

The University of Texas at San Antonio

# UTSA Staff Senate

## General Meeting Minutes

Thursday, October 20, 2022 | 8:30-10:30 A.M. | Hybrid Meeting – North Paseo (NPB) 1.412 & Zoom

### 8:30 a.m. Meeting Called to Order

- Attendees: Amy Fritz, Damaris Ibarra, Dominick Morales, Amanda Perez, Angel Espinoza, Brandy Garcia, Cindy Orth, Destiny Jones, Drew Vincent, Stef Casper, Jaime Fernandez, Jake Erney, Jenny Stokes, Lisa Alonzo, Matt Fey, Nnenna Ikwuagwu, Olamiposi Kolajo, Olinda Ongay, Sapna Naik, Sara Cliffe, Sara Tate, Ty Middleton, Vero Salazar, Victoria Downing, Xavier Loreda, Yasmín Codina, Jessica Vela, Wanta Guntz, Clarisa De La Fuente, Demetrius Johnson, Justin Marmolejo, Sharon Martinez, Anna Boyer-Chadwick, Melissa Blanton, Julie Fisher
- Absences (Excused): Robert Ripley, Matt Keneson, Norma Gomez, Xavier Santos
- Absences (Unexcused): Diana Lomas

### 8:35 a.m. Motion to vote on Staff Senate Meeting Minutes 9.22.2022 – Jake Erney, Parliamentarian

- Motion seconded by Drew Vincent
- 11 yeses in person, 9 in online; no nays. Minutes approved.

### 8:40 a.m. University Service Updates

- Enriching Campus Wellbeing Steering Committee – TBA**
  - Connected with Dr. Wyatt and LT Robinson, who have asked for a Staff Senate representation.
  - Needs a representative from the Health and Wellness Committee.
- Faculty Senate – Justin Marmolejo**
  - Southwest campus visit for last meeting. There are open office spaces that we can rent offices (hoteling) using <https://utsa.resourcescheduler.net/MapView/> and conference spaces can be rented from Events Management. Parking permits work on Southwest campus too.
  - Presentation from Provost Espy on Academic Affairs.
  - No updates on merit yet.
  - Presentation from J. Shaw, Interim REDKE, who talked about NRUF and not meeting the audit requirements.
- Hispanic Thriving Initiative – TBA**
  - Damaris received an email from Angela Griffith. Jessica Dawson was the Staff Senate representative on this council.
  - First meeting is on October 31. They meet 3-4 times per year. Additional meetings may be needed because of the Seal of Excelencia renewal. This is an opportunity for a Staff Senate representative.
  - Amanda Perez is interested and will be able to attend the first meeting virtually. Damaris will send Amanda's information to Angela. Lisa Alonzo can serve as backup if necessary.
- Homecoming Committee – Jessica Vela**

The University of Texas at San Antonio

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## General Meeting Minutes

Thursday, October 20, 2022 | 8:30-10:30 A.M. | Hybrid Meeting – North Paseo (NPB) 1.412 & Zoom

- <https://www.utsa.edu/homecoming/> Events for homecoming are happening this week. Tomorrow is Best Fest.
- Window Wars – Judging today, October 20. Winner will be announced at Best Fest tomorrow. Homecoming Committee asked for a representative from Staff Senate to announce the winner. The announcement will be at 8:30pm. Lisa Alonzo volunteered. Amanda Perez can be a backup for the announcement.
- 13 entries. The judging is a mix of virtual and in person and should be completed by 4pm.
- **HOP Committee** – Jaime Fernandez
  - Policies Voted On
    - HOP 2.46 – Faculty Rights & Responsibilities – Abstained
    - HOP 2.02 – Faculty Appointments & Titles - Abstained
  - Published Policies
    - [HOP 9.24 – Sexual Harassment & Sexual Misconduct](#)
    - [HOP 2.46 – Faculty Rights & Responsibilities](#)
  - Policies Reviewed
    - HOP 2.25 Faculty Development Program - Abstained
  - Request further information from Jaime.
- **Parking & Traffic Committee** – Estefania Casper, Wanda Guntz, Clarisa De La Fuente
  - Reallocation of spaces – 50 spots have been reallocated back to staff.
  - Downtown campus parking and 7-10 minutes to get to building. Concerns were about accessible spots and lots of construction, including to build accessible spaces.
  - Pot hole concerns brought up at Main Campus. Some have been filled. Making sure they are filling the rest and preventing future pot holes.
  - Discussion:
    - One of the lots that had been reallocated was near Arts and SEB. That was primarily the lot that was reallocated.
    - Downtown campus under highway parking. Are they looking at public safety for students walking. Yes, there is supposed to be more presence and safety. There will be a presentation about safety at the downtown campus from UTSA PD.
    - One issue at the DT Campus is the elevator in the garage. It seems to be broken often and the signage is poor.
- **University Leadership Council** – Damaris Ibarra
  - President Eighmy is traveling to Austin and Washington DC for legislative sessions. Issues of discussion include tenure and critical race theory. The level of attention on these topics has not been as high as anticipated. President Eighmy will continue to travel on behalf of UTSA and to advocate for needs.
  - Faculty Senate support. They will continue to advocate for academic freedom. Staff Senate will continue to support Faculty Senate.
  - Campus Climate Town Hall, Monday Oct 17

