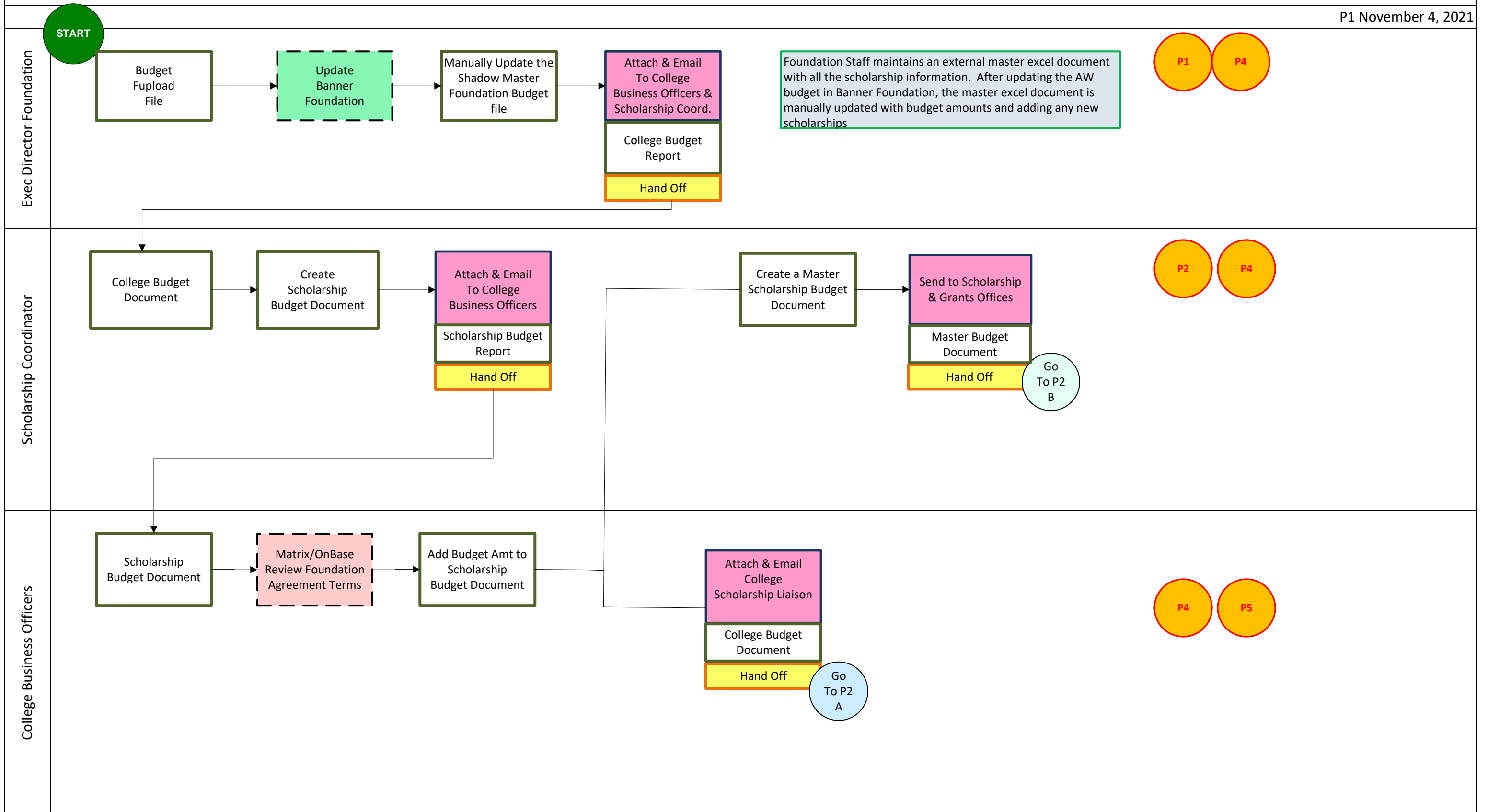


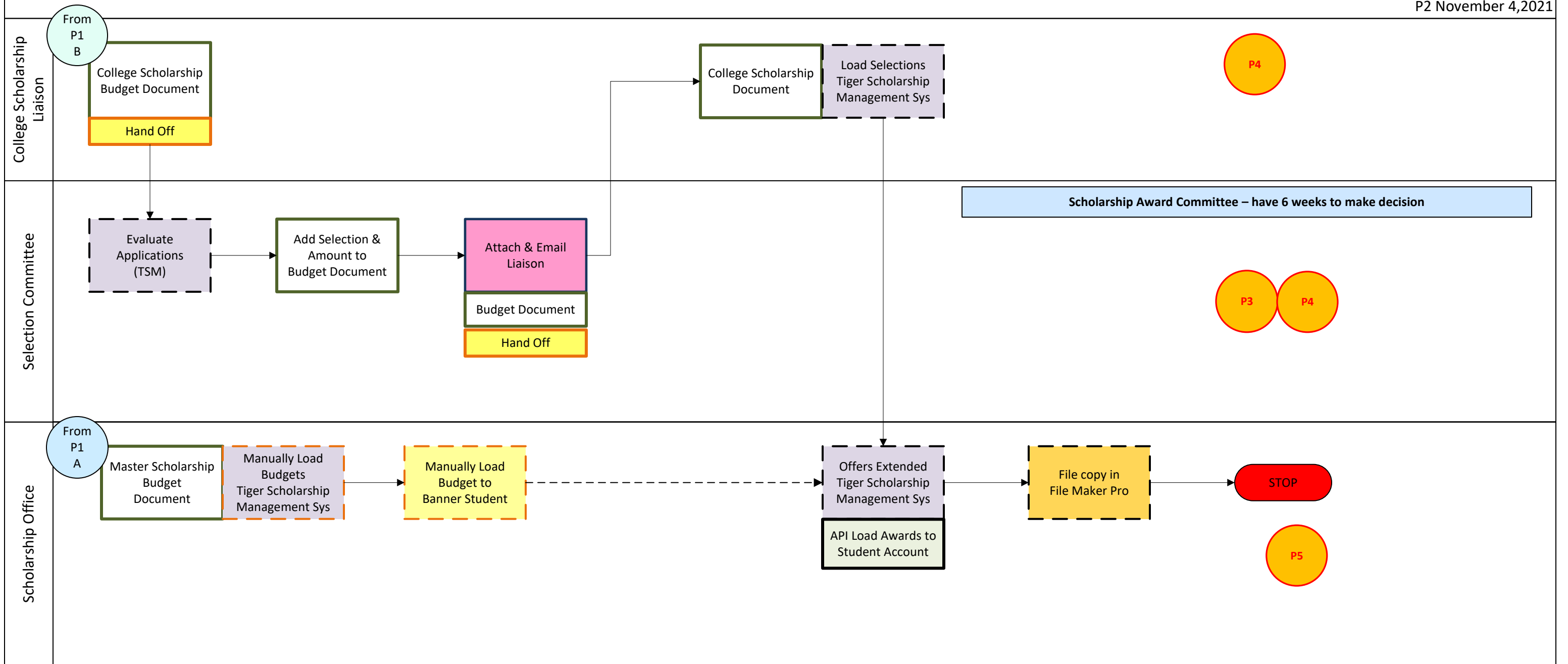
Foundation Funds/Budget Process 'AS IS'

P1 November 4, 2021



Foundation Funds/Budget Process 'AS IS'

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Pains & Issues:

The issues and pain points identified during the AS IS Process Mapping and Analysis workshop are noted below. The issue is numbered and its Root Cause Analysis is in red text, preceded by **RCA** prefix.

1. Foundation office maintains a master scholarship document in excel, that they manually maintain year to year with new budgets and scholarships.

RCA: Manual maintaining external shadow system in excel with scholarship information by adding new year budgets and scholarships. This is duplicate of effort. .

2. Scholarship Coordinator takes the budget excel report and breaks down into separate excel documents and email to each College Business Officers.

RCA: Manual process, no systematic process designed.

3. Only the College Business Officers have access to see the Fund Agreements with criteria, committees need this information when making decisions.

RCA: Department Financial Managers/Chairs do not always have terms of the agreement when making selections.

4. Several handoffs of paper documents

RCA: Six handoffs are included in the process

5. Awards are made when there isn't a budget:

RCA: Colleges/Departments not following the process.

