

UNIVERSITY OF WEST GEORGIA
ANNUAL REPORT
Fiscal Year 2008 (July 1, 2007 to June 30, 2008)

DEPARTMENT OF Budget Services and Asset Management

Name of Department Head Patsy B. Barr
Name of Person Completing Report Patsy B. Barr

1*	Departmental Mission/Vision Statement <i>(url only, required)</i>	http:// www.westga.edu/budget/ http://www.westga.edu/budget/index_1522.php
2*	Departmental Statement of Goals, Process to Assess These Goals, and Assessment Results <i>(url only, required)</i>	http:// www.bf.westga.edu/EffectEval/Assessments/Budget.asp http://www.bf.westga.edu/EffectEval/Assessments/Asset_Management.asp
3*	Give an Example of How your Department Used the Assessment of Goals and Outcomes to Change/Improve a Process <i>(required)</i>	
	All University System Office reports including the quarterly amendments for FY08 and the original budget for FY09 were submitted on time this fiscal year. Faculty contracts and employee letters were delivered to the President's office when expected. The department has not conducted a customer satisfaction survey this year. We have used assessment tools– analyzing the average time to complete specific processes – to try to become more efficient in the processes we perform every day.	
4*	General Statement of Department Condition <i>(required)</i>	
	The Department of Budget Services and Asset Management is in good condition at this time. A new staff assistant for budget position management started in August 2007. A newly created position of assistant director was filled by Randall Rowland, a CPA, in September 2007. We have just hired an inventory specialist replacing a staff person who had been with the department for a number of years.	
	The addition of an assistant director has allowed us time to develop new and improved projection and trend models for tuition and auxiliary revenue. Using the trend model, we projected the total tuition for the year a few days after the start of fall semester allowing the distribution of surplus tuition in September rather than later in spring. This enabled the institution to make more informed decisions in hiring and purchasing using the overage.	
	The benefits of having a full time surplus manager for the year are clearly shown by the amount of surplus revenue generated in FY08, \$44,839, an increase of 240% over the previous year. Asset Management is reviewing all policies and procedures for the department in an effort to make the department more efficient and effective. We hope to add another position to the department – a person whose sole duty will be to track inventory and perform departmental physical inventory audits.	
	The department has performed the clean up functions associated with the PeopleSoft 8.9 upgrade and is in position to manage this computer conversion as smoothly as possible.	
5	Departmental Achievements	
	Tuition revenue projections were within 8% of the original budgeted amount, with the over-realization primarily from higher than expected enrollment. Mandatory fee revenue was an average of 3% above original budget.	
	Models were developed for tuition revenue projection, tuition trending, and housing revenue and expenditures. Our department assisted with the development of the 5 Year Auxiliary Plans.	
	The director was a budget analyst for the University System studying the budgets of 4 other system institutions. This work included interviews at each of the 4 institutions, analysis, and a final report of the work to the USO. The department also worked with the USO budget analyst for West Georgia.	
	The department improved several processes that led to more efficiency. We now file budget amendments in journal entry number order. Personnel Action Request forms are now filed alphabetically in 3 ring binders making research on a particular employee much more efficient.	
6	Staff Productivity	
	In two randomly selected weeks this year, the department processed 75 budget amendments with an average time to process after receipt being 3 days. The average time for Asset Management to process surplus is 5 days including time for WIC to pick up items. Personnel Action Requests are processed within an average of 2.5 days.	
7	Student Achievements	

8 Other Awards, Distinctions, and Achievements

Staff committee work included the Senate Faculty and Administrative Staff Personnel committee (FASP), the Student Activities SAFBA committee, Office 2007 Implementation Project Team, UWG Strategic Planning Committee, the Business & Finance customer satisfaction awards committee.

Three staff members attended the Lean Six Sigma for Higher Education white belt training, and two completed the green belt training. The director assisted with a presentation at Georgia Summit along with Robin Mullinix demonstrating UWG's budget development processes.

Courses and workshops attended include A to Z Grant Writing offered by Continuing Education, SACUBO workshop: Accounting Updates/financial Ratio Analysis/How to Keep Your President Off the Front Page/Strategic Resource Allocation & Assessment, Georgia Property Managers Council Conference, and Testing for PeopleSoft 8.9 upgrade in Athens. Continuing Professional Education included Microsoft Excel and Audits of State & Local Governments, and professional development of Enhancing Your Classes with Impatica.

UPON COMPLETION

Please email completed report to:

Institutional Research and Planning

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REMINDER—Include paragraph of departmental accomplishments in your email.