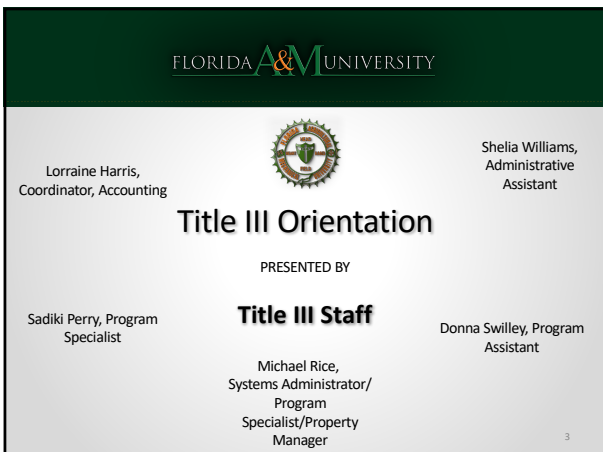




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FLORIDA **A&M** UNIVERSITY



Evaluation Procedures


PRESENTED BY

Michael Rice, Program Specialist

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Michael Rice




Quarterly Performance Evaluations

(1 visit per quarter)


The Process

- Quarterly Reports due about 2 weeks after the end of the quarter
- Program Specialist Reviews the Report
- Program Completes the Internal Evaluation form
- Sharing session is scheduled with Activity Director to discuss further actions needed.



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Michael Rice



Quarterly Performance Evaluations


Title III Program
QUARTERLY PERFORMANCE REPORT
Activity: Academic Success Institute Director: Teri Littleberry
Report Period: 1 Mar 2020

SUMMARY FOR QUARTER

- 1- OBJECTIVES METS
- 2- COLLABORATION
- 3- PERSONNEL
- 4- BUDGET ANALYSIS
- 5- GOALS ACHIEVED
- 6- TRAVEL
- BUDGET REPORT**


Title III Program
QUARTERLY PERFORMANCE REPORT
Activity: Academic Success Institute Director: Teri Littleberry

**Input Notes (Please summarize the progress made during the current quarter).*



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Quarterly Performance Evaluations Michael Rice



Title III Program
QUARTERLY PERFORMANCE REPORT
Submit here to review


Review each objective listed here and indicate the current status.

Enter your objectives	Review the progress you have made this quarter on each objective	Indicate the STATUS of the objective (use icon)	Describe the tangible evidence you will provide to substantiate this progress?
Objective 1: Increase the 4 year graduation rate from 28% to 30% by September 30, 2022. Increase the 6 year graduation rate from 57% to 57%.		[Red X Icon]	
Objective 2: Increase first time in college success rate retention rate from 65% to 68% by September 30, 2022.		[Red X Icon]	
Objective 3: Reduce time to degree for freshmen as college students increase 10% a percent of students to be awarded a diploma from 4.5 years to 4.2 years by September 30, 2022.		[Red X Icon]	



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Quarterly Performance Evaluations Michael Rice



Title III Program
QUARTERLY PERFORMANCE REPORT


Activity: Academic Success Institute Director: Teri Little-Berry
Report Period: 1 Date: 2/18/2022

SUMMARY FOR QUARTER	<input type="button" value="EXIT Report"/> <input type="button" value="Print Report"/>
1 - OBJECTIVES STATUS	
2 - COLLABORATION	
3 - PERSONNEL	
4 - BUDGET ANALYSIS	
5 - GOALS ACHIEVED	
6 - TRAVEL	



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Quarterly Performance Evaluations Michael Rice



Tennessee State University
TU21_15 - Program Coordination UAG
Internal Evaluation Worksheet

Date of Review: _____ Attendees: _____
Type of Review: _____
Start Time: _____ End Time: _____

<p>1. Progress on Objectives (40%)</p> <ul style="list-style-type: none"> Quarterly Performance Reports _____ Documentation of progress _____ Satisfactory Progress _____ Adherence to implementation strategy _____ <p>AVERAGE: → _____</p>	<p>2. Fiscal Management (20%)</p> <ul style="list-style-type: none"> Encumbrance Liquidation _____ Adherence to planned Travel Budget _____ # of Budget Modifications _____ Adherence to planned spending _____ <p>AVERAGE: → _____</p>
<p>3. Personnel (20%)</p> <ul style="list-style-type: none"> Time and Effort Forms _____ All positions filled _____ Personnel Records Kept _____ <p>AVERAGE: → _____</p>	<p>4. Property Management (10%)</p> <ul style="list-style-type: none"> Database _____ Property Documents _____ Random Check of Property _____ <p>AVERAGE: → _____</p>

Comments

5. Communications (10%)


- Responsiveness to Communications _____
- Attendance at Meetings _____

AVERAGE: → _____

Final Rating _____ 0.0


Legend

- 0 = Outstanding (Exceeded goal, no corrective actions needed)
- 1 = Good (Meeting goal, minor corrective actions needed)
- 2 = Fair (Significant corrective actions needed)
- 3 = Poor (Program not performing)




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Quarterly Performance Evaluations Michael Rice




Present the Evaluation form to the AD:

- An actual site visit
- Phone Meeting
- Zoom meeting
- Written request for more data or additional actions.



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Quarterly Performance Evaluations Michael Rice



Performance Checklist

1. Progress on Objectives

- Quarterly Performance Reports (QPR) - Have the QPRs for this quarter timely and accurate, and complete?
 - Do you have qualitative statements to support your objectives?
- Documentation of progress
 - Do you have documents or data that support claims in the QPR?
- Adherence to implementation strategy
 - Is your program moving ahead according to your approved implementation strategy?

