

PET FORM
Planning and Evaluation Tracking
(2011-2012 Assessment Period)

Division of: Finance & Admin. Services

Person Responsible for this Division: Terry Berg

Department of: Purchasing/Rec. Retention

Person Responsible for this Form: Vickie Shelton

Purpose Statement (With Last Updated Date): Purchasing: Assure the procurement of goods and services for AC in an ethical legal manner, utilizing best practices while lawfully maintaining an active on-going records management program (Updated 10-3-11).

Goal Statement #1:

Reduce the length of time to pay vendors by assuring the employees with purchasing privileges comply with purchasing procedures.

Outcome/Objective Statement

(Be sure to include audience, behavior, conditions, degree/benchmark, and evaluation method):

After being trained on an individual basis, employees with purchasing privileges will completely and accurately comply with PO procedures, by including all supplemental information necessary to place the order 100% of the time, as measured by the requisition register. (Revised 10-7-11)

• Results (Provide Numbers and Percentages for Quantitative Data)

- **2010-2011 Data:** Numbers = 923 out of 952 and Percentage =97%
923 purchase orders out of 952 had the necessary paperwork to place the order accurately in compliance with PO procedures.
- **2009-2010 Data:**
New goal set in 2010-2011

• Analysis

- Provide Previous Data/Result Analysis
(Include if benchmark was met and how results relate to outcome statement):
We were close to meeting our benchmark.

• Improvements

- List any Improvements Made in the **2010-2011** (Last Academic) Year Based on the **2009-2010** PET Results:
No results obtained in this goal for year 2009-2010, but since 2006 Purchasing Director has been individually training troubled areas in purchasing guidelines to ensure successful submission of purchase orders.
- Evaluate Why Improvements Were Successful/Were Not Successful:
Improvements were successful due to the fact that the Purchasing Director in 2006 recognized early on the need for training departments on the Purchasing guidelines and statues. The testing group was successful due to the diligence in previous years before tracking data in a representative sample was completed. The objective needed to be verified with results to see if the training had been successful.

- Provide the Budget Information Needed to Make Past Improvements (Cost/Details):
Budget information not required in these actions, only requires staffing of the Purchasing Director and Purchasing Specialist to train departments on purchasing guidelines.
 - **Recommendations/Actions for 2011-2012**
 - Person Responsible (Who will complete the action?):
Vickie Shelton
 - Action Plan:
Purchasing Director recognized the 3 percent that was not meeting standards was a result to turnover. We will need to target the new people through intense intervention training.
 - Expected Time Frame Needed to Implement Action Plan (Please provide specific deadline date):
We will track another representative sample of requisitions-January, February, March and April 2012 to see if we maintain the same consistent results for this budget year so we can improve and obtain the results of 100% compliance.
 - Budget Information Needed for Future Action (Cost/Details):
None
-

Goal Statement #2: Standardize label information on boxes for storage, retention, and inventory purposes.

Outcome/Objective Statement 2.a.

Increase participation (compliance) in AC's Records Management Program by 25%. (Revised 10-7-11)

Results (Provide Numbers and Percentages for Quantitative Data)

	2009/2010	2010/2011	2011/2012
Records Series In Use	46/66 43% increase	66/84 27% increase	
Liaisons Participating	27/31 15% increase	31/34 10% increase	
Inventory Total	924/1243 35% increase	928/1540 66% increase	
Boxes Disposed	261/315 21% increase	315/311 1% decrease	

- **Analysis**
 - Provide Previous Data/Result Analysis
(Include if benchmark was met and how results relate to outcome statement):
 - Benchmark was met at 25% (averaged.)
- **Improvements**
 - List any Improvements Made in the **2010-2011** (Last Academic) Year Based on the **2009-2010** PET Results:
 - State Re-certification of the College Record Schedule is ongoing.
 - Incorporating abandoned records into the inventory.
 - Evaluate Why Improvements Were Successful/Were Not Successful:
 - State Re-certification is successful because it exposes department personnel to a greater level of responsibility regarding the process of records scheduling and disposal. This increase their participation and compliance for the institution.

