

# 1. Assessment Plan - Four Column



## PIE - Administrative Services: Fiscal Services Accounting Unit

<i>Unit Goals</i>	<i>Resources Needed</i>	<i>Where We Make an Impact: Closing the Loop on Goals and Plans</i>
<p><b>Customer Service</b> - To provide excellent customer services <b>Status:</b> Active <b>Goal Year(s):</b> 2016-17, 2017-18, 2018-19 <b>Goal Entered:</b> 06/01/2017</p>		
<p><b>Fiscal Independence</b> - To maintain Fiscal Independence Status <b>Status:</b> Active <b>Goal Year(s):</b> 2016-17, 2017-18, 2018-19</p>		
<p><b>Updating Fiscal Service Website</b> - To update the Fiscal Services Website to include FAQ. This will include basic information or desk reference for the college campus to use at any time. This will provide better customer service. <b>Status:</b> Active <b>Goal Year(s):</b> 2017-18 <b>Goal Entered:</b> 06/15/2017</p>		
<p><b>Professional Development</b> - Provide Microsoft Access and ARGOS Training to the Fiscal Specialist. This will improve the ability to establish an Access database and generate ad hoc reports (2015-16). Fiscal Services Department is</p>		

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collaborating with Professional and Organizational Development. The plan is to start with a small pilot group to create reports in Access.

**Status:** Inactive

**Goal Year(s):** 2015-16

**Goal Entered:** 06/15/2017

**Date Goal Archived/Inactivated:** 06/30/2017

**Professional Development-Cross-training**

- Continue promoting training and cross-training for all Fiscal Services areas to enhance employee knowledge, which will increase productivity, encourage collaboration and personal growth (2015-16).

Fiscal Services will continue promoting training and cross training for all Fiscal Services staff.

**Status:** Active

**Goal Year(s):** 2015-16, 2016-17, 2017-18, 2018-19

**Goal Entered:** 06/14/2017

**Federal Grants changes to OMB A-133**

- 2015-2016-Training to assess Time and Effort certification process as a result of changes to OMB A-133. This is a mandate for federal grants (2015-16).

2016-2017-The Budget Specialists and managers attended an Office Management and Budget Uniform Administrative Requirements Cost Principles and Audit Requirements for Federal Awards (OMB Supercircular) workshop.

2017-2018-Write procedures on Federal grants requirements from

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when the Grant is received to closing the grant. This project would be in conjunction with the Grants Office. Part of the new regulations are to have written instructions. It will also be a great tool for new staff to come.

**Status:** Active

**Goal Year(s):** 2015-16, 2016-17, 2017-18

**Goal Entered:** 06/14/2017

**Develop Procedures** - To develop Internal and external procedures to improve efficiencies and collaboration

**Status:** Active

**Goal Year(s):** 2015-16, 2016-17, 2017-18, 2018-19

**Goal Entered:** 06/15/2017

**Fixed Assets Reports** - To create a report that can combine all date into one form for Fixed Assets tracking. This will aide in the tagging of commodities as they are received. It will also aide in the reconciliation of our assets. It will help with the College inventory if all assets are tagged and updated properly. It will also help identify assets that should be capitalized or not.

**Status:** Active

**Goal Year(s):** 2017-18, 2018-19

**Goal Entered:** 06/15/2017

**Budget Query through Banner self Services** - Implement Banner self service on-line budget queries. As a result of the on-line budget transfer implementation with a full year's worth of data in the system, Fiscal

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Services will develop a training guide for campus users. This would allow users to access and review their budgets on-line, rather than having to log on to the Banner system. This would also allow campus users to have full access to view their budget and process budget transfers on campus, as well as off site (2015-16).

Online Budget transfer went live in Fiscal year 2015-16.

Some budget managers do go on-line to check their budget. They find it more user friendly than Banner INB. However, procedures and training has not been developed. This would help current and new managers.

**Status:** Inactive

**Goal Year(s):** 2015-16

**Goal Entered:** 06/15/2017

**Date Goal Archived/Inactivated:**  
08/09/2018