The University of Texas at San Antonio

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## General Meeting Minutes

Thursday, October 20, 2022 | 8:30-10:30 A.M. | Hybrid Meeting – North Paseo (NPB) 1.412 & Zoom

- Livestream: <https://www.utsa.edu/president/event/2022-10-17-campus-climate-town-hall.html>
- Recording on YouTube: <https://www.youtube.com/watch?v=i9piVce0ZP4>

### 9:00 a.m. IRMY23 Year in Review – Sheri Hardison, Sr. Assoc. VP for Financial Affairs & Deputy CFO

- <https://www.utsa.edu/budget/irm/>
- Note: Presentation slides appended to the end of the meeting minutes.
- Additional notes
  - IRM is the resources allocation model that allocates the money around to units at the university.
  - Budgeted revenue
    - \$691,620,087 for FY23
    - 10 years ago, the budget was \$477 M. State appropriate percentage has gone down. To compensate, tuition and fees and in some cases sponsored and gifts have gone up.
    - Compensation and benefits is 57% of the total.
    - Financial aid to students is about \$200M.
  - Guiding principles are on the [IRM website](#)
  - Post-pandemic, have tried to maintain as much enrollment as possible. Small increase in tuition revenue because of enrollment maintenance. Auxiliary revenue also increased. FY23 has been fully back up to speed. They budgeted conservatively last year. Campus Services, Food, Parking, and Housing activities have increased.
  - Post-pandemic, some students are taking a smaller course load, so credit hours have decreased. Students pay by credit hour, which means less revenue overall. Auxiliaries, research have gone up. Expenses have also increased.
  - Strategic Investment Fund – <https://www.utsa.edu/budget/irm/strategic-investment-fund/>
    - Funded projects: <https://www.utsa.edu/budget/irm/strategic-investment-fund/funded-projects.html>
- Question: Is that available to colleges/departments, and how do you get that funding?
  - Different revenues, 14% taken from some, like tuition; 8% off others. 14% funds the Strategic Investment Allocation. This comes out of the 14%. After that, the funding is available for distribution through a proposal process. Anyone in a college or VP unit can submit a proposal, with a max of 2 from each VP unit. Those proposals are then reviewed by the SIF Committee. The funded proposals vary a lot in what they cover. These are temporary initiatives that are funded, not permanently, but gives areas more time to figure out how to fund them permanently. There will be more information on how to create a good proposal.

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## General Meeting Minutes

Thursday, October 20, 2022 | 8:30-10:30 A.M. | Hybrid Meeting – North Paseo (NPB) 1.412 & Zoom

They receive more proposals from faculty than staff. They are planning to come up with tools and targeted information to help with the process.

### 9:28 a.m. University Service Updates continued

- **University Scholarships Committee** – Damaris Ibarra & Diana Lomas
  - No information yet.
- **Sustainability Council** – Jake Erney
  - They are creating a student survey on their understanding of sustainability. This might trickle down to staff at some point, which Jake will bring up.

