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The University of Texas at San Antonio[™]

**FY22 Operational Review Committee
Unit Presentations Preparation**

January 19, 2022

Overview of Topics

- Unit presentation templates
- Committee deliverables to university leadership
- Evaluation tool
- Written report by committee

Unit Presentation Components

- Unit decks will have the following:
 - General information to “Tell Your Story”
 - Mission
 - How unit aligns to university goals
 - Organizational chart and position/staffing information
 - Opportunities and strengths
 - Key Performance Indicators (KPIs), benchmarks, and surveys
 - Five-year financial pro-forma
 - Reserve utilization
- 45 minutes max

Deliverables

Deliverable from Unit to Committee

- Packet submission checklist by units
- Unit deck presented to committee

Deliverable from Committee to University Leadership

- Unit deck presented to committee
- Summary report by committee members [5 sections]
 - Goals & Initiatives
 - Organization
 - Operations
 - Finance
 - Assessment

Evaluation Tool Feedback

- Team assigned prior to presentation for 5 written report sections
 - Goals & Initiatives
 - Organization
 - Operations
 - Finance
 - Assessment
- Comment box for each scoring line is a good add to elaborate each line score
- Row 18 pertains to Reserve Funds
- Benchmarks & surveys are the preferred feedback methods
 - Not all units will have KPIs
- Process improvements by units
 - Units to detail their plan
- Consistent evaluation tool is a good addition
- Evaluation is to assess their effectiveness & efficiency to support mission

Evaluation Tool



Microsoft Excel
Worksheet

Blue Cells

Completed by Committee Member

Cell B2

Submitting Unit Presenter

Cell B3

Unit Title

Cell B4

Committee Member Name

Cell B5

Committee Member Evaluation Score [Scale 1-5]—Calculates Automatically

Cell B6

Committee Member Evaluation Score [Scale 0%-100%]—Calculates Automatically

Evaluation Tool Cont'd

Cell B10

Evaluate Unit on Understanding How they Support their Customers in Achieving Goals, Destinations, and Strategic Initiatives

Cell B12

Evaluate Unit on How they Manage their Cost

Cell B14

Evaluate Unit on How they Are Addressing their Opportunities/Challenges

Cell B16

Evaluate Unit Based on their Scores with Benchmarks and/or Surveys

Cell B18

Evaluate Unit Regarding Efficient Utilization of Reserves

Evaluation Tool Cont'd

Cell B20

Evaluate Unit on KPIs if Provided; If not, then score the same as cell A16 Score, Comment Box Should State "Not Applicable"

Cell B22

Evaluate Unit on Establishing a Mindset of Continuous Improvement. Did they Outline Steps they are Taking to Close Gaps?

Cell B24

Provide Comments Pertaining to the Unit's Strengths in Outlining their Mission

Cell B26

Provide Comments Pertaining to the Unit's Weakness in Outlining their Mission

Written Summary Report to Senior Leaders

- 5 Sections
 - Goals & Initiatives
 - Organization
 - Operations
 - Finance
 - Assessment
- Assign Committee Members Prior to Presentations - OPTIONS
 - Same members write the same section for each presentation (FY21 format)
 - Change assignments for each presentation



Microsoft Word
Document

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