

# **SOUTHEASTERN LOUISIANA UNIVERSITY**

## **INSTITUTIONAL EFFECTIVENESS PLAN CURRENT YEAR**

**Unit Name:** Controller's Office

**Unit Head:** Nettie L. Burchfield

**Unit Area:** Administration and Finance

**Unit Type:** Institutional Support

**Reporting Period:** 2004-2005

### **Mission Statement:**

The mission of the Controller's Office at Southeastern Louisiana University is to properly account for resources received and used in an efficient and effective way; to ensure the University is complying with all Federal, State and regulatory financial guidelines, such as NACUBO; to provide information to assist the administration in making decisions and in the effective allocation and use of resources; to assist faculty and staff in understanding the financial operations of the University; and to assist the students who attend and visit our campus.

### **Objectives:**

1. To continue to promote good quality service to all students, faculty and staff.
2. To improve the training of faculty, staff and student workers.
3. To provide the Controller's Office staff with the tools they need to maximize their ability to serve all constituents.
4. To present fairly and accurately the financial position of the university in accordance with GASB and NACUBO standards and other Federal and State regulatory agencies.

### **Assessments:**

1. Conduct a survey of students, faculty and staff who have used the services of our office and ask how we might improve our current procedures, and review the annual ACT Student Survey.
2. By measuring the number of participants in faculty and staff training sessions conducted by the Controller's Office and survey them for ways that we can make our training more effective.
3. By measuring the number of staff members who participate in training programs and by the number of faculty and staff waivers issued to employees of the Controller's Office. Use point of service evaluations for internal training.
4. An annual review of the financial statements conducted by the Legislative Auditors.

## **Results:**

1. The result of the 2004-2005 surveys collected to date of the Controller's Office resulted in an overall rating of 88%.
2. The Controller's Office has established a training program for travel, TimeCentre, and the use of the Financial Information System. The Controller's Office participates in workshops and training seminars conducted by Sponsored Research for the training of faculty and staff who administer grants and contracts. There were 193 participants who attended the travel training in 2004 - 2005.
3. The Controller's Office had one (1) full-time staff member who received an undergraduate degree from Southeastern Louisiana University in December 2004 and two full-time staff members who are still pursuing their degree. We have also had one employee who completed the Comprehensive Public Training Program certification in 2004. The Controller's Office participates in the annual HEUG conference and PeopleSoft training for student financials and payroll. The Controller, Assistant Controllers and Payroll Director participated in NACUBO Training classes such as Student FICA.
4. The University had no legislative audit findings for the fiscal year 2004 – 2005. The Controller's office conducted reconciliations of all balance sheet accounts for the fiscal year 2003 – 2004.

## **Use of Results:**

1. All classified staff and student workers of the Controller's Office are required to go through the Customer Service Training. We will provide on-going training for the use of PeopleSoft. The Controller's Office will continue to update practices based on the results of customer surveys.
2. The Controller's Office will establish an evaluation form for the assessment of the training programs in order to keep the established programs effective.
3. The Controller's Office will establish a point of service evaluation for internal training.
4. The Controller's Office will continue to monitor the reconciliation of the balance sheet accounts and keep them current throughout the course of the fiscal year.