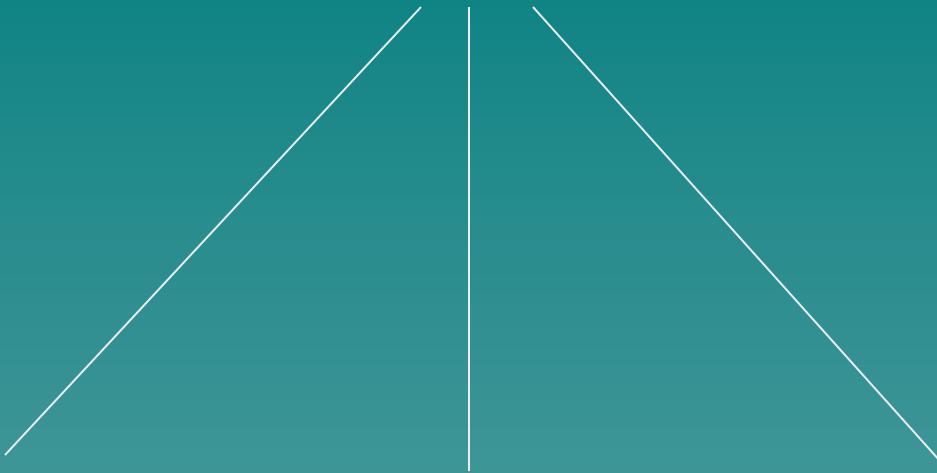


# Departmental Budgeting, Annual Reports and Outcome Assessment

By  
Glenn Cunningham, Ph.D.  
Professor, Chemistry Department  
UCF

# FISCAL MANAGEMENT



Planning

Monitoring

Flexibility

# BUDGET PLANNING

- ◆ Good Data on Past Expenses
- ◆ Review Strategic Plan for New Programs
- ◆ Special Commitments



# BUDGET PLANNING

- ◆ What are the likely limitations?
- ◆ What if there is a decrease in funding from the previous year?
- ◆ What if more funds become available?



# BUDGET PLANNING

- ◆ What are the department priorities?
- ◆ How do we handle emergencies?
- ◆ Documentation for all planned purchases.
- ◆ Faculty and Staff input is critical.

# Relationship of Chairs with the Dean and the Deans Budget Office

- ◆ Trust
- ◆ Responsibility
  - Need
  - Justification
  - Monitoring

**COLLEGE OF ARTS & SCIENCES  
NON-SALARY ALLOCATION  
2004-2005**

**CHEMISTRY**

*Please complete the form below:*

**2004-2005 Non-Salary Allocation Request**

**CAS Plan for 2004-2005:**

Description	Amount
CAS Non-Salary Base Allocation	
CAS New Adjustments	
Graduate Commitment	
Phased Retiree	
Startup	
<b>Subtotal:</b>	

**CAS NON-SALARY  
DISTRIBUTION**

Operations	OPS
<b>Subtotal:</b>	

**Other Funding Sources for 2004-2005:**

Description	FY 03-04 Revenue Generated	Projected Amount for FY 04-05
Honors		
Material & Supplies (Lab Fees)**		
Overhead		
Auxiliary		
AA New Program Startup		
<i>Other:</i>		
<i>Other:</i>		
<b>Subtotal:</b>		

**TOTAL:**

**\*CAS Plan + Other Funding Sources for FY 04-05**

**\*\*Revenue generated as of Budget Position Report dated: 05/10/04**

**Startup will be on a separate worksheet (see attached)**

**Please note the following:**

All OPS, including undergraduate hourly, regular hourly, graduate, adjuncts, phased retirees and one time payments will be disbursed from 11XX-00-74

**COLLEGE OF ARTS & SCIENCES  
BUDGET PLANNING WORKSHEETS  
2004-2005  
CHEMISTRY**

**OPS PLANNING:**

Time Period:	Type (Adjunct, Grad.):	Amount:	Non-CAS Funding Sources & Amounts:
Summer 7/1- 8/4/04:	Grad		
	Adjuncts		
	Other		
Fall 2004:	Grad		
	Grad		
	Adjunct		
	Other		
Spring 2005:	Grad		
	Grad		
	Adjunct		
	Other		
Summer 5/6- 6/30/05:	Grad		
	Adjunct		
	Other		

