

Q1. 2021 Unit Assessment Plan

Complete the GCU Unit Assessment Plan with three goals aligned with GCU's Mission and Strategic Compass. See the template within the University Assessment Plan on the GCU Assessment webpage. You can repeat your previous assessment plan if it is still valid.

Unit Assessment Plans are due February 28.

Q2. Name of Administrative Unit

Budgeting/Financial Planning/Purchasing

Q3. Name of the person completing this report. (Last, First)

Burdsall, Dawn

Q4. Email address of person completing this report.

dburdsall@georgian.edu

Q5. To which Cabinet Member does this unit report?

- President
- Provost
- Executive Director for Mission Integration
- Vice President Finance and Administration
- Vice President Institutional Advancement
- Exec. Director of Marketing and Communication
- Vice President for Enrollment & Retention
- Other, (please specify

Q6. This plan is based on the following year type selection:

- Calendar Year (January-December)

- Academic Year (September-August)
- Fiscal Year (July-June)
- Other

Q7. State Goal 1 for your administrative unit.

Enhance Budget and Financial Planning function at GCU. (2021-22)

Q8. State the Outcomes for Goal 1.

- 1.1
a. Hire appropriate staffing (Sr Budget Analyst and Budget Analyst) by 12/31/21.
- 1.2
b. Add and train additional users on the BudgetPak software by 02/28/22. Number of users will be dependent upon requests from GCU community.
- 1.3
c. Implement Position Control to better monitor salary budget by 04/15/22.
- 1.4
- 1.5
- 1.6

Q9. State Goal 2 for your administrative unit.

Continue on goals of past plan to develop strategic purchasing function (2022-23)

Q10. State the Outcomes for Goal 2.

- 2.1
a. Review current purchasing and related policies. Ensure all published policies are up to date/consistent and are disseminated appropriately.

- 2.2
b. Perform outreach to university community to remind and educate them of policies related to purchasing in general, and specifically, related to the purchasing card (AMEX) and travel.
- 2.3
c. Review current vendor contracts, prepare summary of terms, and determine any adjustments as necessary.
- 2.4
d. Maintain partnerships with current and potential vendors by periodic outreach.
- 2.5
- 2.6

Q11. State Goal 3 for your administrative unit.

Implement capital and multi-year budgeting at GCU (2023-24)

Q12. State the Outcomes for Goal 3.

- 3.1
a. Determine mechanism (hopefully, ERP system) and process for these 2 new budgeting models
- 3.2
b. Education university community
- 3.3
- 3.4
- 3.5
- 3.6

Q13. Give the Mission alignment for unit assessment goals. Check all that apply.

	Goal 1	Goal 2	Goal 3
Georgian Court University, founded by the Sisters of Mercy of New Jersey in 1908 and sponsored by the Sisters of Mercy of the Americas since January 2007, provides a comprehensive liberal arts education in the Roman Catholic tradition.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The university has a special concern for women and is a dynamic community committed to the core values of justice, respect, integrity, service, and compassion, locally and globally.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Georgian Court provides its students with a curriculum broad enough to be truly liberal, yet specialized enough to support further study and future careers.

Georgian Court provides students with an environment for the entire university community to grow through shared educational, cultural, social, and spiritual experiences.

Georgian Court provides students with the will to translate concern for social justice into action.

No direct alignment with Mission.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Q14. Give the alignment with the GCU Strategic Compass Point (s) for your unit assessment goals. Check all that apply.

	Goal 1	Goal 2	Goal 3
Compass Point 1: Mission Fulfillment through Academic Excellence.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compass Point 2: Mission Fulfillment through an Exceptional Student Experience.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compass Point 3: Mission Fulfillment through Revenue Generation and Diversification.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compass Point 4: Mission Fulfillment through Operational Efficiency and Utilization.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
No direct alignment with the Strategic Compass.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q15. Please select the directive(s) aligned with your goal(s) for Compass Point 1: Mission Fulfillment Through Academic Excellence. (check all that apply)

This question was not displayed to the respondent.

