



Sam Houston
State University

2016-2017

Administrative Effectiveness

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Office of the President

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: President, Office of****Sam Houston State University****President, Office of**** Goal 1: Lifelong Learning Environment****Goal Description**

Foster a lifelong learning environment in support of a diverse faculty and staff who are excellent scholars, educators, and professionals.

Related Items** Lifelong Learning Environment - Professional Development****Performance Objective Description**

Dr. Hoyt will promote a lifelong learning environment in support of a diverse faculty and staff who are excellent scholars, educators, and professionals by promoting and supporting internal and external professional development programs.

** Lifelong Learning Environment - Professional Development****KPI Description**

- Continue to support and promote growth of the High Performing Employee Leadership Academy
- Continue to support and promote growth of Founders Day/Education Day at SHSU
- Send one employee per year to the Governor's Executive Development Program

Results Description

- High Performing Employee Leadership Academy: TDCJ will send 8 participants and HISD will send 2 participants for the FY 2018 co-hort. Dr. Hoyt reviewed with Cabinet the nomination packet for the Leadership Academy. The packet included 11 nominees for SHSU. SHSU usually selects 8 nominees to attend. The City of Huntsville was not able to participate this year. The City of Huntsville usually submits 3 participants. David Yebra noted in his memo the Leadership Academy has the capacity to take all 11 nominations. Cabinet agreed with Mr. Yebra's recommendation and recommended all 11 nominations for the Leadership Academy. The FY2018 co-hort will have 21 participants as it did in FY2017
- Founders Day/Education Day at SHSU: SHSU hosted the 4th Founders Day/Education Day on April 22, 2017. The event was well attended and received praise from attendees. The event was not held in conjunction with the President's Circle spring meeting this year. Instead, it was combined with the Golden Circle Luncheon. The change was made in hopes of getting additional attendees from the Golden Circle Luncheon. The event was very successful and will be combined with the Golden Circle Luncheon again next year.
- Dr. Hoyt sent Kristy Vienne, Assistant VP of Student Affairs, to the Governor's Executive Development Program.

Lifelong Learning Environment - Stimulate Academic Environment

Performance Objective Description

Dr. Hoyt will promote a lifelong learning environment in support of a diverse faculty and staff who are excellent scholars, educators, and professionals by bringing to campus speakers and by hosting open forums to discuss various higher education topics.

Lifelong Learning Environment - Stimulate Academic Environment

KPI Description

- Host a President's Breakfast Series for administrators each semester with a key note speaker to speak on current higher education topics
- Host 2-3 President/Provost Roundtable forums each semester on current higher education topics

Results Description

- Dr. Hoyt hosted a President's Breakfast Series for administrators for Fall 2016, on 10/4/16 with Elizabeth Chang, David Attis, and Ryan Quillad from Education Advisory Board (EAB) as speakers. Dr. Hoyt extended an invitation to a couple of speakers for Spring 2017, but was not able to secure one.
- Dr. Hoyt and Provost Eglsaer hosted 1 President/Provost Roundtable open discussion session each semester as follows: September 2016- "Re-imagining the First Year" and March 2017 - "Quality Enhancement Plan"
- Cabinet decided at the August 2016 mini-retreat to add a series "Administrator's Forum". The first forum was held 11/3/16 hosted by Dr. Hernandez, VPFO, entitled "Construction Update". The second forum was held 4/5/17 hosted by Dr. Hernandez and Dr. Hoyt entitled "Legislative Update".

Goal 2: Stimulate Learning Environment

Goal Description

Promote a stimulating learning environment through the integration of academic settings, campus culture, and service.

Related Items

Stimulate Learning Environment - Academic

Performance Objective Description

Dr. Hoyt will promote a stimulating learning environment through the integration of academic settings, campus culture, and service by developing a training center and business incubator facility.

Stimulate Learning Environment - Academic

KPI Description

- Develop the plans for implementing Innovation Plaza. The plaza will include a training center and business incubator facility on the 78 acres of land donated to SHSU from TDCJ.
- Develop plans to expand Allied Health Programs.

Results Description

- Innovation Plaza: Planning and engineering consulting work has been done to define the infrastructure, building requirements, and associated costs for Phase I. This plaza will be built on the 78 acres of land obtained from TDCJ. Phase I includes a training center and business incubator facility. SHSU is still in the process of negotiating with the City of Huntsville regarding the infrastructure of the land. SHSU has had several personnel changes in the leadership role for this project. The position that will have a leadership role for this project is Associate VP for Research and Sponsored Programs is currently in the stage of interviewing candidates and should be filled soon.
- Allied Health Programs: SHSU will present to the TSUS Board of Regents at a August 2017 meeting a motion to offer a degree program and associated courses leading to a Doctor of Osteopathic Medicine. The Dean of Osteopathic Medicine was hired this year (Dr. Charles Henley) and two Associate Deans (Dr. Stephen McKernan and Dr. Olivera Taylor) and Assistant Dear (Courtney West). SHSU also has a letter of commitment for a donation of land on I-45 in The Woodlands to build a facility and are in the process of finalizing the land transfer. SHSU is currently seeking accreditation and has submitted a feasibility study to the Commission on Osteopathic College Accreditation (COCA).

Stimulate Learning Environment - Culture/Service

Performance Objective Description

Dr. Hoyt will promote a stimulating learning environment through the integration of academic settings, campus culture, and service by maintaining the university's culture of "up close and personal" and "service oriented".

Stimulate Learning Environment - Culture/Service

KPI Description

- Actively participating in and support campus activities such as "All Paws In" service project
- Hosting student give away activities through social media
- Attend and host luncheons for students, faculty, and staff

Results Description

- Campus Activities: Dr. Hoyt attended virtually all the football games and as many of the basketball, volleyball, and other sporting events that her schedule would allow. She also attended virtually all the University Advancement/Alumni events - even traveling to the New York for the 12/14/16 alumni event . She attended/participated in the "All Paws In" student service project.
- Dr. Hoyt hosted a couple of student give away activities per semester.
- Dr. Hoyt hosted 3 faculty and 3 staff small luncheons per semester. In addition, she attended 2 - 3 Student Affairs luncheons per semester and a couple of new Diversity luncheons hosted by Student Affairs.

Goal 3: University Resources And Infrastructures

Goal Description

Increase and develop university resources and infrastructures that support the intellectual transformation of students.

Related Items

University Resources And Infrastructures - Funding

Performance Objective Description

Dr. Hoyt will seek to obtain resources for the University from the State, donors, and other various sources to support the intellectual transformation of students.

University Resources And Infrastructures - Funding

KPI Description

- SHSU will prepare the request for funding from the State for the upcoming 85th legislative session for facilities and academic programs.
- Contact and receive donor support for academic programs, scholarships, and building projects. Dr. Hoyt will work with the division of University Advancement to proceed with the silent phase of new SHSU Capital Campaign.

Results Description

- Dr. Hoyt presented SHSU's Legislative Appropriation Requests (LAR) to the Office of the Governor and Legislative Budget Board (LBB) on 9/29/16 and to the House Appropriation Committee on 2/22/17. The regular session ended 5/31/17. There were no Tuition Revenue Bonds (TRB) funded this session as expected. The 85th legislature faced significant budgetary challenges that were driven by weaker than anticipated economic conditions in the State. SHSU experienced a decline in State support, particularly focused on non-formula items such as LEMIT and CMIT, that offset incremental investments in formula funding. Higher Ed was not funded by the State as SHSU hoped; however, SHSU's funding was manageable.
- The official start of the Capital Campaign was noted by a dinner held 3/11/17 and hosted by the President's Office and University Advancement. The university's comprehensive (capital) campaign is nearing the \$100 million mark toward its \$125 million goal. While a number of donors have committed six and seven figure gifts for the athletic component, a contribution in the range of \$7-\$12 million is essential to move forward with major priorities, which includes the football stadium. Through mid-June of the 2017 fiscal year, Sam Houston State received \$13.2 million from 9,250 donors. Last year at the same time, 9,650 donors had given \$11.3 million.

University Resources And Infrastructures - Planning/Development

Performance Objective Description

Dr. Hoyt will implement and develop plans for the most effective and efficient use of SHSU's resources to support the intellectual transformation of students.

 University Resources And Infrastructures - Planning/Development**KPI Description**

- Review Curriculum to make certain SHSU stays on the cutting edge to offer courses in high demand.
- Review International Program offerings to determine efficient use of exchange agreements.

Results Description

- Curriculum: Dr. Hoyt continues to review the curriculum. She has found the most critical need for the area SHSU serves is the health care industry. Dr. Hoyt has continued to focus on adding allied health programs such as the Doctor of Osteopathic Medicine to the SHSU curriculum. There is a board motion that will be presented to the TSUS Board of Regents at the August 2017 meeting that will allow SHSU to add this program to the curriculum.
- International Programs: Dr. Hoyt has continued to review SHSU International Programs. Cabinet reviewed International programs offerings (location and demand) at the Cabinet Mini-Retreat on 8/16/16. Dr. Hoyt received an update to International programs offerings (July 2017) and is in the process of reviewing the report at this time.

 Goal 4: Marketing Outreach**Goal Description**

Enhance marketing outreach and visibility to include academic and scholarly activities through consistent and integrated messaging while optimizing communication channels.

Related Items **Marketing Outreach - External****Performance Objective Description**

Dr. Hoyt will enhance marketing outreach and visibility to include academic and scholarly activities through consistent and integrated messaging while optimizing communication channels by promoting/exposing SHSU to external markets.

 Marketing Outreach - External**KPI Description**

- Serve or be involved in four national higher education boards.
- Support Montgomery County functions and improve University attendance at Montgomery County/Chamber events.
- Participate in Greater Houston Partnership committees and programs and encourage SHSU personnel to participation.

Results Description

- Dr. Hoyt is on the board of directors for the following national higher education boards: American Association of State Colleges and Universities (AASCU), Southern Association of Colleges and Schools Commission on Colleges (SACSCOC), American Search, Inc.(ASI), American Academic Leadership Institute (AALI). In addition, Dr. Hoyt served as chair of the Council of Public Universities Presidents and Chancellors (CPUPC) during FY2017.
- Dr. Hoyt either attended or sponsored the following events in the Montgomery County area: Southern Montgomery Co./Woodlands Chamber of Commerce Chairman's Gala, Greater Conroe/Lake Conroe Chamber of Commerce Chairman's Ball, Woodlands Area Economic Development Partnership, Woodlands Area Chamber of Conference Economic Outlook Conference. SHSU is also greatly involved with the Montgomery County area through Vice President Frank Holmes' participation in a multitude of events and boards.
- SHSU is a member of the Greater Houston Partnership (GHP). Dr. Hoyt is on the Advisory Committee for Higher Education. She also requested several administrators to serve on committees and councils according to the similarity between the discipline of the administrators and the focus of the committee/councils. Dr. Hoyt and SHSU is very involved in the GHP.

Marketing Outreach - Internal

Performance Objective Description

Dr. Hoyt will enhance marketing outreach and visibility to include academic and scholarly activities through consistent and integrated messaging while optimizing communication channels by marketing academic programs and promote branding.

Marketing Outreach - Internal

KPI Description

- Continue funding to maintain or increase marketing 8 - 10 new academic programs annually.
- Continue funding for branding focus (social media and video). Use the new position of Videographer to promote SHSU.

Results Description

- Dr. Hoyt funded the promotion of the following academic programs for FY2017:

Primary Undergraduate programs (20,000) - Philosophy, Finance, Victim Studies, Teaching, Kinesiology, Computer Software Engineering Tech, Mass Communication, International Student Recruitment

Secondary Undergraduate Programs (10,000) - Spanish, Communication Studies, Economics,

Athletic Training, Health Care Administration, FCS - Food Service Management, Nursing - RN to

BSN on-line, Agriculture Communications, Engineering Technology, Geography, Physics, Art.

- Dr. Hoyt has participated and promoted the following social media venues.

Facebook: 78,900 fans, increase of 8% over last year, 196,390 average users - measures activity/engagement, 18% increase over last year.

Twitter: 21,000 followers, increase of 13% over last year.

Instagram: 15,700 followers, increase of 29% over last year

Snapchat 1,500 followers, launched in August 2016

Videographer: Dr. Hoyt and the university has used the videographer to produce a multitude of videos to promote the University. The most recent project is to produce a video to promote the university's values, vision and motto.

Goal 5: Data Driven Decisions

Goal Description

Promote efficient data driven decision making through the integration of centralized data analysis, review and dissemination.

Related Items

  Data Driven Decisions - Analysis

Performance Objective Description

Dr. Hoyt will promote efficient data driven decision making through the integration of centralized data analysis, review and dissemination by focusing on the use of facilities and efficient use of assets.

  Data Driven Decisions - Analysis

KPI Description

- Continue to keep the Student to Faculty Ratio approximately 25:1
- Monitor number of courses with over 100 students
- Implement centralization/outsourcing of certain assets for efficient use of resources

Results Description

• Student to Faculty Ratio for Fall 2016 decreased from 25:1 (Fall 2015) to 23:1 (Fall 2016). The 2017 Student to Faculty Ratio will not be available until Fall 2017, but should remain close to the goal of 25:1.

- 2% of SHSU classes had over 100 Students for FY2017. (45 Classes 100+/1,793 sections)
- Centralization: **Events** - Dr. Hoyt continues to tweak the centralization of Events. She met with the Director of University Events, VP and Associate VP of University Advancement during FY2017 to continue to consolidate events. She wants to make certain that during the Capital Campaign not to overwhelm the donors with too many events. **University Advancement** - Dr. Hoyt also has continued to work with the Administrators on campus to ensure the centralization of donor relations/giving through University Advancement. This will be extremely important during the Capital Campaign. **Fleet** - During FY2015, SHSU implemented a piolet program to centralize the campus fleet. Since the piolet program has gone so well, Dr. Hoyt continued this program during FY2017. The fleet program continues to grow.

Data Driven Decisions - Planning

Performance Objective Description

Dr. Hoyt will promote efficient data driven decision making through the integration of centralized data analysis, review and dissemination by connecting the strategic plan and budget planning process through data analysis.

Data Driven Decisions - Planning

KPI Description

- Collect from each division a strategic plan
- Connect the annual budget requests to goals listed on divisional strategic plan

Results Description

- Dr. Hoyt received and discussed with the Vice Presidents and Athletic Director their Strategic Plans for the upcoming year during one of their one-on-one sessions.
- Dr. Hoyt and VPFO Hernandez ask each division to prioritize the lists of items needed to achieve objectives from their Strategic Plans. A meeting was held April 3 and April 4, 2017 with members from President's Cabinet and Council of Academic Deans to discuss these items. Dr. Hoyt ask each VP/AD and CAD to present to the group a list of items that were funded and implemented the previous year and list of prioritized items for the upcoming year. This list was used to set up the budget for FY18.

Goal 6: Proactive Response To Ever-Changing Needs

Goal Description

Cultivate a continually sensitive and proactive response to the ever-changing needs of our constituents.

Related Items

Proactive Response To Ever-Changing Needs - Diversification

Performance Objective Description

Dr. Hoyt will cultivate a continually sensitive and proactive response to the ever-changing needs of our constituents by continuing to promote diversification across campus to serve the needs of a diverse student population.

Proactive Response To Ever-Changing Needs - Diversification

KPI Description

- Continue to diversify campus through hiring practices, implementing a center, hiring a diversity officer.

Results Description

· Dr. Hoyt continues to review with President's Cabinet hiring reports prepared by Human Resources. Dr. Hoyt discussed areas that indicated room for improving a more diverse hiring strategy. She asked Cabinet to proactively integrate a more diverse hiring strategy within each division. One of the biggest problem is having a diverse hiring pool for selection of faculty,

· The Coordinator of Diversity, Heather Varela, was hired 7/16/16 and is housed in HR. Jeanine Bias housed in Student Affairs has also expressed an interest in the position of Diversity Officer. Currently Cabinet is trying to determine where the Office of Diversity and Inclusion will be located and the structure of this office.

Proactive Response To Ever-Changing Needs - Off Campus Student Population

Performance Objective Description

Dr. Hoyt will cultivate a continually sensitive and proactive response to the ever-changing needs of our constituents by continuing to develop SHSU's services available to online and geographically dispersed students.

Proactive Response To Ever-Changing Needs - Off Campus Student Population

KPI Description

Require all areas to review services for online and geographically dispersed students

Results Description

The Woodlands Center offers Career Services, Legal Services, Academic Success Center, Graduate Studies Office, Vet Success Center, Community Counseling Clinic and Testing Center, Money Management Center and International Programs.

SHSU is in the process of opening a medical facility in the Woodlands. The Vice President of Student Affairs is already seeking input from colleagues regarding the types of students services that will be needed at the new facility.

The Distance Learning students are offered the same feasible services on-line as the traditional on-campus students.

Division of Academic Affairs

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: Academic Planning and Assessment****Sam Houston State University****President, Office of****Academic Affairs, Division of****Academic Planning and Assessment** **Effective And Efficient Administrative Practices****Goal Description**

The Office of Academic Planning and Assessment will contribute to the creation and maintenance of effective and efficient administrative practices that support the mission of Sam Houston State University at large, and the Division of Academic Affairs in particular.

Related Items **Create A Curriculum Plan For Academic Affairs****Performance Objective Description**

Develop a Curriculum Plan that incorporates strategic planning and budget.

 Curriculum Plan**KPI Description**

Develop and complete the Curriculum Plan and develop budget spreadsheets and white paper forms to use with the plan.

Results Description

The white paper template was reviewed and amended to include only those pertinent planning components that can be reasonably predicted 1, 2, or 3 years prior to a full proposal submission, depending on proposed degree level. Detailed cost and revenue projection requirements were eliminated as discussions revealed these items to be unreliable and not realistically predicted at the time of white paper submission. The detailed projections were replaced with a qualitative description of the necessary resources and impact to other programs. The new white paper template is currently being incorporated into the upcoming curriculum software, online curriculum guides, and resources. No progress was made with regard to incorporating a strategic budget analysis into the curriculum planning processes.

 Curriculum Review and Approval Process**Performance Objective Description**

The Office of Academic Planning and Assessment will work with the campus community to improve the curriculum review and approval process.

 CourseLeaf Implementation for Curriculum Planning**KPI Description**

The Office of Academic Planning and Assessment will work with the campus community to implement the use of CourseLeaf to help facilitate the curriculum review and approval process. This software should be in place by summer, 2017.

