



## Planning and Evaluation Tracking

College Year: 2008-2009

Division of: Finance and Adm. Services

Person Responsible: Terry Berg

Department of: Purchasing/Records

Person Responsible: Vickie Shelton

Retention

**Purpose Statement:** Assure the procurement of goods and services for AC in an ethical and legal manner while utilizing best practices.

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

<p>2. Standardize labels on boxes for storage, retention and inventory purposes.</p>	<p>2.a. Accurately identify items for storage by holding training sessions with AC departments to inform them of the new standardized procedures, showing a 75% increase in compliance this year as measured by database record system. (revised 12/08)</p>	<p>2.a. Aug 07- Dec 08 N= 712 records from 23 individuals (this is our baseline year)</p>	<p>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.</p> <p>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 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.</p>
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