

IRM Governance ~

Operational Review Committee  
Kick-Off Meeting

November 19, 2020

The logo for The University of Texas at San Antonio (UTSA) features the acronym "UTSA" in a bold, white, sans-serif font. A small registered trademark symbol (®) is positioned to the upper right of the "A". To the left of the text is a vertical orange line that extends from the top of the text area down to the bottom of the slide.

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# Topics to be Covered ~

1. Committee Membership
2. Role of the Operational Review Committee
3. Operational Review Process
4. Process Flowchart
5. Operational Reviews
6. Timeline
7. Base Year Pilot Group – Reviews
8. List of Non-Academic Revenue & Support Units
9. Questions

# Operational Review Committee Membership

Member	Name	Unit	Term
Academic College Dean	Sean Kelly	College of Liberal and Fine Arts	8/31/2022
Academic College Department Chair	Juan Gutierrez	COS - Mathematics	8/31/2022
Academic Support Unit Leadership	Lynn Barnes	Strategic Enrollment	8/31/2022
Member at Large	Ram Krishnan	COE - Electrical Engineering	8/31/2022
Space Committee Representative	Patrick Grant	Intercollegiate Athletics	8/31/2022
Academic College Dean	Lynne Cossman	College for Health, Community and Policy	8/31/2023
Academic College Department Chair	Jon Taylor	COLFA - Political Science and Geography	8/31/2023
Member at Large	Marie Tillyer	HCaP - Criminology and Criminal Justice	8/31/2023
Staff Senate Representative	Brandy Barksdale	Advising Administration	8/31/2023
Administrative Support Unit Leadership	Sheri Hardison	Financial Affairs	8/31/2023
Academic College Business Officer	Linyi Zhou	College of Education and Human Development	8/31/2024
Academic Support Unit Financial Officer	Carlotta Bell	Academic Innovation	8/31/2024
Auxiliary Unit Leadership	Laura Munroe	Campus Recreation	8/31/2024
Faculty Senate Budget Committee Chair	John Wald	College of Business	Coincides with Faculty Senate Term

*Subsequent members will serve a 3-year term, except for the Faculty Senate Budget Committee Chair which will coincide with the Faculty Senate term.*

# Role of the Operational Review Committee

- ❖ Participate in operational reviews of Non-Academic Revenue (Auxiliary) units, Academic and Administrative Support units
- ❖ Collaborate with these revenue generating and support units to make informed recommendations concerning expected service levels and associated costs
- ❖ Review prior year performance, current year operations, and long range plans
- ❖ Encourage support units to assess internal policies, processes, and priorities to identify opportunities to improve outcomes and recognize efficiencies

## Role of the Operational Review Committee (cont.)

- ❖ Provide a forum for support units to lead an evidence-based conversation with central leadership on issues that are important to the unit
- ❖ Promote accountability for support service levels relative to investment
- ❖ Encourage the use of benchmarking and performance evaluation tools
- ❖ Participate in a governance process that will result in accountability for efficiency and operational effectiveness

# Operational Review Process

- ❖ Non-Academic revenue and support units will participate in the review process
- ❖ Units route presentation packets through their respective Dean or Vice President prior to being submitted to the Operational Review Committee
- ❖ Operational Review Committee reviews each packet, documenting questions, concerns, and requests for additional information
- ❖ Feedback will be routed to the University Leadership Council and subsequently Resource Management Team for further discussion and consideration
- ❖ After the review process is complete, feedback will be shared with the units, as well as posted to the IRM website as part of the overall communication plan.

# Operational Review Process

Executive Resource Management Team:

- President
- Provost and SVP Academic Affairs
- SVP Business Affairs
- VP Research
- VP Development and Alumni Relations



# Reviews – For Discussion

- Currently, 34 non-academic revenue and support units  
*(note: the pilot year will consist of 3 units)*
- On a rotating schedule, each unit will have an operational review every few years *(timeline to be determined by this committee)*
- Required documents for the pilot year include items such as benchmark data, financial proformas, operational and efficiency metrics, and other key information to tell their story
- In addition to submitting packets, units will be required to present their information to the Review Committee, as well as respond to questions on their submittals.



# Timeline – Reviews of Pilot Group

		<i>FY 2021 ORC Calendar</i>	
<i>November</i>	<i>1st week</i>		<b>Nov. 19, 2020 3:00 - 5:00</b>
<i>November</i>	<i>2nd week</i>	Committee Kick-Off Introduction of committee members Discuss purpose and expectations Review timeline	
<i>November</i>	<i>3th week</i>		
<i>November</i>	<i>4th week</i>	<b>HOLIDAY BREAK</b>	
<i>December</i>	<i>1st week</i>		<b>Dec. 10, 2020 3:00 - 5:00</b>
<i>December</i>	<i>2nd week</i>	Overall IRM presentation (How does IRM work, the governance process, discuss budget reductions and COVID impact on campus and the pilot units)	
<i>December</i>	<i>3rd week</i>		
<i>December</i>	<i>4th week</i>	<b>HOLIDAY BREAK</b>	

# Timeline – Continued...

		<b>HOLIDAY BREAK</b>	
<i>January</i>	<i>1st week</i>		<i><b>Facilities</b></i>
<i>January</i>	<i>2nd week</i>	Pilot Group 1 - First Presentation	
<i>January</i>	<i>3rd week</i>	Pilot Group 1 - Second Presentation	
<i>January</i>	<i>4th week</i>	Committee to meet and finalize operational review summary to submit to ULC  Create Presentation of Review/Recommendations	
<i>February</i>	<i>1st week</i>		<i><b>Rec Center</b></i>
<i>February</i>	<i>2nd week</i>	Pilot Group 2 - First Presentation	
<i>February</i>	<i>3rd week</i>	Pilot Group 2 - Second Presentation	
<i>February</i>	<i>4th week</i>	Committee to meet and finalize operational review summary to submit to ULC  Create Presentation of Review/Recommendations	
<i>March</i>	<i>1st week</i>		<i><b>Student Success</b></i>
<i>March</i>	<i>2nd week</i>	<b>SPRING BREAK</b>	
<i>March</i>	<i>3rd week</i>	Pilot Group 3 - First Presentation	
<i>March</i>	<i>4th week</i>	Pilot Group 3 - Second Presentation	

# Timeline – Continued...

<b><i>April</i></b>	<b><i>1st week</i></b>	Committee to meet and finalize operational review summary to submit to ULC	
		Create Presentation of Review/Recommendations	
<b><i>April</i></b>	<b><i>2nd week</i></b>		
<b><i>April</i></b>	<b><i>3rd week</i></b>	<i>Committee Presentation to ULC</i>	
<b><i>April</i></b>	<b><i>4th week</i></b>	<i>RMT to Meet / Take Action on Recommendations</i>	

# Base Year Pilot Group

Administrative  
Support Unit

- Facilities

Non-Academic  
Revenue Unit

- Campus Recreation

Academic  
Support Unit

- Student Success

# Non-Academic Revenue and Support Units (34)

Academic Innovations	Campus Services – Bookstore	Campus Services – UTSA Card	Graduate School	Institutional Intelligence	Public Safety	Student Health Services
Academic Success	Campus Services – Business	Child Development Center	Honors College	Library	Research	Student Success
Athletics	Campus Services – Food	Development & Alumni Relations	Housing Services	People Excellence	Strategic Educational Partnerships	Student Union
Business Affairs	Campus Services - Parking	Facilities	Inclusive Excellence	President's Division	Strategic Enrollment	University Communications
Campus Recreation	Campus Services – Transportation	Global Initiatives	Information Management & Technology	Provost Office	Student Affairs	

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