

**SUNY Potsdam
Administrative Unit
Assessment Summary Form**

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PURPOSE

This annual assessment summary form provides the opportunity for units to follow-up on their previous assessment work and reports and to highlight actions taken to improve processes and/or efficiencies in functioning that lead to outcomes that benefits students, staff, or the college. These could be process changes or improvements in efficiency, skill level of staff, opportunities for the college, or other aspects over which the unit has a certain amount of control.

SECTION 1: PRIOR YEAR ASSESSMENT PLAN FOLLOW-UP

A key component of the continuous improvement assessment process is following up on [prior year assessment plans and reports](#). Review your prior year plan and report and select one of the desired goals and outcomes to comment on any changes or improvements resulting from actions taken.

Prior Year Assessment Plan – Desired Goal and Outcome(s)

Copy/Paste or enter the goals and outcomes from your prior plan that you wish to highlight and summarize. Also list any relevant results data and planned actions that may have been previously listed.

Goal: Increase transparency of financial resources

Objective: Campus-Wide use of the Business Intelligence (BI) System.

Target: Comments and Feedback from users during the budget development process.

Result:

Business Affairs was successful in updating their website to provide more information such as terminology and definitions, facts, recorded budget information meetings (Fall 2021, Oct. 6, 2021, and Spring 2022, May 12, 2022), budget training links, and templates to financial campus forms that departments should be using.

Based on the outcomes, collected data/results, and planned actions, please describe what specific actions were taken and the resulting impact, if any.

SECTION 2: ADDITIONAL ASSESSMENT HIGHLIGHTS (optional)

Assessment activity can take place that is not directly tied to previously submitted plans and reports. Please use this space to share any assessment success stories from this past year. What did you assess and how? What were the results? What did you learn from it and do as a result?

As a direct result, we have had a decline in phone calls and emails from people across campus.

However, unfortunately we did not have an effective way to track the number of people who attending the live zoom meetings or track how many times they have been watched since being placed on the website. We would like to develop a formal way to receive and record any feedback from campus trainings or the links that lead directly to the BI website trainings/resources.