### Assessment: 2007 - 2008: Administrative Support

**Bearkat OneCard**

| 8 Goals | 13 Objectives | 15 Indicators | 14 Criteria | 14 Findings | 13 Actions |
### GOAL: Goal 1 - Innovative Programs

<table>
<thead>
<tr>
<th><strong>Objective</strong></th>
<th><strong>Cash &amp; Check Transactions</strong></th>
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<tbody>
<tr>
<td></td>
<td>Reduce the number of cash and check transactions on campus.</td>
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*Associated Goals: Goal 1 - Innovative Programs*

<table>
<thead>
<tr>
<th><strong>Indicator</strong></th>
<th>HigherOne Monthly Disbursement Preferences Report</th>
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<tbody>
<tr>
<td></td>
<td>The HigherOne Monthly Disbursements Preferences Report is used to determine the number of paper checks that were processed the prior month for refund disbursements.</td>
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<table>
<thead>
<tr>
<th><strong>Criteria</strong></th>
<th>Decrease by 3%</th>
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<tbody>
<tr>
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<td>Decrease the number of participants receiving paper checks, as their preferred disbursement preference, by 3% each fiscal year.</td>
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<table>
<thead>
<tr>
<th><strong>Finding</strong></th>
<th>Checkless Reimbursement Process</th>
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<tbody>
<tr>
<td></td>
<td>Assessment Findings Available September 1, 2008</td>
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### Actions for Objective:

<table>
<thead>
<tr>
<th><strong>Action</strong></th>
<th><strong>Paperless Disbursement Process</strong></th>
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<tr>
<td></td>
<td>With the changes to the Department of Education rules on disbursements, the Bearkat OneCard Services office has worked with HigherOne, our processing agent, to eliminate the check option for refund disbursements. As of June 1, 2008, all new students will only have the option of having an electronic method for disbursements. However a percentage of our students are grandfathered into the check option and will continue to receive a paper check until they graduate or change preferences. The goal of the OneCard Office is to go completely paperless and will therefore work with students to convert them to an electronic options with the hopes of being all electronic.</td>
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GOAL: Goal 1 - Innovative Programs

Objective
Declining Balance Program
Develop and implement a new declining balance account for convenience purchases on campus
Associated Goals: Goal 1 - Innovative Programs

Indicator
Student Service Fee 2008-09 Funding Request
Receipt of approval for funding from 2008-09 Student Service Fee Committee

Criteria
Research & Secure Funding
Research and secure funding from campus departments, Student Service Fee Committee, and/or any other applicable grants that might approve funding for this type of expenditure

Finding
Declining Balance Program Put on Hold
Due to the workload and a prioritization of work orders currently in progress, the Department of Computer Services indicated that they would not be able to provide the man hours or programming necessary to create the DBA system at this time. Therefore, the BKO Advisory Committee recommended that we not proceed with a funding request until the basic operational system could be developed. Therefore the OneCard Office and the OneCard Advisory Committee are working with Computer Services to determine an ETA of when the DBA could be developed.

Actions for Objective:

Action
DBA Operating System Creation
Prior to seeking funding for the DBA account, the OneCard Services Office will continue to work with the VPSS, Computer Services, and the Advisory Committee to develop a timeline for creating the DBA operating system. Once this timeline is created and Computer Services begins production, funding initiatives will be sought.
GOAL: Goal 1a - Marketing Plan

Objective
Incoming Freshman Campaign
Utilize marketing campaign to communicate with all incoming freshman on how to obtain a Bearkat OneCard and why it is important and necessary to have one.

Associated Goals: Goal 1a - Marketing Plan

Indicator
Freshman Campaign Mass Email
The Bearkat OneCard Services will measure the active Bearkat OneCards of incoming freshman for the Fall 2008 semester by utilizing the 2008 Orientation Participants data report (Policy & Procedure Manual Appendix I) and the RHISO2RG Sam Menu report.

