will continue to do e-mail reminders to encourage the timely turn in of PO.

1. a. After completing mandatory training, employees who repeatedly do not follow purchasing procedures, will completely and accurately comply with PO procedures 100% of the time, as measured by a log maintained by purchasing.

1. a. Nov 2007-Dec 2008
N=38/38=100%

1. a. June 2006-Oct 2007
N=42/42=100%

1. a. After successful completion of training, attendees are complying. Action plan: Any individual who is non-compliant will be asked to attend the requisition training offered through POD at the next scheduled time. These trainings will be scheduled several times during the year. We will continue to monitor this objective.

2. Standardize labels on boxes for storage, retention and inventory purposes.

2.a. Accurately identify items for storage by training AC departments to inform them of the new standardized procedures, showing a 75% increase in compliance this

2.a. Aug 07- Dec 08
N= 712 records from 23 individuals (this is our baseline year)

2. a. This is a new outcome statement and hence the data reflects our baseline. We intend to compare future years to this data and expect to see a drastic increase due to the

year as measured by
database record system.
(revised 12/08)

following: 1) We have created a full time position dedicated to bringing records management into compliance. 2) The tracking of disposition of records 3) Formation of procedures to dispose of records 4) Formation of a Records Management Committee 5) Updated retention schedule 6) Begin the process of examining Electronic Record Management software to achieve compliance with State Law on an enterprise level.

2. Entering records into records management database then printing a standardized label for each box will apply compliance with the retention schedule.

2. b. By training the AC personnel to correctly identify records before submitting them into storage we will increase compliance. An increase in compliance will be related to the percentage growth in the database for total boxes stored, total boxes destroyed, new record series, and total new users. The goal is an average 25% increase for all categories.

2.b. Prior Oct 03, 2007
N= Zero

May 09, 2008
N= 100% increase

Feb 03, 2009
N= 82% increase

Sept 24, 2009
N= 48% increase.

2.b.(1)We have created a full-time position dedicated to bringing records management into compliance. (2) The tracking of disposition of records. (3) Formation of procedures to dispose of records. (4) Formation of a Records Management Committee. (5) Updated Retention Schedule. (6) Beginning the Process of examining Electronic Record Management software to achieve compliance with State Law on an Enterprise level.