Results Description

The software and IT infrastructure was implemented in the spring of 2017. Much progress has been made on the implementation of the CourseLeaf Curriculum Module. All curriculum forms have been migrated from their previous Word or Adobe formats into the new online system, data has been integrated between Banner, CourseLeaf Catalog, and CourseLeaf Curriculum. OAPA staff are currently in the process of finalizing form content and functionality.

Curriculum Review and Approval Timelines

KPI Description

The Office of Academic Planning and Assessment will work with the campus community to develop and implement time lines and processes for curriculum review and approval that will then be implemented during the 2017-2018 academic year.

Results Description

An ad-hoc Curriculum Process Review Committee was formed and met throughout the Spring 2017 semester. The Committee made the following recommendations for improvement to the curriculum process:

1. Increase Support Resources
 - a. Develop a user-friendly, informative curriculum website
 - b. Develop a curriculum handbook
 - c. Develop curriculum process flow charts
 - d. Provide training for curriculum proposal writers
2. Provide Additional Guidance to the University Curriculum Committee (UCC)
 - a. Develop a detailed and explicit charge to the UCC
 - b. Provide additional guidance to the incoming UCC Chair
3. Implement the use of a sub-committee structure within the UCC for purposes of enhancing the efficiency of the review process (specific structure to be determined by the UCC).
4. Increase curriculum submission points from one to two per year
 - a. Allow curriculum submission points in March and September of each year for targeted inclusion in the August and February TSUS Board meetings, respectively.
 - b. Allow additional curriculum motions in May and November TSUS Board meetings by necessity (i.e., to be determined by volume of requests received in March and September).
 - c. Allow both course and program-related changes to be reviewed and submitted at both entry points and included in any relevant TSUS Board meeting (i.e., remove the existing Phase I and Phase II separation of curriculum review).

As of August 1, 2017, work has commenced on altering the curriculum cycle to allow for two submission points per year. These new entry point has been identified and communicated to the academic colleges.

Development of Curriculum Process Training Materials

KPI Description

The Office of Academic Planning and Assessment will work to develop and implement necessary training materials related to the Curriculum Review process and

new CourseLeaf Software. All necessary training materials will be created during the 2016-2017 cycle, for implementation during the 2017-2018 year.

Results Description

Due to the continued implementation of the CourseLeaf Curriculum module, no training materials have been developed. This objective will be continued into the 2017-2018 academic year.

Undergraduate and Graduate Catalogs

Performance Objective Description

The Office of Academic Planning and Assessment will work with the campus community (e.g., faculty, advisors, administrators, departments/programs) to help ensure that the information presented in both the undergraduate and graduate catalogs are up-to-date, accurate, and are published on schedule.

Catalog Software Training

KPI Description

Office of Academic Planning and Assessment Staff will conduct necessary training sessions, annually, for new and returning users of the CourseLeaf Catalog training software.

Results Description

Numerous trainings for the CourseLeaf Catalog software were held in the Fall 2016 term for new and returning catalog editors. Both open lab sessions and department specific trainings were offered. New users were able to successfully navigate and complete the necessary catalog edit functions as a result of the trainings.

Publish Undergraduate and Graduate Catalogs

KPI Description

After the successful test implementation of CourseLeaf in the 2015-2016 cycle for publishing the 2016-2017 Catalogs, the Office of Academic Planning and Assessment will work with the campus community to fully implement and use the CourseLeaf Catalog software to create and publish an accurate and up-to-date 2017-2018 Undergraduate and Graduate Catalogs on by March 15th, 2017.

Results Description

OAPA successfully worked with the campus community in the use of the CourseLeaf Catalog software to publish the 2017-2018 Undergraduate and Graduate Catalogs. Many improvements were made to the catalogs to include: more accurate degree plans and alignment with DegreeWorks and improved user experience functionality to include: revamp of the page navigation structure, the use of tabs within pages, scrolling tables, automated faculty lists, and visual enhancements of photos and color schemes. OAPA did not meet the publication target date of March 15. The catalog was not published until early May.

Goal Description

The Office of Academic Planning and Assessment will encourage and promote an environment of continuous improvement for all departments, offices, and programs within the various Colleges and Divisions at Sam Houston State University.

Related Items

 **Ensure Quality Annual Assessment Processes**

Performance Objective Description

The Office of Academic Planning and Assessment will ensure that members of the university community are conducting a quality, and effective annual assessment process.

 Annual Meta-assessment Process

KPI Description

The Office of Academic Planning and Assessment will utilize a locally developed rubric designed to evaluate the overall quality of a program's annual assessment plans to facilitate an annual review of assessment plans stored within CampusLabs - Compliance Assist. The results of this evaluation should indicate that 80%, or more, of the reviewed assessment plans for each College/Division reviewed should be rated as “Acceptable” or better. Additionally 80%, or more, of the total number of assessment plans reviewed from across the University should be rated “Acceptable” or better. As meta-assessment has continued to evolve and mature across campus, some units are implementing a sampling process, so that all programs within the unit will be reviewed through meta-assessment within a set time frame. Therefore not all units within a College or Division may be evaluated in the same year.



SHSU Meta-assessment Rubric - Revised

Results Description

During the 2016-2017 assessment cycle, the Office of Academic Planning and Assessment oversaw the Meta-assessment review of assessment plans from six of the seven Academic Colleges. One college did not complete the meta-assessment process, and the six remaining academic colleges conducted college-led meta-assessment reviews of their units.

A summary of the results are provided here for each college. Percentages represent the percentage of acceptable and exemplary assessment plans/elements from each college:

College #1 - Self-reviewed

Overall	62.50%
Goals	87.50%
Objectives	100%
Indicators	62.50%
Criterion	75.00%
KPIs	66.67%
Findings/Results	50.00%
Actions	25.00%
Plan for Continuous Improvement Update	75.00%
New Plan for Continuous Improvement	42.86%

College #2 - Self-Reviewed

Overall	68.75%
Goals	75.00%
Objectives	75.00%
Indicators	70.00%
Criterion	50.00%
KPIs	83.33%
Findings/Results	62.50%
Actions	56.25%
Plan for Continuous Improvement Update	68.75%
New Plan for Continuous Improvement	43.75%

College #3 - Not Reviewed

Overall	N/A%
Goals	N/A%
Objectives	N/A%
Indicators	N/A%
Criterion	N/A%
KPIs	N/A%
Findings/Results	N/A%
Actions	N/A%
Plan for Continuous Improvement Update	N/A%
New Plan for Continuous Improvement	N/A%

College #4 - Self-reviewed

Overall	50.00%
Goals	72.22%
Objectives	83.33%
Indicators	83.34%
Criterion	66.67%
KPIs	55.55%
Findings/Results	72.22%
Actions	50.00%
Plan for Continuous Improvement Update	55.55%
New Plan for Continuous Improvement	38.89%

College #5 – Self-Reviewed

Overall	11.11%
Goals	33.33%
Objectives	11.11%
Indicators	14.29%
Criterion	0.00%
KPIs	25.00%
Findings/Results	44.44%
Actions	22.22%
Plan for Continuous Improvement Update	22.22%
New Plan for Continuous Improvement	22.22%

College #6 - Self-reviewed

Overall	14.81%
Goals	100%
Objectives	88.89%
Indicators	25.00%
Criterion	21.05%
KPIs	36.36%
Findings/Results	44.45%
Actions	3.70%
Plan for Continuous Improvement Update	26.92%
New Plan for Continuous Improvement	14.81%

College #7 - Self-reviewed

Overall	46.34%
Goals	80.48%
Objectives	70.74%
Indicators	77.78%
Criterion	61.11%
KPIs	71.42%
Findings/Results	62.50%
Actions	30.00%
Plan for Continuous Improvement Update	56.10%
New Plan for Continuous Improvement	39.03%

Overall for all Academic Colleges

Overall	36.70%
Goals	81.65%
Objectives	76.14%
Indicators	57.96%
Criterion	49.42%
KPIs	56.71%
Findings/Results	55.56%
Actions	25.00%
Plan for Continuous Improvement Update	47.22%
New Plan for Continuous Improvement	32.41%

These results reveal several areas for institutional improvement. No individual college exceeded 80% for all assessment plan elements. Generally, the following elements saw the greatest weakness (i.e., percentages less than 70%):

- Overall Score
- Indicators
- Criterion
- KPIs
- Findings/KPI Results
- Actions

- PCI Update
- PCI

Despite these areas for improvement, the Meta-assessment processes has revealed a number of areas of encouragement as well. Six of the seven academic colleges have instituted their own, locally-led Meta-assessment processes. The effect of this has been to increase the importance and visibility of quality assessment practices within each of these colleges.

Provide Quality Assessment Support Resources

Performance Objective Description

The Office of Academic Planning and Assessment will provide quality assessment resources to the University community through its website, online resources, ongoing training sessions, and workshops.

CampusLabs Training Evaluation Survey - Confidence

KPI Description

Training session attendees will complete a brief survey, consisting of three Likert-scale questions and three open-response questions, which indicate their confidence in using CampusLabs Compliance Assist software. A copy of the survey is provided as an attachment. 90% of respondents will report a pre-to-post increase in their confidence using CampusLabs software. Additionally, 90% of respondents will report a post-score of 4 or 5, indicating they are now confident or very confident with the software.

 CampusLabs Survey

Results Description

CampusLabs surveys were distributed at three group training sessions during Spring 2017. A total of 23 surveys were returned, but 8 of the surveys had invalid responses for question 1 regarding confidence prior to the training session. The reason this question was invalidated is because it was asked after the training rather than prior to the beginning of the training session in order to measure pre- to post- feelings of confidence in using the system. Of the remaining 15 surveys, 1 person did not answer question 2 (confidence after training), 2 people indicated there was no change in their confidence, and 12 people (80%) reported an increase in confidence. Of all 23 surveys, 19 people (82.6%) reported being confident (Likert score 4) or very confident (Likert score 5) with the software at the conclusion of training.

CampusLabs Training Evaluation Survey - Satisfaction

KPI Description

Training session attendees will complete a brief survey, consisting of three Likert-scale questions and three open-response questions, which indicate their satisfaction with the CampusLabs Compliance Assist software training. A copy of the survey is provided as an attachment. The average response to the Likert-scale question related to participant satisfaction should be 4 or higher, indicating that they were satisfied with the training provided by our Office. Additionally, respondent comments from the three open-reponse questions should be generally positive.

 CampusLabs Survey**Results Description**

CampusLabs surveys were distributed at three group training sessions during Spring 2017. Of the 23 completed surveys, 9 people reported being satisfied (Likert score 4), and the remaining 14 reported being very satisfied (Likert score 5) with the training session. The criterion was met with 100% of respondents indicating a 4 or higher in regards to satisfaction. The comments were also very positive overall regarding what they learned during the sessions. There were a few questions and suggestions that will be incorporated into actions for 2017-2018 (see attached document).

 Summary of survey comments **Number of CampusLabs Training Sessions Held****KPI Description**

The Office of Academic Planning and Assessment will conduct at least 8 training sessions per academic year in the use of CampusLabs Compliance Assist Software. These sessions may range from large and small group workshops to individual training sessions.

Results Description

Four CampusLabs training sessions were held during the 2016-2017 academic year. Two sessions were conducted during fall semester 2016, and two sessions were conducted during spring semester 2017. Of the 56 individuals who registered, 30 (54%) completed the training.

 Website Tracking**KPI Description**

Utilizing Google Analytics, the Office of Academic Planning and Assessment will track traffic coming to the department's website. Data from the 2015-2016 cycle will serve as a baseline for subsequent assessment cycles. Particular pages that will be examined include:

- OAPA Homepage
- Assessment Resources
- CampusLabs-Compliance Assist
- Core Curriculum Projects
- Core Assessment Results
- Assessment Mini-Grants

Monthly web traffic will be analyzed for each page, along with annual traffic totals. The expectation for this year is that traffic totals will meet or exceed any baselines established for 2015-2016.

Results Description

Starting with the 2015-2016 assessment cycle, the Office of Academic Planning and Assessment partnered with Computer Services to provide detailed Google Analytics reports regarding all of the various OAPA Webpages. This gives OAPA staff a much more detailed and robust picture of visits to, and usage of, OAPA websites and documents. The tables below contain an overview of the total number of pageviews OAPA webpages received combined for 2016-2017 compared to 2015-2016. A complete breakdown of each monthly, as well as an annual report, are provided in the attached documents. According to the total numbers for the year, there was a 66.2% increase in pageviews and a 67.7% increase in unique pageviews from 2015-2016 to 2016-2017.

Combined Number of Pageviews/Unique Pageviews

for all OAPA Webpages – 2016-2017

Month	Pageviews	Unique Pageviews
September	1495	1270
October	1340	982
November	2180	1724
December	979	814
January	1396	1086
February	1055	783
March	1234	1021
April	1166	981
May	1593	1234
June	1159	1029
July	1639	1345
August	1787	1491
Yearly Total	16182	13390

Combined Number of Pageviews/Unique Pageviews

for all OAPA Webpages - 2015-2016

Month	Pageviews	Unique Pageviews
September	877	760
October	517	460
November	593	463
December	548	465
January	658	550
February	627	541
March	523	441
April	785	578
May	526	442
June	1,086	817
July	1,586	1,333
August	1,410	1,133
Yearly Total	9,736	7,983

A further analyses of the data revealed the top 10 most visited OAPA websites:

Website	Pageviews	Unique Pageviews
http://www.shsu.edu/dept/academic-planning-and-assessment/index.html	5846	4908
http://www.shsu.edu/dept/academic-planning-and-assessment/assessment/campuslabs.html	3512	3080
http://www.shsu.edu/dept/academic-planning-and-assessment/idea-evaluations	3119	2362
http://www.shsu.edu/dept/academic-planning-and-assessment/about/index.html	762	667
http://www.shsu.edu/dept/academic-planning-and-assessment/assessment/index.html	407	336
http://www.shsu.edu/dept/academic-planning-and-assessment/assessment/resources.html	393	325
http://www.shsu.edu/dept/academic-planning-and-assessment/assessment/assessment-mini-grants.html	387	326
http://www.shsu.edu/dept/academic-planning-and-assessment/catalog/index.html	351	257
http://www.shsu.edu/dept/academic-planning-and-assessment/assessment/projects.html	344	280
http://www.shsu.edu/dept/academic-planning-and-assessment/assessment/results.html	141	109

-  01- APA GA Sept 2016
-  02- APA GA Oct 2016
-  03- APA GA Nov 2016
-  04- APA GA Dec 2016
-  05- APA GA Jan 2017
-  06- APA GA Feb 2017
-  07 - APA GA March 2017
-  08 - APA GA April 2017
-  09 - APA GA May 2017
-  10 - APA GA June 2017
-  11 - APA GA July 2017
-  12 - APA GA Aug 2017
-  13 - APA GA 2016-2017

KPI Description

We will pilot the use of tracking website hits based on when certain emails are sent to campus constituents. Particularly, we will review website hits for the two weeks prior to and two weeks after the dates the following emails are sent:

1. Assessment Mini-Grant Call for Proposals
2. CampusLabs clean-up reminder emails

Results will be used to determine possible changes to our communication strategies. Depending on results, we may also make wider use of tracking dates/web hits of other emails sent from the Office of Academic Planning and Assessment.

Results Description

The below tables represent unique pageviews of the Mini Grant website and the CampusLabs website during the week prior to and the week after reminder emails were sent out to campus constituents. The largest increase in views was after the initial email for both websites. For subsequent Mini Grant emails the number of pageviews tapered off dramatically, which implies that it may not be effective to send out more than 2-3 emails. Both of the CampusLabs emails that were tracked showed a very large increase in pageviews.

Date of Mini Grant email	Unique Pageviews during week prior to email	Unique Pageviews during week after email	Percent Increase
8/22/2016	5	42	740.0%
9/27/2016	7	20	185.7%
10/31/2016	14	20	42.6%
11/17/2016	11	13	18.2%
12/19/2016	0	0	0%

Date of CampusLabs email	Unique Pageviews during week prior to email	Unique Pageviews during week after email	Percent Increase
3/1/2017	18	128	611.1%
3/22/2017	15	84	460.0%

 Workshop Evaluation Survey - Confidence**KPI Description**

Training session attendees will complete a brief survey, consisting of three Likert-scale question and three open-response questions, which indicate their satisfaction with the services provided by the Office of Academic Planning and Assessment and their confidence with assessment practices. A copy of the survey is provided as an attachment. 90% of respondents will report a pre-to-post increase in their confidence with regards to implementing effective programmatic assessment. Additionally, 90% of respondents reporting a post-score of 4 or 5, indicating they are now confident or very confident.

 Workshop Survey**Results Description**

Workshop surveys were distributed at one group training session during Spring 2017. Of the 12 surveys that were returned, 4 people (33.3%) indicated there was no change in their confidence, and 8 people (66.7%) reported an increase in confidence. Of the 12 surveys, 4 people (33.3%) reported being between neutral and confident (Likert score write-in of 3.5), and 8 people (66.7%) reported being confident (Likert score 4) with the implementing effective programmatic assessment at the conclusion of the workshop.

 Workshop Evaluation Survey - Satisfaction**KPI Description**

Training session attendees will complete a brief survey, consisting of three Likert-scale questions and three open-response questions, which indicate their satisfaction with the services provided by the Office of Academic Planning and Assessment. A copy of the survey is provided as an attachment. The average response to the Likert-scale question related to participant satisfaction should be 4 or higher, indicating that they were satisfied with the services provided by our Office. Additionally, respondent comments from the three open-response questions should be generally positive.

 Workshop Survey**Results Description**

Workshop surveys were distributed at one group training session during Spring 2017. Of the 12 completed surveys, 10 people reported being satisfied (Likert score 4), and the remaining 2 reported being very satisfied (Likert score 5) with the workshop. The criterion was met with 100% of respondents indicating a 4 or higher in regards to satisfaction. The comments were also very positive overall regarding what they learned during the sessions. There were a few questions and suggestions that will be incorporated into actions for 2017-2018 (see attached document).

 Summary of survey comments

Provide Quality Assessment Support Services - Brown Bag Lunch Series

Performance Objective Description

The Office of Academic Planning and Assessment will provide quality assessment support by conducting a series of Brown Bag Lunch sessions where, over lunch, members of the university community have the opportunity to share ideas and information and engage in discussions regarding best practices and various assessment related topics.

