

Budget and Planning

Office or Department of Fiscal Affairs

Administrative Unit Assessment

Year Reporting: FY 20 (July 2019-July 2020)

Department and Assessment Report Information

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| Prepared on: 7/23/2020 5:29:14 PM | Prepared by: amanda.funches@mga.edu |
| For which department or area are you reporting? | Budget and Planning |
| 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.

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| 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 University's activities in order to make sound financial decisions to meet the goals and mission of the University. |
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| 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 inclusive and transparent budget process2. To create better prepared budget managers through training, etc.3. To cross train current staff for back up and succession planning |
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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 FY20. Later in the document you will report on objectives you hope to accomplish in the coming fiscal year, FY21.

Objective 1

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| 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 & Planning Office will 100% implement a revised Budget Process with a new timeline that better fits a strategic/planning model and USG deadlines. |
| Objective 1: Detail how your department measured this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort) | Job completed. |
| Objective 1: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement) | This goal of the objective was 100% completion. |
| 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) | The objective was 100% completed. |
| Objective 1: Did your department meet this objective? | The department met 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 that the changes made to the schedule helped producing required documents for the University System Office (USO) much easier. We had valuable insight from cabinet members readily available in order to answer questions and to seek additional funding. |

Objective 2

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| <p>Objective 2: What was this department's second objective for this fiscal year? Objectives should be specific, measurable, and achievable within one year.</p> | <p>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.</p> | | | | | | | | |
| <p>Objective 2: Detail how your department measured this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort)</p> | <p>Number of participants vs. Number of budget managers</p> | | | | | | | | |
| <p>Objective 2: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement)</p> | <p>33% of Budget Managers (BM) Trained</p> | | | | | | | | |
| <p>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)</p> | <p>OBP held six trainings from January – March 2020. Before we started working remotely the followign had been trained:</p> <table data-bbox="815 758 1424 827"> <tr> <td>All with budget access</td> <td>107</td> <td>65</td> <td>60.75%</td> </tr> <tr> <td>Just BM</td> <td>69</td> <td>39</td> <td>56.52%</td> </tr> </table> | All with budget access | 107 | 65 | 60.75% | Just BM | 69 | 39 | 56.52% |
| All with budget access | 107 | 65 | 60.75% | | | | | | |
| Just BM | 69 | 39 | 56.52% | | | | | | |
| <p>Objective 2: Did your department meet this objective?</p> | <p>The department exceeded this objective.</p> | | | | | | | | |
| <p>Objective 2: What did your department learn from working toward this objective? What changes will you make based on this effort next year?</p> | <p>Budget managers like being able to pull their own information when they want. We need to finalize training when we get back on campus as well as offer refresher courses for those already trained.</p> | | | | | | | | |

Objective 3

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| Objective 3: What was this department's third objective for this fiscal year? Objectives should be specific, measurable, and achievable within one year. | The Office of Budget & Planning will cross train to provide back up as well as succession planning. Two new duties will be learned by current OPB staff. |
| Objective 3: Detail how your department measured this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort) | Track number of new duties learned. |
| Objective 3: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement) | Two new duties learned by each staff member. |
| 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) | 2 duties learned by each staff member |
| Objective 3: Did your department meet this objective? | The department met 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? | We learned that cross-training is crucial to having a well-balanced team. Each member has to understand what the other does in case they are out for vacation or possibly a lengthy illness. |

Objective 4

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| 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: Detail how your department measured 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 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? | N/A |

Future Plans

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| <p>Please identify and detail three to 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 of 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 train at least 90% of Budget Managers to use the new budget manager dashboard. (Training will resume when we are back in the office.) 2. The Budget & Planning Office will cross train to provide back up as well as succession planning. Two additional new duties will be learned by current OPB staff. 3. The Budget & Planning Office will be using the new position management tool within PSFIN (when released). |
| <p>Based on this assessment, please share your thoughts on the current status and future direction of this department or area.</p> | <p>The Office of Budget & Planning had a great year despite being all of the challenges faced.</p> |

Open Box for Additional Comments

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| <p>Open Text Box For Assessment Comments:</p> | |
| <p>If the COVID-19 pandemic impacted this assessment cycle, please provide specific details below.</p> | |

