Pilot Year

Patti Ramirez – Asst Vice Provost

Paula Pierson – Sr Director, Budget & Financial Planning

Transition To

Rita Andrews – Director of Financial Projects & Planning

Sheri Hardison – Sr Assoc VP, Financial Affairs
Topics

1. Committee Membership
2. Role of the Operational Review Committee
3. Operational Review Process
4. Process Flowchart
5. Review Summary
6. Operational Review Units Grid
7. Deck Framework Outline
8. Timeline
9. 2nd Year Unit Reviews
10. Questions
# Operational Review Membership

## Operational Review Committee - FY22 Membership Recommendations

<table>
<thead>
<tr>
<th>Member</th>
<th>Name</th>
<th>Unit</th>
<th>Term - 3 Years</th>
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</thead>
<tbody>
<tr>
<td>Dean</td>
<td>Sean Kelly</td>
<td>Honors College</td>
<td>8/31/2023</td>
</tr>
<tr>
<td>Dean</td>
<td>Lynne Cossman</td>
<td>College for Health, Community and Policy</td>
<td>8/31/2023</td>
</tr>
<tr>
<td>College Department Chair</td>
<td>Juan Gutierrez</td>
<td>COS - Mathematics</td>
<td>8/31/2023</td>
</tr>
<tr>
<td>College Department Chair</td>
<td>Jon Taylor</td>
<td>COLFA - Political Science and Geography</td>
<td>8/31/2023</td>
</tr>
<tr>
<td>Faculty Member at Large</td>
<td>Jae Yong Suk</td>
<td>CEID - Department of Architecture</td>
<td>8/31/2024</td>
</tr>
<tr>
<td>Faculty Member at Large</td>
<td>Marie Tillyer</td>
<td>HCaP - Criminology and Criminal Justice</td>
<td>8/31/2024</td>
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<tr>
<td>College Financial Lead</td>
<td>Mike Findiesen</td>
<td>College of Sciences</td>
<td>8/31/2024</td>
</tr>
<tr>
<td>Academic Support Unit Leadership</td>
<td>Lynn Barnes</td>
<td>Strategic Enrollment</td>
<td>8/31/2022</td>
</tr>
<tr>
<td>Academic Support Unit Financial Lead</td>
<td>Carlotta Bell</td>
<td>Student Success</td>
<td>8/31/2022</td>
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<tr>
<td>Administrative Support Unit Leadership</td>
<td>Paul Goodman</td>
<td>Facilities</td>
<td>8/31/2024</td>
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<tr>
<td>ADD: Administrative Support Unit</td>
<td>Cynthia Arreola</td>
<td>Inclusive Excellence</td>
<td>8/31/2024</td>
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<td>ADD: Support Unit Member at Large</td>
<td>Anne Peters</td>
<td>University Relations</td>
<td>8/31/2024</td>
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<tr>
<td>Auxiliary Unit Leadership</td>
<td>Laura Munroe</td>
<td>Campus Recreation</td>
<td>8/31/2023</td>
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<tr>
<td>Faculty Senate Budget Committee Chair</td>
<td>John Wald</td>
<td>College of Business</td>
<td>Coincides with Faculty Senate Term</td>
</tr>
<tr>
<td>Staff Senate Representative</td>
<td>Brandy Barksdale</td>
<td>Advising Administration</td>
<td>8/31/2023</td>
</tr>
<tr>
<td>Space Committee Representative</td>
<td>Patrick Grant</td>
<td>Intercollegiate Athletics</td>
<td>8/31/2023</td>
</tr>
</tbody>
</table>

Red Text Indicates New Members for FY22
Role of Operational Review Committee

- Participate in operational reviews
  - Academic & Administrative Support Units
  - Auxiliary [Non-Academic Revenue] Units
- Collaborate to make informed recommendations
  - Expected service levels
  - Associated costs
- Review financial performance—Past, Present, and Future
- Encourage units
  - Assess internal policies
  - Review processes
  - Identify improvements
  - Benchmarking & Performance Evaluation Tools
- Evidence-based forum with central leadership on issues important to units
- Governance producing
  - Accountability
  - Efficiency
  - Operational Effectiveness
Process

- Units route presentation packets
  - Vice Provost [Academic Support Units]
  - Vice President [Auxiliary & Administrative Support Units]
  - Submit to IRM Unit
- Committee reviews entail
  - Questions
  - Concerns
  - Requests for additional information
  - Evaluating presentation material – we will provide guidelines
- Routed
  - University Leadership Council (ULC)
  - Resource Management Team (RMT)
- Feedback
  - Shared directly with units
  - Posted on IRM website
Review Summary

