2013-2014 Assessment Report

Associate VP Business & Finance

Budget Services

Expected Outcome 1: Budget Transfers
Budget Services will reduce its rejection rate on budget transfers to 2%.

Assessment Method 1: Collection of statistics on documents that come to Budget Services for review.

Assessment Method Description
Budget Services receives monthly reports of statistics about documents that come to the budget queue for approval. Specific statistics include: number of transactions (both for the month and cumulative for the year), average time of processing from the initial entry to completion and processing time in the budget queue (per month and cumulative), number of documents rejected (for the month and cumulative), rejection rate (month and cumulative), and persons who have more than 5 rejects for the month (50 for the year).

Findings
Over the course of the fiscal year, Budget Services rejected a total of 124 documents at a rejection rate of 2.7%. While the total number and percentages are decreased from the prior year (163 and 4%), there is still room for improvement. We are finding that a majority of our disapprovals are related to transaction initiators not providing enough documentation on certain types of transfers, specifically transfers involving restricted funds.

How did you use findings for improvement?
Budget Services is continuing to send out notices to individuals as well as targeted communication at Financial Liaison meetings concerning the problems that we see with the completion of budget transfers. In our training sessions offered through HRD, we will put more emphasis on this particular issue to reduce the likelihood of rejection.

Additional Comments
Expected Outcome 2: HRD Training

Users trained by Budget Services will have a clear understanding of basic financial concepts related to budget matters.

Assessment Method 1: Administered test to attendees.

Assessment Method Description
Budget Services developed an objective test on topics covered during its training course. The test consists of 10 questions (multiple choice, true/false, and fill-in-the-blank) and contains questions on a variety of subjects like: budget queries, components of the calculation for available balances, budget transfer mechanics, and variations between Self Service Banner (SSB) and Banner Admin (INB). We administered the test to a total of 13 attendees (out of 15) during the fiscal year.

Findings
In general, attendees scored highly. The average test score was 8.5 out of 10. A few questions were missed by a couple of people, but there was one question that was missed 10 times out of 13. The particular question that was most missed pertained to a comparison between a particular query in SSB and a form in INB.

How did you use findings for improvement?
Instructors will begin to place a bigger emphasis on comparing the two different systems to show that the same information can be obtained from both modules of Banner.

Additional Comments
Assessment Method 2: Survey of attendees

Assessment Method Description
Budget Services developed a survey to gather thoughts about the training to look for areas to improve. The survey was administered as an alternative to the test in one training class for the year. We gave the survey to all 7 attendees and received 4 back for a 57% response rate. The survey consisted of two sections: some statements followed by a Likert scale rating (1 being low and 5 being high) and a section for open-ended questions/statements. The statements in the first section were:

- This class was helpful to understand new concepts.
- This class will better allow me to complete my job responsibilities.
- The material in this class was communicated well.
- The format of the class allowed me to better understand the material.

The second section questions/statements were:
Please provide comments about the instructor’s knowledge of the material and delivery.
What one item do you now understand better? With what item could you use more in-depth instruction? Why?
What other comments or concerns do you have?

Findings
All of the responses from all of the responders in section 1 were completed with a 4 or 5 rating and gave us a clear picture of how effective we were at teaching the material. The open-ended section of the survey yielded more comments that could be used for improvement, particularly the responses to #2. On each of the responses received, our report repository, e-Print, was mentioned as something they felt they learned more about or were interested in hearing more about.

How did you use findings for improvement?
Budget Services is starting a class on e-Print reports that will take users through the main reports for financial data, how to build them with certain parameters, and how to pull the information for decision-making.

Additional Comments