

UNIVERSITY OF WEST GEORGIA
ANNUAL REPORT TEMPLATE (NONACADEMIC)
FY 2010 (July 1, 2009 to June 30, 2010)

Department Budget Services

Name of Person Completing Report Elizabeth Baker

DEPARTMENTAL MISSION & ASSESSMENT

1. Departmental Mission & Goals

Departmental Mission/Vision Statement :

In keeping with the University of West Georgia's mission of providing "Educational Excellence in a Personal Environment," the mission of the Department of Budget Services is to provide excellent customer service by assisting the university campus in planning and budgeting revenue and expenditures to make the best use of fiscal resources in a method that is consistent with guidelines instituted by the Board of Regents of the University System of Georgia.

Departmental Goals [Align with institutional goals in 5 below]

The goals of the Budget Services department are:

- a. To prepare the necessary information for the administration to make informed decisions for planning and budgeting purposes by preparing the original budget and all amendments and reports accurately and in a timely manner;
- b. To provide assistance and training to all other departments on campus both in joint workshops and individually as needed; and
- c. To have information readily available upon request which necessitates excellent records management.

2. Assessment Summary of Departmental Goals Addressed This Academic Year

During FY 2010 the level of information sharing desired became hindered due to a change in both the position management system and PeopleSoft financials and the processing and administering \$10 million of budget cuts and \$7.8 million of recoding to federal stimulus funding. Given the limited resources available, the department placed a higher priority on meeting system reporting requirements and maintaining sound budgeting principles for the university as a whole.

3. Changes/Improvements Made as a Result of Assessment

Assessing the new environment to ensure we maintain efficiency in our daily processes and that functions were organized appropriately, the position structure was changed.

- a. Asset Management was transferred to the Controller's Office. The activities of surplus management and asset recording and reporting are closer aligned with Purchasing, Accounting, and Financial Reporting which are the responsibility of the Controller's Office.
- b. Additional Budget staff were needed to respond to the new reporting requirements and the ADP system. The office of Budget Services is required to develop and maintain additional reporting requirements as well as distribute information to the departments.
- c. Training assistance, compliance reporting, and information sharing activities needed to be improved to respond to the growing needs of the university, the university system, and the state of Georgia.

The additional staff needed to implement the changes were funded beginning in FY 2011.

To improve information sharing, a Budget Manager's group was formed to discuss and review a variety of budget issues. The group meets once a month to discuss: reporting requirements, both at the university and system level; processes and procedures; changes needed in forms and reporting documents; training opportunities; and improvements needed by Budget Services to serve the university better.

Additionally on the information sharing front, the FY2010 Operating Budget was placed on the university's website. This was the first time budget information was shared this broadly with the campus community.

STRATEGIC PLAN UPDATES

The Strategic Plan (2010-2015) is designed to shape the University of West Georgia for the next five years in such a way as to place it as a **destination university**, particularly among peer universities in the state of Georgia and among those universities in the nation granting doctoral degrees in programs that balance liberal arts education with professional preparation.

4. What are your targeted expectations by 2015 for the strategic plan?

- A. Have the annual budget information sent to each Division and on the university's website prior to July 1 of each year to aid in management decision making, enrollment planning, and academic offerings.
- B. Establish accurate and consistent revenue and expenditure reporting and monitoring to aid departments in good stewardship of the university's resources as we achieve "destination" status.
- C. Assist the office of Sponsored Research in expanding the grant and research activities of the university and maximize the use of the resources received.

5. Identify the strategic plan goals pursued by your department during this academic year:

No.	Institutional Strategic Plan Goals (SPG) (2010-15)	Check the SPG pursued	Indicate your Departmental Initiatives that correspond to applicable institutional SPG
i	Every undergraduate academic program will demonstrate a distinctive blending of liberal arts education, professional competencies, and experiential learning, preparing students to be ethically responsible and civically engaged professionals in the global economy of the 21 st century.		
ii	Every undergraduate student will be advised to take advantage of one of multiple available learning communities. Learning communities that are available to students will include communities organized by living arrangement, by year in program, by other co-curricular associations – Honors Program, Advanced Academy, Band, Athletics, Debate, or program in the major.		
iii	The University will endeavor to increase enrollment in and graduation from graduate programs, including doctoral programs, that have as their mark a practical professional purpose, experiential learning opportunities, and an intellectual program informed by a foundation of liberal education.		
iv	The University will maintain an environment that is safe and conducive to learning.	X	<ul style="list-style-type: none"> • Created new training modules for Budget and Revenue data in PeopleSoft used by the university's PeopleSoft trainer. • Co-Sponsored PeopleSoft query training for Budget Managers to personalized data reports. • Created monthly Budget Managers' meetings as a safe environment for learning and sharing.
v	The University community will provide a balanced variety of cultural, recreational, leisure, and informal education programming opportunities for faculty, staff, and students that enhance the quality of campus life.	X	<ul style="list-style-type: none"> • Each staff person participated in at least 2 campus-wide functions during the year.
vi	All units will strive to improve the compensation and working environment of faculty and staff in order to recruit and retain the best individuals.	X	<ul style="list-style-type: none"> • Began cross training initiative with Budget staff to improve opportunities for advancement.
vii	The University will endeavor to increase our overall enrollment to 14,500 by the year 2015.		
viii	With our enrollment growth, West Georgia will remain committed to the following targets of academic quality: faculty-student ratio of 18 to 1; average class size of 29; full-time to part-time faculty ratio of 4.4 to 1.		
ix	West Georgia will develop several new facilities to improve quality along with meeting capacity demands due to enrollment growth		
x	Capital Campaign: The Development Office will prepare for a capital campaign to assist in meeting the long-term needs of the University of West Georgia.	X	<ul style="list-style-type: none"> • Increase percent of staff contributing to foundation by 25%.

xi	Communication and Marketing: The Office of University Communications and Marketing (UCM) will internally and externally promote the missions and goals of the strategic plan. This will be achieved by aligning the institution's integrated marketing plan (advertising, visual identity standards, web presence, media relations, etc.) with the strategic plan.		
xii	Community Relations: The University will engage the local community educationally, culturally and recreationally.		

6. How did you measure successes/failures toward your expected goal(s)? What metrics are being used?

Timeliness of Reporting – was it completed on time, accurate, and understandable.

Customer Satisfaction Survey – although less scientific, track the level of complaints from departments regarding work product and assistance provided. Given the changes in the position management and financial system softwares, the department was not able to develop and administer a Customer Satisfaction survey.

7. Describe some notable achievements toward selected goal(s) during this academic year.

The FY2010 Operating Budget was placed on the university's website. This was the first time budget information was shared this broadly with the campus community.

8. What resources could have helped you achieve or exceed your goals for the year? How would you have used them to facilitate/improve the work of your department?

Having staff funded sooner, however, due to the change in department director and staff turnover, it would have been difficult to acquire the necessary information in a timely manner to make an intelligent and sound decision.

9. Departmental Accomplishments

Organizing Budget Managers across campus into a monthly information-sharing, advisory group for the Budget Office. Providing operating budget information to the campus community on the university website.

UPON COMPLETION

Please email completed report to the **Vice President of your Division & to:**

Institutional Research and Planning

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