Brown Bag Lunch Session Evaluation Survey

KPI Description

Brown Bag Lunch session attendees will complete a brief survey, consisting of three Likert-scale questions and three open-response questions, which indicate their satisfaction with the meeting. A copy of the survey is provided as an attachment. 90% of respondents will report an increase in confidence with regards to understanding and/or implementing effective programmatic assessment.

Results Description

This KPI was not used for the 2016-2017 cycle and has been placed on hold. The Office of Academic Planning and Assessment plan on using this measure with the Brownbag sessions that will be held during the 2017-2018 cycle.

Number of Brown Bag Lunch Sessions Held

KPI Description

The Office of Academic Planning and Assessment will conduct at least 3 Brown Bag Lunch sessions each semester.

Results Description

Five Brown Bag Lunch Sessions were held during the 2016-2017 academic year. Three were held during fall semester, and two were held during spring semester. Assessment topics discussed and attendee information for each session are as follows:

Date	Topic	Registered*	Attendees*
09-13-2016	Writing Good Goals and Objectives	15	15
10-14-2016	Best Practices in Survey Design	13	14
11-15-2016	Aligning Assessment with Practice	13	10
02-28-2017	Reliability and Validity in Assessment	15	14
04-05-2017	Assessment Potpourri	13	13

*Excludes OAPA staff members

Promote The Scholarship Of Assessment

Goal Description

The Office of Academic Planning and Assessment will promote the growing scholarship of assessment within SHSU, Texas, and the nation, through research, presentations, and publications.

Related Items

Assessment Mini-Grants

Performance Objective Description

The Office of Academic Planning and Assessment will help promote the scholarship of assessment at SHSU through sponsorship of assessment mini-grants. These grants are available to faculty and staff at SHSU to help fund new or ongoing assessment practices within programs, offices, or departments; or to help fund travel to make assessment-related presentations at professional conferences.

Assessment Mini-Grant Awards For 2016-2017

KPI Description

The Office of Academic Planning and Assessment will award 10 \$1,000 Assessment Mini-Grants during the 2016-2017 assessment cycle. At the completion of each grant-funded project, each recipient will also complete and submit a follow-up report.

Results Description

The Office of Academic Planning and Assessment received a total of 29 Assessment Mini-Grant applications and awarded 10 Assessment Mini-Grants for the 2016-2017 academic year, totaling \$10,000. Details regarding Assessment Mini-Grant awards for 2016-2017 are as follows:

- William Blackwell, Language Literacy & Special Populations, Developing Multi-Point Assessment Instruments for Measuring the Knowledge, Ethical and Professional Reasoning, and Growth of Educational Diagnostician Candidates
- Mae Cox, Curriculum and Instruction, Assessment of Teaching Post Bacc Students
- Sarah Fritsch, Department of Mathematics and Statistics, Calculus Preparation Project
- Dana Grant, Residence Life, Annual Residence Life Student Satisfaction Survey
- Lisa Muftic, Criminal Justice and Criminology, Assessing Criminal Justice Living Learning Communities
- Jaron Rider, Recreational Sports, Student Staff Risk Management Knowledge and Skillm Assessment
- Michael Sproat, Sam Houston Memorial Museum, Sam Houston Memorial Museum Visitor Experience Assessment
- Ann Stiles, School of Nursing, Teaching Transcultural Self-Efficacy in Nursing Students
- Mary Williams, Department of Kinesiology, Assessing Inter-Professional Education in Healthcare Professions
- Kelly Zinn, School of Nursing, A Pilot Study Assessing the Impact of Virtual Simulation on Clinical Judgment and Confidence in Pre-Licensure BSN Students

 Scholarly Presentations And Publications**Performance Objective Description**

The Office of Academic Planning and Assessment will make presentations and submit publications on various assessment related topics through state, regional, and national venues.

 Scholarly Presentations**KPI Description**

The Office of Academic Planning and Assessment will track the number of scholarly presentations conducted by members of its staff annually. The minimum target for success will be 4 presentations at state, regional, or national conferences or meetings. Additionally, at least 3 members of the OAPA staff will be involved in making a presentation.

Results Description

For the 2016-2017 cycle, OAPA staff made 4 state, regional, or nation presentations:

Roberts, J. (2017, February). *General education assessment: Differences in written communication skills as a function of demographic characteristics*. Paper presented at the Southwest Educational Research Association Conference, San Antonio, TX.

Jones, B., Hamrick, T., & Roberts, J. (2017, February). *Assessing teamwork using student self-reflections: Efforts to design and pilot a locally developed instrument*. Presented at the 4th Annual LEAP Texas Forum, Dallas, TX.

Roberts, J., & Sanford, G. M. (2017, February). *Expanding the use of an existing course/program-level critical thinking assessment to the institutional level*. Presented at the 4th Annual LEAP Texas Forum, Dallas, TX.

Roberts, J. (2016, October). *Institutional assessment at Sam Houston State University*. Invited presentation at the Stephen F. Austin State University Assessment Workshop, Nacogdoches, TX

Three different members of OAPA Staff participated in these conference presentations (Jeff Roberts, Brandi Jones, Tama Hamrick). OAPA Staff also partnered with the Associate Dean of the College of Humanities and Social Sciences (Glenn Sanford) to conduct a presentation on a general education assessment that uses data from a critical thinking course taught by the Philosophy program.

 Scholarly Publications**KPI Description**

The Office of Academic Planning and Assessment will track the number of scholarly articles submitted and accepted for publication by member of its staff. The minimum target for success will be one article submitted and accepted for publication, per year.

Results Description

During the 2016-2017 cycle, one scholarly work was officially published in the *New Directions for Institutional Research*. This publication had been accepted during the 2015-2016 cycle, but was not published until Summer, 2017.

Flood, J. T., and Roberts, J. (2017). The evolving nature of higher education accreditation: Legal considerations for institutional research leaders. *New Directions for Institutional Research*, 2016(172), 73-84. doi:10.1002/ir.20205

One article has been submitted to *Research and Practice in Assessment* by OAPA staff. This article is still currently out for review:

Roberts, J., Nardone, C. F., & Bridges, B. (TBD). Differences in student writing ability as a function of student characteristics at one Texas university. Manuscript in Preparation.

One article has been submitted to several journals; however, has not been accepted. It has been decided to pull this article for now until such a time it can be revised and resubmitted at a later date:

Roberts, J. (TBD). A systematic review of recent literature surrounding higher education performance funding systems. Manuscript in Preparation.

Support And Facilitate The Undergraduate Program Review Process

Goal Description

The Office of Academic Planning and Assessment will support and facilitate the Undergraduate Program Review Process as Sam Houston State University.

Related Items

Design and Implement Quality Undergraduate Program Review Process

Performance Objective Description

The Office of Academic Planning and Assessment will work to design, and ultimately implement, a quality undergraduate review process. The first steps involved with this project will be to study examples of best practice from institutions around the country and to develop a straw-man process for presentation to the leadership at SHSU for feedback and approval.

Undergraduate Program Review Guidelines

KPI Description

Office of Academic Planning and Assessment Staff will conduct a search for best practices relating to undergraduate program review, and compile examples from institutions from around the country. These will then subsequently be used to develop a straw man undergraduate program review process for SHSU.

Results Description

The Associate Vice President for Academic Affairs, Director of Assessment, and Assessment Coordinator III met several times throughout the year to discuss and revise the UPR Self-Study and to create a UPR Manual. The first draft of the UPR Self-Study was revised several times, and a final draft is nearing completion. A UPR Manual was also created to address the timing of the process, roles and responsibilities, and a sample timeline of initial departments to go through the process. The manual has gone through a few revisions as well, and is nearing the final draft.

 Undergraduate Program Review Pilot
KPI Description

The straw man process (Self-Study instructions and manual) will be presented to the Provost and to the Council of Academic Deans (CAD) and accepted to pilot undergraduate program review in fall 2017 with a group of volunteer departments.

Results Description

The UPR Self-Study and Manual have not yet been presented to the Provost and CAD, so the anticipated fall 2017 pilot will need to be postponed to a future semester/academic year that has not been determined at this time.

 Support The Institution's Ongoing Southern Association Of Colleges And Schools Commission On Colleges (SACSCOC) Accreditation Efforts
Goal Description

The Office of Academic Planning and Assessment will support the institution's ongoing efforts to respond to all SACSCOC requirements for maintaining accreditation.

Related Items
 Ensure Institutional Compliance With And Timely Submission Of Required SACSCOC Documentation
Performance Objective Description

The Office of Academic Planning and Assessment will work with the University administration to ensure that all required SACSCOC documents are submitted timely, and appropriately.

 Address Functional Deficits In Faculty Credentials Reporting System
KPI Description

The Office of Academic Planning and Assessment will work with the campus community to finish all necessary updates to the Faculty Credentials Reporting System to ensure that the system has regained full functionality in preparations for the 2019 SACSCOC Reaffirmation of Accreditation.

Results Description

The Faculty Credentials Reporting System is fully functional with all updates being completed for course rosters, vitae, and syllabi. The faculty degree data is being pulled from the faculty database on demand. Work continues to automate the credentials system pulling live faculty degree data directly from Banner.

 Appropriate Submission Of SACSCOC Required Documentation**KPI Description**

The SACSCOC liaison, and the Office of Academic Planning and Assessment, will ensure that all required SACSCOC documents, such as Institutional Profiles, Letters of Notification, Prospectuses, Institutional Profiles, etc., will be submitted timely and appropriately to the SACSCOC.

Results Description

All SACSCOC reports and requests for institutional information were submitted by specified due dates in the 2016-2017 academic year.

 Facilitate Completion Of The SACSCOC 2019 Compliance Certification Report**Performance Objective Description**

The Office of Academic Planning and Assessment will work with the University community to ensure the successful completion of the 2019 Compliance Certification Report for SHSU's reaffirmation of accreditation by the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC). To this end, the Office will work to disseminate information and resources, provide necessary training, and complete and submit all required documents.

 Establish Necessary Committees for 2019 SACSCOC Report**KPI Description**

The Office of Academic Planning and Assessment will facilitate the establishment of both the SACSCOC Leadership Committee and the Ad-hoc Compliance Certification Committee, and will begin necessary work towards reaffirmation.

Results Description

Both the SACSCOC Leadership Committee and the Compliance Certification Committees have been formed and work is currently underway upon SHSU's SACSCOC Compliance Certification Report.

 QEP for 2019 Reaffirmation**KPI Description**

The Office of Academic Planning and Assessment will establish and facilitate a process for selecting a QEP Topic for SHSU's 2019 reaffirmation by SACSCOC.

Results Description

The QEP selection process is currently underway. During the spring 2017 semester,

SHSU held a series of campus meetings (President's Round Table, Campus Town Halls) to provide the campus with information about the QEP Process and to highlight available institutional data. A call was issued for QEP White Paper topics, of which 6 were ultimately submitted for consideration.

Support The Strategic Planning Process For The Division Of Academic Affairs

Goal Description

The Office of Academic Planning and Assessment will support the ongoing strategic planning process underway within the Division of Academic Affairs.

Related Items

Provide Quality Strategic Planning Resources And Processes

Performance Objective Description

The Office of Academic Planning and Assessment will provide quality strategic planning resources and facilitate effective planning processes within the Division of Academic Affairs.

Begin Development Of A Comprehensive And Quality Academic Affairs Strategic Plan

KPI Description

For the 2016-2017 cycle, the Office of Academic Planning and Assessment will work with the leadership within the Division of Academic Affairs to identify and hire a strategic planning consultant. Additionally, planning will be put into place to begin strategic planning retreats during the Spring 2017 semester.

Results Description

A strategic planning consultant list was identified by the Academic Deans, however, a consultant was not hired. Strategic planning discussions have been placed on hold by the division administration.

Director of Athletics

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: Athletics, Director****Sam Houston State University****President, Office of****Athletics, Director**** Brand Expansion****Goal Description**

The department is committed to superior branding performance in market share growth, increasing attendance and visibility of the program.

Related Items** Media Opportunities, Market Share Growth And Licensing****Performance Objective Description**

Increase local and national media opportunities, market share growth, game attendance and visibility of the athletic program through advertising and control of officially licensed products.

** Athletic Performance Indicator Report-Marketing Expansion And Branding Opportunities****KPI Description**

The department reviews key criteria data tracked internally by the associate director of athletics for external operations. The criteria establishes that the department will increase the total game attendance by 5%. Team appearances will occur with one national televised game and three regional televised games per year. Market share growth will be determined by the number of licensed retail businesses who register to produce licensed apparel. A marketing strategy is currently being developed in conjunction with LLP to determine the appropriate levels of market share growth. The goal is to have this developed by fall 2015.

Results Description

In the process of inputting APR data for 16-17 to the NCAA and waiting for them to review and calculate for all 17 teams. Should have APR complete by mid October, then we can complete the assessment plan. Items will be reported by Nov. 1, 2017.

** Institutional Control****Goal Description**

The department is committed to excellence in the areas of institutional control through compliance, diversity and equitable opportunity, which provides an environment that is supportive of all university, NCAA Bylaws and Southland Conference Operating Principles for minorities and women.

Related Items** Policy And Guideline Compliance****Performance Objective Description**

Maintain compliance with all federal, state, university, NCAA and Southland Conference policies and guidelines.

Athletic Performance Criteria Report-Compliance

KPI Description

The department reviews key criteria data collected by the NCAA, Southland Conference and appropriate university departments. The indicators consist of NCAA major/secondary violations and Title IX plans.

Results Description

In the process of inputting APR data for 16-17 to the NCAA and waiting for them to review and calculate for all 17 teams. Should have APR complete by mid October, then we can complete the assessment plan. Items will be reported by Nov. 1, 2017.

Revenue Generation

Goal Description

The department is committed to promoting active financial participation in student centered athletic programs and activities.

Related Items

Revenue Enhancement

Performance Objective Description

Expand ticket sales, annual and major gifts, media revenue, concessions, royalties and corporate sponsorships and endowments that will generate revenue to enhance academic and athletic services.

Athletic Performance Indicator Report-External Revenue

KPI Description

The department reviews key indicator data generated by outside revenue streams. The criteria establishes that the department will increase revenues by a total of 5% from ticket sales, annual and major gifts, media revenue, concessions, royalties and corporate sponsorships and endowments. Additionally, attendance levels will exhibit actual levels in order to determine future attendance benchmarks. The department will also increase corporate revenue opportunities through the addition of new scoreboards and videoboards by the fall of 2015.

Results Description

In the process of inputting APR data for 16-17 to the NCAA and waiting for them to review and calculate for all 17 teams. Should have APR complete by mid October, then we can complete the assessment plan. Items will be reported by Nov. 1, 2017.

Student-Athlete Achievement

Goal Description

The department is committed to academic achievement and athletic excellence that strengthens learning

opportunities within an ever-changing environment where the student-athlete excels in the classroom and on the field of competition.

Related Items

Student-Athlete Academic Environment

Performance Objective Description

Provide an environment for student-athletes necessary to enhance the university's educational enterprise, NCAA/Southland Conference policies, promote graduation and enhance life skills experiences.

Athletic Performance Indicator Report-Academic Achievement

KPI Description

- Graduation Rates
- Academic Awards
- Grade Point Average
- NCAA Academic Performance Rates (APR)

The department reviews key criteria data collected by the NCAA, Southland Conference and appropriate university departments consisting of graduation rates and NCAA Academic Progress Rate (APR). An ongoing evaluation by the President and the director of athletics is performed.

1. The department will maintain a graduation rate higher than the general student graduation rate.
2. All sports teams will maintain an APR ratio where no reductions in scholarships or additional penalties are applied.

Results Description

In the process of inputting APR data for 16-17 to the NCAA and waiting for them to review and calculate for all 17 teams. Should have APR complete by mid October, then we can complete the assessment plan. Items will be reported by Nov. 1, 2017.

Student-Athlete Athletic Recruitment

Performance Objective Description

Identify student-athletes who will assist teams in achieving a top four standing in Southland Conference competition.

Athletic Performance Criteria Report-Commissioners Cup Standings, Team Conference/Tournament Standings, NCAA Post-Season Participation

KPI Description

The department reviews key criteria data from the NCAA and Southland Conference consisting of:

- Commissioner's Cup Standings
- Team Records
- Winning Percentage
- Tournament Participation

The criteria establishes that the department will finish in the top four of the Southland Conference Commissioner's Cup, Men's All-Sports and Women's All-Sports standings. Additionally, the department will have at least 60% of all its teams achieve an overall winning percentage above 50% and at least 60% will finish in the top four of the final conference rankings. The President and the director of athletics perform annual evaluations on the status of each program and the overall department.

Results Description

In the process of inputting APR data for 16-17 to the NCAA and waiting for them to review and calculate for all 17 teams. Should have APR complete by mid October, then we can complete the assessment plan. Items will be reported by Nov. 1, 2017.

Division of Enrollment Management

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: Enrollment Management, Vice President****Sam Houston State University****President, Office of****Enrollment Management, Vice President** **Educated Workforce****Goal Description**

To meet the student enrollment, graduation and employment goals in response to national, state, and regional demand by preparing an educated workforce.

Related Items  **Texas Workforce****Performance Objective Description**

Place current graduates in the Texas workforce within one year of graduation.

 Campus Wide Outcome Survey**KPI Description**

In March 2017 the current graduating student list will be submitted to the Outcomes Survey provider to send the initial survey. Return rate expected between 35% and 40%.

Results Description

The survey was provided to all graduates one month prior to May 2017 graduation, again after graduation, and one month later. The return rate is 22%.

 THECB Exit Survey**KPI Description**

Sam Houston State University will appear in the top 10% of Texas institutions placing students in the Texas workforce.

Results Description

Over 70% of students will be working in Texas. For 2016-17, SHSU fell within the top 10 of state institutions. THECB changed the exit survey to only report in school and working together.

 Institutional Data**Goal Description**

To serve as a centralized source for the analysis and dissemination of institutional data to support planning, review, and informed decision making.

Related Items

 Legislative Information**Performance Objective Description**

Distribute information regarding pending legislation.

 Legislative Updates**KPI Description**

Current log of filed legislation will be provided on the T:/drive by Institutional Effectiveness. The spreadsheet is updated several times a week to include related and/or partnered legislation, committee members, and status of the bill through the legislative cycle.

Results Description

The 85th Legislative log is complete and provided on the T:/drive. The spreadsheet is available to Cabinet and other leadership teams.

