

# SUNY Potsdam Administrative Unit Assessment Plan

**Administrative Unit: Budget**

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**Mission Statement:** SUNY Potsdam's Budget Office is responsible for developing and updating the College's state operations, income fund reimbursable, and dormitory income fund reimbursable budgets. We do this work in order to make budgeting at the project manager level a task that is easier, as well as easier to understand. In its advisory capacity, the Budget Office provides background information and performs ongoing analyses of the College's financial standing so that College leadership can make informed decisions regarding existing financial priorities and new initiatives. Finally, and perhaps most importantly, the Budget Office monitors spending and coordinates with Purchasing & Payables to identify trends, implement SUNY System controls, and keep the lines of departmental communication open so that the budgeting process improves with each fiscal and academic year.

Goals	Desired Outcomes/Objectives	Assessment Methods and Targets
1. Increase resource use transparency.	<ul style="list-style-type: none"> <li>A. A Budget-Focused, Campus-Based and Secure Website That is Updated Regularly.</li> <li>B. Monitoring of Usage Statistics to Determine Whether Web Site Needs Additional Advertisement on Campus.</li> <li>C. Preliminary Work on a General Financial Health Dashboard or Dashboards.</li> <li>D. Campus-Wide Trainings on Business Intelligence.</li> </ul>	<ul style="list-style-type: none"> <li>A. Comments and Feedback from Users from the Budget Website Email Link.</li> <li>B. Collection and Analysis of Usage Statistics.</li> <li>C. Progress on Financial Health Dashboards Monitored Via President's Council and Budget Office.</li> <li>D. Collection and Analysis of Training Attendance Statistics.</li> </ul>
2. Increase positive communications with all levels of faculty and staff.	<ul style="list-style-type: none"> <li>A. Decrease Turn-Around Time Between Receipt of Financial Information Requests and Response to Requests.</li> <li>B. Establish Budget Meetings with Department Heads, Deans, and VPs.</li> <li>C. Maintain an Open Line of Communication About Any and All Major Budget Events with 7<sup>th</sup> Floor to Facilitate Proactive and Coordinated Communications Campus-Wide.</li> </ul>	<ul style="list-style-type: none"> <li>A. Informal Survey of All Analysts, VP, and Director of Business Affairs to Determine Turn Around Times.</li> <li>B. Review of Calendar Data and Notes Regarding Budget Meetings for 15-16.</li> <li>C. Review of Calendar Data and Email Tracking Major Communications with 7<sup>th</sup> Floor Faculty and Staff.</li> </ul>

3. Increase involvement in strategic planning activities on campus.	A. Office Presence at All Major Campus Planning Events.	A. Review of Calendar Data.
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