

Office of Budget & Planning

Fiscal Affairs

Administrative Unit Assessment

FY 19 (July 2018-July 2019)

Department and Assessment Report Information

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For which department or area are you reporting?	Office of Budget & Planning
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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 whom it serves.	To provide the President and members of his or her cabinet with pertinent budgetary and financial information regarding the University's activities in order to make sound financial decisions to meet the goals and mission of the University.
What are the goals for this department? These should be the "big things" the department/area intends to accomplish within 5 years.	1. To create a more transparent budget process 2. To create better prepared budget managers through training, etc. 3. To cross train current staff for back up and succession planning

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 FY19. Later in the document, you will report on objectives you hope to accomplish in the coming fiscal year, FY20.

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.	The Budget Services Office will continue to seek 75% faculty/staff who believe the budgeting process is more transparent.
Objective 1: How did your department measure this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort)	By a survey.
Objective 1: What was your target outcome for this objective? (i.e. 80% participation, 5% enrollment growth, 7% change in engagement)	75% of F/S believe budget process is more transparent
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 – the survey was not sent out in FY19
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?	The department learned from that we need to continue to find ways to make the budget process more transparent and that we need to send out a survey in April/May before faculty leave for the year.

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.	The Budget Services Office will train at least 50% of Budget Managers to use Budget Activity reports
Objective 2: How did your department measure this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort)	Number of participants vs. Number of budget managers
Objective 2: What was your target outcome for this objective? (i.e. 80% participation, 5% enrollment growth, 7% change in engagement)	50% of Budget Managers Trained
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)	N/A – Training was not conducted as ITS has created a new module for budget managers to use for review their budget.
Objective 2: Did your department meet this objective?	The department did not meet this objective, due to ITS asking schools to move from budget activity report use and to the new budget manager dashboard. The budget manager dashboard was not finalized for training in FY19
Objective 2: What did your department learn from working toward this objective? What changes will you make based on this effort next year?	We need to train budget managers on the newest way to track their budget.

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? (i.e. 80% participation, 5% enrollment growth, 7% change in engagement)	48% of policies will be updated and 2 policies 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)	0% of policies were updated. 2 policies were created.
Objective 3: Did your department meet this objective?	The department did not meet this objective with formal policies. However, there are various how-to documents that we updated throughout the year.
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 do it. Moving into FY20, we plan to review one policy each month and create new ones as we see the need.

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.	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)
Objective 4: How did your department measure this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort)	Job completed
Objective 4: What was your target outcome for this objective? (i.e. 80% participation, 5% enrollment growth, 7% change in engagement)	100% completion of 2 fiscal years planning
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)	100% - We use the Additions to Base and Budget Update for Cabinet spreadsheet to show current year and the upcoming years' budget.
Objective 4: Did your department meet this objective?	The department met 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?	We learned that we need to continue to think more strategic in our budget process. I believe our new budget process will assist with this.

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 & Planning Office will 100% implement a revised Budget Process with a new timeline that better fits a strategic/planning model and USG deadlines.2. The Budget & Planning Office will train at least 33% of Budget Managers to use the new budget manager dashboard which gets an update in late November. Training will start in Jan/Feb 2020.3. The Budget & Planning Office will cross train to provide back up as well as succession planning. Two new duties will be learned by current OPB staff.
<p>Based on this assessment, please share your thoughts on the current status and future direction of this department or area.</p>	<p>While my assessment does not show it, Budget & Planning had a very successful year. We were a part of numerous committees, worked on streamlining the Job Req and PARF process with HR, and took on auxiliary accounting duties from Office of Finance. I think we will continue to grow this year as we move forward in crosstraining each other and working with budget managers to train them.</p>

Form run:

Tuesday, January 14, 2020