

ANNUAL REPORT TEMPLATE (NONACADEMIC)
FY 11

Department Budget Services

Name of Person Completing Report Elizabeth Baker

DEPARTMENTAL MISSION & ASSESSMENT

1. Departmental Mission & Goals

Departmental Mission/Vision Statement :

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]

- Provide the university community with the annual budget information prior to July 1 to aid in management decision making, enrollment planning, and academic offerings.
- 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.
- Assist the office of Sponsored Research in expanding the grant and research activities of the university and maximize the use of the resources received.

Cultivate a continuous improvement culture within the Budget Services department that promotes service excellence while achieving efficiency, effectiveness and economy.

2. Assessment Summary of Departmental Goals Addressed This Academic Year

The assessments include:

- The quality and timeliness of updates to Budget Services website for budget data.
- Number of training sessions offered.

Improvement in information sharing between Sponsored Research and Budget Services noted by fewer questions, phone calls, follow-up contacts, and the accuracy of data.

3. Changes/Improvements Made as a Result of Assessment

During the past year, the department website has improved significantly due to additional resources provided by the Vice President of Business and Finance. These efforts have positively impacted the assessment identified above by updating budget information, providing training material, and improving information sharing.

- Forms used for budget processes occurring throughout the year and the accompanying instructions are now on the website. This includes budget amendments, new department requests and personnel action requests.
- Further additions this past year include: Annual Reports; faculty contract preparation and summer faculty payroll deadlines; Budget Development calendar; department chart string information; and staff information.
- For the first time, the new-year budget data was available on the website prior to July (in May) with department-specific data distributed to Budget Managers.
- A much needed “Frequently Asked Questions” section has been added. Currently it covers Position Management and Budget information.
- The creation of a “Budget Management Tools” aid on our website just began starting with information about fringe rates and pay groups. In the future we envision it containing assistance with budget reconciliations, how-to obtain formation from PeopleSoft Financials, position management tracking, and budget monitoring.

A hands-on training lab for PARs, our most troublesome document from an accuracy stand point, is offered monthly.

The coordination of information sharing and ensuring processes are maintained and efficient is still being worked through with the transition of post-award to ORSO occurring at the end of April.

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?

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.		
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	Budget Services staff are encouraged to participate in at least 2 campus-wide functions during the year. During the past year, this included Relay-For-Life, student's First Day, Annual Fund, and numerous athletic events.
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	During FY 2011, the renovation of the second floor of Aycock Hall provided a significant improvement in the working environment for Budget Services. Staff were able to move out of "closets" and into a more collaborative and document-secure environment. Additional work spaces were provided to accommodate the growth in Budget Services.
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.		
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?

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

The creation of the "Frequently Asked Questions" section of our website is a good example. Each staff member contributed to this project re-writing answers as needed over several months. The project was developed in coordination with the campus budget managers. We've received very positive feedback.

A second achievement is the on-line PAR. Staff may now complete the form on-line and save it. The added benefit is the ability to reuse the form for changes in a person's employment without re-entering all the data—just a few of the fields need to be changed. This was created in conjunction with Payroll/ Human Resources and special assistance from Kimily Willingham in the former College of Arts and Sciences and Mellonee Blumenberg in ITS.

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?

9. Please list any changes to the structure of your department (or the substructures within your department) implemented this year.

The budget function for post-award grant activity was moved to the Office of Research and Sponsored Operations (ORSO) that now administers both pre-award and post-award grant activity.

UPON COMPLETION

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

Institutional Research and Planning

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