

## Budget and Planning

Division of the University: Fiscal Affairs

Administrative Unit Assessment Year Reporting: FY22 (July 2021 – June 2022)

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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>Budget - 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>Auxiliary - Auxiliary Services' mission includes the provision of optimal service through all enterprises in unity with supporting the academic mission of the institution. Middle Georgia State University's Auxiliary Services is a financially self-supporting integral department of the institution. Auxiliary Services seeks to enhance the learning environment, focusing on current student trends, by offering innovative goods and services while providing excellent customer service within the confines of highly maintained facilities.</p>
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<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"><li>1. To create a more inclusive and transparent budget process</li><li>2. Target net profit and reserve numbers for each auxiliary function, focusing on holistic profitability.</li><li>3. To create better prepared budget mangers through training, etc.</li><li>4. To increase utilization and overall satisfaction of the dining program.</li></ol>
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	5. Focus on improving auxiliary policies, procedures, and website and marketing initiatives.
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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 FY22. Later in the document you will report on objectives you hope to accomplish in the coming fiscal year, FY23.

### 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.	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 specifically how your department measured this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort)	number of participants
10. Objective 1: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement)	90% completion
11. Objective 1: Provide details for your target performance level established (i.e., accreditation requirement, past performance data, peer program review, etc.)	Budget Managers change throughout the year, so we felt that 100% was unattainable. 90% shows that almost all budget managers are trained.
12. 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)	BM total users 73 completed 65 completion % 89.04%
13. Objective 1: Did your department meet this objective?	The department did not meet this objective.
14. Objective 1: Improvement Plans and Evidence of changes based on an analysis of the results: What did your department learn from working toward this objective? What changes will you make based on this effort next year?	Budget learned that managers are seeking additional training. We need to make sure that when managers are on-boarded that we get on their schedule. Early and often budget training can head off issues.

## Objective 2

<p>15. 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 &amp; 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.</p>
<p>16. Objective 2: Detail specifically how your department measured this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort)</p>	<p>Counted number of new duties learned</p>
<p>17. Objective 2: What was your target outcome for this objective? (i.e. 80% participation, 5% enrollment growth, 7% change in engagement)</p>	<p>2 new duties learned</p>
<p>18. Objective 2: Provide details for your target performance level established (i.e., accreditation requirement, past performance data, peer program review, etc.)</p>	<p>Two new skills is an attainable number to learn and learn well over the course of a year.</p>
<p>19. 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>100%</p>
<p>20. Objective 2: Did your department meet this objective?</p>	<p>The department did not meet this objective.</p>
<p>21. Objective 2: Improvement Plans and Evidence of changes based on an analysis of the results: What did your department learn from working toward this objective? What changes will you make based on this effort next year?</p>	<p>With the current job market is so important to cross train so that if someone leaves there is not such a steep learning curve or lack of ability to continue to the job.</p>

### Objective 3

22. Objective 3: What was this department's third objective for this fiscal year? Objectives should be specific, measurable, and achievable within one year.	The Budget & Planning Office will begin using the new position management tool within PSFIN (when released).
23. Objective 3: Detail how your department measured this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort)	Job completed
24. Objective 3: What was your target outcome for this objective? (i.e. 80% participation, 5% enrollment growth, 7% change in engagement)	100% completed
25. Objective 4: Provide details for your target performance level established (i.e., accreditation requirement, past performance data, peer program review, etc.)	Using the tool is a yes or no objective.
26. 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)	100%
27. Objective 2: Did your department meet this objective?	The department met this objective.
28. Objective 2: Improvement Plans and Evidence of changes based on an analysis of the results: What did your department learn from working toward this objective? What changes will you make based on this effort next year?	We will continue to use the position tool for the future. This makes it easier to see if our encumbrances are accurate.

## Objective 4

29. 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
30. Objective 4: Detail how your department measured this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort)	n/A
31. Objective 4: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement)	n/A
32. Objective 4: Provide details for your target performance level established (i.e., accreditation requirement, past performance data, peer program review, etc.)	n/A
33. 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
34. Objective 4: Did your department meet this objective?	The department met this objective.
35. Objective 4: Improvement Plans and Evidence of changes based on an analysis of the results: 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>36. 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 &amp; Planning Office will train at least 90% of Budget Managers to use the new budget manager dashboard.                  2. Review and update 25% of policies and procedures for Budget and Auxiliaries.                  3. Redesign and enhance at least 25% of auxiliary websites on an annual basis to attract more customers.                  4. The HCC will continue to make sure Clients will be satisfied with the service provided by the Conference Center, and will be measured by our satisfaction survey. Goal for FY23 will remain at 80%</p>
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**Open Box for Assessment Comments**

<p>37. In this field, please document the overall use of assessment results for continuous improvement of this department area (consider the past, present, and future and specifically address these in your narrative).</p>	<p>Overall, budget had successful year, but learned that we need to do more outreach to our budget managers.</p>
<p>38. Optional Open Text Box for Assessment Comments:</p>	
<p>42. If the COVID-19 pandemic impacted this assessment cycle, please provide specific details below.</p>	

**MGA’s Strategic Plan**

<p>39. Based on your goals and objectives listed above please indicate their connection with MGA's Strategic Plan (<a href="https://www.mga.edu/about/docs/Strategic_Plan_Overall_DB.pdf">https://www.mga.edu/about/docs/Strategic_Plan_Overall_DB.pdf</a>) 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>40. Please indicate which of the following actions you have taken because of the 2021/2022 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,                  Customer Service Changes:                  Communication, Services, etc</p>

**Other**

41. 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.)	
43. Mindset Update (Academic Deans ONLY)	