Criteria
Freshmen with Active ID Cards
The criteria of this objective is to have 85% of all incoming freshman with active Bearkat OneCards as of 8/25/08.

Finding
Freshman ID Campaign
This assessment is currently in progress and will be updated September 1, 2008.

Actions for Objective:

Action
Freshman ID Campaign
This assessment is currently in progress and will be updated September 1, 2008.
GOAL: Goal 2 - Programming & Education

Objective

OneCard Semester Orientation Schedule
Continue to work with the University Center, SHSU Graduate School, and various colleges and departments to schedule education programs, orientations, and venues for which their students can obtain a Bearkat OneCard.

Associated Goals: Goal 2 - Programming & Education

Indicator

Bearkat OneCard Departmental ID Card Orientation Checklist
Bearkat OneCard Departmental ID Card Orientation Schedule/Semester Calendar

Criteria

Minimum Number of Departmental Sessions
- Participate in a minimum of (1) Graduate School Orientation each Year
- Travel to the University Center a minimum of once a month for ID card processing
- Contact each department on the Bearkat OneCard Departmental ID Card Orientation Checklist each semester to schedule an orientation time

Finding

OneCard Orientation Schedule
This Assessment Information will be available September 1, 2008

Actions for Objective:

Action

OneCard Orientation Schedule
This Assessment Information will be available September 1, 2008
GOAL: Goal 2 -Programming & Education

Objective  
OneReward Program  
Continue to build the OneAccount Rewards program along the I-45 corridor.  
Associated Goals: Goal 2 -Programming & Education

Indicator  
Higher One OneSupport Progress Report  
Quarterly a request is made to Higher One OneSupport Administrators to request a quarterly update/progress report for the Division of Student Service Performance indicators. Included in this report is the request and status for participating OneRewards merchants. This report includes the number of participating merchants in our local area.

Criteria  
OneRewards Merchants  
Increase the number of participating OneReward merchants.

Finding  
One Rewards Merchants  
This assessment is in progress and will be available September 1, 2008

Actions for Objective:

Action  
One Rewards Merchants  
This assessment is in progress and will be available September 1, 2008
GOAL: Goal 2a - Inclusive Representation

Objective

Participation & Appointments
Monitor participation and appointments on committees, boards, focus groups, and task forces to ensure a representative participation.

Associated Goals: Goal 2a - Inclusive Representation

Indicator

Committee Appointment Log
Bearkat OneCard Services Committee Appointment Log contains information that includes name of appointee, title, date appointed, and expiration of term.

Criteria

Student Representative
Have a minimum of (1) student representative on each committee the Bearkat OneCard Office is responsible for.

Finding

Appointed Student Members
Completed Objective: Appointed (3) student representatives to the Bearkat OneCard Advisory Council in October 2006 for one year terms.

Indicator

Committee Appointment Log
Bearkat OneCard Services Committee Appointment Log contains information that includes name of appointee, title, date appointed, and expiration of term.

Criteria

Student Representative
Have a minimum of (1) student representative on each committee the Bearkat OneCard Office is responsible for.

Finding

Appointment of Student Comm. Members Completed
Completed Objective: Appointed (3) student representatives to the Bearkat OneCard Advisory Council in September 1, 2008 for one year terms.

Actions for Objective:

Action

Maintain & Update Appointments
Maintain and update the Bearkat OneCard Advisory Appointments for 2008-09 as needed.
GOAL: Goal 3 - Effectiveness Of Programs, Services, And Operations

Objective: Increase Event Tracking User Satisfaction
Increase departmental satisfaction of OneCard Event Tracking program and reports
Associated Goals: Goal 3 - Effectiveness Of Programs, Services, And Operations

Indicator: Determine User Satisfaction
Conduct user survey to determine satisfaction with OneCard Event Tracking program and reports

Criteria:
Percentage of Satisfaction with OneCard Event Tracking Program
80% of participants will indicate satisfaction with programs

Finding: Event Tracking Satisfaction Survey
Assessment Currently in Progress. Data will be available September 1, 2008.

