

The University of Texas at San Antonio

Business Affairs

STRATEGIC PLAN 2007-2016

December 2007

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Business Affairs 2016

1. Introduction:

Business Affairs is passionate about supporting UTSA in transforming lives through education. This is accomplished through our partnerships with the University community to improve service, safety, efficiency, effectiveness and wellbeing of the employees.

The Business Affairs organization is comprised of five departments: Administration, Facilities, Financial Affairs, Human Resources, and Police.

The Business Affairs Brand, “Your partner for successful solutions” reflects the partnerships and alignments we have created and continually foster with our customers. We strive to fulfill our brand promise, “We are committed to helping you achieve your goals, through excellence in service – every person, every day, every job,” with each of our customers/partners.

The Business Affairs organization continually challenges its leaders to promote change, think and act creatively, and communicate effectively. Since progress can only be derived through change, the organization is constantly energized through the creative ideas of the staff. The fundamental goal of Business Affairs is to deliver quality service through excellence, while exceeding customer expectations. As such, the organization understands that this can only be accomplished through a culture that promotes and rewards change, creativity and communication. We strive to achieve effective communication through unity, commitment and motivation.

2. Business Affairs Mission, Vision and Core Values:

Business Affairs’ mission, vision, and core values statements reflect the purpose of business affairs (Mission), what we aspire to be (Vision), and the guiding principles that we will use to reach our goals (Core Values).

Mission Statement

Business Affairs is dedicated to supporting and enhancing the goals of The University of Texas at San Antonio while maintaining a visible commitment to excellence. This will be achieved by providing and implementing programs that enhance the quality and effectiveness of the institution. A best practices environment will be created that fosters quality, integrity, leadership, flexibility, creativity, participation and strategic partnerships with other campus and community constituencies.

Vision Statement

In all we do, we do with excellence...every person, every day and every job.

Core Values

Business Affairs’ core values mirror those of the University’s: integrity, excellence, inclusiveness, respect, collaboration, and innovation.

3. Business Affairs Strategic Advantages:

Human Capital

- Knowledgeable, dedicated, flexible/adaptable, experienced, professional staff
- Customer/partner focused

Financial

- Financial condition
- Growth of the University

Technology

- Opportunity for innovation and development

Partnerships/support

- Community and legislature
- Partnerships within and external to the University

4. Business Affairs Strategic Challenges:

Human Capital

- Upper management diversity
- Resource/workload planning
- Private sector competition for limited resources
- Succession management planning
- Training

Financial

- Funding for strategic initiatives
- Funding to meet space demands

Technology

- Lack of Enterprise Resource Planning (ERP: finance/payroll and HR)

Data

- Availability, integrity, flexibility, security

Processes

- Manually driven
- Decentralized key practices/processes
- Change management for innovation and implementation
- Process/procedures inconsistently documented

Space

Communication

- Internal to Business Affairs and external to University Community

5. Strategic Initiatives, Goals, Action Items and Metrics

In order to meet our vision and fulfill our mission, **Business Affairs** is committed to pursuing activities that support the University's strategic initiatives and foundational themes with 5 goals. While very unique, the objectives of the diverse goals can be summarized into the acronym **CHIPS**, which reflects our 5 basic goals of **C**ustomer Service, **H**uman Capital, **I**mprovement, **P**artnerships, and **S**tewardship.

Goals, action items and metrics that support each of the University's strategic initiatives are identified below. Some of the goals are included in several initiatives with different action items.

Goal 1: Customer service

Embracing a culture of customer service and exceeding expectations of stakeholders/partners

Goal 2: Human capital

Cultivating human capital that is aligned with our mission, vision, and values through the identification, recruitment, retention, management and development of our staff and promoting an organizational culture of excellence wherein our employees might excel

Goal 3: Improvement

Promoting continuous improvement through efficiency, effectiveness, productivity, use of available technology and the development of technological solutions

Goal 4: Partnerships

Developing and sustaining partnerships and communication

Goal 5: Stewardship

Practicing stewardship, transparency and ensuring compliance

UTSA's Strategic Initiative I: Enriching Educational Experiences to Enable Student Success

Business Affairs Goal 1: Embrace a culture of customer service and exceed expectations of stakeholders/partners

Action Items:

1. Provide high quality new capital construction and facility renovations
2. Develop and manage a long range Facilities Master (and Renovation) Plan
3. Develop initiatives to increase safety awareness and reduce crime
4. Improve financial & fiscal services to students through new online and email services, training and other venues
5. Meet the needs of customers with efficient and timely services through partnerships

Metrics:

- University's growth needs and cost estimates
- Crime stat reduction of Part I and Part II crimes
- Number of crime alerts
- Number of crime prevention seminars
- Number of students who use new online features
- Number of Engineering Building II and Combined Science Facility Renovation outstanding project deficiencies (at the following critical project points: substantial completion, 3, 6 and 12 months post completion)
- Periodic customer surveys

