

Annual Report 2007 - 2008

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 (2006-2007) Report

Strategic Plan Goal

Unit Goal

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

Goal for 2007-2008

Strategic Goal 7 - Community Leadership

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

What actions have you taken to achieve this goal?

Initiated the process of developing an RFP or ITN as appropriate. This has entailed research of not only how to conduct the process of a proposal, but given its unique nature seeking information from other institutions on how best to market brands off campus. The attempt is to enter into an agreement with a marketing firm to manage our logo merchandising

What measures have you taken towards assessment of this goal?

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

Fall 2008 is the expected completion date. By that time, it is anticipated an agreement will either be reached or close at hand. Additionally, a current manufacturer of logo merchandise is working towards the distribution of our logo merchandise in local sporting goods stores where apparel is commonly available.

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 2007-2008 goal best align?

Goal for 2007-2008

Strategic Goal 8 - On-Going Quality

Convert budget reports to the new reporting environment.

What actions have you taken to achieve this goal?

With assistance from report experts in Finance and Accounting, several reports are either operational or in test mode to be implemented.

What measures have you taken towards assessment of this goal?

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

Translation of reports have occurred, and are available to end users. Reports for use by the Budget Office are developed, and need to be tested. However, the need to maintain our current reporting tool for other needs has slowed the need to complete this project, allowing time to be utilized elsewhere.

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 2007-2008 goal best align?

Goal for 2007-2008

Strategic Goal 8 - On-Going Quality

Update budget management documentation

What actions have you taken to achieve this goal?

Refined certain budget reports, and initiated Self-Service Budget Development

What measures have you taken towards assessment of this goal?

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

Created new report tools for reporting to the Board of Trustees, audit controls, etc. Additionally, developed the Budget Development process to archive and store all budget request information.

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

The results have lead to stronger fiscal control on reporting and posting of the budget.

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 2007-2008](#). 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.)

Goal VIII: On-going Quality. The University ended with a budget that is in line with the allocation and authority granted by the UBOT.

Part 2

Section A

Unit Goals for Coming Year (2008-2009)

Strategic Plan Goal

Unit Goal

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

Goal for 2008-2009

Goal 8: On-Going Quality

Streamline the process of new account request.

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

Research and develop a defined process to handle the creation of new account (FOAPAL) strings in the chart of account. The current process at time has gaps, and needs some structure

By what means will you assess goal achievement?

If an improved process is in place.

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

Based upon few incidences of request being delayed or lost.

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

Strategic Plan Goal

Unit Goal

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

Goal for 2008-2009

Goal 8: On-Going Quality

Development of a "Budget Manager's" manual

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

Collate and assemble all current training tools, information, etc. into one manual to be made available to budget managers on campus. The intent is to provide a reference tool that is available at any time.

By what means will you assess goal achievement?

The creation of the manual.

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

When it can be made available, and is utilized by departments.

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

Strategic Plan Goal

Unit Goal

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

Goal for 2008-2009

Goal 8: On-Going Quality

Update Policy and Procedures

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

Review current documentation and update accordingly.

By what means will you assess goal achievement?

When any references to outdated or altered practices are removed.

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

When the update for the year is complete, and review indicates it is current with our practices.

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 2008-2009 from your area VP or the President that is based on your analysis of assessment data for 2007-2008?

None.

Section C

Assessment Plans

What assessments are you planning to conduct during 2008-2009?

Section D

Coming Year - Strategic Plan Contributions