

Improving Budget Office Practices and Budget Processes at Brooklyn College

Assessing Needs, Refining Practices, and Sustaining Improved Ways of Working

Brooklyn College is a public institution and part of the City University of New York (CUNY) system. Facing an unprecedented structural budget deficit and drastically declining enrollment numbers, the chief business officer (CBO) hoped to better understand his colleagues' perspectives on budgeting processes and engagement with the budget office. The budget office works closely with approximately 170 budget managers across campus.

Setting the Stage to Support Changes Due to Enrollment Decline

Enrollment declines resulted in a material structural budget deficit at Brooklyn College, and the CBO recognized that, with changes to funding priorities on the horizon, there was a need to enhance budget-related communications. Training and informational resources that support budget processes would need to be updated, and current approaches to sharing information needed to be evaluated and potentially updated.

Motivated by this desire to improve services to the college community, support budget literacy, and enhance support services to colleagues who rely on the budget office, the CBO wanted to gain a baseline understanding of current perceptions and understanding of the budget process and supporting activities. By surveying stakeholders about their perceptions and needs related to budget office operations, the CBO and his team would have information to guide the design of systems and update communications.

Preparing and Implementing the Survey

The CBO customized and refined the assessment, selecting questions that were best aligned with institutional practices and goals. The response scale used in the survey template offered in Budget Process Assessment Toolkit was altered from the Lickert Scale provided, to a binary 'agree /disagree' response framework.



Improvement Project

Better Budget Office Practices to Build Capacity for Change



Toolkit Used

Budget Process Assessment



Results

- After customizing the Budget Process Assessment, Brooklyn College successfully deployed the survey to its budget office stakeholders. Responses reflected a need to strengthen campus-wide understanding of budget processes and identified opportunities to improve support for budget managers.
- Actions were taken to improve support for budget managers and the campus community, including developing a new model to respond to requests for assistance submitted to the budget office and creating web-based training and information resources.



“The key to addressing budget challenges and preparing people for change across the institution is to help people understand more about planning, budgeting, and finance activities. People need to understand and have confidence in budget office processes and communications, and see that we are not hiding anything, so my team and I needed to figure out what people knew, and where we had to do a better job at sharing information.”

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Alan Gilbert,

*Senior Vice President for Finance
and Administration*

The CBO felt that a binary response model would make it easier for survey-takers and provide their team with the needed information. Assessment questions were populated into Microsoft Forms, and a link to the assessment was sent to 167 internal campus stakeholders via email, with a 1-month timeline for response. The survey generated a 50% response rate.

Responses reflected material gaps in awareness of processes and identified areas of opportunity to improve budget office mechanisms to support the needs of budget managers and their colleagues. Based on the survey results, a work plan was developed to improve communications and to enhance systems to support access to and responsiveness of the budget office. The CBO and his team undertook a multi-phased effort to make improvements.

Leveraging Assessment Insights

Improvement to budget office practices at Brooklyn College centered on service improvements for campus stakeholders who participate in planning and budgeting activities that will evolve and change over time. Outbound communications were reviewed and enhanced, and online requests for help were centralized to track the volume of inquiries and improve the ‘matching’ of subject matter experts with requests for assistance. Budget office hours were designated for support, and virtual walk-in hours were established, allowing individuals needing help to quickly reach an appropriate person with budget expertise.

Web-based resources to support and enhance understanding of business office practices and processes are continuously improving. Mechanisms to respond to email and phone inquiries and requests for assistance have been improved and will continue to be enhanced as user interface data is collected.

Sustaining Momentum

Under the CBO’s leadership, the budget office team has reported significant improvements in being better prepared to work together and support each other. Going forward, written procedures will be developed, and work processes will be documented to strengthen continuity when positions are turned over. The CBO will issue the assessment again to measure progress against the baseline results collected at the beginning of the work.