### 9:30 a.m. Committee Updates

- **Communications** – Drew Vincent
  - Previous discussion was about adding Staff Senator to our email signatures. Because that is a brand-related question and has to align. They approved Senator Email Signature. Drew will share the signature information with Staff Senators.
  - [Staff Senate Communications Request Form](#) - Please use this form to request communications.
  - Requests: Provide winner of Window Wars (photo, name of team), and provide photos of all Window Wars submissions to committee for social media.
  - Send any pictures to Drew for social media as well.
  - Senators and their pictures and committee members have been updated on the website.
- **Community Outreach & Events** – Jessica Vela
  - Window wars, as discussed earlier.
  - No additional updates.
- **Elections** – Cindy Orth
  - Have not met this month. This committee is more seasonal.
  - Full representation for 2022-2023, with 40 members.
  - Committee will be meeting to discuss election process and representation for staff presence at Southwest, Downtown, and San Pedro I campuses.
  - If you have any recommendations about improving the process, please let the committee know.
- **Finance** – Angel Espinoza
  - FY23 Budget update: \$13,711.97 available
  - History of the cost center: This is where all of the fundraising is deposited into, so the total of \$20,000 is not available because it is transferred to scholarships.

## General Meeting Minutes

Thursday, October 20, 2022 | 8:30-10:30 A.M. | Hybrid Meeting – North Paseo (NPB) 1.412 & Zoom

- The spreadsheet is available in Teams in the Finance Committee channel.
- Last year, the bulk of the funding went to committee outreach and events.
- Based on the same proportions as last year, the committee projected amount that can be spent for each committee. Any committee who did not have spending last year. The finance committee would like to propose asking each committee to submit a budget request form. This will allow the committee to review requests and estimate spending. This is separate from the purchase request form.
- Discussion about the proposed process for funding:
  - Deadline to submit the form? Finance committee has currently set the deadline for the next November meeting. One piece of feedback is some committees would need more time.
    - This would be an estimate. Once you're ready to make the purchases, you can submit a purchase request.
  - What if events come up? How does that fit in?
    - Committee will think about this process.
  - Note, we have less money to spend this year because we previously had a carryover from the previous fiscal year. Also need to reinforce the current programming and signature events.
  - As we forecast, should we take some off the top and put it in a reserve? By a certain date, if we need an extra reserve, then can use it for replenishing or additional programming.
  - We overspent last year, so we did not have a rollover.
  - History to the process: There was an initial allocation for the Great Staff Appreciation event. Over the course of the last couple of years, there was a decline. Part of the allocation for Staff Appreciation also went to Rowdy Games. That budget was split last year. The allocation based on the same proportion for \$9,800 for FY23 for Staff Appreciation is low and will be difficult.
- Additional questions and feedback from Senators:
  - Amy: We have \$20,000 for scholarships, why are we only awarding \$500?
  - Amy: Do we have an opportunity to ask for a larger budget?
    - Damaris: Brandy Barksdale, previous Chair, asked for \$15,000 again. Last year was a trial time for needs for staff members.
  - Drew: Going back to the importance of planning and the question about 'unplanned/unexpected' events, I personally would recommend we limit how many of those we allow. We can be flexible to a point but we really should focus on planning.
  - Parliamentary process note: Updates to our procedures and how we operate as an organization will need a vote. The committee will need to propose their process, answer questions formally, and motion for adoption. If adopted, our

## General Meeting Minutes

Thursday, October 20, 2022 | 8:30-10:30 A.M. | Hybrid Meeting – North Paseo (NPB) 1.412 & Zoom

SOP would need to be updated to make this change official for future generations.

