

Budget

Fiscal Affairs

Administrative Unit Assessment FY 18 (July 2017-July 2018)

Department and Assessment Report Information

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For which department or area are you reporting?	Budget
What is the name and MGA email address of the person responsible for this report?	Amanda Funches amanda.funches@mga.edu

Departmental Mission and Goals

The mission and goals of the department should be consistent over a 5 year period, although some institutional changes may necessitate and prompt a change in mission or goals for specific departments. In this section, you will report the mission statement for your department as well as the long term goals (5 year range) for the department.

What is the mission statement for this department/area? Your mission should explain why the department/area exists and who it serves.	To provide the President and members of his or her cabinet with pertinent budgetary and financial information regarding the College's activities in order to make sound financial decisions to meet the goals and mission of the College.
What are the goals for this department? These should be the "big things" the department/area intends to accomplish within 5 years.	<ol style="list-style-type: none">1. To create a more transparent budget process2. To create better prepared budget managers through training, etc.3. To document how tos, etc in planning for succession

Objectives

Each year, every department should identify objectives the department hopes to accomplish in the next year. These should align with departmental goals and the MGA strategic plan. In the next section you will be reporting on the objectives you set and whether or not you achieved them in FY 18. Later in the document you will report on objectives you hope to accomplish in the coming fiscal year, FY19.

Objective 1

Objective 1: What was this department's first objective for this fiscal year? Objectives should be specific, measurable, and achievable within one year.	To work with USG to create tuition transition plan to true university rates.
Objective 1: How did your department measure this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort)	Approval of plan by BOR in minutes of April Board meeting.
Objective 1: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement)	Tuition Plan should be approved by USG BOR
Objective 1: At what level did the department/area achieve on this objective? (This should be a number, i.e. 82%, 6%, 345 attendees, 75% engagement)	N/A
Objective 1: Did your department meet this objective?	The department did not meet this objective.
Objective 1: What did your department learn from working toward this objective? What changes will you make based on this effort next year?	This objective can be thrown out for future years. USG does not want to raise tuition.

Objective 2

Objective 2: What was this department's second objective for this fiscal year? Objectives should be specific, measurable, and achievable within one year.	To create a communication plan in order to foster a more transparent budgeting process.
Objective 2: How did your department measure this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort)	Survey
Objective 2: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement)	75% of faculty/staff should feel that the budget process is more transparent than before.
Objective 2: At what level did the department/area achieve on this objective? (This should be a number, i.e. 82%, 6%, 345 attendees, 75% engagement)	47% agreed or strongly agreed
Objective 2: Did your department meet this objective?	The department did not meet this objective.
Objective 2: What did your department learn from working toward this objective? What changes will you make based on this effort next year?	We learned that while we are making progress, we need to continue to push data out to faculty/staff.

Objective 3

Objective 3: What was this department's third objective for this fiscal year? Objectives should be specific, measurable, and achievable within one year.	To document policies and procedures for the Budget Services Office.
Objective 3: How did your department measure this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort)	Track number of policies in place and updated.
Objective 3: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement)	10 policies will be updated and 2 polices will be created. (Currently have 21 policies.)
Objective 3: At what level did the department/area achieve on this objective? (This should be a number, i.e. 82%, 6%, 345 attendees, 75% engagement)	8%
Objective 3: Did your department meet this objective?	The department did not meet this objective.
Objective 3: What did your department learn from working toward this objective? What changes will you make based on this effort next year?	My area needs to put more effort into documenting what we do and how we dod it. As we learned this year, there can be turnover and having these things in place will be very helpful.

Objective 4

Objective 4: What was this department's fourth objective for this fiscal year? Objectives should be specific, measurable, and achievable within one year.	N/A
Objective 4: How did your department measure this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort)	N/A
Objective 4: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement)	N/A
Objective 4: At what level did the department/area achieve on this objective? (This should be a number, i.e. 82%, 6%, 345 attendees, 75% engagement)	N/A
Objective 4: Did your department meet this objective?	The department did not meet this objective.
Objective 4: What did your department learn from working toward this objective? What changes will you make based on this effort next year?	N/A

Future Plans

<p>Please identify at least four measurable objectives for the next fiscal year. In listing the objectives, please use the format shown in these examples.1) The Department of X will improve services levels by 5% as measured by our satisfaction survey. 2) The department to X will provide training in ABC for at least 73 MGA faculty and staff.</p>	<ol style="list-style-type: none">1. The Budget Services Office will continue to seek 75% faculty/staff who believe the budgeting process is more transparent.2. The Budget Services Office will train at least 50% of Budget Managers to use Budget Activity reports.3. The Budget Services Office will document more how tos as well as P&Ps that will aid when/if we have turnover, successions, etc. 5 documents will be updated and 2 will be created.4. The Budget Services Office will work in conjunction with the EVP to develop a multi-year planning tool. Goal of 2 FY (FY20 and 21)5. The Budget Services Office will work in conjunction with the EVP to document salary administration for changes during budget prep, etc. Goal of all promotions documented.
<p>Based on this assessment, please share your thoughts on the current status and future direction of this department or area.</p>	<p>I believe that the Budget Services Office is doing great work. We are being relied on for more information and data than before and on most occasions we are able to reply with the request as soon as it is received.</p> <p>I feel that they are still certain areas where we could do better and we are working on those. This includes training of budget managers, sharing of knowledge between colleagues (Shane needs to learn more of what I do, etc).</p>

Form run:

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