**TOTAL OPS:**

Comments:  

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**OPERATIONS PLANNING:**

PROJECTED EXPENDITURES IN 2003-2004:	PROJECTED NEEDS FOR 2004-2005:	NON-CAS Funding Sources & Amounts:

**TOTAL OPERATIONS:**

Comments:  

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**COLLEGE OF ARTS & SCIENCES  
BUDGET PLANNING WORKSHEETS  
2004-2005  
*CHEMISTRY***

## **LIST BY FACULTY/STAFF TYPE & PRIORITY ORDER**

Type (Faculty or Staff):	Rank (According to priority):	Classification:	Salary Est.:	Purpose:
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## **BUDGET JUSTIFICATION**

### **A. Expense**

- Explanation for significant changes from previous year

### **B. Capital Equipment - (over 1000.00)**

### **C. GTA's, Adjuncts**

### **D. New Faculty**

### **E. Start-up Funds**

### **F. New Program - (reminders)**

Updated  
6/9/2004

**DEPARTMENT**  
**2003 - 2004 EXPENDITURES IN EXPENSE CATEGORY**  
**and**  
**EXPENSE BUDGET REQUEST FOR 2004 - 2005**

<b>EXPENSES</b> <b>Budget and Category</b>	<b>2003-2004</b> <b>Spent to Date</b>	<b>2004-2005</b> <b>Needs for Next Year</b>
Ads-Recruitment	\$2,320	\$4,000
Books & Educational Supplies	\$895	\$1,000
Consultation Fees	\$5,265	\$6,000
Copier Rental-Blanket (Copy Machine)	\$6,000	\$7,000
Computer Supplies/Accessories	\$3,245	\$4,000
Computer Equipment	\$8,525	\$7,000
Postage/FedEx	\$2,352	\$3,400
Teaching Laboratory Supplies	\$58,470	\$60,000
Lab Equipment/Instruments (below \$1,000)	\$42,357	\$45,000
Office Supplies	\$11,524	\$15,000
Print Shops & Copy Centers (Campus)	\$2,325	\$4,000
Rental Equipment Other-Gases	\$15,350	\$18,000
Repairs and Maintenance	\$18,755	\$22,000
Telephone	\$13,250	\$15,200
Travel- Recruitment	\$2,824	\$2,500
Travel- Faculty	\$4,734	\$5,000
<b>TOTAL</b>	<b>198,191</b>	<b>219,100</b>

\*\* Numbers are made up for illustration

# AFTER BUDGET

- ◆ Budgetary Control
- ◆ Frequent Monitoring
- ◆ Agreement with monthly ledger statement



# AFTER BUDGET

- ◆ Transparent – Faculty are fully informed
- ◆ Be flexible and do not compartmentalize
- ◆ Contingency plan (cutbacks, etc)



# DATABASE PROCEDURES

- ◆ Enter info into database at the time of credit card purchases or when Requisitions are generated. This ensures that monies are encumbered in a timely fashion.
- ◆ Develop a paper flow system to ensure that incidental department bills are not lost.

# INTERNAL DATABASE SYSTEM

- ◆ Importance of error-free internal monitoring and reporting system
- ◆ Database tracking system with multi-report capability



# ROLE OF STAFF

- ◆ Training in the accounting system
- ◆ Spreadsheet knowledge
- ◆ Checks and balance system of monitoring





