

ANNUAL REPORT TEMPLATE (NONACADEMIC)
FY12

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]

The goals of the Budget Services department are:

- To provide the university community with the annual budget information prior to July 1 to aid in management decision making, enrollment planning, and academic offerings.
- Maintain accurate and consistent revenue and expenditure budget monitoring to aid departments in good stewardship of the university's resources as we achieve "destination" status.
- Develop more on-line management tools for manager with implementation of I-Strategy (budget monitoring report) and ePAF (electronic position management/payroll requests).
- Continue to 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.
- Number of complaints regarding timeliness.

Number of corrections needed to budget requests

3. Changes/Improvements Made as a Result of Assessment

- University-wide budget data continues to be accessible on Budget Services website prior to July with department-specific data distributed to Budget Managers.
- The creation of a “Budget Management Tools” aid on our website has expanded significantly to include “how-tos” for accessing data and reports in PeopleSoft financials, budget reconciliation aids, and position management data.
- Monthly budget monitoring report was created for the Vice President for Business and Finance.
- Monthly budget monitoring report was created for the Auxiliary units in a “for profit” format to include monthly comparisons to prior the year.

As a result of the budget management tools provided and the continued information sharing at the monthly Budget Managers’ meetings, departmental information has been received sooner than in prior years and with less errors. Budget Services staff needed to adjust work assignments and process calendars to accommodate this unexpected good fortune particularly regarding year end close-out and new year setup which occurs simultaneously. This is a good thing!

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?

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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	With the anticipation of introducing the new ePAF electronic Personnel Action Form a new position was added to the budget staff. This allowed an advancement opportunity for current staff. Additionally, the restructuring of the Research and Sponsored Program area in the Division of Academic Affairs allowed a reclass of a budget analyst position from intermediate to senior.
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	The Office of Budget Services had 100% participation in the annual fund drive this year.
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.

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?

Implementation of the two online programs scheduled for this year (I-Strategy and ePAF) has been delayed due to insufficient IT resources available to assist with system set up, security, and testing. This resulted from several unfilled positions in the IT department.

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

The transfer of budget duties from Research and Sponsored Programs back to Budget Services and the planned implementation of two new on-line programs required restructuring in the Budget Office. Due to planned restructuring in Human Resources, a position was available to be transferred to Budget Services to assist with the ePAF on-line program. During the spring this position became vacant which allowed a restructuring of several positions with promotional opportunities for existing staff. The changes were:

- Budget Analyst Intermediate to Budget Analyst Senior to coordinate Academic Affairs budgets and grant activity.
- Budget Analyst Intermediate to Budget Program Specialist to administer ePAF system.

Departmental Assistant (HR position) to Budget Analyst Intermediate to back fill duties of change in Budget Analyst Intermediates.

UPON COMPLETION

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

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