

SAM HOUSTON STATE UNIVERSITY
ANNUAL MERIT REVIEW (AMR) FORM

FISCAL YEAR: 08

INSTRUCTIONS: Use this form to document staff employee's annual merit review. This form should be completed by the supervisor and reviewed with the employee during the annual merit review. This form should be kept in the department's file to maintain a record of the employee's annual merit review. See Human Resources Policy ER-6, Staff Evaluation System.

I. EMPLOYEE:

Name : HEARTFIELD, ANNE D.
Title: DIRECTOR, BUSINESS OFFICE

SAMID: 0201947
Dept.: VP FINANCE AND OPERATIONS

II. STAFF EMPLOYEE PERFORMANCE RATING:

INSTRUCTIONS: The immediate supervisor should complete this section as a part of the employee's annual merit review. Rate only performance topics that relate to the job performance of the employee being rated. It is understood that the performance topics have different levels of importance or weight relative to each specific job.

PERFORMANCE TOPICS:	Not Related	Below Average	Average	Above Average
1. Understanding and carrying out instructions	0	0	0	●
2. Quality of work	0	0	0	●
3. Quantity of work	0	0	0	●
4. Adherence to policies, procedures & rules	0	0	0	●
5. Initiative	0	0	0	●
6. Organization & use of time	0	0	0	●
7. Working relationship with co-workers and/or student	0	0	0	●
8. Communication with others	0	0	0	●
9. Use of required technology	0	0	0	●
10. Attitude	0	0	0	●
11. Dependability	0	0	0	●
12. Other: <u>Honesty</u>	0	0	0	●

- ① 40,000 - Dining Services - look at Budget
- ② move 7/1/08 or 6/16/08.
- ③ Report to Sarah Woods -
a. Cashiers to perform
b. New Position in Bus Office (OVER)

④ Review of band
dependency -
Wells Fargo vs.
FNB - Summary
by Thursday
May 29, 2008

III. SUMMARIZE THE PERFORMANCE OVER THE PAST YEAR:

*A dedicated and loyal staff member of SHSU.
A valuable asset to SHSU.*

IV. INDICATE OR LIST SUGGESTED WAYS, IF ANY, EMPLOYEE CAN IMPROVE JOB PERFORMANCE:

V. OVERALL RATING OF STAFF EMPLOYEE PERFORMANCE: (Circle One)

Excellent

Overall performance of job responsibilities and productivity is at a level that is consistently (>90% of the time) above that which is normally expected or required.

Outstanding

Overall performance of job responsibilities and productivity is at a level that is usually (>70% of the time) above that which is normally expected or required.

Exceeds Job Requirements

Overall performance of job responsibilities and productivity is at a level that is often (>50% of the time) above that which is normally expected or required.

Meets Job Requirements

Overall performance of job responsibilities and productivity is at a level that is normally expected or required.

Does Not Meet Job Requirements

Overall performance of job responsibilities and productivity is sometimes at a level below what is normally expected or required.

VI. SIGNATURES:

Employee Acknowledgment

Ann Skutumpah

Date

5/28/08

Supervisor

Jack Parker

Date

5/18/08

NOTE: Attach supporting documents if necessary.

Business Office
Anne Heartfield, Director
Fiscal Year 2008 Departmental Accomplishments

Business Office:

1. Completed the draft of the Annual Financial Report for the review by our System Office on October 15, 2007. Published AFR mailed by due date of November 20. Complimented by Linda Yarborough, assisting with System and Comptroller's Office review of AFRs.
2. Completed 12 annual reports and 2 quarterly (prepared 4 times a year) reports to outside agencies and our System Office.
3. Business Office web page updated. We now have 2004, 2005, 2006, and 2007 AFRs available through links on this web page.
4. Continued to update Desk Procedures for the position of Director of the Business Office.
5. Processed over \$2.9 million in outside scholarships and loans to date for FY 2008.
6. Assisted with the RFP and selection of an insurance carrier for Raven Nest Golf to meet the requirements of their lease agreement with the city.
7. Reconciled over \$ 33.5 million in credit card payments to date for FY 2008.

Vending Operations:

1. Continued to operate the Vending Department utilizing student workers in place of one benefits-eligible employee.
2. Implemented a new Excel spreadsheet developed by Director of the Business Office to replace an outdated Quattro Pro. This spreadsheet meets audit requirements from the Vending Audit.
3. Continued to explore ways to purchase products at lower prices.
4. Initiated the shredding of all stored documents with approved destruction dates according to the state of Texas guidelines for the Business Office.

Accounts Payable:

1. Processed over 13,200 purchase orders to date in FY 2008.
2. Processed over 38,131 to date in FY 2008.

Cashiers Office:

1. Continued to protect University assets by maintaining a zero balance in cash over (short) accounts for Cashiers and Registration through April 2007.
2. Continued to train departments on the policies and procedures for depositing funds with the University.

Fiscal Year 2009 Departmental Goals

Business Office:

1. Complete a successful review of the 2008 Annual Financial Report for the SACS accreditation.
2. Complete a successful transition if SHSU has a new depository bank.
3. Continue to update the Business Office Web Page. The goal for 2009 will be the addition of 2008 Annual Financial Report.
4. Continue to complete all reports and reconciliations accurately and by stated deadlines. 2009 will include the completion of reports by an earlier than usual due date and fiscal notes will be required in the spring when the legislature is in session.
5. Continue to cross-train and update all procedural manuals.

Vending Operations:

1. Implement an "on-line" survey on the Vending web page. This survey will be used once a year to obtain valuable information from consumers about products offered.
2. Implement a replacement program for older machines by creating a table identifying in priority order of replacement vending and laundry machines. The goal is to begin replacing approximately 5-10 machines a year.
3. Continue to purchase the products needed at the lowest price possible.
4. Continue to update procedural manuals.

Accounts Payable:

1. Continue to process payments accurately and within cash discount period.
2. Continue to train departmental personnel in the procedures for efficient and timely payment of invoices.
3. Continue to update procedural manuals.

Cashiers Office:

1. Continue to guard university assets by striving towards \$0 in the cash short/cash over accounts (Cashiers and Registration accounts).
2. Continue to monitor departments on following deposit policy and procedures. One way this will be accomplished is to develop and offer a training program.
3. Continue to cross train and update all procedural manuals.

Contracts and Grants:

1. Develop and maintain a web page with pertinent information and links to forms and other departments.
2. Develop in conjunction with the Office of Research and Sponsored Programs policies and procedures.

3. Continue to meet federal and state guidelines for the administration of contracts and grants.
4. Provide on a monthly basis informational reports such as Aged Accounts Receivable.