Actions for Objective:

Action: Event Tracking Satisfaction Survey
Assessment Currently in Progress. Data will be available September 1, 2008.
### GOAL: Goal 3 - Effectiveness Of Programs, Services, And Operations

<table>
<thead>
<tr>
<th>Objective</th>
<th>Increase Student Satisfaction</th>
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<tbody>
<tr>
<td></td>
<td>Increase student satisfaction of OneCard program and services</td>
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**Associated Goals:** Goal 3 - Effectiveness Of Programs, Services, And Operations

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<th>Indicator</th>
<th>Conduct student survey to determine satisfaction with OneCard program</th>
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<th>Criteria</th>
<th>Percentage of Satisfaction with OneCard Program</th>
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<td>80% of participants with indicate satisfaction with programs.</td>
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<th>Student Satisfaction Survey</th>
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**Actions for Objective:**

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GOAL: Goal 4 - Money Management

Objective: Money Management Programs
Develop a money management educational program where students can obtain counseling on matters related to personal finance, budgeting, retirement savings, identity theft assistance, and other personal financial matters.

Associated Goals: Goal 4 - Money Management

Indicator: Student Services Calendar Of Events
Money Management Program dates posted on the Division of Student Services Calendar of Events on the SHSU website

Criteria: Minimum of (2) co-sponsored events
Sponsor or co-sponsor a minimum of (2) financial workshops, seminars, or guest speakers each semester.

Finding: Money Management Programs Held
The Bearkat OneCard Services co-sponsored Funny Money & the Ultimate Money Skills programs with Student Activities and First Year Experience in 2007-08. In addition, the Director of OneCard Services presented a 45 minute presentation on the importance of financial literacy to parents and students during the (8) Orientation sessions held during the summer 2008. The Director of Bearkat OneCard Services also presented as a guest lecturer to academic courses on campus during the Fall 2007 & Spring 2008 semesters.

Actions for Objective:

Action: Continue Money Management Programming
Though the objectives for this fiscal year were exceeded for this objective, due to the success of the events and the interest among students Bearkat OneCard Services will continue money management educational programming for the 2008-09 fiscal year. However this objective will be under the new Student Money Management Center and will be a collaborative effort between the two departments.
GOAL: Goal 4 - Money Management

Objective
Student Financial Money Management Center
Submit funding request to Vice President for Student Services, President of SHSU, and the TSUS Board of Regents for the approval of the development of a Student Financial Management Center where students can obtain counseling on matters related to personal finance, budgeting, retirement savings, identity theft assistance, and other personal financial matters.

Associated Goals: Goal 4 - Money Management

Indicator
TSUS Board Of Regents Motion Approval
Approval of the Student Financial Money Management Center Motion for a dedicated fee for the establishment of a center on the campus of Sam Houston State University.

Criteria
Student Dedicated Fee
Approval by the TSUS Board of Regents for a student dedicated fee to fund the Bearkat OneCard Services Office and the Student Financial Money Management Center for $10-$15.00 per semester.

Finding
Dedicated Fee Approved for Fiscal Yr 2009
The TSUS Board of Regents approved the motion in November 2007 for the Bearkat OneCard Services Office to receive $12.00 per semester per student in dedicated fees to support the OneCard Office Operations and the creation of a new Student Money Management Center. A temporary office location has been secured for the Fall 2008 and a full-time position has been approved and is posted on the HR website.

Actions for Objective:

Action
Student Money Management Center Office Development
Now that funding has been secured for the SMMC, the goals for the 2008-09 year will include, but not be limited to, hiring personnel, developing policies and procedures for the center, and joining professional organizations in this field.
GOAL: Goal 5 - Increase Communication & Networking

Objective
Conference Attendance
In an effort to share ideas and information to improve current programs and services and collaborate on new and innovative programs available to students, all professional staff members will attend a minimum of (1) local, regional, board sponsored, state wide conferences, or professional development meeting, during the year

Associated Goals: Goal 5 - Increase Communication & Networking

Indicator
Conference Registration & Staff Report
We will use the conference/workshop registration along with the staff report following the staff members return from the conference. Both indicators will be documented in departmental minutes and reported in the VPSS monthly report.

