



Planning and Evaluation Tracking

College Year: 2009-2010

Division of: Dean of Financial & Administrative Services

Person Responsible: Terry Berg

Department of: Budget (Associate Dean of Finance)

Person Responsible: Theresa Rider

Purpose Statement: Responsible for financial records of the College in accordance with the fiscal policies adopted by the Board of Regents and external regulatory agencies

This division had a reorganization 9/1/09.

Goals 3 & 4 were taken from Accounting & Budget PET form from 2008-09 and are listed as Goals 1 & 2 on this form

Goal Statements	Objectives/Outcomes (including assessment tools and standards)	Results	Use of Results (including improvements and revisions)
1. Provide accurate financial information in a timely manner	1.1 Provide accurate and helpful information to AC employees as measured in the Customer Satisfaction Survey-Goal of 4.0 This objective was taken from 2008-09 Accounting & Budget Pet Form-Only Budget information is being used in 2009-10	1. 2008-2009 55% N= 111 of 200 Rating on Jan. 2009 survey was 4.3 for questions relating to budget 111 of 200 surveys were completed Prior Survey 2007 Rating on Jan. 2007 survey was 4.3	1. 2008-2009 2008-2009 ANALYSIS The results of the survey were consistent with the prior survey and overall goal of 4.0 was met for questions relating to budget PLAN OF ACTION/ RECOMMENDATIONS for 2009-2010 Next survey will be done in January of 2011

	<p>1.2 After providing Colleague Budget Training, Budget Officers and/or their Assistants will indicate a satisfaction score of 4 or above on session evaluation</p>	<p>2008-2009 26 Employees attended 4 training sessions Overall evaluation rate was 4.81</p> <p>2007-2008 49 AC employees participated in the 4 budget training sessions An overall evaluation rate was 4.59</p>	<p>The overall satisfaction rate increased by .21 23 fewer employees attended the training sessions</p> <p>PLAN OF ACTION /RECOMMENDATIONS for 2009-10 Continue to offer the training sessions-especially the one-on-one budget help sessions</p>
<p>2.External Audit has no material exceptions</p>	<p>2.After following all THECB AFR requirements all Accountants will prepare AFR schedules correctly and accurately 100% of the time and obtain an external audit with no material exceptions as documented by Annual Financial Report (AFR).</p>	<p>2.2008-2009 100% N= 1 of 1</p> <p>Including this year, there have been 7 audits with no findings in the general accounting area. Prior to that we had 1 finding in 2002, 3 findings in 2001 and 4 findings in 2000.</p>	<p>2.2008-2009 ANALYSIS</p> <p>Continue as is</p> <p>Having a clean financial audit is important to the operation of Amarillo College since the audit is used by various entities including grant applications and bond rating hearings</p>

3. New Goal

Provide budget planning documents that are more clear for those preparing to submit a budget

3. After preparing the budget instructions for 2010-11, set up a focus group to review the instructions for clarity as documented by log kept during time of putting budgets into colleague

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revised 8/1/05