- Dominick: I know we typically have a fundraiser or 2 for scholarships. Could we do a separate fundraiser to raise funds for Staff Senate in general that we could use for things outside of the Great Staff Appreciation event so we don't have to take budget away from that?
  - Jaime: Agree, I think with Great Staff Appreciation & Rowdy Games among other things. We have rising costs at this time anyway. I do wonder if we can re-propose and ask for more money.
  - Damaris: Last Great Staff Appreciation, spent money at Freebirds for 500 people. There was a lot of food left over.
  - Damaris: Proper planning is necessary and being mindful about how we are spending.
  - Amy: All this conversation about a smaller budget, we need this form. It will also keep committees tied to their budget, so they can find more cost-effective options when planning their events/needs.
  - Angel thanks Senators for feedback. In the past, committee approved on a first-come first-served basis, so the committee wants to be a bit more strategic.
  - Clarisa: Expectation of outcomes for the Great Staff Appreciation will be determined based on what the budget is.
  - Lisa: For future budget increases-how about we use the recent Campus Climate report to request additional funding whether it is one-time funds or increased overall budget. There were items in the report that are in direct alignment with the type of work Staff Senate does, in regards to staff retention etc.
    - Lisa is happy to work on developing this idea.
    - Can connect the time of programming that we do contributes to a positive campus climate and to staff retention.
  - Angel: Next step is that the finance committee will meet again to discuss feedback. They will bring it back to the Staff Senate next time.
- **Health & Wellness – Wanda**
    - Rowdy Games tentative date vote
      - Committee proposes Saturday, March 25, 2023. The date is available in the Rec Center and has been put on hold.
    - UT System allocation – Bryanda from Rowdy New U submitted a proposal. Received \$1000 for allocation to the event. The greater we grow the event, the more we can potentially ask for.
    - Motion to vote on date, and seconded by Dominick.
    - Yeses: 11 in chat, 10 in person; 1 no. Motion passes and date approved.
    - Materials and t-shirts are left over from last year. All of the information, including the logo, is also on Teams. Will re-use logo.

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- Graphics is available to help with graphics to create marketing materials, like a save the date. Damaris will share that information.
- **QIC** – Sapna and Dominick
  - [Form](#) statement changed to reflect discussion last time about posting on the website.
  - Spanish language form under review.
  - Cymanii email ticket submitted to UTS
  - Donation of sick leave
    - <https://www.utsa.edu/hop/chapter4/4-20.html>
    - Donating to pool vs. donating to specific individual
    - Both donor and recipient are taxed
  - A&P comp time
    - Jaime also asked Wanda Boller in People Excellence, awaiting responses.
    - A&P does receive comp time for working on a holiday.
      - The issue was for other instances.
    - <https://www.utsa.edu/hr/Leave/CompTime.html>
      - “A&P employees are not eligible for state compensatory time as determined by the Campus Management Operations (CMO). A&P employees are ONLY eligible to earn state compensatory time for the hours worked on a holiday.”
- **Staff Appreciation & Scholarships** – Sharon Martinez
  - Individual winner for October has been chosen. The award will be announced in person next week. No team winners for October.
  - Nominations: <https://www.utsa.edu/staffsenate/Appreciation.html>
  - Proposal to committee name changes: Still working on this.

### 10:25 a.m. General Announcements & Reminders – Damaris

- Adopt-a-Family is coming up
  - Last year, this was led by Community Outreach and Events
  - Do we want to be a part of it this year as well?
  - RowdyLink form: <https://utsa.campuslabs.com/engage/submitter/form/start/546861>
  - Community Outreach and Events has discussed it and will take the lead on this. Vero and Amy volunteered to help.
- Table cloth purchase request
  - Which logo and color? We are required to use UTSA branded logo. Not sure about if it's required to be blue. Drew recommends contacting Marketing.
  - Damaris will ask for our feedback.
- Upcoming meeting with Veronica
  - Topics to bring over – If you have any topics, email Damaris.

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- Meeting with staff members across campus
  - Ideas that Damaris will bring to us in Teams
    - Meet your Senator Coffee Chat
    - Tabling opportunities across campus?
    - Any other ideas?

**10:30 a.m. Adjourn** – Jake

- Next General Meeting: Thursday, November 17<sup>th</sup> at 8:30 a.m. – Hybrid

# IRMY23: Year in Review

**UTSA**

The University of Texas at San Antonio™

**Veronica Salazar***Chief Financial Officer and Senior Vice President for Business Affairs***Kimberly Andrews Espy, Ph.D.***Provost and Senior Vice President for Academic Affairs***Sheri Hardison***Deputy Chief Financial Officer and  
Senior Associate Vice President for Financial Affairs*