 Optimize Communication**Goal Description**

Expand the university's competitive advantage by optimizing delivery of communication and services for the emerging needs of new and current students.

Related Items **Increase Local Visibility****Performance Objective Description**

Provide on-campus structured activities for local high school students.

 HISD EXCEL**KPI Description**

Increase in the number of admission applications from Huntsville High School. All or most junior and senior high school students attend a full day interactive event on the SHSU campus related to the enrollment process.

Results Description

In February of 2017, the entire HISD junior class attended a full day, interactive event on campus. Each student received guidance on admissions, financial aid, next steps for enrollment after acceptance.

 Recruitment**Goal Description**

To provide affordable, quality education to a diverse population by recruiting and enrolling qualified freshmen, transfer, adult learners and graduate students for admission.

Related Items **60x30**

Performance Objective Description

Review and analyze new statewide 60x30 recruitment and enrollment KPI's for these markets.

 Graduates and Adult Learners**KPI Description**

Increase enrollment for online undergraduate non-completers (adult learner), and graduate degrees.

Increase 100%-online-student enrollment by one hundred undergraduate students and fifty graduate students.

Results Description

We did not reach the enrollment increase as stated. A greater loss happened due to resignations as a result of Hurricane Harvey

 Admissions**Performance Objective Description**

Work with IT to streamline processes related to Admissions, Parts of Term, and the DO Program.

 DO Program Admissions**KPI Description**

SHSU enrollment management personnel will visit the Marian University campus for process planning. Detailed processes will be defined and compared to current SHSU processes for implementation.

Results Description

The EM Division has created an implementation timeline for the Admissions, Financial Aid, Registrar and reporting components. The Admissions office has hired a consultant for software and hiring.

 Parts of Term Enrollment**KPI Description**

Graduate students will have the option to enroll in 7.5 week courses in fall and spring semesters. Ten graduate programs will be added to the 7.5 parts of term schedule.

Results Description

This initiative has been moved to Fall 2018. The results of Hurricane Harvey and the re-start to the semester caused this adjustment.

 Streamline Admissions**KPI Description**

Speed up the processing of admissions documents for student acceptance. Graduate admissions decisions will be made within 48 hours of receipt of all required documents.

Results Description

The graduate admissions process continues to improve with the collaboration between Admissions and Graduate Studies. This is a culture change as well as a process change.

** Staff Resources****Goal Description**

Provide necessary space and staff resources for the division in support of the university's current and emerging needs.

Related Items

  **Employee Engagement**

Performance Objective Description

Measure Enrollment Management employee engagement.

  **Gallup Action Plans**

KPI Description

More than 75% of Enrollment Management staff will participate in the Gallup Employee Engagement Survey. The Engagement Survey will be used to guide department leaders to develop plans of engagement related to quality, customer service, expectations, recognition, material and equipment needs.

Results Description

The VP for Enrollment Management (Fall 2016) scheduled departmental meetings to discuss the results of the survey. Each department created action plans related to the employees' requests for office engagement.

** Technology****Goal Description**

To promote, implement and maintain technology to the fullest capacity in order to facilitate the enrollment management process.

Related Items

  **Admissions**

Performance Objective Description

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  **DO Program Admissions**

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ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: Institutional Effectiveness****Sam Houston State University****President, Office of****Enrollment Management, Vice President****Institutional Effectiveness**** Collect, Analyze And Disseminate Institutional Data And Relevant Information In An Accurate, Timely And Understandable Manner****Goal Description**

The Office of Institutional Effectiveness will collect, analyze, and disseminate institutional data and relevant information in an accurate, timely, and understandable manner.

Related Items** Develop And Maintain Outcome Indicators****Performance Objective Description**

Develop and maintain a core of outcome indicators at multiple institutional levels.

** Data Definitions - Create Operational Document Identifying Key Data Definitions****KPI Description**

Data Definitions - Create operational document identifying key data definitions and begin developing training sessions for SHSU employees

Results Description

Data Cookbook is an online inventory of data definitions and reports. Institutional Effectiveness maintains the information contained in SHSU's Data Cookbook at shsu.datacookbook.com.

- Added Official Race and First Generation status variables to the General Student Report at the recommendation of IE and approval of the VPED and Registrar.
- AVP for IE presented a Virtual Tour of IE and the Data Cookbook as part of a Learning Academies Come for Coffee session and a Staff Council Professional Development Conference track.



Data Cookbook Definitions Example



IE Virtual Tour Excerpt - Data Cookbook

** Develop New And Enhance Existing Cognos Reports****Performance Objective Description**

Develop new and enhance existing Cognos reports to provide a comprehensive overview of critical activities of the university.



Cognos Reports

KPI Description

Create four new Cognos reports for use by university personnel.



Results Description

The following Cognos reports were created:

- Application Comparison by High School (for UG Admissions)
- Graduate Applicant List (for Dept. of Educational Leadership)
- SHSU Degree Awards for All Terms (for Registrar)
- Employee Past Due Balance (for Bursar)
- Enrolled Students Using VA Education Benefits

The following Cognos reports were updated or modified:

- Open Records Report (for Registrar)
- Employee Master Report - Veteran Status (for HR)

Develop and Design Interactive Fact Book

Performance Objective Description

Develop and design an interactive institutional dashboard (Fact Book).

Identify Platform for Institutional Fact Book

KPI Description

Results Description

Institutional Effectiveness staff researched platforms to be used for the development of an institutional Fact Book (dashboard). Tableau was chosen, and three licenses were purchased.

Tableau is business intelligence software that helps transform data into actionable insights, explore data with visual analytics, build dashboards and perform ad hoc analyses, and share work with others.



Team Performance

Performance Objective Description

Improve communication with clients

Client Checklist for Initial Work Order Review

KPI Description

Create a checklist of items for discussion with clients to improve accuracy of final report and client satisfaction.

Results Description

AVP for IE and Asst. Dir. for APR will work with Asst. Dir. of IR and IR Analysts to determine specific information analysts need to know before working on a ticket. A one-page document will be designed.

(Pending - This item was moved to FY18 per the APR Action Plan.)

Cross Training

KPI Description

Cross train with 2 Enrollment Management Departments

Results Description

Institutional Effectiveness (IE) staff trained in the areas below:

- The following IE staff were trained by Cindy Hardy, Assistant Registrar, on Family Educational Rights and Privacy Act of 1974 and SHSU policies and procedures: Xiaohong Li, Judy Sjogren, Kristina Yount, Michelle Lewis, Fei Wang, David Arriola
- The following IE staff attended New Student Orientation (Summer 2017): David Arriola, Kristina Yount

 FERPA - Registrar's Office Web Info

 SHSU FERPA Information - Student Guidelines

Improve Quality Assurance Communication

KPI Description

Conduct internal review on strategies to follow up with clients and ensure satisfaction

Results Description

Created follow-up review telephone call procedure and developed a log to track phone calls and client responses.

 IE Client Satisfaction Call Log Example

Track And Evaluate User Satisfaction

Performance Objective Description

Increase the overall satisfaction level of those who receive data requests.

 Post Fulfillment Survey
KPI Description

Post Fulfillment Survey – Evaluate user satisfaction via survey.

 Institutional Effectiveness Survey of Satisfaction Results for FY 16

Results Description

Due to employee turnover, survey results for FY17 are not available. The survey will be reviewed for improvement and implemented in FY18. Cherwell Development software may provide an automated function to eliminate the dependence on a staff member to conduct each survey, therefore decreasing the opportunity for lost data or failure to conduct the survey.

 Contribute Materially In The University-wide Process For Continuous Improvement By Assisting Administrative Units In The Evaluation Of Operations

Goal Description

The Office of Institutional Effectiveness will contribute materially in the University-wide process for continuous improvement by assisting administrative units in the evaluation of operations.

Related Items

 **Administrative Program Review Evaluation**

Performance Objective Description

Administrative Program Review will be evaluated by the department undergoing the review. APR will receive a satisfactory rating in this review.

 APR Process Satisfaction
KPI Description

The APR process will receive a rating of at least satisfied on the evaluation rubric completed by the administrative department under review.

Results Description

An online survey was used to collect feedback from staff involved in the APR process. During FY2017, three departments were surveyed.

- 83% of respondents were either satisfied or extremely satisfied with the completion of the APR Self-Study. The remaining respondents were neutral.
- 83% of respondents were either satisfied or extremely satisfied with the completed Action Plan. The remaining respondents were neutral, with one respondent stating that the action plan consisted of things the department already knew needed improvement.
- 83% of respondents would recommend the APR process to a colleague as a tool for seeking continuous improvement.

The APR survey has since been revised to include a question to gauge overall satisfaction with the APR process. The new survey will be distributed to the remaining completed units in August 2017.

 APR Survey Results New APR Survey **Conduct APR Process in Institutional Effectiveness****Performance Objective Description**

Complete the APR process for the Office of Institutional Effectiveness.

 Complete IE Action Plan**KPI Description**

Complete an Action Plan for Institutional Effectiveness

Results Description

IE completed the APR action plan in July 2017.

 IE Action Plan **Expand Administrative Program Review****Performance Objective Description**

Expand the Administrative Program Review process into more University departments.

 Continue to Conduct and Improve APR**KPI Description**

Complete five Administrative Program Reviews.

Results Description

The APR process was completed for the following departments:

- Newton Gresham Library
- First-Year Experience / SSI
- Student Advising and Mentoring Center (SAM Center)
- Academic Success Center
- Testing Center
- Continuing Education
- Institutional Effectiveness

Pending: Office of International Programs

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: Visitor Services****Sam Houston State University****President, Office of****Enrollment Management, Vice President****Visitor Services**** Campus Participation****Goal Description**

Increase involvement of on-campus recruitment efforts regarding campus events for academic departments/colleges.

Related Items**  Campus Events****Performance Objective Description**

We will work with academic departments and colleges to help them coordinate the planning and marketing for on-campus events, at which recruiting opportunities can be increased. This will help us to build relationships with on-campus entities to the Division of Enrollment Management, but also to aid the academic departments in utilizing our services, rather than adding more workload to professors during the academic semesters.

** Events****KPI Description**

Add at least two more ExCEL (Exploring College Education & Life) programs to the current offerings by Aug '17.

Results Description

Goal not met.

While we made progress laying the groundwork for developing these programs with our campus academic partners, the goal was not achieved of actually hosting more of these events. Due to some changes and shortages of staff members, we were unable to focus on building these programs the way we intended. Instead, we were working to make sure our flagship programs (Saturday@SAM, Scouts@SAM, etc.) were executed as successfully as possible.

** Improve Effectiveness****Goal Description**

The Visitor Center will implement assessments to allow for improvements in areas that are not as

effective.

Related Items

Student Tracking

Performance Objective Description

The Visitor Center will convert visiting prospective students to applicants/enrolled students at SHSU.

Conversion

KPI Description

Through the use of data tracking, we will run reports through Hobsons to determine the percentage of students (of applicable age) who apply and subsequently enroll after they attend a visitor center presentation and tour. The end goal is to have a conversion rate of greater than or equal to 50%.

Results Description

Total students (those that have provided enough personal information to track) that toured campus and/or attended a recruitment event offered by Visitor Services and was of applicable age/qualifications to apply/enroll equaled:

Toured: 4,681

- Applied: 2,982 (63%)
- Enrolled (as of 8/3/17): 1,635 (34%)

Goal not met.

Spanish Speaking Tours

Goal Description

Increase Spanish Speaking Tour Offerings

Related Items

Increased Options - Spanish Tours

Performance Objective Description

Addition of session offering for Spanish Tours to include Admissions, Financial Aid, and Residence Life department presentations.

Implementation - Spanish Tours

KPI Description

A comprehensive Spanish Speaking Visit Program will be implemented by Spring '17

Results Description

Did not make significant advancement towards fully functioning program.

Admissions – The office currently employs one Spanish-speaking counselor, often out on recruitment travel, and therefore unavailable on many of the Friday Spanish tour times. Spanish-speaking Visitor Services staff cover Admissions information as needed.

Financial Aid – The office currently employs one bilingual employee who previously served as a Financial Aid Counselor. On a need-based schedule of availability, she serves as the Spanish-speaking liaison for prospective and current students. Her current job responsibilities are no longer directly counseling students. On occasion, her current position disallows her from being available for all Spanish tour offerings. Both Spanish-speaking full-time staff on the Visitor Services Staff completed Financial Aid training with Kristy Mills in order to gain Banner access to student information and act as additional resource for students and families.

Residence Life – Visitor Services' SAMbassadors were trained in conducting Spanish Residence Life tours, as there are no bilingual Residence Life Ambassadors nor full-time employees currently on the Residence Life staff.

** Summer Recruitment Efforts****Goal Description**

Add a summer SHSU Bridge Program.

Related Items

 **Creation - Summer Bridge Program**

Performance Objective Description

Create a Summer Bridge Program to give prospective students a more hands on informational experience regarding higher education at SHSU. This will also help with the transition from high school to university life, preparing students for success.

** Events****KPI Description**

Add at least two more ExCEL (Exploring College Education & Life) programs to the current offerings by Aug '17.

Results Description

Goal not met.

While we made progress laying the groundwork for developing these programs with our campus academic partners, the goal was not achieved of actually hosting more of these events. Due to some changes and shortages of staff members, we were unable to focus on building these programs the way we intended. Instead, we were working to make sure our flagship programs (Saturday@SAM, Scouts@SAM, etc.) were executed as successfully as possible.

Division of Finance and Operations

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: Finance and Operations, Vice President****Sam Houston State University****President, Office of****Finance and Operations, Vice President** **Advance Student Success****Goal Description**

Increase and develop university resources and infrastructures that support the intellectual transformation of students.

Related Items  **Automated Solutions****Performance Objective Description**

Departments will identify additional third party solutions that will simplify/facilitate business processes.

 3rd Party Solutions**KPI Description**

- Departments must identify one business processes that may be better supported by 3rd party solutions.
- Department heads will prepare and submit proposals at 1-on-1 meetings with VPFO.

Results Description

The following information supports the Goal of *Advance Students Success*.

The division of Finance and Operations together with the Integrated Technology division are in the process of implementing Adobe Sign which will dramatically improve the Financial Aid Certification process. This 3rd party solution will improve the student experience with dealing with Financial Aid processes.

Additionally, the division of Finance and Operations is working to complete a new “onboarding process” through the Cornerstone Management software application which will improve efficiency by reducing paperwork and reducing the time between applying and beginning work.

The following information supports the Goal *Increase Efficiency of University Operations*.

All units within the division of Finance and Operations continue to implement new automated solutions for financial processes of the University. Several areas have executed 3rd party solutions such as Chrome River, Adobe Sign and Windstar, all which provide improvements to multiple financial processes. Improvement in the areas of travel and expense reporting, facilitation of signature processes and enhancements to current tax

assessment software. Retirement Manager and Common Remitter software will be implemented in order to expand offerings to employees by the Human Resources department.

Expand Student Employment

Performance Objective Description

VPFO departments will seek to serve full-time institutional support functions through the establishment of student employment opportunities that enhance student preparation for the workforce by imparting real world experience in their fields.

Student Employment Within VPFO Departments

KPI Description

- Department will identify opportunities for increasing student employment as part of budget request.
- Department will report pre and post implementation student employment headcount quarterly.
- Departments will calculate and report dollar and/or operational efficiency impacts quarterly, if any.

Results Description

The division of Finance and Operations views student employment as an essential part of our daily operations. All departments within the division continually evaluate their processes in order to determine areas where students can assist with enhancing operational efficiencies. We understand the importance of not only educating students, but also providing an opportunity to learn skills which will assist them when seeking employment after graduation. The office of Risk Management employed two (2) graduate assistants to help the Science Labs Safety Coordinator. The office of the Controller also employed two (2) student accountants to assist with BSN process reviews.

Increase/Develop University Resources For Student Employment

Performance Objective Description

Identify resources to increase on-campus employment opportunities in an effort to increase student persistence and success.

Budget Analysis And Allocation

KPI Description

- Identify funding strategies
- Prepare and submit proposals to cabinet
- Monitor and report impact of funding allocations

Results Description

Data Driven Decisions

Goal Description

Develop and implement reporting tools and reports that allow visibility into revenue and expense activities across the campus.

Related Items

Benchmarks And KPI's

Performance Objective Description

Departments will identify a variety of HE specific bechmarks (or private sector if applicable) and develop KPI metrics that monitor and compare institutional performance.

Departmental Efficiency/Effectiveness

KPI Description

- Departments will identify industry specific benchmarks and develop related KPI's.
- Department heads will report departmental performance to VPFO.

Results Description

When available, departments within the division continually utilize industry benchmarks in order to systematically compare and improve the administrative processes of our organization. Several of our departments have access to and are members of regional, state and national organizations that assist with our benchmarking activities.

The payroll department developed and conducted a benchmarking survey, which was sent to other state universities in order to gain information relating to areas of payroll processes and their associated costs. The responses have been received and results are being compiled. Controller's office has continued to utilize The Composite Financial Index as a benchmark for financial health and performance.

Facilities management continues to use the Association of Physical Plant Administrators (APPA) for benchmarks related to the facilities functions of Universities and Colleges. Additionally, Facilities management continues to use the Energy Utilization Index as a benchmark for establishing target locations for reducing energy consumption.

Financial Analysis Models

Performance Objective Description

Departments will develop replicable reporting models that allow measurement of enterprise performance to budget, PY and support modeling for future periods.

Reporting Models

KPI Description

Departments will develop:

- Revenue Analysis report by Major elements
- Expense Trend and Budget Analysis Report
- Budget Report for quarterly reporting to TSUS
- Auxiliary enterprise P&L

-Working capital report

Results Description

Reports developed and available within ERP system that allow end users to produce spend analysis by supplier, organization, item and category. This allows department's better visibility and tracking of spending, therefore assisting with control of departmental budgets. Collaboration between budget office and financial reporting office will result in the production of a 5-year budgeting model for divisions to use during the budget process.

Building and landscape services has implemented reporting tools and reports that allow visibility into the quality and completeness of the service they provide. Bi-monthly building evaluations established to track effectiveness and productivity as well as give insight into areas for growth and potential areas of weakness.

Development of reports targeted at improving facilities project cost tracking will continue to be a priority. Leadership changes coupled with extended position vacancies has delayed progress of this KPI. Currently, the integration of campus ERP system and Facility's web based product has assisted this process, but work will continue into FY 18 to further develop tracking of project costs. A variance report has been developed and is being used by the Direct of Planning and Construction to monitor project budgets and actual costs.