- Total Units = 34
  - 12 Academic Support Units
  - 9 Administrative Support Units
  - 13 Auxiliary [Non-Academic Revenue Units]
- Unit reviews
  - Rotational Basis
- Presentation format submission to IRM Unit
  - Framework Provided that Addresses
    - Mission Statement & How Goals of University Align
    - Organizational Chart
    - Reserves & Balances
    - Benchmark and/or Surveys
    - 5 Year Pro-Forma
    - What is going well? What requires improvement?
  - Other slides keep to minimum
- In Person
  - Review committee
  - Answer questions
# Operational Review Units

<table>
<thead>
<tr>
<th>Academic Support Units</th>
<th>Academic Affairs - Graduate &amp; Postdoctoral Studies</th>
<th>Academic Affairs - Honors College</th>
<th>Academic Affairs - All Other (inc SVP Office)</th>
<th>Academic Affairs - Academic Innovation</th>
<th>Academic Affairs - Library</th>
<th>Academic Affairs - Academic Success</th>
<th>Academic Affairs - Strategic Enrollment</th>
<th>Academic Affairs - Student Success</th>
<th>Academic Affairs - Student Affairs</th>
<th>Research</th>
<th>School of Data Science</th>
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<tbody>
<tr>
<td>Auxiliary Revenue Unit</td>
<td>Athletics</td>
<td>Campus Recreation</td>
<td>Child Development Center</td>
<td>Housing Services</td>
<td>Student Health Services</td>
<td>Student Union</td>
<td>Campus Services - Bookstore</td>
<td>Campus Services - Business</td>
<td>Campus Services - Food</td>
<td>Campus Services - Parking</td>
<td>Campus Services - Transportation</td>
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<tr>
<td>Administrative Support Units</td>
<td>Business Affairs</td>
<td>Development - Alumni Relations</td>
<td>Facilities</td>
<td>People Excellence</td>
<td>University Technology Solutions (UTS)</td>
<td>Inclusive Excellence</td>
<td>President's Division</td>
<td>Public Safety</td>
<td>University Relations</td>
<td></td>
<td></td>
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</table>
Deck Framework Outline

- Mission Statement
- Unit Goals Align to University Goals
- Organizational Chart
- Reserves & Balances
- Benchmark and Surveys
- 5 Year Pro-Forma
- What is going well?
- What requires improvement?
- Other Slides Keep to Minimum
## Timeline

<table>
<thead>
<tr>
<th>Date</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept</td>
<td>Committee Meet to Discuss Overview, Timeline, Deck Format, and Units Being Reviewed</td>
</tr>
<tr>
<td>Dec or Jan</td>
<td>Kickoff Meeting with Evaluators on Committee</td>
</tr>
<tr>
<td>Jan</td>
<td>Inclusive Excellence Presents - Mid Month</td>
</tr>
<tr>
<td>Jan</td>
<td>Committee Meet to Discuss Inclusive Excellence [1 or 2 times prior to next unit presentation]</td>
</tr>
<tr>
<td>Feb</td>
<td>Child Development Center Presents - Mid Month</td>
</tr>
<tr>
<td>Feb</td>
<td>Committee Meet to Discuss Child Development Center [1 or 2 times prior to next unit presentation]</td>
</tr>
<tr>
<td>Mar</td>
<td>University Technology Solutions Presents - Mid Month</td>
</tr>
<tr>
<td>Mar</td>
<td>Committee Meet to Discuss University Technology Solutions [1 or 2 times prior to next unit presentation]</td>
</tr>
<tr>
<td>Apr</td>
<td>Strategic Enrollment Presents - Mid Month</td>
</tr>
<tr>
<td>Apr</td>
<td>Committee Meet to Discuss Strategic Enrollment [1 or 2 times prior to end of month]</td>
</tr>
<tr>
<td>Apr/May</td>
<td>Committee Submits all Evaluations/Feedback</td>
</tr>
<tr>
<td>May</td>
<td>Share Evaluation with ULC &amp; RMT by Mid May</td>
</tr>
<tr>
<td>May/Jun</td>
<td>Feedback to Inclusive Excellence and Post on IRM Website</td>
</tr>
<tr>
<td>June</td>
<td>Feedback to CDC and Post on IRM Website</td>
</tr>
<tr>
<td>June</td>
<td>Feedback to UTS and Post on IRM Website</td>
</tr>
<tr>
<td>Jun/Jul</td>
<td>Feedback to Strategic Enrollment and Post on IRM Website</td>
</tr>
</tbody>
</table>
2nd Year Unit Reviews

• Last Year
  • Facilities, Campus Recreation, and Student Success
• This Year
  • Inclusive Excellence—Target is mid Jan
  • Child Development Center (CDC)—Target is mid Feb
  • University Technology Solutions (UTS)—Target is mid Mar
  • Strategic Enrollment—Target is Mid Apr
• Currently Working on Developing Future Scheduled Unit Reviews
Overarching Goal

• Governance Process
  • Resulting
    • Improved Fiscal Accountability
    • Management of Resources
Questions?