Q16. Please select the directive(s) aligned with your goal(s) for Compass Point 2: Mission Fulfillment Through Exceptional Student Experience. (check all that apply)

This question was not displayed to the respondent.

Q17. Please select the directive(s) aligned with your goal(s) for Compass Point 3: Mission Fulfillment Through Revenue Generation and Diversification. (check all that apply)

This question was not displayed to the respondent.

Q18. Please select the directive(s) aligned with your goal(s) for Compass Point 4: Mission Fulfillment Through the Operational Efficiency and Resource Utilization. (check all that apply)

	Goal 1	Goal 2	Goal 3
4.1 Develop a collaborative financial strategy for the next three years that integrates the strategic enrollment and academic plans. These plans will be supported by Capital and Leased space development programs and the integration of the Facilities Conditions Assessment.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4.2 Develop a plan that re-imagines the campus to make efficient and effective use of physical spaces on campus, inclusive of renewal and replacement programs.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4.3 Develop the Campus Master Plan and a Strategic Technology Master plan to support campus operations and expand satellite and virtual academic sites.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.4 Enhance and expand efficient process improvement programs to provide more supportive operations and efficient campus operations and workflows.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Q19. With which MSCHE (Middle States Commission on Higher Education) Standard are your unit assessment goals aligned. Try to limit your response to the primary area of alignment.

	Goal 1	Goal 2	Goal 3
Standard I. Mission and Goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard II. Ethics and Integrity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard III. Design and Delivery of the Student Learning Experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard IV. Support of the Student Experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard V. Educational Effectiveness Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard VI. Planning, Resources, and Institutional Improvement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard VII. Governance, Leadership, and Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am not sure which Standard to choose	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Applies to all Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q20. What metrics will be used to measure results of Goal 1?

Metrics: 1a: Were the positions filled? 1b: # of users added and trained is dependent upon requests from division head (Pres/Provost/VP) 1c: University full time positions are accounted for in the system

Q21. What metrics will be used to measure results of Goal 2?

2a. All related documents are accurate and appropriate venues of distribution identified (email, website, training sessions) 2b. Employees are surveyed to regarding effectiveness of education/training. 2c. Prepare list of contracts 2d. Ensure that contact is made with vendors; survey vendors regarding relationship with the university

Q22. What metrics will be used to measure results of Goal 3?

3a. Prepare document explaining new budgeting policy, process, and procedures 3b. Training session is held and end users surveyed as to understanding of the process

Q23. What will be the benchmark for successfully meeting Goal 1?

1a. 100% of people are hired 1b.100% of individuals requested are added and trained 1c.100% of FT employees are accounted for in Position Control

Q24. What will be the benchmark for successfully meeting Goal 2?

2a. 100% of identified venues contain published documents 2b.Over 80% of survey respondents are satisfied with knowledge and understanding of the policies 2c.100% of contracts identified and summarized 2d.Contact should be made at least 1 time per year with all contracted vendors Over 80% of survey respondents are satisfied interaction with university

Q25. What will be the benchmark for successfully meeting Goal 3?

3a. Process is clearly defined and documented. 3b. Over 80% of survey respondents are satisfied with knowledge and understanding of the policies

Q26. Name the person(s) responsible for Goal 1.

Assistant Vice President for Finance and Administration

Q27. Name the person(s) responsible for Goal 2.

Purchasing Coordinator

Q28. Name the person(s) responsible for Goal 3.

Assistant Vice President for Finance and Administration

Q29. In which year will Goal 1 be assessed?

Note: Data is collected annually, but analysis is done on a three-year cycle, one goal per year.

- Year 1
- Year 2
- Year 3

Q30. In which year will Goal 2 be assessed?

Note: Data is collected annually, but analysis is done on a three-year cycle, one goal per year.

- Year 1

Year 2

Year 3

Q31.

In which year will Goal 3 be assessed?

Note: Data is collected annually, but analysis is done on a three-year cycle, one goal per year.

Year 1

Year 2

Year 3

Q32. Are there any additional comments you would like to add to this report?

Location Data

Location: [\(39.92170715332, -75.287002563477\)](#).

Source: GeoIP Estimation