Budget Position  
As of: April 30, 2004

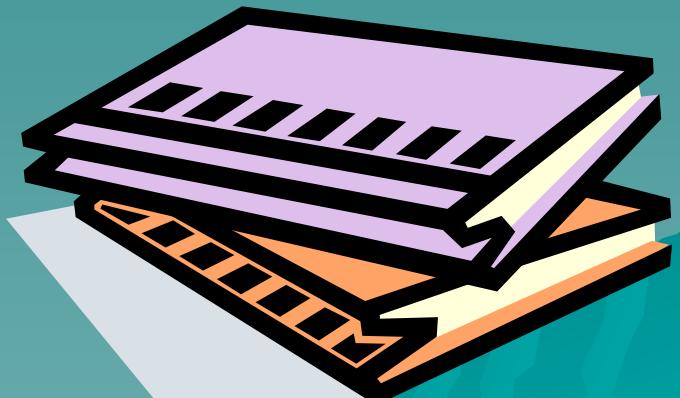
		Current Period Expenditures	Budget Control	Year to Date Expenditures**	Encumb	Pre- Encumb	Balance Available
<b>SubTotal</b>	<b>Other Expenses</b>	5,531.71	0.00	134,365.72	11,679.11	150.00	
752198	FURN & EQPT OTHER TAGABLE	0.00	0.00	4,890.05	0.00	0.00	
752199	FURN & EQPT OTHER NONTAGABLE	(1,320.00)	0.00	8,847.73	0.00	0.00	
753103	SCIENTIFIC EQ TAGABLE	0.00	0.00	171,892.53	0.00	0.00	
753104	SCIENTIFIC EQ NONTAGABLE	1,186.96	0.00	12,967.27	1,505.08	0.00	
754205	CMP PERS ASSOC EQPT TAGABLE	0.00	0.00	4,432.60	0.00	0.00	
754206	CMP PERS ASSOC EQPT NONTAG	0.00	0.00	903.00	0.00	0.00	
754207	COMPUTER SOFTWARE TAGABLE	0.00	0.00	1,995.00	0.00	0.00	
754208	COMPUTER SOFTWARE NONTAGABLE	0.00	0.00	995.00	0.00	0.00	
754212	CMP COMPONENTS NONTAGABLE	0.00	0.00	45.78	0.00	0.00	
754299	OTHER CMP EQUIPMENT NONTAG	0.00	0.00	34.50	0.00	0.00	
756102	PERMITS AND INSPECTIONS	0.00	0.00	50.00	0.00	0.00	
<b>SubTotal</b>	<b>Equipment</b>	(133.04)	0.00	207,053.46	1,505.08	0.00	
713302	EMPLOYMENT ADVERTISING	0.00	0.00	4,143.00	48.00	0.00	
713701	DP GENERAL FEES	0.49	0.00	4.15	0.00	0.00	
713705	DP EQUIPMENT MAINTENANCE	0.00	0.00	222.92	0.00	0.00	
713708	DP TRAINING	0.00	0.00	3,500.00	0.00	0.00	
713709	DP SUPPLIES OTHER	24.85	0.00	4,099.19	0.00	0.00	
713901	MOVING AND STORAGE	0.00	0.00	0.00	0.00	0.00	
713903	MAILING AND DELIVERY SERVICES	8.89	0.00	1,432.50	0.00	0.00	
713999	OTHER INDEPENDENT CONTR SVCS	0.00	0.00	40.00	0.00	0.00	
714102	FCO CONSULTING SERVICES	0.00	0.00	3,500.00	0.00	0.00	
714305	FCO POSTAGE AND FREIGHT	0.00	0.00	111.62	0.00	0.00	
<b>SubTotal</b>	<b>Sub contract</b>	34.23	0.00	17,053.38	48.00	0.00	
	<b>Total</b>	5,432.90	459,711.00	358,472.56	13,232.19	150.00	87,856.25
	<b>Revenues</b>	0.00	0.00	0.00	0.00	0.00	
311000	ACCOUNTS PAYABLE	4,239.78	0.00	(4,318.40)	0.00	0.00	
351013	DT OFFICE SUPPLIES	0.00	0.00	162.01	0.00	0.00	
399901	AM SUSPENSE ITEM	0.00	0.00	0.00	0.00	0.00	
549000	FUND BALANCE UNRESERVED	0.00	0.00	(182,410.77)	0.00	0.00	
	<b>Other Balance Sheet Accounts</b>	4,239.78	0.00	(186,567.16)	0.00	0.00	
111000	CASH ON HAND	0.00	0.00	50.00	0.00	0.00	
112000	CASH IN BANK	(9,070.42)	0.00	(142,528.37)	0.00	0.00	

# PERSPECTIVE

- ◆ Budget planning and control is a critical element in a smooth running department – budgets drive programs
- ◆ Faculty should be informed both during the planning and as changes are made

# PERSPECTIVE

- ◆ Staff expertise in the computing system and in databases is important for accurate monitoring
- ◆ Keep all budget correspondence, memos, e-mails and transfers for the entire budget year