## Agenda

FY2023 UT System Budget

IRM Model Overview

IRM Process Improvements

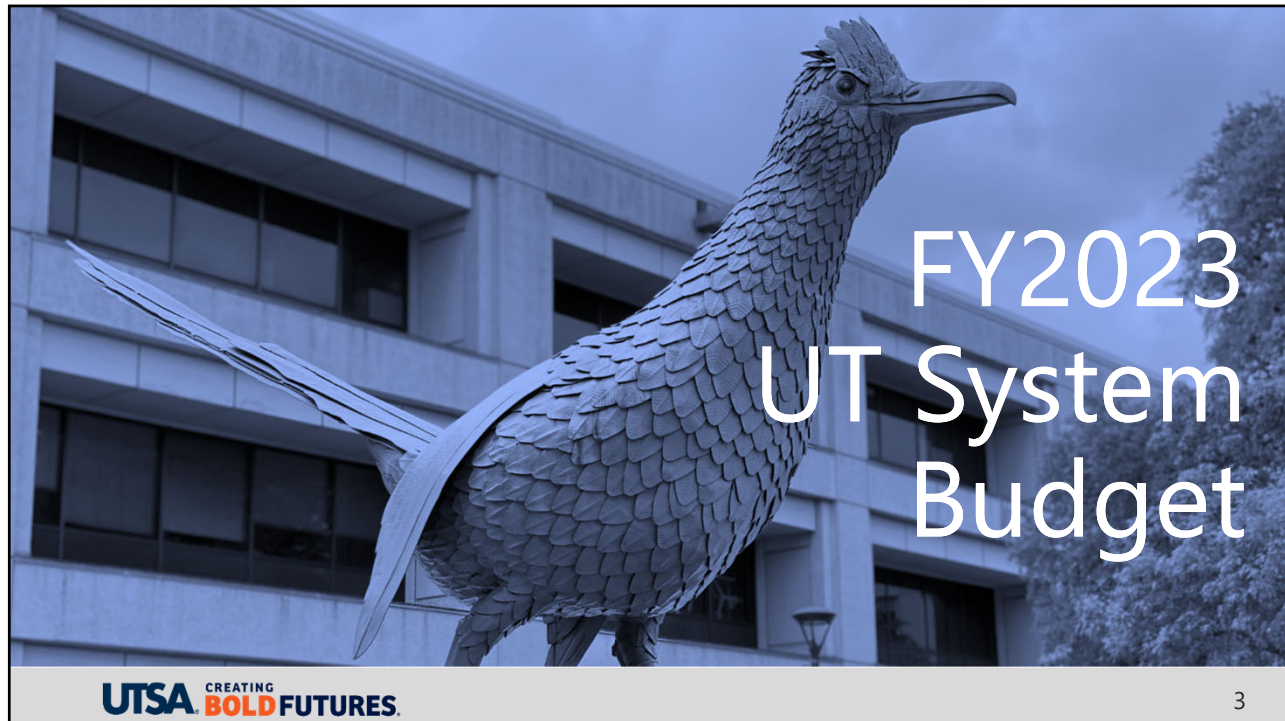
IRMY23 Outcomes

IRMY23 At Work

- Strategic Investment Fund
- Operational Review Committee

IRMY23 Conclusion

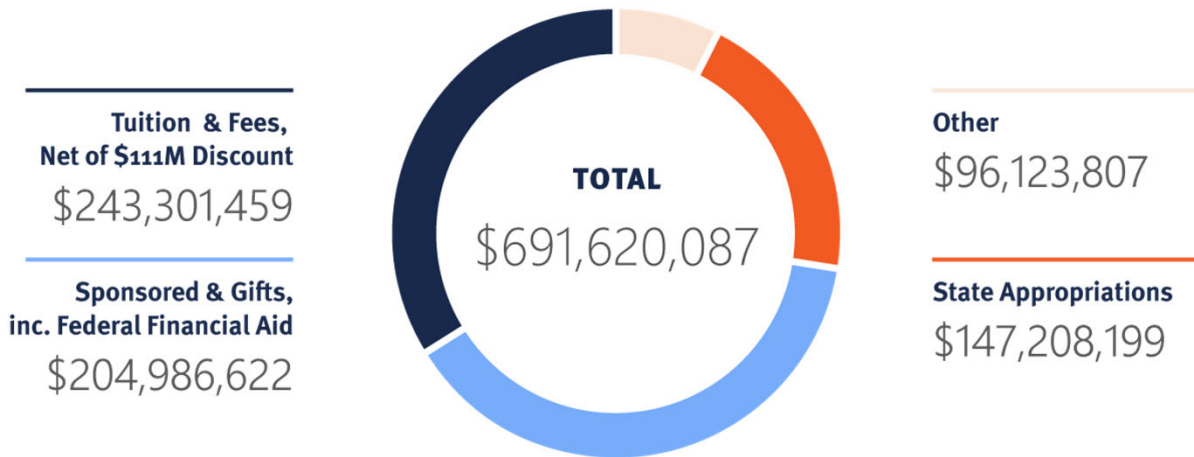
**UTSA** CREATING **BOLD FUTURES**



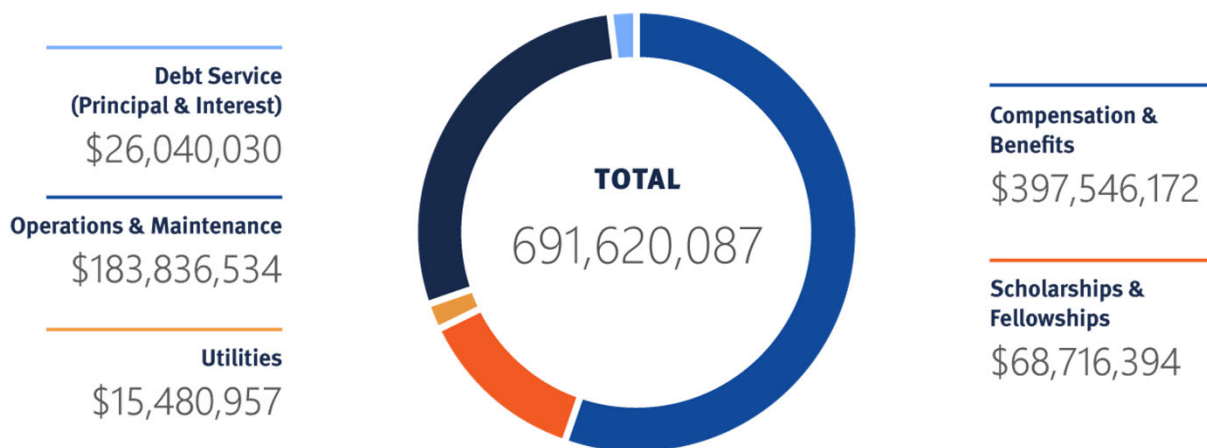
## IRM vs. UT System Budget

IRM INCENTIVIZED RESOURCE MANAGEMENT	UT SYSTEM BUDGET
"Roadmap" for strategic investment decisions	Legislation requires Board of Regent approval on fiscal year budget
Revenue allocation of budget spending authority	Provides maximum spending authority for UTSA
Revenue from actuals for the prior formula year (summer 202x, fall 202x and spring 202y)	Tuition revenue forecasted for the fiscal year (fall 202y, spring 202z and summer 202z)
Follows UTSA established guidelines and governance structure	Prepared in accordance with Board of Regents' Rules and UT System budget instructions