2. Fiscal Management

- Encumbrance Liquidation
 - Have you made sure that all requisitions have been paid?
- Adherence to planned travel budget
 - Have you stayed within the approved travel for your activity?
 - Have submitted trip reports for all completed travel?
- # of Budget Modifications
 - Have you followed the guidelines for budget modifications?
- Adherence to planned spending
 - Have you stayed within your approved spending plan?

3. Personnel


- Time and Effort Reports - Have you followed guidelines for handling Time and Effort Reports ?
- All positions filled?
- Timely Submission of Contracts

4. Property Management

- Database - Is your TTrac property database up-to-date?
- Random Check - Are you prepared to pass a random check of your Title III property.

5. Directives and Reports

- Responsiveness to Communications - Have you been responsive to Communications?
- Timely Submission of Activity Reports - Were all reports submitted in a timely manner?




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Annual Performance Report Michael Rice



- Due Date: 1/31/2022
- Log into TTrac to get the report information.




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 **Reminders** *Michael Rice*

- Signature Authorization Form
- Submitting Requisitions
- Quarterly Report Due Dates
 - Qtr 1- 2/18/2022
 - Qtr 2- 5/20/2022
 - Qtr 3- 7/22/2022
 - Qtr 4- 10/24/2022
- APR is due on 1/31/2022



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Personnel Procedures

PRESENTED BY

Shelia Williams, Personnel Representative

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 **Personnel Procedures** *Shelia Williams*


Time and Effort (T&E) Reports

- Contracts & Grants distributes T&E Reports to Title III Program Offices
- Title III electronically distributes via TTRAC
- Activity Director reviews salary and funding source for each employee
- Activity Director or person with firsthand knowledge of effort should verify and sign report
- Note any issues and resolutions on T&E Report

Activity must submit original Time and Effort Reports to the Office of Contracts and Grants within 7 days after receiving notice from the Title III Office and a copy must be uploaded in the TTRAC system.




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 **Personnel Procedures**


Contracts, Graduate & Faculty Recommendations

Contracts:
All contracts must be submitted 21 days prior to start date. This will allow the contracts to move through ImageNow to the different approving departments.

Graduate & Faculty Recommendations must have the AOR attached to the recommendations. Graduate Recommendations must be signed by the Dean of Graduate Studies prior to submission.




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 **Personnel Procedures**

Cost Center Report

Pull the Cost Center Report each pay week, check it for accuracy and if you see any discrepancies, contact HR and the Title III Personnel Representative for answers.




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 **Personnel Procedures**


Processing STIPENDS

- Enter the STIPENDS for Ph.D. students into the Title III TTrac system
 - Prior to the beginning of the semester (Ensure student is enrolled in the program)
- Routing
 - Graduate Studies
 - Title III
 - Sponsored Programs
 - Accounts Payable

Follow-up to ensure processing of student stipends are complete with the various departments




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TIPS TO REMEMBER

Selia Williams


- ✓ Enter Contracts, Graduate & Faculty Recommendations 21 days prior to start date
- ✓ Check the Cost Center Report for accuracy
- ✓ Attach the AOR to the Recommendations
- ✓ Students must sign the Recommendation in the Graduate Studies office
- ✓ Enter the Ph.D. students Stipends prior to the semester



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Fiscal Procedures

PRESENTED BY

Lorraine Harris, Budget Coordinator

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FISCAL PROCEDURES

BUDGET – REQUISITIONS –STIPENDS-BUDGET MODIFICATIONS

- TTrac Budget Balances
- Check your TTrac budget before entering requisitions in iRattler
- Enter a justification / Specify a category
- Receive goods in iRattler
- Graduate Students Receiving Stipends
- Unencumbered Purchase Orders
- Budget Modifications


MONITOR ALL EXPENDITURES IN TTRAC CONTACT ME FOR ANY ISSUES RELATING TO YOUR BUDGET



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Travel Procedures


PRESENTED BY

Donna Swilley, Program Assistant

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Donna Swilley




Submitting a Travel Authorization

- Create a Travel Authorization in iRattler Travel and Expense Module at least 21 days prior to the date of travel.
- Email supporting documents (i.e., Meeting agenda, payment request forms "registration/airfare" and proof of registration) to the Title III email.

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Donna Swilley




After the trip / Trip Report

- Create an Expense Report in the iRattler Module within 5 business days after returning to the University.
- Traveler must submit a "Trip Report", the Trip Report outlines the activities or workshops attended and explain how the program benefited from the travel.
- The Trip Report can be found on the Title III website (www.FAMU.edu/TitleIII)
 - >Click on RESOURCES
 - >Under Program Monitoring click "Trip Report" (the form will download to the computer)

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Donna Swelley



After the trip / Trip Report - cont'd

- The Trip Report must be submitted within 5 business days upon returning to the University.
- The form should be signed by both the traveler and the supervisor and emailed to the Title III email (Title3@fam.u.edu).



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Donna Swelley

Trip Report Form

Part A: Must be completed for reimbursement

Project Name:	Project #:
Name of Participant:	
Conference/Workshop Attended:	
Place of Meeting:	
Dates of attendance:	
Purpose of Travel:	
Provide a brief overview of the trip you attended and how it will benefit the University. (Program Agenda must be attached for reimbursement)	
Signature:	Date:
Recommended for future attendance: () Yes () No	
How would you evaluate this conference, workshop or meeting? () Excellent () Good () Fair () Poor () Other	
Part B: Must be completed before next trip request.	
This information has been shared with my colleagues on _____ via handouts, w-discussion, oral presentation in departmental meeting, etc.:	
(Attach Documentation)	
Participant _____	Date _____
Supervisor _____	Date _____


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Questions?

599-3527

title3@fam.u.edu - Sends mail to all Title III staff
title3docs@fam.u.edu - sends attachments to our ImageNow que



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