

Annual Report 2006 - 2007

Part 1

Section A

Unit Information

Unit:

University Budget Office

Mission Statement:

The University Budget Office supports the mission of Administrative Services, and the University, by providing operational management of appropriated resources and analytical review of fiscal issues impacting the institution. The University Budget Office is charged with the oversight of the entire University Budget, and therefore will interact through teamwork at all levels of the administration. It is through this interaction that the Budget Office provides its greatest service, supporting individual units in completion of their mission through effective communication and guidance on the utilization of resources.

Section B

Unit Goals within Last Year's (2005-2006) Report

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2006-2007 goal best align?

Goal for 2006-2007

Strategic Goal 8 - On Going Quality Improvement

Expand reporting availability for budget managers

What actions have you taken to achieve this goal?

The University Budget Office in partnership with Information Systems has delivered position and rate reports to budget managers delivered with each payroll, in an electronic format. Additionally, budget reports have been made available to budget managers in COGNOS for use.

What measures have you taken towards assessment of this goal?

By the successful delivery of new reports and by collecting feedback on their effectiveness

Describe the progress you have made toward attaining this goal including the anticipated completion date.

Delivery of new information sources is never truly complete, but we consider that development of these reports provides an upgrade in services.

Describe how the results of assessments have been used to improve student learning or your department's activities.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2006-2007 goal best align?

Goal for 2006-2007

Strategic Goal 8 - On-going quality improvement

Continue development and delivery of on-line budget transfers

What actions have you taken to achieve this goal?

Completed the roll out of on line budget transfers to the majority of the budget managers.

What measures have you taken towards assessment of this goal?

Through the completion of budget transfer schedule as defined in the project plan.

Describe the progress you have made toward attaining this goal including the anticipated completion date.

The delivery of the service to the customer is by definition attainment of the goal.

Describe how the results of assessments have been used to improve student learning or your department's activities.

With more budget managers able to process routine changes in their budget, the Budget Office is able to focus on more value added activities.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2006-2007 goal best align?

Goal for 2006-2007

Strategic Goal 8 - On-Going Quality

Expand report development knowledge within the budget office on the new reporting system.

What actions have you taken to achieve this goal?

The Coordinator of University Budgets has been immersed in report development and training since the start of the year.

What measures have you taken towards assessment of this goal?

By logging training and practice hours in order to realize the amount of effort being exerted

Describe the progress you have made toward attaining this goal including the anticipated completion date.

There is no "end date" to this goal, so success is measured more by general utilization of the reporting tool and level of comfort amongst the staff.

Describe how the results of assessments have been used to improve student learning or your department's activities.

Through the training, we have been able to convert some reports to the new reporting format, and create new reports not previously available.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2006-2007 goal best align?

Goal for 2006-2007

Strategic Goal 8 - On-Going Quality

Expansion of services

What actions have you taken to achieve this goal?

This goal was developed contingent upon the funding of a new person to handle tasks that would allow for more services within the office. The funding for such did not materialize.

What measures have you taken towards assessment of this goal?

The construction of the new position description and the changes to current staff position descriptions will detail the new and modified duties assigned.

Describe the progress you have made toward attaining this goal including the anticipated completion date.

The measurement of this goal is derived from new services not previously offered.

Describe how the results of assessments have been used to improve student learning or your department's activities.

Strategic Plan Goal

Unit Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2006-2007 goal best align?

Goal for 2006-2007

Strategic Goal 8 - On-Going Quality

Redesign procedures and budget management documentation

What actions have you taken to achieve this goal?

Created new training manuals and other materials to support new processes and budget management as now currently defined.

What measures have you taken towards assessment of this goal?

The first assessment is to determine if by year end the current documentation in place is current. Secondly, there needs to be a determination of whether or not all applicable processes are documented, and have those items accounted for.

Describe the progress you have made toward attaining this goal including the anticipated completion date.

The goal is not complete, as a large number of items are still in need of update. However, the critical day to day operations have been addressed in training and other vehicles.

Describe how the results of assessments have been used to improve student learning or your department's activities.

Section C

Program or Service Specific Assessments

What program or service specific assessment occurred in the current academic year?

How were the results of the assessment used to improve programs or services?

Section D

Unit Contribution or President's Performance Measures

Please review the [President's Performance Measures for 2006-2007](#). Did your unit contribute to any specific performance goals for the President? (If so, please indicate whether the measure set was attained and to what degree.)

The University Budget Office, through its management and counsel, contributed to the expected completion of the fiscal year with a balanced budget. The measure is to whether or not the budget stayed within the tolerances and parameters as defined by the Board of Trustees.

Part 2

Section A

Unit Goals for Coming Year (2007-2008)

Strategic Plan Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2007-2008 goal best align?

Strategic Goal 7 - Community Leadership

Unit Goal

Goal for 2007-2008

Marketing of University logo merchandise in retail establishments in Southwest Florida.

What action(s) will you undertake to achieve the goal?

Initiate and Request for Proposal or other such instrument to identify partners to manage our logo and marketing operations.

By what means will you assess goal achievement?

The selection of a partner and the availability of product in the general marketplace, done within a plan as defined.

How will you know if you have successfully attained each goal?

When we are able to witness University merchandise in the area.

How will the results of the above assessments be used to improve student learning or services?

Strategic Plan Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2007-2008 goal best align?

Strategic Goal 8 - On-Going Quality

Unit Goal

Goal for 2007-2008

Convert budget reports to the new reporting environment.

What action(s) will you undertake to achieve the goal?

Coordinate the migration of basic budget office reports to the COGNOS environment. This will ensure continued report availability as software and technology change.

By what means will you assess goal achievement?

When the ability to provide basic reporting and Board of Trustee reporting is available in the new environment.

How will you know if you have successfully attained each goal?

If we are able to complete the task by end of year.

How will the results of the above assessments be used to improve student learning or services?

Strategic Plan Goal

With which 1 or 2 goals from the 8 current strategic plan goals does your 2007-2008 goal best align?

Strategic Goal 8 - On-Going Quality

Unit Goal

Goal for 2007-2008

Update budget management documentation

What action(s) will you undertake to achieve the goal?

Update all web based policy and procedures to reflect new environments and changes in University practice.

By what means will you assess goal achievement?

Verification that all references to old business methods have been eliminated.

How will you know if you have successfully attained each goal?

If all such documents are completed by the end of the year.

How will the results of the above assessments be used to improve student learning or services?

Section B **Resources**

What additional resources have you requested and received a commitment for during 2007-2008 from your area VP or the President that is based on your analysis of assessment data for 2006-2007?

Additional travel funds and OPS support to expand services. However, fiscal reality will probably prevent realization of these resources.

Section C

Assessment Plans

What assessments are you planning to conduct during 2007-2008?

Section D

Coming Year - Strategic Plan Contributions

The University Budget Office will contribute to the balanced budget, and provide fiscal management and analysis in an number of areas. All of which contributes to many goals on campus.