UTSA Strategic Initiative II: Serving Society through Creativity, Expanded Research, and Innovations

Business Affairs Goal 5: Practice stewardship and transparency and ensure compliance

Action Items:

1. Analyze and streamline processes to eliminate redundancy and non-value added activities
2. Enhance and increase use of technology in all areas
3. Evaluate current processes to establish baselines
4. Deliver annual customer service surveys
5. Increase customer collaboration and communication
6. Design staff education programs in collaboration with respective departments
7. Communicate crime occurrences and police actions
8. Achieve Police Department accreditation

Metrics:

- Number of annual process improvements
- Customer survey response of process improvements
- Cost savings from process improvements
- Track attendance and feedback from education programs
- Measure effectiveness of education programs, establish baseline and goals for improvement
- Publish annual Cleary report
- Achieve CALEA Police accreditation
- Increase wireless use of cameras

UTSA's Strategic Initiative III: Promoting Access and Affordability

Business Affairs Goal 5: Practice stewardship and transparency and ensure compliance

Action Items:

1. Implement a financial assessment process to publish budget to actual data and uses of funds by division, department
2. Develop facility plans and programs to meet or exceed code and legal requirements
3. Develop best value services that promote an ethical and fair environment at affordable costs
4. Identify and facilitate community partnerships

Metrics:

- Customer survey regarding knowledge, understanding of data
- Track program costs to measure effectiveness
- Benchmark costs against peer institutions and/or industry standards

UTSA's Strategic Initiative IV: Serving the Public through Community Engagement

Business Affairs Goal 3: Promoting continuous improvement through efficiency, effectiveness, productivity, and use of technology and the development of technological solutions

Action Items:

1. Provide collaborative support services for community and outreach programs

Metrics:

- Track annual community programs supported
- Periodic survey for compliance and excellence
- Meetings on compliance updates

Business Affairs Goal 4: Developing and sustaining partnerships and communication

Action Items:

1. Develop and support both global and community partnerships that promote accessible, quality, life-long learning

Metrics:

- Periodic review of support for the Office of International Programs transactional process

UTSA's Strategic Initiative V: Expanding Resources and Infrastructure

Business Affairs Goal 1: Embracing a culture of customer service and meeting expectations of stakeholders

Business Affairs Goal 2: Cultivating human capital that is aligned with our mission, vision, and values through the identification, recruitment, retention, management and development of our staff, and promoting an organizational culture of excellence wherein our employees might excel

Business Affairs Goal 3: Promoting continuous improvement through efficiency, effectiveness, productivity, and use of technology and the development of technological solutions

Business Affairs Goal 4: Developing and sustaining partnerships and communication

Business Affairs Goal 5: Practicing stewardship and transparency and ensuring compliance

Action Items:

1. Create an organizational culture, administrative processes, systems and structures that value and promote productivity, while optimizing both the utilization of existing resources and technology and the generation of new resources/technology.

2. Customize, collaborate and communicate the delivery of services to meet customer expectations, timely completion, and regulatory compliances.
3. Distribute annual customer surveys for all areas to define services and validate customer expectations.
4. Develop and manage an integrated Facility Asset management program to include condition assessments, life cycle planning, and comprehensive project priority planning.
5. Establish key performance indicators and monthly operations performance reviews.
6. Partner with chief management officers and deans to identify, develop and implement methods to plan for and proactively meet future staffing needs.
7. Complete annual Affirmative Action Plans and disseminate information to VP's and deans to assist in hiring decisions.
8. Improve processes for succession planning and the identification of skill competency for all departments.
9. Increase and optimize the revenue mix through auxiliary services and partnership opportunities.

Metrics:

- Regular staff meetings that encourage creativity
- Survey of Organizational Excellence departmental results
- Number of process guidelines created
- Time and money saved from process improvements
- Turnover statistics
- Customer survey results
- Average facility condition index for all facilities
- Total backlog of deferred maintenance for all facilities
- Monthly facility performance index results
- Monthly and 12 month running average of work order and preventive maintenance schedule compliance
- On-time completion percentage for reported corrective maintenance calls
- Analyze financial versus non financial measures

6. Business Affairs Key Indicators:

The following metrics will serve as indicators of **Business Affairs'** overall progress in achieving our vision and meeting our strategic goals. Each indicator will have associated targets and will be benchmarked against past performance as well as peer institution performance as applicable.