Treasury Office has identified comparison tools for the costs associated with banking activities. These tools will be developed and used to benchmark our banking costs to that of peer institutions. Collaboration with Financial analysis and reporting department in order to customize reports that show income generated by the Universities operating and endowment funds, as well as, forecasting income over the short to medium term.

Identify Disruptive Change Opportunities

Goal Description

Identify opportunities to increase institutional revenues, explore privatization/contracting, evaluate departmental effectiveness.

Related Items

Departmental Effectiveness/efficiency Evaluations

Performance Objective Description

- Departments will collaborate with institutional efforts focused on organizational efficiency.
- Identify external consultant support as needed.
- Engage external consultants to evaluate departmental operations.

Increase Revenues

Performance Objective Description

Develop and implement solutions that increase institutional revenues.

 Revenue Enhancement**KPI Description**

- Change investment strategies
- Develop new student assessment frameworks

Results Description

Strategies to increase institutional revenues took place within the Treasury Office and were very effective in increasing portfolio performance in both operating and endowment funds. Allocations were adjusted within the operating funds and new investment vehicles were used within the Endowment funds.

 Increase Efficiency Of University Operations**Goal Description**

VPFO departments will continue to develop and deploy automated solutions.

Related Items **Automated Solutions****Performance Objective Description**

Departments will identify additional third party solutions that will simplify/facilitate business processes.

 3rd Party Solutions**KPI Description**

- Departments must identify one business processes that may be better supported by 3rd party solutions.
- Department heads will prepare and submit proposals at 1-on-1 meetings with VPFO.

Results Description

The following information supports the Goal of *Advance Students Success*.

The division of Finance and Operations together with the Integrated Technology division are in the process of implementing Adobe Sign which will dramatically improve the Financial Aid Certification process. This 3rd party solution will improve the student experience with dealing with Financial Aid processes.

Additionally, the division of Finance and Operations is working to complete a new “onboarding process” through the Cornerstone Management software application which will improve efficiency by reducing paperwork and reducing the time between applying and beginning work.

The following information supports the Goal *Increase Efficiency of University*

Operations.

All units within the division of Finance and Operations continue to implement new automated solutions for financial processes of the University. Several areas have executed 3rd party solutions such as Chrome River, Adobe Sign and Windstar, all which provide improvements to multiple financial processes. Improvement in the areas of travel and expense reporting, facilitation of signature processes and enhancements to current tax assessment software. Retirement Manager and Common Remitter software will be implemented in order to expand offerings to employees by the Human Resources department.

Develop Automated Processes

Performance Objective Description

Departments will continue to develop automated processes to simplify/facilitate business processing.

Automating Processes

KPI Description

- All departments will identify one business process they will redesign from paper-based to computer supported.
- Department heads will discuss proposals at 1-on-1 meetings with VPFO.

Results Description

In addition to new 3rd party solutions, many departments within the division of F&O have enhanced currently owned resources and programs by working with vendors to expand functionality of software. Our payroll office has broadened our Windstar tax platform to support scholarships and vendor payments for international individuals and entities. Payroll is also working with IT department to roll out Employee Profile for point of access for pay, timesheet, leave and tax documentation for employees. Continued development and enhancement of our ERP system processes is ongoing. Procurement staff has developed multiple reporting tools with Sciquest and Banner that assist with both University and State reporting requirements. Many areas have automated multiple forms through our ERP system and eProcurement system. This automation has greatly improved the workflow efficiency with the areas of the controller's office, travel, disbursements, procurement, payroll and treasury office. Human Resources is working to utilize current Cornerstone Performance Management System in order to provide increased efficiency in the tracking of Faculty Tenure and Promotion Process, as well as, to develop an onboarding process for new student employees.

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: Payroll Office and Tax Specialization****Sam Houston State University****President, Office of****Finance and Operations, Vice President****Assistant VP of Finance and Operations****Payroll Office and Tax Specialization** **Campus Expansion and Infrastructure****Goal Description**

Expand our payroll processes and help other entities outside of our organization.

Related Items **TSUS Business Office****Performance Objective Description**

Development of a TSUS Business Office infrastructure and framework within the Sam Houston State's business office's that expands the TSUS business process to emulate the model in SHSU's payroll, procurement, disbursements, and accounting areas.

 TSUS Plan**KPI Description**

Work in tandem with AVPFO to schedule meetings with appropriate departments to begin the TSUS business process. Progress will be dependent upon direct instruction from TSUS board.

Results Description

As indicated previously, progress has been driven by the TSUS board. Approval to launch was provided by Daniel Harper 07/10/2017. Consultancy with SIG Corporation initiated 07/19/2017 confirmed for weeks of 08/14, 08/21, 11/12, and 12/3.

 Develop Culture and Business Environment**Goal Description**

Enhance our business culture and environment by developing procedures to increase productivity and use tools to provide feedback to better our office.

Related Items **Develop Timesheet Procedures****Performance Objective Description**

Develop procedures and follow-up plan to ensure employee timesheets that do not receive supervisor approval are included in payroll.

 Timesheet Procedure**KPI Description**

Achieve approval of VPFO (by working through AVPFO) to allow mass approval of time sheets or leave reports that have been submitted by employee but not received final departmental approval.

Results Description

Request was made to the VPFO through the AVPFO and declined.

 Enhance Comment Card**Performance Objective Description**

Enhance Comment Card response by utilizing target distribution to gauge customer service.

 Comment Card**KPI Description**

Add comment card to payroll staff email signatures and add to the end of any training sessions.

Results Description

Request for comment cards is attached to all communication from the Payroll Office staff to on and off campus constituents. Currently on track to receive at or above the number originally received in calendar year 2016.

 Increase Operating Efficiencies and Effectiveness**Goal Description**

Improve departmental operational efficiency by updating and creating various procedures and policies in the office.

Related Items **Broaden Windstar****Performance Objective Description**

Broaden Windstar tax platform to support scholarship and vendor payments for international individuals and entities.

 Windstar**KPI Description**

Work with administration in Bursars and Disbursements offices to identify and appropriately tax international payments.

Results Description

Windstar is now being used to tax international scholarship recipients.

Conversations have been held with Disbursements to begin identifying and including foreign vendor payments.

Develop Moving Expense Policy

Performance Objective Description

Development of a Moving Expense Policy and procedures to ensure timely and accurate payment and taxation.

Moving Expense

KPI Description

Implement policy and form developed by AVPFO to appropriately tax moving expense at the point of distribution.

Results Description

Policy has been approved by cabinet and published to campus April 2017. All moving expense reimbursement requests are processed directly through the Payroll Office.

Develop Tax Procedures

Performance Objective Description

Develop procedures to ensure that all related tax processes/reconciliations are reviewed quarterly.

Tax Procedures

KPI Description

Produce checklists for monitoring all tax related activity for SHSU.

Results Description

The Payroll Office is now utilizing the IRS tax calendar and enhancing with state filing dates if different then those required by the IRS.

Expand Multi-State Payroll

Performance Objective Description

Expand multi-state payroll offering to accommodate increased need to hire out of state employees.

Multi-State Payroll

KPI Description

Target three states to be added annually.

Results Description

States in progress: Nevada, Florida, Oklahoma, and Arizona.

 Implement Retirement Manager Program**Performance Objective Description**

Implement VALIC, Retirement Manager Program to remit ORP and annuity payments via a Common Remitter upload process. In addition, Retirement Manager offers and employee portal for integration with HR.

 Retirement Manager Program**KPI Description**

Review acceptance of agreement with Retirement Management Inc. Begin implementation using road-map provided by Retirement Management Inc.

Results Description

Contract currently issued by Retirement Manager has been reviewed and edited by TSUS general counsel. It is currently under review with SHSU IT. Once approved through IT, it will be routed through Retirement Manager for conclusion of edits and final contract.

 Job Automation**Performance Objective Description**

Explore scheduling jobs to automate the payroll process and increase staff efficiency.

 Job Automation**KPI Description**

Utilize established checklist to determine point of launch for automation. Work with IT to develop UC4 process.

Results Description

Transition of payroll processes to Accountant I has delayed identifying processes to be automated. On target for next years efforts.

 Online Form Enrollment**Performance Objective Description**

Increase enrollment in online distribution of W2's and 1095C's via campaign.

 Online Form Enrollment**KPI Description**

Targeted email distribution at year end to individuals not currently signed up for automated delivery.

Results Description

Emails were sent to all anticipated W-2 and 1095-C recipients increasing participation by 5.4%.

Resource Enhancement

Goal Description

Development of various tools both in and outside of the department to enhance resources for the payroll office.

Related Items

CPP and FPC Training

Performance Objective Description

Explore opportunities to offer CPP (Certified Payroll Professional) or FPC (Foundational Payroll Certification) training and certification for targeted payroll staff.

CPP/FPC

KPI Description

Schedule, at minimum, two payroll staff members to attend training in San Antonio in Summer 2017.

Results Description

Sent 3 payroll staff members to training, will be sending 2 more next year.

Employee Profile

Performance Objective Description

Implementation and roll-out of *Employee Profile* for campus employees. *Employee Profile* is the point of access for pay, timesheet, leave, and tax documentation for employees.

Employee Profile

KPI Description

Complete set up of Employee Profile. Approve for public distribution by IT. Digital facelift by IT should provide public access by Summer 2017.

Results Description

System upgrades have delayed full publication. Soft publication went live Spring 2017.

Payroll Benchmarking Survey

Performance Objective Description

Development of a Payroll Benchmarking survey within Texas and similar universities as well as participation in the upcoming (2017) APA Benchmarking survey.

Payroll Benchmarking Survey

KPI Description

Utilize Qualtrics to develop survey. Create distribution list of Texas schools.

Distribute survey Spring 2017.

Results Description

31 schools were polled, 9 responded. Results have been compiled and are being reviewed by the AVPFO July 2017 for distribution to recipients August 2017.

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: Facilities Management****Sam Houston State University****President, Office of****Finance and Operations, Vice President****Facilities Management**** Advance Student Success****Goal Description**

Increase and develop university resources and infrastructure that supports intellectual transformation of students

Related Items** Seek Opportunities To Expand The Use Of Student Workers****Performance Objective Description**

Identify opportunities for increasing student employment with focus on increasing department efficiency.

** Identify One Opportunity To Increase Student Employment As Part Of The Budget Process****KPI Description**

Identify one opportunity to increase student employment as part of the budget process

Results Description

Student Employee opportunities have been expanded to bring on more students in the Facilities Services area: Fleet Services, Parking Lot Services, and Carpentry Services. Facilities Management Business Services has expanded Student Employee growth in the Central Stores and Receiving to maintain a higher level of Customer Service Satisfaction.

** Identify Disruptive Change Opportunities****Goal Description**

Identify opportunities to increase revenue, explore privatization/contracting out, and evaluate effectiveness.

Related Items** Identify Privatization And Outsourcing Opportunities****Performance Objective Description**

Explore opportunities for outsourcing organizational activities to increase revenues, reduce cost, or increase efficiency.

 Identify One Activity That Can Be Outsourced**KPI Description**

Identify one activity that can be outsourced

Results Description

Currently Comprehensive Cleaning and Softwashing (pressure washing) Campus Building Exteriors are being looked at for outsourcing.

 Increase Efficiency Of University Operations**Goal Description**

Develop and deploy automated solutions.

Related Items **Develop Automated Processes****Performance Objective Description**

Develop automated processes to simply/facilitate business processing.

 Discuss Proposals At 1-on-1 Meetings With VPFO**KPI Description**

Discuss proposals at 1-on-1 meetings with VPFO

Results Description

As proposals are drafted/received they are discussed with the VPFO in bi weekly meetings.

 Identify One Business Process To Redesign From Paper-based To Computer Supported**KPI Description**

Identify one business process to redesign from paper-based to computer supported

Results Description

Utility Billing Automation. This new process has been a collaborative effort between IT, Procurement Business Services, and Campus Energy Management.

 Make Data Driven Decisions**Goal Description**

Develop and implement reporting tools and reports that allow visibility into revenue and expense activities across campus.

Related Items **Identify Benchmarks And Develop KPI Metrics****Performance Objective Description**

Monitor and compare institutional performance with peer institutions.

 Using APPA Key Performance Indicators Program, Identify PEER Institutions

KPI Description

From data compiled by APPA, identity five peer institutions to use in comparing FM performance measures.

Results Description

Peer institutions identified. This KPI is complete.

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: Facilities Planning and Construction****Sam Houston State University****President, Office of****Finance and Operations, Vice President****Facilities Management****Facilities Planning and Construction**** Implement Continuous Improvement Within Division****Goal Description**

Require Directors/AVP's to integrate a culture of continuous improvement within their departments.

Related Items**  Integrate Project Management Software And University Accounting Database****Performance Objective Description**

Utilizing web-based product, e-Builder, to capitalize on "real-time" construction project tracking and management from planning phases through completion of FPC projects. Information can be accessed at multiple levels of the project phases and organizational structure. Ultimately, enhancing the over-all project delivery. The integration of BANNER, the University's accounting database, with the project management software, reflects accurate information and an intense process of checks and balances.

** Comparison Of Project Costs Via Cognos Report****KPI Description**

Review monthly the FPC Monthly Manager Reports and Cognos dashboards to track Project softcosts, Design and General Contractor Contracts and Project change orders in comparison to Total Project Cost (TPC) and BANNER Budget pools. The Cognos report run daily compares BANNER and eBuilder project costs and is used to determine need for redirection and analysis of risks exposure. Less than a 1% variance is considered successful when comparing Banner and eBuilder...:

1. Project Budgets
2. Expenditures
3. Encumbrances
4. Rem Balances

Results Description

The variance report is generated daily and sent to the Director of Planning and Construction for review. Differences in variances are minimal and differ only due to timing issues of input in varies software, example: banner, bearkat buy, ebuilder etc. Other areas of this KPI were not achieved.

 Provide For Continued Improvement In Campus Facilities And Grounds**Goal Description**

Boost participation of campus departments in the verification of their facilities space and improve departmental understanding of the Texas Higher Education Coordinating Board (THECB) space coding structure.

Related Items **Increase Campus Participation In The Verification Of Their Facilities Space****Performance Objective Description**

With the constructed environment expanding every year and the existing campus rooms in a constant state of change, it is important that campus spaces are reviewed on a regular basis. We can make significant improvements in the use of space through reliable information. It is imperative that the space users collaborate with the Facilities Planning Office to ensure that the facilities space data sent to the THECB is accurate. There are a number of decisions made by the THECB and state legislature based on this data, including funding for new construction.

 Achieve 100 Percent Annual Inventory Responses From Departments**KPI Description**

Annual inventory review performed by the institution's departments during March-April of each year. A new web program has been designed to access buildings and rooms by department. Review requests will be communicated to department contacts and managers. A percentage of the departments responding will be reported to the Director of Facilities Planning & Construction and the Associate VP of Facilities Management. The introduction of the program yielded only a 55% response. A range of 98%-100% response is desired.

Results Description

To enhance the Universities knowledge of Space Management and Allocation the Campus Space Manager participated in the Staff Development day where a training session was held. The goal of reaching 100% response rate has been achieved.

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: Human Resources****Sam Houston State University****President, Office of****Finance and Operations, Vice President****Human Resources**** Develop A Strong Employee Development Process****Goal Description**

The Human Resources Department will develop a strong employee development process.

Related Items** Additional Online Training****Performance Objective Description**

The Human Resources Department will provide additional online training sessions via the Cornerstone Talent Management System to promote continuous learning and improvement for department managers and employees.

** Additional Job Specific Training****KPI Description**

The Human Resources Department will provide additional job specific training for employees. The "Come for Coffee" series of training events will provide training opportunities for participants to receive up to date information from knowledge experts on various topics.

Results Description

The Human Resources Department provided the following "Come for Coffee" training events during FY 2017 to provide employees with additional job specific training: Staffing & Diversity; Performance Appraisals – Getting Results; How the Money Flows at SHSU; University Social Media; and FERPA – What You Need to Know.

** New Student Employee Onboarding Process****Performance Objective Description**

Human Resources will move the onboarding process for new student employees to the Cornerstone online system. This is the same system currently used for professional development, training, and performance management.

** Complete New Onboarding Process For New Student Employees****KPI Description**

Human Resources will complete the new onboarding process for new student

employees in the Cornerstone online system. This new functionality will be available to new hires beginning January 2018.

Results Description

The Human Resources is on track to complete the new onboarding process for new student employees in the Cornerstone online system. This new functionality will be available to new hires beginning January 2018.

Utilize The Cornerstone Performance Management System For Additional Efficiency

Performance Objective Description

The Human Resources Department will further utilize the Cornerstone Performance Management System to provide additional efficiency for department administrators and employees.

Utilize The Cornerstone Performance Management System For Faculty Tenure And Promotion Review

KPI Description

The Human Resources Department is working with the Provost's Office to utilize the Cornerstone Performance Management System for the Faculty Tenure and Promotion Process. The College of Education is participating as a pilot group during the 2016-2017 review period. Utilizing the online system for this process will provide increased efficiency for all participants in the process.

Results Description

The Human Resources Department worked with the College of Education as a pilot group during the 2016-2017 review period to utilize the Cornerstone Performance Management System for the Faculty Tenure and Promotion Process. The pilot program was a success and the Provost's Office is interested in using this method moving forward. Utilizing the online system for this process will provide increased efficiency for all participants in the process.

Facilitate Continuous Improvement Within Department

Goal Description

Facilitate continuous improvement efforts within the Human Resources Department.

Related Items

Compensation Review For Staff Internal Pay Equity

Performance Objective Description

The Human Resources Department will complete a compensation review of staff job offers and reclassification requests for internal pay equity.

Review Of Staff Job Offers And Reclassification Requests

KPI Description

The Human Resources Department will review each staff employee job offer and reclassification request for internal pay equity, addressing any concerns with the applicable hiring supervisor or department administrator.

Results Description

The Human Resources Department reviews each staff employee job offer and reclassification request for internal pay equity, addressing concerns with the applicable hiring supervisor or department administrator.

 Consolidation Of Classification System**Performance Objective Description**

The Human Resources Department will consolidate staff position classes within the classification system.

 Provide More Reliable Compensation Analysis And Career Paths**KPI Description**

The Human Resources Department will consolidate staff position classes within the Staff Classification System in order to provide more reliable compensation data analysis and aid in the design of staff position career paths.

