

Administrative, Educational and Student Support Units
Annual Assessment Findings Report

Directions: Use content from your 5-Year Assessment Plan, and data collected and analyzed to complete the Annual Assessment Findings Report for the corresponding year. Submit report electronically to aess@york.cuny.edu.

Assessment Year: 2018-2019

Division: Administrative Affairs

Unit: Budget Office

Date: August 5, 2019

Completed by: Ismael Perez

Other contributors (e.g., person who analyzed data): [Click here to enter text.](#)

Unit Mission: The Office of Planning and Budget efficiently and effectively plans and manages the budgetary resources of York College to optimize resource utilization in support of instruction, research and student development activities. We serve our constituents through the Budget Office, Bursar Office, Business Office, and Purchasing.

1. Record each goal, corresponding outcome(s), measure(s), the target(s) of success, and if applicable, the student ILO(s). For each outcome listed above, describe the conclusions, significance and implications of the data collected for the assessment year indicated above (e.g., 2018-2019). Describe the results in comparison to the target of success, and if applicable, the student ILO(s) identified prior to data collection. What is your interpretation of the results?

Remember to use information from your approved 5-Year Assessment Plan.

Goal(s)	Outcome(s)	Student ILOs (if applicable)	Measures and Target of Success	Analysis, Findings, and Use of Results
Goal 1. Provide accurate, timely, and reliable financial information to support optimal decision making.	Departments will have final budget allocations upon approval of the financial plan by the University Budget Office.		15 business days turn around allocation notification.	In FY2019, the Financial Plan was not formally approved. Conversations between the University Budget Office and York College administration have been ongoing.
Goal 2. Develop and oversee the execution of a comprehensive	Obtain approval from the City University of		University approval of Financial Plan	In consultation with the Executive Cabinet and after review by the Senate Committee on Resources,

Goal(s)	Outcome(s)	Student ILOs (if applicable)	Measures and Target of Success	Analysis, Findings, and Use of Results
financial strategy for the College.	New York of a financial plan that supports Strategic Planning goals.			The Office of the Budget submitted the York College Financial Plan in September, 2018. We subsequently submitted 2 additional iterations based on UBO comments.
Goal 3. Maximize return on investment and expand revenue sources.	3.1. Create the Revenue Generating Committee.		Administrator approval	Obtained President's approval for the creation of the Revenue Generating Committee (RGC). Communicated to members, set meeting schedules, completed deliverables.
	3.2. The Revenue Generating Committee will create a system for stakeholders to submit proposals.		A system to submit proposals	Developed a system to submit proposals to the RGC, via a newly-created email address and website. These were communicated to the College Community via News blast and discussions in public forums
	3.3. The College will achieve a surplus revenue over expenditures		Reserves equal to 0 .5% – 1% of revenues	Submitted a final report to the President on May 31, 2018 for review and comment. Report is currently awaiting review by the President.
Goal 4. Support and guide the efforts for an improved customer service experience across all Financial Planning and Budget Units.	Campus community members who interact with Office of Financial Planning and Budget, Budget Office, Bursar Office, and Business Office		75% of survey participants will report satisfaction.	The Office of the Bursar completed a survey of third party vendors. According to those who responded, 100% of the vendors were satisfied and agreed their invoices were received within 30 business days

2. Action Plan. Using information from the Analysis, Findings, and Use of Results section above, what steps will you take to ensure recommended changes will be implemented and sustained? If no changes are being recommended, provide an explanation with supporting evidence. *(Add additional rows for outcomes, as needed by copying and pasting the appropriate outcome textbox. You may delete any unneeded textboxes.)*

Outcome 1.1 Departments will have final budget allocations upon approval of the financial plan by the University Budget Office..

Recommended changes: No change, once the FY20 financial plan is approved, departments will receive final budget allocations within 15 business days

Outcome 1.1 Obtain approval from the City University of New York of a financial plan that supports Strategic Planning goals.

Recommended changes: A draft FY20 plan was submitted on September 30th to the UBO for review. A final plan will be submitted on October 11th. Approval is expected.

Outcome 1.1 Create the Revenue Generating Committee

Recommended changes: No change. Committee has met and delivered its report to the President for review.

Outcome 1.1 The Revenue Generating Committee will create a system for stakeholders to submit proposals.

Recommended changes: No change. Completed

Outcome 1.1 The College will achieve a surplus revenue over expenditures

Recommended changes: We await guidance from the University regarding the submission of our financial plan.

Outcome 1.1 Campus community members who interact with Office of Financial Planning and Budget, Budget Office, Bursar Office, and Business Office

Recommended changes: Continue to utilize surveys and other instruments to assessment student and staff satisfaction with services provided

3. Communicating Results: Describe how you communicated assessment results, recommendations, and changes to appropriate stakeholders (e.g., staff, supervisor, students).

The results of the submission of the financial plan was shared throughout various meetings across campus including the Senate, P&B, Committee on Resources, the Executive Cabinet and Directors in addition to the VP of Administration and Finance

The results from the online survey have been shared during departmental staff meetings.

4. Action Taken: Describe how you used the results from last year to inform your action this year. Narrative should include **action(s) taken or changes implemented** as identified by assessment activities completed (i.e., closing the loop). Indicate when the changes were implemented and when they will be reassessed to see if they helped to improve support outcomes (SOs) and/or student learning outcomes (SLOs).

Prior years' financial results are always utilized as the basis of the preparation of the following years' financial plans. Financial results are analyzed to understand trends, identify areas of inefficiency or over spend, review rate of collections and monitor inflows and outflows in order to develop a financial plan that is comprehensive and in line with prior results.

5. Achievement Summary: York College is excited to hear about what is going well! Share your unit's proudest accomplishments for this assessment period.

The creation of a Revenue Generating Committee and subsequent report of 20 short and long term ideas that may help the college generate revenue in the future.

The completion and submission of a timely financial plan which included a narrative on how York can reach its goals.

6. Assessment Plan Year 2019-2020: Briefly outline the assessment plan for next year. Explain any revisions you will need to make based on results (e.g., revision in outcomes, target for success, measuring instrument). Attach an updated 5-Year Assessment Plan for your unit. (Remember to revise the years.)

The Year 2 assessment plan will be similar to year 1. It is our expectation that a financial plan is approved by the UBO. We will develop a thorough communications and review process to ensure stakeholders have greater input into the development of the plan.

7. Annual/Special Reporting (optional): Highlight accomplishments directly related to how assessment activities in your area contributed to the mission of the division and the College-- not assessed elsewhere, but related to operational effectiveness.