- Too often, defunct college programs or closed staff & faculty offices result in abandoned records. This material is left behind, in closets and store rooms, and then eventually winds up at the records storage building with no one taking ownership. The success here is - this “cleanup” wouldn’t happen properly (legally) if not for a functioning records program, records committee & records officer administering the procedures.
 - Provide the Budget Information Needed to Make Past Improvements (Cost/Details):
 - The software used to manage the program was created by AC staff in 2007.
 - All other material used to run the program is included in the current budget.
- **Recommendations/Actions for 2011-2011**
 - Person Responsible (Who will complete the action?):
 - Mike Jager
 - Action Plan:
 - See NEW Goal Statement 2b & 3. Both are planned improvements and will impact this Goal.
 - Expected Time Frame Needed to Implement Action Plan (Please provide specific deadline date).
 - 3 months for #2b
 - Next fiscal year for #3.
 - Budget Information Needed for Future Action (Cost/Details):
 - Email notices – No additional budget necessary.
 - Replacement software - \$40,000.00.

Outcome/Objective Statement 2.b.:

After receiving an invitation via email, liaisons of AC records who have not previously participated will identify and submit all inactive scheduled records as measured by a log of participation. (New Outcome statement 2011)

● **Results (Provide Numbers and Percentages for Quantitative Data):**

	2009-2010	2010-2011	Percent Change
Total Dept. Liaisons ***see list at end	116	116	
Total Liaisons Participating	31	34	10% increase over 2009-2010
Percent Participating	27%	29%	

● **Analysis**

- Provide Previous Data/Result Analysis
(Include if benchmark was met and how results relate to outcome statement):
 - Program is basically static, not showing growth in the area of new participants.

● **Improvements**

- List any Improvements Made in the 2010-2011 (Last Academic) Year Based on the 2009-2010 PET Results:
 - No results – new outcome statement
- Evaluate Why Improvements Were Successful/Were Not Successful:
 - No data
- Provide the Budget Information Needed to Make Past Improvements (Cost/Details):
 - No data

- Recommendations/Actions for 2011-2012
 - Person Responsible (Who will complete the action?):
 - Mike Jager
 - Action Plan:
 - Create and distribute an invitation email to engage departments not currently participating.
 - Expected Time Frame Needed to Implement Action Plan (Please provide specific deadline date):
 - 3 months to create and send out email.
 - Budget Information Needed for Future Action (Cost/Details):
 - No additional budget is needed.
-

Goal Statement #3: Commit the College to technology which attracts and retains students by enabling more effective and efficient College operations. (AC Strategic Plan through 2015, Strategy 4.6)

Outcome/Objective Statement:

AC administration will establish technology priorities. (AC Strategic Plan through 2015, Task 4.6.1)

- Results (Provide Numbers and Percentages for Quantitative Data)
 - No quantitative data at this time: New Objective Statement
- Analysis
 - Provide Previous Data/Result Analysis
 - This records management software has not been purchased.
- Improvements
 - List any Improvements Made in the **2010-2011** (Last Academic) Year Based on the **2009-2010** PET Results:
 - Evaluate Why Improvements Were Successful/Were Not Successful:
 - Provide the Budget Information Needed to Make Past Improvements (Cost/Details):
 - Cost of the software is included in the 2011-2012 budget.
- Recommendations/Actions for 2011-2012
 - Person Responsible (Who will complete the action?):
 - Terry Berg/Lee Colaw
 - Vickie Shelton
 - Mike Jager
 - Action Plan:
 - Purchase a software application - Perceptive Software Records Policy Manager.
 - Submit a formal TRTF Software Request Form for 2011-2012 FY.
 - Expected Time Frame Needed to Implement Action Plan (Please provide specific deadline date).
 - Budget Information Needed for Future Action (Cost/Details):
 - \$40,000.00 includes software, license, and installation/maintenance fee. Based 2010 estimate.