Activity driver allocations for both revenue and expense used throughout model for the various revenue and support units	No activity driver allocations used

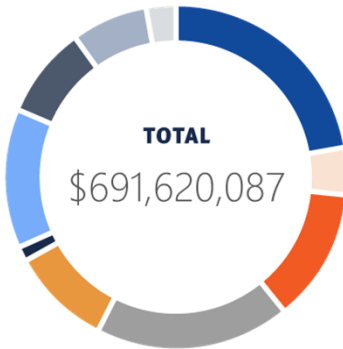
## FY2023 Budgeted Revenue



## FY2023 Budgeted Expenses By Type



## FY2023 Functional Budgeted Expense



### Instruction

\$150,015,021

### Research

\$120,864,522

### Academic Support

\$101,967,845

### Public Service

\$15,400,985

### Student Services

\$36,045,801

### Auxiliary Enterprises

\$72,794,136

### Institutional Support

\$59,313,411

### Scholarships & Fellowships

\$69,364,906

### Debt Service Interest

\$11,170,850

### Operations & Maintenance of Plant

\$54,682,610



## Guiding Principles

- 

Align resources with institutional priorities and state investment processes.
- 


Promote collaboration amongst the colleges, support units and auxiliaries to advance institutional and student success.
- 


Support the decision-making process with reliable data and analysis.
- 


Improve budget transparency.




