Budget Services
Assessment Report, 2012

Expected Outcomes: Effective and efficient use of web-based budget systems

Enhancement of existing systems to streamline processes to be more efficient with budgeting

Assessment Methods:

Method: Budget contact interviews

The budget office conducted interviews with 50% of its college/unit contacts to assess the performance of the budget system and processes. Specific questions asked were: “What enhancements to the budget development tools would be beneficial to each area?” and “What changes could be made to improve our balancing processes?”

Findings:

College contacts expressed an interest in an efficiency measure of being able to upload salary recommendations into Salary Planner to reduce the amount of time required inputting salary information as well as reduce the likelihood of errors due to manual entry. In addition, personnel expressed an interest in making a modification to balancing reports to include the names of the people on each position. This would provide them information to identify, more quickly, the appropriate changes to be made.

How did you use findings for improvement?

Budget Services took advantage of a new add-on feature of Banner (our financial and human resource record system) that would take salary increase information and upload it to Salary Planner (another component of Banner) that is used in budget development. In prior years, all entries were made by the colleges and VP areas on campus, manually inputting each individual salary increase. Some of our larger units on campus (Engineering, Facilities, Library, Vet Med, and Cooperative Extension System) required as much as 8 hours of manual data entry to completely enter all salary increase information. To be more efficient, as salary increases are approved, Budget Services takes the increase information, copies to an import template (provided through Salary Planner) and uploads the information in approximately 5 minutes. It is expected that that the use of a computer-generated process will eliminate any data entry errors that may have existed prior to this upload procedure.

In addition, balancing reports were changed to reflect individual names for positions. Our measurement of the effectiveness of this implementation will be to determine how much less time areas spend researching the employees tied to the position numbers.
Expected Outcomes: Use of the Banner system to its fullest capabilities

Due to the complexities of the system, training and education are a big component of making sure the system meets the needs of its users.

Assessment Methods:

Method: User interviews and data collection

The budget office conducted interviews, over the course of the year, with approximately 50 people as well as kept phone logs of calls of issues that users were having.

Findings:

Interviews revealed that after instruction, there is not adequate retention of the material discussed in training due to irregular use of the system as well as the lecture format instead of hands-on training. Large class sizes of approximately 20 also tend to dissuade interaction with the instructors, which don’t allow us to assess the user’s understanding of the material discussed. One of the things also discussed in the interviews was a need for more targeted training for a subset of employees (Directors/Department Heads/ Chairs/ Faculty as PI’s for contracts) that would be shorter in length.

How did you use findings for improvement?

We implemented a new class for just this subset of employees and limited it to 1 hour (as opposed to the normal 3 hour class) in order to touch on the broad topics and a general overview of how to use the system from a budget point-of-view. In the first year, approximately 20 people took advantage of the course.

We are targeting the use of more one-on-one or small group training (no more than three). In addition, we plan to reduce our normal class size by half to 10, and train with computers, using more examples related to the users’ personal situation. In both cases, this will promote an environment where questions will be asked, which will allow us to better assess user understanding.