Criteria
Professional staff to attend training and/or conferences
Have all professional staff members in Bearkat OneCard Office attend a minimum of (1) local, regional, board sponsored, state wide conferences, or national conference or staff development program.

Finding
Conference Attendance Completed
All professional staff members attended a professional conference, staff development training, or workshop for staff development purposes this fiscal year. Therefore this objective was completed for the fiscal year 2007-08. Kristy Vienne attended and presented presentations at the Higher One Users Conference in September 2007, NACCU National Conference in April 2008, & TACUSPA Conference in November 2007. Kari Zella attended and presented at the HigherOne Users conference in September 2007. Vivian Carlson attended a Skill Path leadership development conference on May 22, 2008.

Actions for Objective:

Action
Continuation of Conference Attendance
Because of the importance of professional conferences and presentations to understanding the current trends in our respective fields, this objective will remain in place for the 2008-09 fiscal year.
## GOAL: Goal 5 - Increase Communication & Networking

### Objective

**Staff Development Programming**

In an effort to share ideas and information to improve current programs and services and collaborate on new and innovative programs available to students, the Bearkat OneCard Office will sponsor a minimum of (1) professional development meeting each semester on a topic of interest of staff members, a timely issue in Student Services, or a campus wide issue of concern.

*Associated Goals: Goal 5 - Increase Communication & Networking*

### Indicator

- Staff Development Evaluation Form
- Staff Development Evaluation/Focus Group Summary of Findings

### Criteria

Professional staff to attend training

Have all professional staff members in Bearkat OneCard Office attend each of the professional development meetings sponsored by the office each semester. If a staff member is unable to attend a professional development meeting an alternative program should be attended by the staff member.

### Finding

**Staff Development Completed**

The OneCard Office offered training to all employees in CPR (April 2007) and Crisis Training (February 2008).

### Actions for Objective:

**Action**

Continue Professional Development Programs

Because of the importance of staff development and life long learning, this objective will remain in place for the 2008-09 fiscal year.
GOAL: Goal 5a - Customer Service Oriented Staff

Objective
Train Staff & Student Workers
To train Bearkat One Card office staff and student employees to be responsive to clientele.

Associated Goals: Goal 5a - Customer Service Oriented Staff

Indicator
Daily Satisfaction Survey
Daily satisfaction surveys that are a likert scaled design instrument with room from student supplied responses are available every day for comments, suggestions, and ratings of surveys. Students are encouraged to complete these surveys and rate the service they received. Surveys are anonymous and are placed in the suggestion box for review each month.

Indicator
Professional Staff Meetings
Input and minutes from the weekly Bearkat OneCard Professional staff meeting notes

Criteria
Professional Staff meetings
Conduct a minimum of (1) weekly professional staff meeting.

Finding
Completed Professional Staff Meetings FY 2008
The criterion for both the professional staff members and the students staff members of (1) weekly and (1) monthly meeting held, respectively, for this objective was completed for fiscal year 2007-08.

Finding
Completed Student Staff Meetings 2007-08
The criterion for both the professional staff members and the students staff members of (1) weekly and (1) monthly meeting held, respectively, for this objective was completed for fiscal year 2007-08.

Indicator
Student Staff Meetings
Monthly Student Staff Meeting agenda and minutes

Criteria
Student Staff Meetings
Conduct a minimum of (1) monthly student staff meetings.

Actions for Objective:

Action
Responsive to Clientele through Training
Due to the importance of being responsive to the needs of our clients and the ever changing environment, staff training and staff meetings will remain in place for the 2008-09 fiscal year.