Results Description

The Human Resources Department consolidates staff position classes within the Staff Classification System on an ongoing basis in order to provide more reliable compensation data analysis.

 Improvements To Hiring Process**Performance Objective Description**

The Human Resources Department previously worked with a focus group of employees from each division to review the hiring process. Human Resources will utilize the feedback to provide additional efficiencies in the hiring process.

 Implementation Of The New Hire Export Process Between PeopleAdmin And Banner**KPI Description**

Human Resources staff will work with PeopleAdmin and Ellucian to implement the New Hire Export process. This process will provide hiring departments with the ability to obtain approvals for new hires within the PeopleAdmin system and alleviate the need for hiring departments to create new hire Electronic Personnel Action Forms (EPAFs) in Banner. This process will be implemented for staff new hires in 2017.

Results Description

Human Resources staff worked with PeopleAdmin and Ellucian to implement the

New Hire Export process; however, during the testing stage of implementation, it was determined that the process would not increase efficiency. This new process will not be implemented for staff new hires.

Search Committee Training And Resources

KPI Description

The Human Resources Department will provide online Search Committee Training and resources to assist search committees and hiring administrators with the hiring process.

Results Description

The Human Resources Department has provided online Search Committee Training and resources to assist search committees and hiring administrators with the hiring process.

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: Office of Treasury and Investment Management****Sam Houston State University****President, Office of****Finance and Operations, Vice President****Office of Treasury and Investment Management** **Advance Student Success****Goal Description**

Develop resources and opportunities to support the intellectual transformation of students which will enable them to succeed once they have graduated from our University.

Related Items **Expand Opportunities For Student Employment****Performance Objective Description**

Treasury will seek to establish student employment opportunities that will allow students to obtain practical work experience that is related to their field of education.

 Student Employment Within Treasury**KPI Description**

- Identify practical opportunities that will increasing student employment and be funded as part of the budget process.
- Show an increase in student employment by adding at least 1 student worker to the department.

Results Description

Worked with COBA to identify a student that would work as a student assistant in the Treasury office. She worked with us in the Fall semester and continued to work with us in the Spring. Based on this experience, we are planning to have a student in our office for FY18.

 Improve Participation Of Vendors**Performance Objective Description**

Work with vendors to improve their participation in career services events such as career fairs.

 Add Vendors To Career Service Events**KPI Description**

- Work with Treasury's vendors to boost opportunities especially in finance/banking and retail/marketing.
- Track participation of Treasury's vendors in such events on an annual basis.

Results Description

- Treasury has worked to make our business partners (Wells Fargo, Pepsi) aware of campus recruiting and hiring events
- We will reach out to Career Services to identify additional opportunities to promote their events

** Data Driven Decisions****Goal Description**

Develop and implement reporting tools and reports that allow visibility into revenue and expense activities across campus.

Related Items** Benchmarks And KPI's****Performance Objective Description**

Treasury will identify benchmarks and develop KPI metrics that monitor and compare institutional performance.

** Departmental Efficiency/Effectiveness****KPI Description**

- Treasury will identify industry-specific benchmarks and develop related KPI's.
- Prepare and submit report to VPFO.

Results Description

- Treasury has identified some benchmarks for our investment activities but we are still trying to find benchmarks for our treasury activities
- We have identified comparison tools for the cost of our banking activities and are currently in the process of benchmarking our banking costs to peers

** Financial Analysis Models****Performance Objective Description**

Treasury will develop reporting models to measure performance to budget and support modeling for future periods.

** Reporting Models****KPI Description**

- Develop reports to track the current year revenue generated from the investment of operating funds.

- Create a model to predict future revenues that will be generated by our investment activities.

Results Description

- Currently generating customized reporting that shows income generated from operating funds and endowment
- Presently working towards a predictive model that will help us to forecast income over the short to medium term

Improve Operational Efficiency

Goal Description

Treasury will evaluate and deploy solutions to improve the efficiency of the University's operations.

Related Items

Automated Solutions

Performance Objective Description

Identify third party solutions that will simplify or facilitate business processes on campus.

3rd Party Solutions

KPI Description

- Identify one business process that may be better supported by a third party solution.
- Prepare and submit proposal to VPFO at 1-on-1 meeting.

Results Description

- Most of our banking and investment activities are already done by third-parties, under our supervision and direction
- Over the coming year, we are looking at 3rd party solutions to support some new initiatives. An example would be a 3rd party billing company for the proposed College of Osteopathic Medicine's patient clinic

Develop Automated Processes

Performance Objective Description

Treasury will continue to develop automated processes to simplify/faciliate business processing.

Automating Processes

KPI Description

- Treasury will identify one business process that will be redesigned from a paper-based process to a computer-based solution.

- Prepare and submit proposal to VPFO at 1-on-a meeting.

Results Description

- Treasury completely overhauled the wire approval process and transitioned it from a paper-based process to an electronic process
- All initiation and approval of a wire is now done online, which allows for departments to track progress and see completion date
- This transition to an online process has been positively received by the campus community

 Innovate And Identify Disruptive Change Opportunities**Goal Description**

Identify opportunities to increase institutional revenues, explore privatization/contracting, and evaluate departmental effectiveness.

Related Items **Departmental Effectiveness/Efficiency Evaluations****Performance Objective Description**

- Treasury will collaborate with institutional efforts focused on organizational efficiency.
- Identify external consultant support as needed.
- Engage external consultants to evaluate departmental operations.

 Work with External Consultants**KPI Description**

- Treasury will work to identify areas where we can improve organizational efficiency
- Identify external consultant engagements to improve efficiency and accuracy

Results Description

- Treasury has initiated discussions with Wells Fargo to identify areas within our functional areas where we can increase efficiency
- We are also working with Wells Fargo to engage in an informal comparison of our university treasury operations against peer institutions within higher education in Texas

 Increase Revenues**Performance Objective Description**

Develop and implement solutions that increase institutional revenues.

 Revenue Enhancement**KPI Description**

- Change investment strategies for operating funds.
- Consider new alternatives to generate additional alpha from endowment funds.

Results Description

Operating Funds

- Increased allocation to long-term operating
- Increased allocation to growth/appreciation category
- Portfolios are performing much better than under prior policy framework

Endowment Funds

- Entered into a new investment vehicle in the alternatives category (managed futures) to boost risk-adjusted returns

 Privatization And Contracting**Performance Objective Description**

Explore opportunities to increase revenue, reduce cost, or increase efficiency.

 Privatization And Outsourcing**KPI Description**

- Treasury will identify one activity that can be outsourced.
- Prepare and submit proposal to VPFO at 1-on-1 meeting.

Results Description

- We are currently evaluating whether it makes business sense to work with private parties to outsource any of our banking processes
- One option we are considering is outsourcing some of our check printing; however, we would lose some of the flexibility that we currently have (e.g., departments/students wish to pick up checks on campus, courier them to specific locations, or hold them till a specific date/event)

ADMINISTRATIVE USE ONLY-SACSCOC REPORT
Department: Student Financial Services (Bursar's Office)

Sam Houston State University

President, Office of

Finance and Operations, Vice President

Office of Treasury and Investment Management

Student Financial Services (Bursar's Office)

 I. Advance Student Success

Goal Description

Develop university resources and infrastructures that support the intellectual transformation of students.

Related Items

 **Increase Visibility/Accessibility of the Bursar's Office**

Performance Objective Description

The Bursar's Office will provide increased opportunities for interaction with students and their parents beyond normal office operations.

 Student Success

KPI Description

- The Department will provide targeted communication to students through various communication channels to inform students of critical payment requirements.
- Department will report the percentage of students dropped for fall and spring semester first class day, twelfth class day, and twentieth class day drops.
- The Department will develop new brochures to distribute to students regarding services offered and payment options.

Results Description

- Approximately five business days before each drop during the fall, spring and summer semesters, the Bursar's Office used the sydrop report to review student accounts and provide messages to those not meeting payment requirements. Targeted text, email, and recorded phone calls were made leading up to each drop date.
- Drop percentages were reduced for each semesters payment due dates. A Payment Analysis was prepared for fall and spring showing the drop numbers by defined criteria and also the percentage of students dropped. Previous year's information is provided on the Analysis for comparison. Need to attach payment analysis
- A new brochure that provides payment information, services offered, and more was developed and distributed at each Passport to Sam.

-  201680_Payment_Analysis
-  brochureimportant_due_date_handout
-  Spring_2017_Payment_Analysis__01_11_17_

Reduce Financial Drops of Course Schedules

Performance Objective Description

The Bursar's Office will seek to support student retention and success by decreasing the number of students dropped from courses due to not meeting payment requirements.

Student Success

KPI Description

- The Department will provide targeted communication to students through various communication channels to inform students of critical payment requirements.
- Department will report the percentage of students dropped for fall and spring semester first class day, twelfth class day, and twentieth class day drops.
- The Department will develop new brochures to distribute to students regarding services offered and payment options.

Results Description

- Approximately five business days before each drop during the fall, spring and summer semesters, the Bursar's Office used the sydrop report to review student accounts and provide messages to those not meeting payment requirements. Targeted text, email, and recorded phone calls were made leading up to each drop date.
- Drop percentages were reduced for each semesters payment due dates. A Payment Analysis was prepared for fall and spring showing the drop numbers by defined criteria and also the percentage of students dropped. Previous year's information is provided on the Analysis for comparison. Need to attach payment analysis
- A new brochure that provides payment information, services offered, and more was developed and distributed at each Passport to Sam.

-  201680_Payment_Analysis
-  brochureimportant_due_date_handout
-  Spring_2017_Payment_Analysis__01_11_17_

II. Increase Efficiency Of University Operations

Goal Description

Develop and deploy automated solutions that allow visibility into the departmental business needs.

Related Items

Identify Third Party Solution (Automated Solutions)

Performance Objective Description

The Bursar's Office will identify a third party process that may be better supported by a 3rd party solution/provider.

Third Party Solutions

KPI Description

- The Bursar's Office will identify a collection process that may be better supported by a third party provider
- The Bursar's Office will meet with a third party provider of the pre-collection process.

Results Description

- From information gathered at conferences and other similar institutions it was determined that some universities use a third party provider to help in a pre-collection process to reduce amounts sent to collection/ number of students sent to collection • Department met with a provider to access the service they provide and the value of that service

Implement a Customer Service Tracking System (Develop Automated Solutions)

Performance Objective Description

The Bursar's Office will work with IT to design and implement a reporting system to evaluate customer service needs and will develop related KPIs.

Automating Processes

KPI Description

- The Department will work with IT to develop a "check-in" system to monitor service needs
- Department will track patterns and needs of the student population based on data collected from check-in system.

Results Description

- A check in system was developed face-to-face transactions that allows for tracking of services requested as well as which CSR performed those services and the length of time per service. This was previously a paper-based tracking completed by each CSR.
- Reporting from the check-in system is monitored and used to determine staffing needs and areas for staff improvement.

 Bursaroffice -2017-08-20-08-25-Workers totals

 BursarsOffice-2017-08-13-08-19 workers

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: UPD and Parking****Sam Houston State University****President, Office of****Finance and Operations, Vice President****UPD and Parking**** Continually Improve The Support Services To Internal Constituents.****Goal Description**

Continually improve the support services to internal constituents.

Related Items**  Enhance University Crime Prevention And Safety****Performance Objective Description**

To enhance crime prevention and safety across campus.

** Analyze Parking Citations****KPI Description**

The department will evaluate the number of parking citations issued to the number of parking citations that are paid per year. Although this is not a main staple of our budget, the parking citation revenue is used to offset the revenue not generated through the sale of parking permits. This indicator can provide trends and better help plan for future budget needs. Our ongoing goal for the future is to have \$250,000 in reserve for infrastructure maintenance.

Results Description[Overview](#)

Parking and Transportation transitioned to a new paperless, parking management system utilizing license plate recognition. The system allows us to capture granular data regarding parking behavior that we have not been able to report in the past. We are identifying Key Performance Indicators and Performance Indicators that will be useful for us in future reports. Two of the tasks identified by the Finance and Operations Division for FY17 are:

- 1) Conduct a Third-Party Supply versus Demand Parking Evaluation;
- 2) Complete a South Campus Feasibility Study of One Way Traffic and Additional Parking.

[Financial Statistics](#)

DescriptionAnnual Activity*Parking Permits Total*\$1,867,830.25*Citation Fine Total*\$638,535.40*Sam Houston Parking Garage*\$179,757.51*Daily and Hourly Parking*\$172,075.25*Event Parking*\$5,402.50*Total*\$2,940,398.09

Customer Service

DescriptionAnnual Activity*Phone Calls Received*34,285*E-Mails Received*10,544*Citation Appeals Received*5,488*Event Requests Received*268 **Review Survey Results Of Participant To Be Above Average On All Questions****KPI Description**

To enhance crime prevention and safety across campus, the University Police Department will actively engage in making presentations. These presentations are normally requested through the Department of Residence Life, Enrollment Management, and other requesting departments. The purpose of these presentations is to inform the campus community of current trends recognized by this department and to provide general advice. In order to evaluate this, our department will compare crime statistics for reported on campus crimes and conduct a survey of the participants who attend the presentation made by the officer. The purpose of the survey will be to evaluate how the material is received and if the program needs changes. Presentations will be rated Above Average on all survey questions.

Results Description

To enhance the crime prevention and safety across campus, the Department of Public Safety Services has actively engaged in making presentations and conducting security risk assessment surveys of campus buildings. The primary components within Public Safety Services that has led this area is the CORE Team (Community OutReach Effort) the Office of Emergency Management/Public Information. The two groups are led by (respectively) Officer Jeff Butterworth and Director David Yebra.

The presentations are normally requested through the departments on campus such as Department of Residence Life, Department of Military Science, Greek Life and others. The purpose of these presentations is to inform the campus community of current trends recognized by this department and to provide general advice.

Since January 2017, the department has conducted over 30 different presentations to students, staff, faculty, and visitors. Presentation topics ranged from Alcohol/Drug Abuse Prevention, Interacting with Law Enforcement, Civilian Response to Active Shooter Events, Domestic Violence/Sexual Assault Awareness, etc. Of the completed survey responses, we have received above average marks for all presentations.

In addition to requested presentations, the CORE Team has also taken time to create several safety events for the university community. “Kats Safety Bash” has been hosted annually by the University Police Department each Fall semester since 2014. This program, which is developed in accordance with National Campus Safety Month, has become the premier safety program conducted by the department. Participants have the opportunity to engage with local law enforcement and public safety personnel who have knowledge of various safety topics.

Additionally, participants have the opportunity to observe a mock dorm room fire, a vehicle extrication, engage in a traffic stop demonstration, see various public safety emergency vehicles and helicopters, and operate a peddle cart with intoxicated vision goggles in a simulation environment. Participation at this event from the university community has grown exponentially each year, with over ~1,000 attending in 2016.

The department has also partnered with the Office of Health Promotion to present “Destination Spring Break” to the students each Spring semester. This completely unique safety presentation provides safety tips that benefit the students before traveling to their Spring Break destinations. The program incorporates a live DJ, interactive skits, and engaging presentation strategies to distribute a variety of safety information. We have consistently had over 500 students attend this one of a kind safety presentation.

Furthermore, the Office of Emergency Management/Public Information conducted several presentations with university faculty, staff, student, and alumni organizations. Additionally, the office produced training videos and online material for reference. The material for the training was developed from national resources (FEMA, DHS), best practices, community concerns, and a trend analysis of campus activity. Also, both Officer Butterworth and David Yebra presented at each new student orientation to incoming students and their parents/guardians.

To prepare individuals for all-hazards, the Department developed a 75-minute [All-Hazards Presentation](#) that provided participants the option of attending in person or viewing online. A total of 319 have completed the training in person or online for development credit, with a total of 482 online viewings. A total of 70 personnel attended the training in person. The feedback received from those in attendance was rated as follows: 38 Excellent, 13 Good, and 1 Average review. Overall feedback from all the presentations is characterized by many similar comments to the ones below:

- This was one of the best ones I have seen, and it was done here, essentially homegrown.
- Great presentation!
- Training was extremely informative and caused me to critically think about the decisions I would make.

- Wished more discussion was brought up on other hazards
- Excellent presentation. I learned a lot!!
- Very knowledgeable. Perhaps sharing with us a map/plan for our specific buildings would be good.
- Training met my expectations
- Overall great training. Learned a lot and will present to my department.
- I think this training should be given for every employee.

Instructor was excellent and very detailed!

Efficient Use Of Resources

Goal Description

Efficient use of resources

Related Items

 **Provide Efficient Operations In Comparison To Similar Universities**

Performance Objective Description

Provide efficient operations in comparison to similar Universities.

Officer To Student Comparison Ratio

KPI Description

The University Police Department will evaluate and compare number of students enrolled in a similar university and the number of full time police officers who work at the institution. This comparison will help the department to evaluate and compare how other university police department personnel compare to current full time officer to student ratio.

Currently, through our experience, our administrative staff has noted that other university police departments are set up in a similar manner and provide the same basic services as we do. Also, departments outside of university law enforcement gauge population to officer ratios to help determine a need for officer resources. A general number that is used for comparisons is one officer for every 1,000 in population (students/ faculty/staff). SHSU UPD's ratio/population will be comparable ($1/1000 = 5.5\%$) to other universities our size or even lower (ideal = $1/800 = 4.5\%$).

Results Description

The Department of Public Safety Services continues to examine university growth, trends (reporting) and ratios to ensure a safe campus community. During Fiscal year 2017, the department has made several changes to help capitalize on our operational effectiveness. The changes included the additional of a new reporting department, creation of a new internal position, and personnel allocation (shift change).

In examining our current growth, and to follow the University's approach at providing a level of service to meet the State's goals (doing more with less), we made an enormous transition in our shift structure to provide more officer coverage during a weekly basis. In the Spring of 2017, we began examining the differences between eight, ten and twelve hour shifts. In the end, with support of the patrol officers, the twelve-hour shift model provided the best accommodations not only to the officer, but also to our service model.

In this sense there will always be a shift minimum of two officers. Before, the shift minimum was one officer. There is a supervisor and three officers assigned to each shift (two day shifts & two night shifts). This shift dynamic also allows for each patrol officer to have a full weekend off every other weekend. The shift relationships have improved and officer production during this trial period has improved as well. At this time, we are pushing forward with Fall 2017 implementation as well.