## Guiding Principles

- 

Incentivize enrollment growth and cost effectiveness while enhancing fiscal accountability and prudent management of resources.
- 

Align college opportunities to develop resources for program support and to make "local" decisions that advance their college and students
- 

Evaluate the budget process periodically and adjust as necessary.
- 

Develop a budget model that promotes clarity and understanding for academic and administrative leaders with financial responsibilities.



## IRM Roles

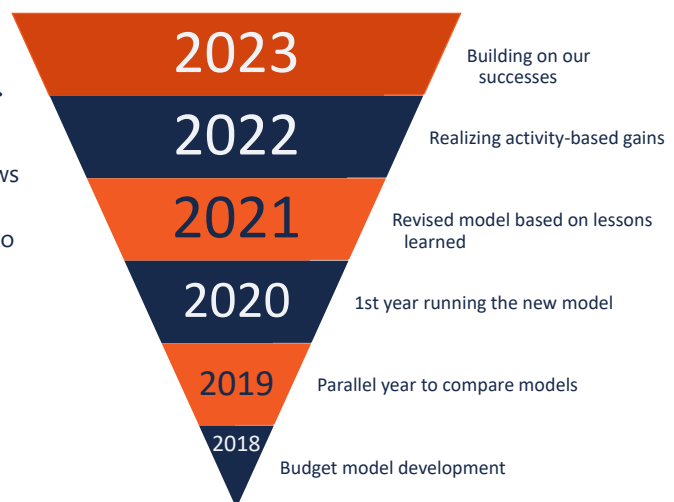
Institution	Colleges/Deans
Establishing and monitoring adherence to guiding principles and policies	Decision making and communication on allocation of college resources, with transparent processes for decision input
Oversight of model framework and methodologies	Oversight of college activity drivers and the actions needed to maximize activity
Ensuring adequate resources for UTSA to thrive, including best practice, efficient support unit operations	Ensuring adequate resources for College to thrive, including best practice, efficient supporting operations
Oversight and communication of mechanism for strategic investment at institutional and divisional levels	Oversight and communication of mechanism for allocating new or excess funding, including reserve balances
Regular communication of model outcomes and any methodology changes	Regular communication to Chairs regarding the connections between academic activity, IRM revenue/cost principles in the context of the specific college
Continuous improvement and agility to pivot in a dynamic environment	

## IRM Model Development

**Despite delays from COVID in 2020, IRMY23 is the fourth year of the model.**

### Continuous Assessment

- University Finance Team regularly reviews model inputs and effectiveness.
- Final IRMY23 model results were close to forecasted outcomes
- Regular communication with stakeholders





## Process Improvement

### Continuous Collaboration & Planning

- Ongoing collaborative meetings with academic college Deans
- Planning meetings held with Auxiliary Revenue Units and Support Units

### Standardized Communications and Materials

- Service Level Agreements for Administrative & Academic Services
- Standardized template for SCH/WSCH – also in Dashboard
- Standardized template for Academic Forecasting/Planning
- Standardized communications
  - Regular email communications
  - Annual presentations



## Process Improvement

### Improved Modeling

- Agility to run many scenarios and produce summary results quickly
- More accurate projection of revenues, expenses and Strategic Investment Allocation
  - Used earlier assumptions and estimates for draft models
  - Analyzed more than two dozen models with varying assumptions
  - Factored in more extensive expense and budget transfer analysis
- Already planning on how to further improve forecasting

## Process Improvement

### IRM Retreat

- University Finance Team (Academic Affairs & Business Affairs)
- Determined goals and projects for next year
- Discuss improvements we can make to progress the model
- Working group action plan for next year
  - SIF and ORC Committee improvements
  - IRM timeline- how to provide planning information earlier
  - Institutional data reporting
  - Activity drivers





## FY2022 Compensation Strategy Summary

Compensation Type	Employee Count	Total Amount
Minimum Pay Rates and Pay Scales	550	\$ 2,137,175
Merit	2,892	7,913,971
Market Retention	249	3,683,772
One-Time Stipends	3,630	3,262,200
<b>Total</b>	<b>7,321*</b>	<b>\$ 16,997,118</b>