Goal 1: Customer Service

- Customer assessments will be evaluated within 3 months of completion and recommendations developed
- Subsequent surveys will reflect improved timely and efficient service delivery and improved customer satisfaction

Goal 2: Human Capital

- Critical skill set and core competency gaps will be identified and succession plans will be developed for all critical positions
- Staff turnover will decrease
- Exit survey process will provide turnover information useful in planning of processes, systems, and programs
- Succession plans will be created for all key positions
- Results of Bi-Annual Survey of Organizational Excellence will improve and action items will be identified

Goal 3: Improvement

- CALEA Police accreditation will be achieved
- Reporting system will be utilized by departments for financial planning activities
- Reduction in number of impaired critical systems
- Facilities new capital and renovation projects will reflect high quality construction
- Comprehensive facility annual work plans and predictive, preventive and corrective maintenance activities will be executed and maintained
- Master Plan will provide roadmap for resource allocation
- Performance evaluations will reflect “line of sight” to UTSA’s strategic plan

Goal 4: Partnerships

- Participation in community programs will be increased

Goal 5: Stewardship

- Complete compliance to all regulations and codes
- Affirmative Action Plans goals will be measured, reported to CMO and achieved
- Financial reporting system will facilitate oversight and planning processes
- Budget processes will ensure that internal resources are appropriately matched with the university’s strategies for achieving its goals

7. Call to Action and Accountability for Business Affairs:

For our *UTSA 2016 Strategic Plan* to be successful, we must follow through to incorporate the **Business Affairs** initiatives into our everyday management, operations, and decision making. The intent of UTSA is to operate as an integrated whole, with each element and component contributing to the University mission and vision, collaboratively and in a holistic fashion. This approach will transform the institution from our present reality toward realization of our future vision. Thus, we will become a catalyst and crucible for change, inviting and involving all stakeholders to the table as contributors as well as beneficiaries. This approach reflects the notion of citizenship imbedded in our statements of mission, vision, and core values. Citizenship in its truest sense involves a shared responsibility and contribution to the welfare of our entire community.

Implementation:

An implementation process that will ensure that the strategic plan is carried out effectively is critical to our success.

<u>Plan Levels</u>	<u>Scope</u>	<u>Timeframe</u>	<u>Lead Responsibility</u>	<u>Content</u>
University Strategic Plan	University Strategic Direction	10 years	Campus Management and Operations (CMO) and Team 2016	Long-term initiatives
University Compact	Operational Goals	2 years	CMO and Deans Council	Short-term initiatives
Vice Presidential and College Strategic Plans	Unit Strategic Directions	5 years	Vice Presidents and Deans	Long-term initiatives
Departmental Plans	Operational Goals	12 months	Colleges and Departments	Implementation details
Task Forces	Cross-divisional Goals	Short-term	Appointed by CMO	Priority initiatives and reforms

- *We must integrate UTSA 2016 into our operational planning (unit-level plans and compacts).*
- *We must integrate UTSA 2016 as the guide for our **Business Affairs** budget process.*
- *We must participate in ongoing revision and modification of the **Business Affairs** plan.*
- *We must develop an organizational structure to support the **Business Affairs** plan and assign responsibilities.*

Accountability:

In order for the plan to work, **Business Affairs** must ensure that an effective system involving both communication and assessment is established and maintained.

Communication:

Business Affairs must develop a communication system to inform our personnel of our fidelity to our mission and progress toward its initiatives, goals and action items. Routine reporting of metrics on our goals will be a standard part of meeting our goals and timeliness. Every month there will be a report on one of the initiatives to Team 2016. The report will include progress (metric review) and issues. Twice a year, progress on all initiatives will be incorporated into a report reviewed by the CMO, Team 2016 and the Executive Leadership Council. UTSA's President will present an annual public "State of UTSA" address that reflects overall progress toward University initiatives and goals to which **Business Affairs** contributes.

As a result of our internal system and the public Web site, the university community will be able to assess our progress, and senior leaders will have regular opportunities to discuss and adjust our initiatives as needed.

Marketing UTSA:

Business Affairs will contribute information to the CMO and Team 2016 to help UTSA tell its story and share our 2016 Vision, both of which are essential to attract top students, faculty, research sponsors, and resource contributors and to gain optimal buy-in from all UTSA's community and state stakeholders. Stories demonstrating UTSA's values-in-action work to positively reinforce integrity, excellence, inclusiveness, respect, collaboration, and innovation. The UTSA image, branding, reputation, and prestige will reflect all the aspirational goals outlined in this plan and inform key audiences about progress, constantly recognizing and celebrating accomplishments along this journey.

Assessment:

Business Affairs must develop an assessment system to determine our fidelity to our announced mission and progress toward our vision. There will be clear lines of responsibility for managing and reporting the components of our strategic plan, to include collecting metric data, reporting progress, and resolving issues.

8. Appendix: Business Affairs Strategic Planning Process

APPENDIX:
Business Affairs STRATEGIC PLANNING PROCESS

Several meetings were held by the Business Affairs organization, led by the Vice President for Business Affairs. Then, the Business Affairs Associate Vice Presidents met independently with their staffs to develop their departmental strategic plans. The AVP's then met to consolidate their plans into a draft reflecting a strategic plan reflective of the entire organization.