# ANNUAL REPORT OF DEPARTMENTAL ACTIVITIES

- ◆ Assessment of productivity



# Department of Chemistry

## Annual Report

### 1. Overall

#### A. Research

#### B. Refereed Publications

C. Presentation at Science meeting-

D. Programs - New -

E. Partnerships, Collaborations or Research  
Agreements-

## 2. Undergraduate Programs

A. SCH Productivity 2004      2005      % Change  
Undergraduate  
Lower Division

Upper division

B.Quality measures - learning outcome measures  
will discuss latter

### 3. Graduate Program Productivity

A. SCH      2004      2005      % change

B.Quality Measures

C.Program Changes or Additions

## 4. Awards and Honors

## 5. Service

- A. Professional
- B. State
- C. University and College
- D. Other

## 6. Contribution to Goals

A. President-University goals

B. College

## 7. Progress on Departmental Goals

8. Departmental Goals and Action Plans  
for the coming year

# LEARNING OUTCOMES ASSESSMENT



# **Chemistry B.S. Degree Program Assessment Plan**

# Mission

The mission of the Chemistry B.S. degree program is to educate students in the fundamental skills, knowledge and laboratory practice of Chemistry in order to (1) prepare them for employment in various chemistry related industries, and (2) to prepare them to pursue advanced degrees in chemistry, chemistry related fields or health related professional schools.

# Student Learning Outcomes Assessment in the State University System

University:		Degree Program:		
Assessment Instruments and Procedures	Discipline Knowledge and Skills:	Communication Skills:	Critical Thinking Skills:	Goals:
Nationally Normed Exam: Educational Testing Service Field Exam in Chemistry	X		X	<p><b>Outcome 1:</b> Will have knowledge of chemistry, which compares favorably to that of students nationally.</p> <p>Notes:</p> <p>Exam given in senior year.</p> <p>Performance on the exam and the sub scores that cover four fundamental areas of chemistry and two Assessment Indicators:</p> <p>(1) Biochemistry and (2) Critical Thinking and Reasoning will be used to evaluate student learning on an individual and total group basis.</p>

# Nationally Normed Exam

(measure 1.a.)

Students will take the Educational Testing Service Field Exam in Chemistry during their Senior year. Performance on the exam and the sub scores that cover four fundamental areas of chemistry will be used to evaluate student learning on an individual and total group basis.

◆ The ETS Field Exam includes:

- ◆ Physical Chemistry
- ◆ Organic Chemistry
- ◆ Inorganic Chemistry
- ◆ Analytical Chemistry
- ◆ Biochemistry (added 2002)
- ◆ Critical Thinking and Reasoning

# **Student Learning Outcomes Assessment in the State University System**

<b>University:</b>		<b>Degree Program:</b>		
<b>Assessment Instruments and Procedures</b>	<b>Discipline Knowledge and Skills:</b>	<b>Communication Skills:</b>	<b>Critical Thinking Skills:</b>	<b>Goals:</b>
Departmental survey to measure acceptance into advanced degree programs	X			<b>Outcome 1:</b>  Note: Administered during last semester of senior year.

# Student Learning Outcomes Assessment in the State University System

University:		Degree Program:		
Assessment Instruments and Procedures	Discipline Knowledge and Skills:	Communication Skills:	Critical Thinking Skills:	Goals:
Seminar Preparation – Direct evaluation of preparation.	X	X	X	<b>Outcome 2:</b> Will critically read the chemical literature, grasp and outline the pertinent information, and be able to present it orally to an audience of peers and faculty members.

# **Student Learning Outcomes Assessment in the State University System**

<b>University:</b>	<b>Degree Program:</b>			
<b>Assessment Instruments and Procedures</b>	<b>Discipline Knowledge and Skills:</b>	<b>Communication Skills:</b>	<b>Critical Thinking Skills:</b>	<b>Goals:</b>
Faculty panel to evaluate presentation using a standard evaluation form	X	X	X	<b>Outcome 2:</b>  Note: Eighty percent of the preparations/presentations will receive an overall evaluation of a “4” or “5” on a 5-point scale as determined by a faculty panel.

