



Operational Review Committee FY22

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

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

Process FlowChart

Executive Resource Management Team:

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



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

Academic Support Units	Academic Affairs - Global Initiatives	Academic Affairs - Graduate & Postdoctoral Studies	Academic Affairs - Honors College	Academic Affairs - All Other (inc SVP Office)	Academic Affairs - Academic Innovation	Academic Affairs - Library	Academic Affairs - Academic Success	Academic Affairs - Strategic Enrollment	Academic Affairs - Student Success	Academic Affairs - Student Affairs	Research	School of Data Science
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Auxiliary Revenue Unit	Athletics	Campus Recreation	Child Development Center	Housing Services	Student Health Services	Student Union	Campus Services-Bookstore	Campus Services-Business	Campus Services-Food	Campus Services-Parking	Campus Services-Transportation	Campus Services-UTSA Card	Campus Services-Vending
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Administrative Support Units	Business Affairs	Development-Alumni Relations	Facilities	People Excellence	University Technology Solutions (UTS)	Inclusive Excellence	President's Division	Public Safety	University Relations
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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

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

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?
