NACCU Standards and Guidelines - With a Twist?

Melissa Neidigh, University of Montana
Jeanine Brooks, The University of Alabama
What to Expect

• Review the NACCU Self Assessment Guidelines
• Why assessment important to us
• How we each used the NACCU Self Assessment Guidelines
• What we learned through this process
• Changes have we made since this process was first completed
• NACCU Standards and Guidelines remote classroom --NEW
About Our Card Programs - Griz Card

- Established 1993
- Supports 4 campuses
- Student Affairs
- Under Residence Life
- Employees: 2.25FTEs, 3 students
- Self funded operation
- Technical Support: SA Information Technology

- 1.6 million annual card swipes
- 209,000 debit/card transactions
- Online photo submission app
- 20,000 active cardholders
- 31 off-campus merchants
- 10 campus systems integrations
About Our Card Programs - Action Card

- Established 1995
- Campus Enterprise Level System
- Enterprise Operations → Financial Affairs
- Employees: 10FTEs, 2 students
- Campus Category: Service Center
- Technical Support: Information Technology

- 8.4 million annual card swipes
- $22 million annual debit card sales transactions
- 9,900 student meal plans/term
- 70,000 active cardholders
- 77 off-campus merchants
- 13 campus systems integrations
About our Schools

University of Montana

- Montana’s Second Largest Public Institution
  - Founded 1893
- Located in Missoula, MT
  - City Population 70,000
  - County Population 112,000
- 12,000 Student Enrollment
- 3,500 Faculty/Staff
- 11 Truman Scholars
- 28 Rhodes Scholars
- Famous “Griz” include: Jeannette Rankin, Jim Messina, Jeff Ament, J.K. Simmons
About our Schools

The University of Alabama

- Alabama’s Oldest Public Institution
  - Founded 1831
- Located in Tuscaloosa, AL
  - City Population 95,000
  - County Population 200,000
- 37,665 Student Enrollment
- 6,000 Faculty/Staff
- 43rd Ranking among Public Universities (U.S. News and World Report)
- 500+ National Merit Scholars
- 15 Rhodes Scholars
- 16 Football National Championships
About Us

**Melissa Neidigh**
- Associate Director of Operations for Residence Life for 4 years
- Over 10 years of experience with campus card programs
- Member of the SA Assessment Council at UM
- New NACCU Board Member

**Jeanine Brooks**
- Director Action Card
- 22 years of experience with campus card/transaction systems
- Former NACCU Board member and Committee Chair
- Former Chair NACAS Professional Development Committee
Before We Get Started

- Who has heard of the NACCU Standards and Self Assessment Guidelines?
- Who has taken a look at them?
- Who has completed a program review using the NACCU Self Assessment Guidelines as a tool?
- Who is here to learn more about the NACCU SAGS Course being offered to mentor you through the process?
What are Self Assessment Guidelines?

- Tool for comprehensive review
- Evaluation of where your program stands
- Allows for a consistent process which can be replicated to ensure that the assessment cycle continues
What Can You Use Them For?

• Guide strategic plans

• Identify opportunities and strengths

• Identify weaknesses and areas that need development

• Address campus issues

• Educate upper administrators on the valued services you provide campus
What Areas are Addressed?

- Mission
- Program
- Marketing
- Leadership
- Organization & Management
- Facilities
- Diversity
- Ethics
- Assessment & Evaluation
- Campus & External Relations
- Legal Responsibilities
- Financial Resources
- Technology & Campus Card Equipment
Assessment

Why it is important to us
Questions we have received...

• What value do you add?
• How are you meeting the needs of the campus community?
• Are you delivering quality services in a timely manner?
• How much money can you do without?
• How are you helping to close gaps and build efficiencies?
• Can you job share instead of posting this position?
• With the pressure of increasing enrollment on resources, how can your department aid campus in managing services?
• How are you providing accepting and inclusive campus community services?
• What are the barriers to you expanding your program?
Program assessment answers three questions:

1. What are you trying to do?
2. How well are you doing it?
3. How can you improve?
NACCU Self Assessment Guidelines

How we used them
Review Process Example

Internal Review
- Fall 2011
- Based on NACCU SAGS
- Develop Tool
- Gather Supporting Evidence
  - Organize & Distribute
  - Internal Review team members completed assessment
- Individual Assessments
- Group Assessment
  - Internal Team completed assessment as a group
- External Reviewer

External Review
- Benchmarking
  - NACCU Staff
- Campus Visit
  - Meet with Stakeholders
  - Meet with Staff and Observe
- Full Assessment
  - Recommendations
  - Executive Summary
- Completes Assessment
- Response
  - Internal Review Team Responds to Recommendations
Sample evidence and documentation

- Marketing Plan
- ID Card contract
- Facility access policy/procedures
- Operating Plan and Budget
- Funding Model
- Capital Project projections
- Confidentiality agreement
- On Boarding Checklist
- Vision and Mission Statements

- Computer use agreement
- Assessment Plan
- Internal Control assessment
- MOUs, SOWs, SLAs
- Disaster Recovery Plan
- IT Audit
- Customer Service expectations
- Organizational chart
- System Workflow diagrams
What we Learned
What we learned in the Internal Review

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Another look at what can be learned

• Creates a historical record of your program to serve as reference points for the decision process at that time
• Use in determining department position gaps
• Serves as a tool for campus administrator awareness
• Periodic SAG review becomes a checklist for industry standards compliance
Changes Made

As a result of the NACCU SAGs
Changes made as a result

- Documentation standards
- Online photo submission web app
- Tested our Disaster Recovery Plan
- Created a User Agreement
- Established an MOU with Student Affairs IT
- Added card readers to laundry machines in apartments
- Added Papercut to provide more printing options and locations
- Partner with Internal Audit for class projects
Changes made as a result

• Created a marketing/communications plan
• Created a new FTE position dedicated to marketing, communications, documentation and event planning
• Established a consistent Project Management approach and checklist
• Created documentation
  • All new projects must have documentation prior to release to production
  • Project partners approve project documentation prior to release to production
Not only is there nothing wrong with having standards, it turns out to be a shortcut to doing great work and making an impact.

Seth Godin from “Nothing wrong with having standards” Blog
NACCU SAGs Remote Classroom

Coming soon!
SAGs Course

- Intensive 10-month course
- Course kicks off in June
- Conference calls and Google Drive will be used
- Application process opens in mid-April
- Class enrollment limited
- Calls will be scheduled once participants are identified
More selling points from Jeanine...

- Participants will be expected to complete assignments on time and provide feedback to institutions in the review process.
- Upon course completion, participants will have a completed internal review for their card program.
- Departments completing the course will receive a $500 stipend (limited to 10 institutions).
The results are worth the investment
Thank you!

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