With the shift change taking place, this further allowed for us to use an officer within our investigative division without shorting the patrol division. An investigator position was created and an officer was assigned to this assignment. Since we only had one investigator, the case load was burdensome and made it very difficult to assign priorities since each reported crime has a level of importance. With two investigators, the case load has been distributed and better investigations can be completed. Thus, enhancing our efficiencies and productivity.

Also, in the Spring of 2017, the Office of Emergency Management was transferred to the Department of Public Safety Services. This move created a third division with Parking and Police. In an effort to assist with other areas, the department was retitled to Emergency Management & Public Relations. The director of this department now focuses on identified emergencies, providing public information regarding policing/emergency activities, and continuing an education campaign across campus in reference to emergency best practices. The alignment of this department has greatly complimented and strengthened our relationship with the University community.

We currently meet three times a year with the Texas State University System campus police to look at current trends, staffing issues, and best practices. Our department command staff participate and are a part on numerous professional organizations that also look at these factors in order to compliment and prepare modifications or request for new internal actions.

At this time based on the prescribed ratio, we feel that our department is meeting its obligations. However, with new programs being planned by the University within the next couple of years; our department is planning on requesting additional personnel to meet the demand that could be placed on our department.

Division of Information Technology

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: IT Client Services****Sam Houston State University****President, Office of****IT, Vice President****IT Client Services**** Analyze Opportunities To Increase Campus Efficiency****Goal Description**

Client Services will continuously analyze processes to increase campus efficiency in one or more of the following areas: costs, operations, and communications.

Related Items** Evaluate Processes To Increase Campus Efficiency****Performance Objective Description**

Client Services will evaluate at least one process within the department to increase campus efficiency.

** Asset Management Operational Improvements****KPI Description**

Client Services' Asset Management area will implement policies and procedures from the audit and demonstrate performance improvements in the inventory audit process, with a goal of improving the inventory audit results year over year.

Results Description

Improvements to asset management policies and procedures were made over the course of the past fiscal year. Several personnel changes have also been completed. The FY17 audit yielded improved results over the FY16 audit, and additional changes are planned to improve the completion timeline of the audit process.

- The Asset Management area has implemented sign sheets, requiring signatures from IT@Sam Staff, clients, and the Asset Manager, in order to more effectively track movement of devices prior to their installation.
- The Asset Management area has implemented requirements on fillable fields in the Configuration Management Database (CMDB) and will continue to implement policy relating to the regular updating and data validation for Configuration Items in CMDB.
- The Fiscal Year 2017 (FY17) SHSU Annual Inventory Audit results for the Information Technology division yielded a net missing of .53%, representing a total of 56 assets not found out of 10,553 assets total. This metric represents approximately .22% of the net value of Information Technology assets. IT@Sam will strive to progressively improve asset tracking, CMDB data validation, and related processes in order to improve our results on a yearly basis.

- The Asset Management area is researching procedures and interior door changes to better monitor and regulate the flow of technological assets into and out of the area, and to control access to AB1 112.
- The Asset Management area is evaluating the utilization of RFID technologies in order to more accurately track the physical movement of Configuration Items campus-wide.

IT Service Tool - Service Delivery Improvements

KPI Description

Client Services will lead the division in efforts to improving service delivery for a more positive customer experience level, specifically with improvements to our IT "ticketing" tool by (1) reducing the service catalog options; (2) streamlining processes for end users; and (3) creating a more easily-navigable portal; all areas based on user feedback from both "internal" IT staff and the "external" campus community.

Results Description

Fixed Assets Integration Improvement

- Created validation table for Asset Make. This along with the existing Manufacturer and Model tables allows for clean consistent data going into the system.
- All existing records were updated to reflect the new field.
- The synchronization of data between fixed assets and Cherwell now includes the following
 - Bi-directional updating of locations. The system with the last location change "wins"
 - Sync of Manufacturer, Make, and Model to Fixed Assets. Cherwell has the ability to have supporting validation tables where Banner does not. This ensures the data is uniform in both systems. In addition, there is a sync of Condition Code to Fixed Assets. IT staff see the IT assets frequently to know their condition. This will allow the most current and reasonable assessment of condition to exist in both systems.
 - Sync of Cost, Class Code, Notes, and Net Book Value from Fixed Assets. This data is entered on the Fixed Assets side as part of normal Property processes. Fixed Assets will hold the best data for these fields and so will sync back into Cherwell.

ITPT Updates

- Extensive modification of the ITPT module occurred, especially in the area of project initiation.
- Vendor Technical Responses – Forms created for vendors to submit information about their products. There is now a form for on premises installations as well as SaaS.

- Intake Form – reduced the number of questions required. In addition, automated process were created to send reminders each week of incomplete intake forms.
- Reduction of 6 approval gates to 2.
- Addition of Adjusted Planned End Date field to aid in baselining projects.
- Addition of a Pending state for projects.
- Addition of an Intake Coordinator Role.
- Addition of automated emails upon creation of a new project and completion of the Intake Form

Updated UI

- Updated the form look and feel for Tasks and Knowledge Articles DR
- There is now a DR instance of Cherwell available at Texas State. SQL updates are running daily.

Improvement Of Division-wide Communications

KPI Description

Client Services will lead the division in efforts to develop and implement a division-level communications plan outlining communication efforts both internal (within the division) as well as external (to the campus community). This was initiated in 2013-2014 but not completed.

Additionally, the department will lead the division in improvements to the division's website, newsletter, and social media outlets, providing more regular postings and informational updates. We will also reach out to the campus community to determine alternative (and best) venues for disseminating information.

Results Description

Executive Management Team and Communication Manager reviewed and revised the Division Communication Plan. The Communication Plan received approval 7/25/2017.

Web Governance Committee was reactivated with a small core membership. The members are listed below:

Chair:

Jurden Bruce, Client Services, Division of Information Technology

Indefinite Terms:

Jeff Olsen, Communications

Andrew Stewart, Academic Instruction Technology and Distance Learning

Eric Odom, Academic Instruction Technology and Distance Learning

Jana Richie, Enrollment Management Communication

Lucrecia Chandler, Client Services, Division of Information Technology

Kelley Osborn, Disability Services

- Two-Factor Authentication
- Windows 10
- Firefox Removal
- Mac OSX Upgrade

Standard communication response to widespread phishing attacks has been established. Communications staff work closely with the Security team to modify the approved communication plan to fit the need of the most current situation. This process is documented within the Division Communication Plan.

Provide High-Quality Support Services To Campus

Goal Description

Client Services will utilize work order surveys to evaluate clients' perception of the work performed by IT@Sam staff to complete the service request.

 FY17 Client Satisfaction Data

Related Items

  **Service Delivery Will Be Perceived As A Good Experience For The Client**

Performance Objective Description

Client Services will utilize work order surveys to evaluate clients' overall perceptions of working with IT@Sam to resolve their request.

  **Client Overall Perception Of Experience Resolving Service Request**

KPI Description

We will deliver a work order survey to the client upon completion of the request. The client will be asked to rate their perception of overall service request experience. Available responses are "Very Dissatisfied, Dissatisfied, Neutral, Satisfied, and Very Satisfied." We will target a 95% or better overall satisfaction rating for Client Services Department-specific survey items.

Results Description

Of 1,550 surveys returned, 95% of responders were satisfied (Very Satisfied or Satisfied) with their experience. This result meets our target rate of 95% for the year.

  **Service Delivery Will Be Perceived To Be Provided By Qualified Staff**

Performance Objective Description

Client Services will utilize work order surveys to evaluate clients' perceptions of the technical qualifications of the staff member assisting with their requests.

 Client Perception Of Technical Qualifications Of IT@Sam Staff**KPI Description**

We will deliver a work order survey to the client upon completion of the request. The client will be asked to rate their perception of the technical competency of the IT@Sam representative. Available responses are "Very Dissatisfied, Dissatisfied, Neutral, Satisfied, and Very Satisfied." We will target a 95% or better overall satisfaction rating for Client Services Department-specific survey items.

Results Description

Of 1,536 surveys returned, 96% were satisfied (Very Satisfied or Satisfied) with the technical qualifications of the IT@Sam staff. This result is 1% more than our target rate of 95% for the year.

 Service Delivery Will Be Perceived To Be Timely And Efficient**Performance Objective Description**

Client Services will utilize work order surveys to evaluate clients' perceptions of the duration to complete the service request.

 Client Perception Of Time To Complete Service Request**KPI Description**

We will deliver a work order survey to the client upon completion of the request. The client will be asked to rate their perception of time needed to complete the service request. Available responses are "Very Dissatisfied, Dissatisfied, Neutral, Satisfied, and Very Satisfied." We will target a 95% or better overall satisfaction rating for Client Services Department-specific survey items.

Results Description

Of 1,548 surveys returned, 94% were satisfied (Very Satisfied or Satisfied) with the timeliness of completion of the their request. This result is 1% less than our target rate of 95% for the year. We will continue to monitor and implement changes to improve the timely completion of service requests.

 Service Delivery Will Be Perceived To Have Kept The Client Informed**Performance Objective Description**

Client Services will utilize work order surveys to evaluate clients' perceptions of how well they were kept informed of the status of their request.

 Client Perception Of Adequate Communication With IT@Sam**KPI Description**

We will deliver a work order survey to the client upon completion of the request. The client will be asked to rate their perception of adequate communication with IT@Sam. Available responses are "Very Dissatisfied, Dissatisfied, Neutral, Satisfied, and Very Satisfied." We will target a 95% or better overall satisfaction rating for Client Services Department-specific survey items.

Results Description

Of 1,545 surveys returned, 95% were satisfied (Very Satisfied or Satisfied) with the communication level regarding their specific request. This result meets our target rate of 95% for the year.

** Provide Quality Information Technology Resources****Goal Description**

Client Services will provide resources that meet resource type needs, be reliable and be available when and where needed by the University.

Related Items** Provide Reliable Core Customer Services To Campus****Performance Objective Description**

Client Services will provide reliable core services to faculty, staff, and students, to include: 10-Minute Promise services to support faculty and classroom technology; mass email services; website services; and IT Training courses for all eligible constituents.

** Evaluation of satisfaction of Clients with the manner and/or medium in which resources are delivered.****KPI Description**

Client Services will evaluate the satisfaction of clients with the manner and/or medium in which resources are delivered.

Results Description

The communications and training service unit is reviewing the feasibility of conducting webinar training sessions in addition, or in place of classroom training sessions. Tools such as WebEx, GoToMeeting and Skype for Business are being investigated.

The WEPA pilot is concluding. Student usage a feedback from the pilot have demonstrated a need for printing services in select residence halls. Print stations will be installed in select residence halls to accommodate the need.

** Provide "Mass Email" Services To Campus****KPI Description**

Client Services will provide (and track statistics for) "mass email" services to campus that include: template creation; content delivery; target audience delivery; and state and federal guideline compliance (CAN/SPAM Act) for faculty and staff.

Results Description

Number of Mass Emails: 746 mail emails were sent during FY, an average of 14.3 emails per week. Turn-around time averaged 3-4 days per service request. Web Services currently pulls data from Cognos to facilitate targeted mass emails to a wide range of audiences and is actively seeking ways to automate the process and provide a hands-on service that approved/experienced clients can use to send their own emails.

 Provide IT Training Beneficial Faculty & Staff In Their Work**KPI Description**

Client Services' trainers will provide each attendee of an IT@Sam Training Session with a post-training survey and encourage completion of the survey at all instructor-led sessions. The attendee will be asked to rate their perception of how well the training delivered will benefit their work. Available responses are "Excellent, Above Average, Average, Below Average, Poor." We will strive for a 90% or better rating.

Results Description

Of the faculty and staff that attendee training sessions and submitted a post-training survey, 100% indicated that the training they attended was beneficial (Excellent and Above Average) to their work. This result is 10% over the goal for the year.

Training staff will continue surveying training attendees for continued improvement of training content, format and delivery.

 Provide Reliable 10-Minute Promise Service To Faculty**KPI Description**

Client Services will track 10-Minute Promise services to support faculty and classroom technology for both availability and first-time resolution. We will strive for a 95% or better rating for meeting the promise, and an 80% or better rating for resolving on initial contact.

Results Description

During the past year there were 686 10-Minute Promise service opportunities. The Service Desk met the promise in 662 of those opportunities, a success rate of 97%, exceeding the goal of 95%. Resolution was achieved on initial contact 532 times, a success rate of 78%, falling slightly short of the goal of 80%, but representing a 10% increase over last FY's numbers.

We are continuing to closely monitor the initial contact rate, and will continue to strive towards the target rate of 80%.

 Provide Stable Website Platform For The University**KPI Description**

Client Services will provide a stable platform for websites to be created, updated, and viewed. We will strive for an annual 99.75% "uptime" rating.

Results Description

The annual 'uptime' rating for FY was 99.93%, .18% above the target rating of 99.75%. This included scheduled and internet outage downtimes, which were corrected by supplying redundancy.

 Success with Project Delivery
KPI Description

Client services will track feedback regarding project completion and client satisfaction levels.

Results Description

Client Services collaborated with the English department for upgrades to the Evans 105 auditorium. Upgrades to the audio and video systems in the lab were completed to provide a better audio and video experience for students viewing films and for faulty presenting content. Positive feedback was received regarding the upgrades and the improvement to the student experience in Evans 105.

IT serves internal clients as well as campus. The communications group completed a project which revamped the project intake process. Positive feedback was received from the Project Management office team members regarding the quick responsiveness, proactive approach, and speed at which the changes and updates were completed.

 Provide Quality Professional Development Opportunities For Staff
Goal Description

IT Client Services will provide time and funding for staff to attend professional development through training and/or conferences.

Related Items
 Provide Opportunity For High Quality Professional Development That Enhances Value
Performance Objective Description

Client Services will provide high quality professional development opportunities to enhance staff value to students, faculty, staff, and alumni by bringing value to individual employee's work.

All training opportunities for employees in Client Services are evaluated by their immediate supervisor for necessity and value. The department has used both per-capita and on-demand/as-available models for appropriating funding across the various services in the department. We will strive for a 100% rate for professional development activities attended to improve or enhance operational effectiveness related to CS functions.

 Provide Professional Training Opportunities that Enhance Value**KPI Description**

All training opportunities for employees in Client Services are evaluated by their immediate supervisor for necessity and value. The department has used both per-capita and on-demand/as-available models for appropriating funding across the various services in the department. We will strive for a 100% rate for professional development activities attended to improve or enhance operational effectiveness related to CS functions.

Results Description

Professional training opportunities that were attended by CS staff and Managers were of high quality and will provide enhanced value to the department and the division. All attended satisfied the 100% goal of improving or enhancing operational effectiveness related to CS functions.

 Provide Professional Development**Performance Objective Description**

Client Services staff will meet or exceed the SHSU Human Resources Staff Professional Development requirements (based on classification as staff or managers, as well as hire date in relation to evaluation requirements).

 Professional Development Training Provided for Staff**KPI Description**

Tracking and reporting of internal and external professional development is managed through Talent Management. Employee thresholds are based on position (i.e., staff or manager), and the amount of training required per employee is prorated against their hire dates. We will strive for a 100% rate for this objective.

Results Description

All Client Services staff completed their professional development training, yielding a 100% completion rate for the department.

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: IT Project Management Office****Sam Houston State University****President, Office of****IT, Vice President****IT Project Management Office**** IT PMO Provide Optimal Services Through Efficient Processes****Goal Description**

IT PMO will review the current project management processes to redesign critical processes to increase campus efficiency in the IT PMO unit based on time, cost, and communications.

Related Items

  **IT PMO Continually Analyze Critical Processes Efficiency**

Performance Objective Description

The IT PMO will review the current IT intake and standardize project management process for efficiency improvements.

** IT PMO Demonstrable Evaluation - Project Management Process****KPI Description**

The IT PMO will provide a standardized project management process along with documentation and training to the IT Division first, then evaluate expansion to the functional areas. This standardized project management process can enhance the customer experience by repetitive utilization of already created project templates.

Results Description

The IT PMO has created work flow documents, step-by-step how to documents, and presentation documents along with two training sessions completed August 2017. These documents are stored in the IT Division share drive.

** IT PMO Demonstrable Evaluation of Governance Process****KPI Description**

The IT PMO will provide documentation and training of the new governance rules and policies and disseminate the information to the VP direct reports.

Results Description

The IT PMO and department heads agreed and established a weekly governance meeting that began on March 15, 2017. The following are the guidelines:

- The Governance team will be the Steering Committee for all project requests submitted for approval.
- The Governance team consists of the 6 Department Heads.
- The Governance team will work together to determine the priority level of the

projects beginning with VP's projects first and numbering starting with number one.

- If all members of the Governance team agree a request should be a project then the IT PMO Director will assign a PM to the project.
- If all members of the Governance disagree a request is a project then the request gets kicked back to the requester and the request is either deleted or put on hold
- Governance will be provided by the Department Heads for the duration of the entire project life cycle.
- The Governance team agrees to provide resources for the project and makes a commitment to make sure the resources work with the Project Managers

 Governance Team Guidelines

IT PMO Demonstrable Evaluation of New Intake Process

KPI Description

The IT PMO will provide documentation and training for a new intake process for the IT division then implement the process into production.

Results Description

The IT PMO provided a work flow diagram, step-by-step how to document, and a presentation document used for two training sessions given to IT division leaders. A user request form time frame has been reduced from 52 days to 21 days to complete.

The new intake process has improved efficiency and reduced overall intake process time from 122.29 days to 43 days for the IT division. This process is in production today. All documentation resides on the IT share drive.

Next step is to communicate and train the functional areas on understanding the IT intake process flow.

 Intake Process

 Step by Step Intake Process

IT PMO Demonstrable Kaizen Process Evaluation

KPI Description

IT PMO understand project process gaps through conducting IT PMO Kaizen sessions.

Results Description

The IT PMO completed this Kaizen process in December 2016. These Kaizens

allowed the PMO to understand gaps and timing of each step in the project management process, thus allowing for visual ways to improve the PMO.

- What happens in the current process at the very beginning
- What happens in the middle
- What happens in the end

IT PMO Provide Quality Information Technology Resources

Goal Description

IT PMO will follow the University, IT Division, and IT PMO mission to provide project management reliable and available resources to assist in the coordination of quality project process delivery when requested.

Related Items

IT PMO Improve Technology Resources

Performance Objective Description

The IT PMO will work continuously to improve the completion of active projects on time, within scope, and within budget to meet or exceed the student, faculty, staff, and alumni consistent with common expectations for service.

