

Budget & Planning

Office or Department of Fiscal Affairs

Administrative Unit Assessment Report Information

Year Reporting: FY21 (July 2020 – June 2021)

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Department 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.

<p>6. What is the mission statement for this department/area? Your mission should explain why the department/area exists and who it serves.</p>	<p>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.</p>
<p>7. What are the goals for this department? These should be the "big things" the department/area intends to accomplish within 5 years.</p>	<ol style="list-style-type: none">1. To create a more inclusive and transparent budget process2. To create better prepared budget mangers 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 FY21. Later in the document you will report on objectives you hope to accomplish in the coming fiscal year, FY22.

Objective 1

8. Objective 1: What was this department's first objective for this fiscal year? Objectives should be specific, measurable, and achievable within one year.	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.)
9. Objective 1: Detail how your department measured this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort)	Number of participants vs. Number of budget managers
10. Objective 1: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement)	90% trained
11. 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)	87.5 trained
12. Objective 1: Did your department meet this objective?	The department did not meet this objective.
13. Objective 1: What did your department learn from working toward this objective? What changes will you make based on this effort next year?	Budget managers like being able to pull their own information when they want. We need to continue training as well as offer refresher courses for those already trained each year.

Objective 2

14. Objective 2: What was this department's second objective for this fiscal year? Objectives should be specific, measurable, and achievable within one year.	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.
15. Objective 2: 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.
16. Objective 2: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement)	Two new duties for each staff member
17. 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>100%</p> <p>Leigh Ann</p> <p>1. Learn to set up DBT /MCOP for new departments</p> <p>2. Learn about ecore - payments, revenue, etc.</p> <p>Shane</p> <p>1. Learned MRR process - recon, invoicing, etc.</p> <p>2. Learned about budget prep schedules</p>
18. Objective 2: Did your department meet this objective?	The department met this objective.
19. 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 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 3

20. Objective 3: What was this department's third objective for this fiscal year? Objectives should be specific, measurable, and achievable within one year.	3. The Budget & Planning Office will be using the new position management tool within PSFIN (when released).
21. Objective 3: Detail how your department measured this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort)	Job completed
22. Objective 3: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement)	Job completed
23. 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)	100% done
24. Objective 3: Did your department meet this objective?	The department met this objective.
25. Objective 3: What did your department learn from working toward this objective? What changes will you make based on this effort next year?	OPB learned that using the position management tool makes it much easier to budget for personal services. We will continue using this tool in the future.

Objective 4

26. 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
27. Objective 4: Detail how your department measured this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort)	N/A
28. Objective 4: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement)	N/A
29. 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
30. Objective 4: Did your department meet this objective?	The department met this objective.
31. 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>32. 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>	<p>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 begin using the new faculty contract process.</p>
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Open Box for Assessment Comments

<p>33. Based on this assessment, please share your thoughts on the current status and future direction of this department or area. Use this space to summarize overall use of assessment results for continuous improvement and open text box for assessment comments:</p>	<p>The Office of Budget & Planning had a great year and hope to continue on that path.</p>
<p>37. If the COVID-19 pandemic impacted this assessment cycle, please provide specific details below.</p>	

MGA's Strategic Plan

<p>34. Based on your goals and objectives listed above please indicate their connection with MGA's Strategic Plan (https://www.mga.edu/about/docs/Strategic_Plan_Overall_DB.pdf) by checking all associated and relevant Imperatives / Strategies from the list below. (Check all the apply)</p>	<p>Build Shared Culture 6. Sustain financial health through resourceful fiscal management</p>
<p>35. Please indicate which of the following actions you have taken as a result of the 2020/2021 Assessment Cycle (Note: These actions are documented in reports, memos, emails, meeting minutes, or other directives within the reporting area) (Check all the apply)</p>	<p>Process Changes: Improve, Expand, Refine, Enhance, Discontinue, etc. Operational Processes</p>

Other

<p>36. Please indicate (if appropriate) any local, state, or national initiatives (academic or otherwise) that are influential in the operations, or goals, and objectives of your unit. (Complete College Georgia, USG High Impact Practice Initiative, LEAP, USG Momentum Year, Low-Cost No-Cost Books, etc)</p>	
<p>38. Mindset Update (Academic Deans ONLY) Please provide an update on the implementation of your school based mindset plan/strategy. Include any adjustments to metrics for the AY20/21 as well as outcomes associated with your appraisal of your schools activities.</p>	