

Operational Review Committee – Pilot Year Process, Timeline, and Next Steps

UTSA

The University of Texas at San Antonio™

Operational Review Committee

Presentation to ULC

April 28, 2021

Presenters:

Lynn Barnes

Laura Munroe

Sean Kelly

Operational Review Committee

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

- ❑ Operational reviews of Non-Academic Revenue (Auxiliary) units, Academic and Administrative Support units

- ❑ Review prior year performance, current year operations, and long range plans

- ❑ Encourage units to assess internal policies, processes, and priorities to identify opportunities to improve outcomes and recognize efficiencies

- ❑ 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, academic support, administrative support units will participate in the review process
- ❑ Operational Review Committee reviews each packet, documenting questions, concerns, and requests for additional information
- ❑ Committee feedback routes to the University Leadership Council and subsequently Resource Management Team
- ❑ After the review process, feedback will be shared with the units, as well as posted to the IRM website as part of the overall communication plan

Required Information From Units

Each unit under review was required to provide the following information:

- General Information to “Tell Your Story”
- Organizational Chart and Positions
- Opportunities and Challenges
- Key Performance Indicators / Benchmarks / Comparisons
- Budget, Financial and Reserve Data

Committee Next Steps

Discuss and Evaluate the Pilot Year Review Process:

- Continuous Evaluation and Refinement of Operational Review Process
- Recognize the Time Commitment by Unit Leadership and the Review Committee
- Evaluate Required Documentation in Unit Reports
- Create Timeline for Ongoing Process
- Review and Document Committee Expectations for Future

Excerpt of Keys to Consider During Review Process

Organization	<ul style="list-style-type: none"> ✓ Impression of Organizational Structure and Services Offered ✓ Staffing, Collaboration and Partnership
Operations	<ul style="list-style-type: none"> ✓ Innovation, Productivity, Efficiencies, Process Improvement ✓ Opportunities for Continuous Review, Improvement and Growth
Finance	<ul style="list-style-type: none"> ✓ Budget Adequate to Support the Operation ✓ Review and Implementation of Cost Efficiencies
Assessment	<ul style="list-style-type: none"> ✓ Engagement in Continuous Assessment and Evaluation ✓ Identifying Opportunities and Challenges
Goals and Initiatives	<ul style="list-style-type: none"> ✓ Contingency Planning and Deferred Maintenance Planning ✓ Initiatives Planned to Recognize Efficiencies and Growth

Committee Pilot Year Timeline

November – December 2020

- Committee Kick-off Meeting
- Review IRM and Governance Process

January 2021

- Review of Facilities (Administrative Support Unit)

February 2021

- Review of Campus Recreation (Non-Academic Revenue Unit)

March 2021

- Review of Student Success (Academic Support Unit)

April – May 2021

- Committee Reports Shared with University Leadership Council
- Committee Reports Shared with Resource Management Team