# Student Learning Outcomes Assessment in the State University System

University:		Degree Program:		
Assessment Instruments and Procedures	Discipline Knowledge and Skills:	Communication Skills:	Critical Thinking Skills:	Goals:
Faculty Committee will evaluate the research project and paper using a 20-point scoring scale  (A predetermined evaluation scheme (1 to 5pts. each) for categories that includes Style, Literature Review, Content, and Critical Evaluation)	X	X		<b>Outcome 3:</b> Will be able to use the scientific method to solve original chemical problems, review appropriate literature, collect data, and analyze results and successfully complete an undergraduate research project to be considered for submission to an appropriate journal.

# ETS Field Test Percentiles

	2001	2002	2003
Composite Scores			
Composite Scores (Physical, Organic, Inorganic, Analytical)	92	99	95
Critical Thinking	95	99	95
Biochemistry	92	99	98

# ETS Field Test Percentiles

	2001	2002	2003
Physical	85	99	84
Organic	68	85	98
Inorganic	72	99	95
Analytical	91	98	90
Critical Thinking	95	99	95
Biochemistry	92	99	98

# Research Article Writing Results

(measure 3.b. data collected 2002-2003)

- ◆ After revisions, 90% received at or above the 16 point score of a possible 20 points by the Faculty Undergraduate Research Panel.

# Student Seminar Evaluation Form

Undergraduate Student Presenter:

Date: \_\_\_\_\_

Faculty Evaluator: \_\_\_\_\_ (Use back of page if needed.)

- A. **Overall Evaluation** - Rate from 5 (high) to 1 (low), with one decimal place if needed.
- B. **Evaluate** each item below and **comment** on those areas you consider especially strong or weak.

- |   |                                   |
|---|-----------------------------------|
| 1. Comprehension of Subject (Consider seminar <u>and</u> answers to questions.) | 6. How Well Illustrated           |
| 2. Content - Quality & Accuracy   | 7. Clarity of Illustrations       |
| 3. Content & References - How Current   | 8. Length of Seminar (15 minutes) |
| 4. Sufficient Chemistry Content & Detail  | 9. Quality of Delivery)           |
| 5. Organization of Ideas  | 10. Professionalism               |

C. **Comments on this Student's Seminar**

- D. **Comments on:**
- 1) The Seminar Course (Give both strengths and suggested changes.)
  - 2) The Chemistry Curriculum suggested by the student seminars you have evaluated
  - 3) The content and layout of this Form

# Evaluation of Undergraduate Research Reports

## Major Code

The following represent areas of proficiency that will be evaluated when the final Undergraduate Research Report submitted by a student enrolled in their fourth semester hour of credit is evaluated by the department Undergraduate Research Evaluation Committee.

A rating scale of 1 to 5 (highest) will be used and a total score of 16(20 maximum) will be used as an acceptable/unacceptable guideline. The student must write the report under the direction of the appropriate faculty member who will approve the report before it is sent to the review committee. The faculty member, not the student, will forward the report.

Student Name:

Faculty Approval: \_\_\_\_\_ Date \_\_\_\_\_  
(signature required before submission to review committee)

### RATING    AREA OF-PROFICIENCY

\_\_\_\_\_  
Style - The format and style used to prepare the final report must conform to that acceptable for publication in a peer reviewed scientific journal. The American Chemical Society Style Guide can be used or as an alternative the style required by a specific journal can be used.

\_\_\_\_\_  
Literature Review - The final report must show evidence that the student has performed a review of the current scientific literature. The text of the report must be prepared to demonstrate that the results of that literature review have been assimilated into the study as appropriate.

\_\_\_\_\_  
Content of the Report - Key components of the report shall included as a minimum requirement the following:  
Introduction, Experimental, Results and Discussion, and Literature Citations. The report will accurately reflect the nature and scope of the study and will concisely summarize the final results and conclusions. The student must demonstrate through the written report that he/she has a firm grasp of the topic that is the focus of the study.

\_\_\_\_\_  
Critical Evaluation of Data/Results - Experimental procedures, collected data and results must be presented in a clear and concise fashion and the significance of those procedures/data/results will be interpreted in a fashion that demonstrates the significance and usefulness of the study.

\_\_\_\_\_  
Total Score, Signature of Evaluator \_\_\_\_\_

Use of results: The research report is intended to be the culmination of a research endeavor that involves the individual student and faculty mentor. Should the student submit an unacceptable final report then an I grade will be issued and corrective action will be implemented. The student will work closely with the faculty mentor and a representative from the Undergraduate Research Committee to identify weaknesses and to implement corrective action as appropriate.