IT PMO Demonstrable Evaluation Of On Time Project Delivery

KPI Description

IT PMO will work on increasing customer satisfaction to deliver quality projects on time for the perspective academic year through lesson learned for each project.

Results Description

IT PMO has conducted project lessons learned meetings and documentation that reside in the Cherwell ITPT tool for academic year 2016 to 2017. These lessons learned are the IT PMO's current measurement for meeting quality customer satisfaction in project delivery. For example, the customers of the the Charter School project, the JAMF project, and Course Leaf project provided high customer satisfaction reviews.

IT PMO Demonstrable Project Kick-Off Meeting

KPI Description

The IT PMO will work to meet a 10 day deadline of performing project kick-off meetings for each project once the project charter is approved by the governance team.

Results Description

The IT PMO began presenting project kick-off meetings within 10 days of assignment. These include the project sponsor, client, and team members. The presentation project kick-off meeting includes PowerPoint slides that encumbers project scope, budget, schedule, resources, and other project related elements.

Please see attached example.

 Windows 10 Kick-off Meeting

IT PMO Demonstrable Status Report Process

KPI Description

The IT PMO project managers will provide weekly project status reports to customer sponsors and stakeholders.

Results Description

The IT PMO has created a weekly executive status report to provide to sponsors, clients, and team members. The IT PMO measurement is related to the 15 closed projects for the academic year. Each executive status report includes:

- Project name and ID
- Projected end date
- Health, risks/issues
- Project schedule
- Work completed

Please see attached example status report.

 Windows 10 Executive Status Report

IT PMO Quality Professional Development

Goal Description

The IT PMO Director will provide high quality professional development opportunities for the project management staff that will enhance their value to the University.

Related Items

IT PMO Staff Development Opportunities

Performance Objective Description

The IT PMO Director will budget and request appropriate funding to provide professional development opportunities that meet or exceed the University required credits and the PMI best practices training.

 IT PMO Demonstrable PMP Certification**KPI Description**

The IT PMO Director will work to increase the number of eligible project managers with the PMP certification by 100% in 2017.

Results Description

As of June 2017 all project managers were PMP certified and this is reflected in the Talent Management tool. However, future new hires may not be PMP certified. The IT PMO Director will work to ensure professional development of new hires. The value the PMP certification and other internal and external training brings to SHSU is improved business best practices, building stronger teams, and improving leadership responsibilities that contribute to improved customer and sponsor communication along with quality project delivery.

 IT PMO Quality Service Delivery Experience**Goal Description**

The IT PMO will continuously work towards positively improving client and sponsor perceptions of the IT PMO project delivery service by understanding the customer experience need.

Related Items **IT PMO Deliver Service In A Helpful And Knowledgeable Manner****Performance Objective Description**

IT PMO will continuously improve perceptions of the IT PMO by working towards positively improving client and sponsor understanding of project management delivery service thus providing an enhanced customer experience.

 IT PMO Demonstrable Marketing and Qualitative Metrics**KPI Description**

The IT PMO will elicit feedback from sponsors and stakeholders on the adoption of the intake and the standardized project management process to improve quality delivery by the project managers from the IT PMO.

Results Description

The IT PMO has created survey questions of the 2016 to 2017 intake and standardized project management process in Excel. The IT PMO will transfer those questions over to the Qualtrics tool to distribute to the IT division users for feedback by October 30, 2017. Over the academic year of 2015 to 2016 there was no quantitative metrics to understand the customer's quality project experience. The only way to elicit feedback from the customer was through project lessons learned that were not scored.

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: IT Security Office****Sam Houston State University****President, Office of****IT, Vice President****IT Security Office**** Provide Optimal Services Through Efficient Processes****Goal Description**

IT Security will continuously analyze and as needed, redesign critical processes to increase campus efficiency in one or more of the following areas: costs, operations, and communications.

Related Items** Continually Analyze Critical Process Efficiency****Performance Objective Description**

IT Security will review at least one critical process and provide data showing efficiency improvements or affirmation of efficiency of the current process.

** IT Security Will Review Process for Optimal Efficiency****KPI Description**

CJIS Access process:

Does a process flowchart exist and if so is the process correct?

Are there appropriate Knowledge Articles and are they all current?

Results Description

CJIS Access Process:

CJIS Clearance Workflow and Guidelines for department heads does not exist as a formally documented process, so there is no documented steps to follow when hiring a new employee or changing an existing employee's roles and responsibilities that may warrant them gaining or losing CJIS access.

Much of the known process on who needs to do what when requesting CJIS access exists only in multiple emails and notepad documents spread throughout IT and the Security documentation folder.

** Provide Quality Information Technology Resources****Goal Description**

Consistent with the University mission, technology resources provided by IT Security will meet resource type needs, be reliable and be available when and where needed by the University.

Related Items

Improve Technology Resources

Performance Objective Description

IT Security will continuously improve the types, delivery and availability of services to the students, faculty, staff, and alumni consistent with common expectations for the service.

IT Security Will Deliver Projects Considered Satisfactory

KPI Description

IT Security will collaborate with campus to determine success with project delivery on all projects that IT Security sponsors. This should include following project methodology process as well as the client's satisfaction with the final product.

Results Description

IT Security in collaboration with Project Management, Client Services, and Infrastructure and Support Services implemented a TwoFactor authentication system on our VPN appliances for all employees. This new system puts in place a requirement that all employee users who access the "MyAccess.shsu.edu" VPN device to be challenged with a second authentication factor. DUO, the service we chose to purchase to provide this second factor functionality, allows our employee users to enroll their office telephone, their personal smart phones (for voice calls and SMS), as well as load a smart phone application (the preferred method of operation) and then upon the second authentication proceed with a push of a button (in the case of the smart phone application).

Additionally to satisfy a result of an audit finding, our Public Safety Services uses the DUO application installed on their incar mobile data terminals (Windows laptops), which requires them to authenticate with their second factor each time they log in or unlock their terminal. The officers love the simplicity of the application.

 DUO_Feedback

IT Security Will Establish Target Goals For Core Resource Availability

KPI Description

Protection from Network Attacks: IT Security has established a goal of at least 99.9% availability for the protection of SHSU's network from Internet based attacks. This includes intrusion attempts from bad actors on the Internet as well as inadvertent malware downloads by SHSU network users.

Results Description

IT Security has calculated that the network protection has been available 99.98% of the time over the last year with 63 minutes of downtime for maintenance to the systems that provide this protection.

 IT Security Will Evaluate Satisfaction With Service Accessibility**KPI Description**

Are customers satisfied with the manner and/or medium in which IT Security resources are delivered? Are the resources and access intuitively convenient and efficient?

Results Description

IT Security implemented the DUO Two-Factor Authentication system on the VPN and Public Safety Services in-car data terminals. Feedback was positive as to how easy it was to setup on their mobile device, as well as how easy it was to use. The VPN client application on workstations was not as intuitive to use as the VPN web-access was, due to the fact that the client application does not allow for DUO to integrate seamlessly. Instead, customers need to follow documented instructions on how to use the client VPN application with DUO Two-Factor.

 IT Security Will Improve The Type, Delivery, And Availability Of At Least One Service To Students, Faculty, Staff, And Alumni.**KPI Description**

Was at least one service improved either by the type, delivery, and/or the availability?

Results Description

In November of 2016, IT Security implemented DUO TwoFactor Authentication on campus for VPN and Public Safety Services in a quickly and efficient manner. This implementation improved the authentication service for for both of these systems by adding a new type of authentication called two-factor. This requires the user of the service to not only know their username and password, but to also have in their possession a device or phone number that is used for them to acknowledge that they are in fact the person attempting to authenticate.

IT Security in collaboration with Project Management, Client Services, and Infrastructure and Support Services implemented a TwoFactor authentication system on our VPN appliances for all employees. This new system puts in place a requirement that all employee users who access the "MyAccess.shsu.edu" VPN device to be challenged with a second authentication factor. DUO, the service we chose to purchase to provide this second factor functionality, allows our employee users to enroll their office telephone, their personal smart phones (for voice calls and SMS), as well as load a smart phone application (the preferred method of operation) and then upon the second authentication proceed with a push of a button (in the case of the smart phone application).

Additionally to satisfy a result of an audit finding, our Public Safety Services uses the DUO application installed on their in-car mobile data terminals (Windows laptops), which requires them to authenticate with their second factor each time they log in or unlock their terminals.

Quality Professional Development

Goal Description

Staff satisfaction, staff value to the institution and overall divisional service delivery will be increased by staff completing quality professional development.

Related Items

Provide Staff Development Opportunities

Performance Objective Description

IT Security will provide high quality professional development opportunities for their staff that will enhance staff value to the students, faculty, staff, and alumni.

IT Security Will Meet The Target Goal For Staff To Receive Professional Development And Provide Demonstrable Evidence Of Service Or Operational Improvements.

KPI Description

IT Security staff will attend at least 1 training pertaining to a major security system that the university employs to protect the IT systems and data.

At least 1 item of improvement will be implemented based upon the training.

100% of IT Security will attend professional development to satisfy the SHSU Human Resources Staff Professional Development requirement which includes 8 hours for staff and 12 hours for managers.

Results Description

IT Security Staff participated in a week-long training on the recently implemented Intrusion Prevention System to cover deployment, best practice management, and optimization. Fifteen action items were generated from the lessons learned in the training, prioritized, and have either been implemented or are being worked on as time permits. One in particular was a configuration being applied to the IPS that causes it to read several custom files on an IT Security web server to read in IP Addresses and URLs to block. In doing this, IT Security staff do not have to use the IPS web interface to add these IP Addresses and URLs which is very cumbersome and slower, as well as it causing a restart of the IPS engine. This allows for IT Security staff to process these blocks in half the time.

100% of IT Security staff have satisfied the SHSU Human Resources Staff Professional Development requirement, which includes 8 hours for staff and 12 hours for managers.

Quality Service Delivery Experience

Goal Description

Students, faculty and staff will perceive the services delivered by IT are quality and aid their University related functions

Related Items

Deliver Service In A Helpful And Knowledge Manner

Performance Objective Description

IT Security will continuously improve perceptions of the IT service delivery experience by the students, faculty, staff, alumni and recruits.

IT Security Will Conduct Client Satisfaction Surveys and Reach Target Goals

KPI Description

IT Security will examine Security Ticket Survey responses and ensure that client satisfaction levels are at least Satisfied for each question.

Results Description

Currently, IT Security has only 2 surveys for this year, and all questions are answered at the value of Satisfied or Very Satisfied.

Division of University Advancement

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: Alumni Relations****Sam Houston State University****President, Office of****University Advancement****Alumni Relations** **Enhance The Image Of The University****Goal Description**

Enhance the Image of the University

Related Items **Increase The Number Of Meetings, Events And Attendance****Performance Objective Description**

Increase the number of meetings and events, as well as the overall attendance at these meetings and events. Alumni Relations will increase contact and stewardship in regions with concentrations of significant alumni populations, host meetings and events in regions with concentrations of significant alumni populations, and mail invitations to events to all alumni in regional areas, whether active or not.

 Increase The Number Of Meetings, Events, And Attendance**KPI Description**

Utilize the meetings, events, and attendance report as updated monthly on the Performance Measures report. Our goal for FY'17 is 360 meetings/events with 28,000 total in attendance.

Results Description

As of 5/31/17 our numbers are as follows:

Events/Meetings: 310

Attendance: 22,195

Communication Pieces: 253 (vs. FY '17 goal of 350)

Yearly numbers through 8/31/17

Events/Meetings: 395 vs. Goal of 360

Attendance: 28,874 vs. Goal of 28,000

Communication Pieces: 330 vs Goal of 350

Secure Private Support For The University

Goal Description

Secure Private Support for the University

Related Items

Increase Total Membership In The Alumni Association

Performance Objective Description

Increase membership (Annual, Life, and Complimentary Members) in the alumni association, in order to reach the goal stated for FY 17 in the President's Performance Indicator Report. Membership will be increased through mass mailings to non active alumni, monthly email renewal reminders, and 30, 60, 90 renewal notices to lapsing members in addition to numerous membership appeals throughout the year.

Increase Membership

KPI Description

Track membership in Razor's Edge (query RE). Our goal for FY'17 is 13,400 members.

Results Description

-

Current Members Year to Date:

Annual: 5183

Life/Endowed: 2925

Complimentary: 4334

Total members: 12442 vs. goal of 13,400.

Final numbers not available until 8/31/2017

Numbers through 8/31/17

Annual: 6158 vs. goal of 6000

Life/Endowed: 2942 vs. goal of 3000

Complimentary: 4600 vs. goal of 4400

Total members: 13,700 vs. goal of 13,400.

Meet Gifts Goal (non-dues Income) From President's Performance Indicator Report For FY '17

Performance Objective Description

Meet Gifts Goal (non-dues Income) From President's Performance Indicator Report For FY '17 through event sponsorships, scholarships, and donations.

 Meet Gifts Goal (non-dues Income) From President's Performance Indicator Report For FY '17**KPI Description**

Utilize Razor's Edge and Banner (Alumni Revenue accounts), and daily alumni deposit membership and gift reporting spreadsheet to monitor progress towards goal. Our goal for FY'17 is \$185,000.

Results Description

As of 5/31/17 our gifts total is \$ 214,206.00. This exceeds our FY '17 goal by \$29,206.00.

Final numbers provided through 8/31/17 show gifts total as \$ 221,912.00

ADMINISTRATIVE USE ONLY-SACSCOC REPORT**Department: Marketing and Communication****Sam Houston State University****President, Office of****University Advancement****Marketing and Communication**** Place A Targeted Emphasis On Marketing And Institutional Branding****Goal Description**

The university has established a number of strategic goals, of which, marketing and branding are included. The action and performance of the Marketing & Communications department has a direct impact on these university level goals.

Related Items** Broaden And Strengthen Media Network****Performance Objective Description**

Marketing & Communications is charged with disseminating information to enhance the name recognition and reputation of the University. The frequency and range of media contacts provides the university with a broad representation of outlets and news dissemination enhancing image and building brand strength.

** Number Of Media Professionals Contacted****KPI Description**

The number of media contacts made in a given period is an indication of the effectiveness of the university's public outreach. Media contacts can be measured by counting e-mails, keeping telephone logs, and monitoring electronic submissions. Although the majority of media contacts are managed through Marketing & Communications, the indicator will always be under reported due to direct media contact with faculty and/or colleges. The 2016-2017 FY goal is 13,000.

Results Description

Media contacts reached 24,908 versus the goal of 13,000. The large variance is due to a number of "news worthy" factors including the success of athletic program, academic programs/research and events.

** Expand Media Placements****Performance Objective Description**

The number of media placements measures the effectiveness of Marketing & Communications ability to develop "news worthy" information as well as the relationship and outreach to media.

Number Of Media Placements

KPI Description

Media placements are measured by online clipping and wire services which track SHSU "mentions" in a number of communication channels. FY goal is 25,000.

Results Description

The number of media placements in the 2016-2017 academic year were 40,777 compared to the goal of 25,000. This large positive variance was due primarily to successful athletic seasons, relevant academic programs/research and events.

Integrate Marketing & Branding Through Institution

Performance Objective Description

Marketing is a necessary tool for university success in the current post-secondary education market and in today's strained economic environment. To serve the university's marketing needs the Marketing & Communications Department will support, promote and extend the marketing of a cohesive SHSU brand image and messaging of the highest professional quality. This will include providing numerous consulting activities to support, and facilitate the development of new marketing efforts and to improve the quality of existing marketing by programs, offices and organizations across the university; and to align all marketing, old and new, with the current SHSU brand image. This endeavor also includes the direct initiation and implementation of numerous professional marketing projects by the Marketing Department such as strategic purchasing of electronic media time and print exposures; brochure and printed program preparation; strategic billboard rental and preparation; multi-media promotional campaigns, etc. Historically, the number of marketing consulting activities and directly implemented marketing projects completed by the Marketing Dept. are associated with increases in the amount, quality and brand cohesiveness of all SHSU marketing.

Number Of Marketing Projects Completed

KPI Description

Marketing projects are implemented to promote a cohesive SHSU brand image of the highest professional quality. It is extremely difficult to directly assess the impact or effectiveness of marketing projects upon the outcomes they are intended to influence. Inferred measures of marketing project impact and efficiency might routinely begin by counting, tracking and relating the number of marketing projects completed in a given time period to instances of desired outcomes in an appropriate reaction period. At this point in our assessment evolution we are measuring number of marketing projects completed monthly and cumulatively for the year as a means of determining efficiency and balance between demand and resource availability. Based on growing demand and current resources, the FY goal for projects was increased to 4,500.

Results Description

Demand for marketing & communications support has continued to increase. At year-end, the number of projects completed was 6,053 - an 84% increase since 2015.

Maintain A Continuous Pipeline Of University Information And News

Performance Objective Description

The Marketing & Communications department is charged with disseminating information to enhance the name recognition and reputation of the University. The news releases and articles goal measures outreach to support the strengthening of the SHSU brand.

 Number Of News Releases and Articles**KPI Description**

Content/news is generated in the Marketing & Communications department and disseminated through a number of communication channels and mediums. All content released to traditional media and self-published on the web are counted. FY goal is 500.

Results Description

For the academic year 2016-2017, the number of media releases and articles totaled 546 versus the goal of 500. Releases and articles are largely contingent on the relevance of the content.

 Strengthen Outreach Through Social Media Channels**Performance Objective Description**

The application of social media has become essential to the effectiveness of marketing & communications for SHSU. Social media has been integrated into the fabric of branding strategies.

 Facebook Average Reach**KPI Description**

Facebook average monthly users measures the level of engagement occurring on the SHSU site. The measure is reported by Facebook. FY goal is 110,000.

Results Description

Facebook average reach was 176,309 on 8-31-2017. Actual reach surpassed the estimated goal due to relevant content and changes made to practices based on an analysis and review of SHSU social media channels.

 Facebook Likes**KPI Description**

Facebook Likes measure the number of people who are tracking or engaged with the site. The measure is reported by Facebook. FY goal is 81,500.

Results Description

Facebook likes were slightly below goal at 80,014. Year-over-year, likes increased 8%.

 Twitter Followers**KPI Description**

The number of Twitter followers measures the number of people who are tracking or engaged with the site. The measure is reported by Twitter. FY goals is 22,900.

Results Description

Twitter followers were 21,623 on 8-31-17, which was below the goal of 22,900. Year-over-year, Twitter followers increased 11%.