*\*Note that individuals can be listed in more than one strategy*

## IRMY23 in Summary

- IRM allocations are driven by activity
  - Successful strategies implemented to maintain enrollment gains from the beginning
    - Calling campaigns
    - Retention grants
  - Minor increase in tuition revenue, including previously built-in rate increase
  - Second year of biennium for appropriation revenue
    - No significant change in general appropriation
    - Benefits reimbursement amount increased
  - Significant increases in auxiliary budgeted revenue



## IRMY23 in Summary

### Tuition Activity

IRMY23 tuition period is summer 2021, fall 2021 and spring 2022

- Headcount remains steady
  - 0.8% decrease in student enrollment year over year
- \$1.25M increase in tuition revenue (rate increase)
- 1.7% decrease in WSCH
- 2.9% decrease in SCH

### Other Activity

- 18.4% increase in total revenue for auxiliary units
- \$2.6M (5.2%) increase in research expenditures
- \$26.2M (3.9%) increase in total direct expense



# College Strategic Investment Allocation

## IRMY22 College Strategic Investment Allocation (SIA)

- \$28,363,142
- 8.7% of total college operating revenue

## IRMY23 College SIA

- \$32,099,154 Total SIA
  - \$29,389,845 IRMY23 Recurring SIA- 9.1% of college operating revenue
  - \$2,709,309 CSIF Presidential Allocation (Temporary)
- Total SIA has increased from IRMY22
  - Marginal revenue increases – enrollment activity decreased and the only increase came from a previously approved rate increase
  - Still have to cover expense increases
  - President approved CSIF Presidential Allocation for IRMY23



## Strategic Investment Fund

- SIF funded by allocation of revenues:
  - 14% on tuition, appropriation, sales and services and other revenue
  - 8% on mandatory fees (IRMY22 and forward)
- Allows for investment in critical strategic efforts that serve the best interests of the university.
- SIF Committee comprised of faculty and staff representatives from throughout the university.



## Strategic Investment Fund

- Request for proposals sent in February with a deadline in mid-March.
- Committee scored each proposal using a rubric.
- Committee recommended top proposals to ULC and Executive Leadership team for funding.
- **15 distinct proposals were awarded SIF funding for 2022, totaling approximately \$4.6M!**



# Strategic Investment Fund

## Examples of Funded Projects

Department	Projects
Office of Advancement and Alumni Engagement	Be Bold: A Campaign for Our Future - Public Launch Strategy
Strategic Enrollment	Marketing Infrastructure to Meet UTSA's Enrollment Goals
College of Engineering & Integrated Design	UTSA to Become a National Hub for Materials Research and Education
Academic Affairs - Library	JPL Heart of the Campus Furnishings

 [utsa.edu/budget/irm/strategic-investment-fund](https://utsa.edu/budget/irm/strategic-investment-fund)

# Strategic Investment Fund

## Process Updates

- Two submissions maximum per college or VP division
- Updated Proposal Form
  - Technology section, with UTS required approval
  - One-year of funding only - more clearly defined
  - Prior year awards requesting additional funding
  - Prioritization defined by college/VP division
- Updated evaluation rubric
- General evaluation criteria communicated to division leaders





## Operational Review Committee

- Second round of reviews completed in 2022
- Collaborative review process
  - Assess internal policies, processes and priorities.
  - Identify opportunities to improve outcomes and recognize efficiencies.
- Committee Membership
  - Leadership from academic revenue units, auxiliary units, and support units.
  - Faculty and staff in financial, business, and at-large positions.



## Operational Review Committee

- Reviews during 2021-2022
  - University Technology Solutions
  - Strategic Enrollment
  - Inclusive Excellence
- Reviews during 2020-2021
  - Campus Recreation
  - Student Success
  - Facilities



<http://utsa.edu/budget/irm/operational-review-committee.html>



## Operational Review Committee

### Committee Recommendations

- Ensure mission statement is clear on purpose, role and intent to all university stakeholders
- Identify KPIs and use benchmarking analysis to compare with other institutions
- Explore customer surveys for feedback
- Tie all costs to programs and measurable outcomes
- Some units encouraged to explore grant funding for program sustainability
- Specific areas for cost-cutting measures suggested in some cases





## Final Thoughts

- University Finance Team structure and dedicated IRM office allowed for better forecasting and modeling than previous years
- Demonstrated commitment to continuous improvement since the inception of the model
- Ongoing collaboration ensures shared objectives for process improvement
- What ideas do you have in relation to the progression of IRM?

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