

Administrative and Educational Support Report

Budget Office

Annual Action Plan
Annual Assessment Report

June 2004 – May 2005



Annual Action Plan: June 1, 2004–May 31, 2005

Unit: Budget Office

UTPA Mission: The University of Texas-Pan American (UTPA) serves the higher education needs of a rapidly growing, international, multicultural population in the South Texas Region. The University preserves, transmits and creates knowledge to serve the cultural, civic, and economic advancement of the region and the state. The University provides students advanced instruction in academic programs offered through innovative delivery systems that lead to professional certification, and baccalaureate, master’s and doctoral degrees. Through teaching, research, creative activity and public service, UTPA prepares students for lifelong learning and leadership roles in the state, nation and world community.

Division: Business Affairs **Unit Head:** Juan C. (JC) Gonzalez

Unit Mission: To support optimized resource allocation decisions made by university management through budget, financial and other related decision support services.

Unit Goal: To facilitate & optimize resource allocation & executive decision-making

Link to UTPA Goal(s): 3. Improve UTPA's organizational effectiveness

Unit Objective (Action Priority: #1 is highest)	Link to UTPA Objective	Expected Outcome for Unit Objective (AA-Measurable Objective)	Strategy(ies) to Achieve Expected Outcomes	Assessment Criteria, Evaluation Methods for Expected Outcome	New Resources Needed in FY05
Implement an automated budget request system (1)	7	Improvement in quality & timeliness of budget information provided to budget cycle participants.	<ul style="list-style-type: none"> a. Gain approval from vice president for business affairs & IT department. b. Identify prioritized system capabilities. c. Setup regular meetings to ensure ongoing progress. 	Feedback from users attending training workshops on the newly-created system.	<ul style="list-style-type: none"> a. Staff time b. Programmer time c. Funds for hardware & software
Refine depository structure for electronic files (2)	7	Allow analysts to more-easily identify needed financial data	<ul style="list-style-type: none"> a. Review existing structure b. Identify changes c. Implement changes 	Staff meeting discussions on whether changes were beneficial	Staff time
Setup a structure to allow budget staff to become more self-	7	Less direct supervision by unit head & increased productivity and	<ul style="list-style-type: none"> a. Drafting of template & brainstorming by unit-head. 	Staff meeting discussions of tasks being worked by each	Staff Time

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directed while also ensuring priority tasks are addressed. (3)		contentment of team.	b. Hold discussions with entire team to refine & finalize.	staff member	



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Implement an automated budget request system. (1)	7	Improvement in quality & timeliness of budget request information	Feedback from users attending training workshops on the newly-created system.	Budget requests routed manually through the organization using inefficient paper-based process.	FY 2006 budget requests were successfully submitted by departments using an automated system.
Refine depository structure for electronic files. (2)	7	Allow analysts to more-easily identify needed financial data	Staff meeting discussions on whether changes were beneficial	Disorganized organization of electronic data & information.	Structure was refined; all budget staff are better-able to identify needed electronic files more-quickly
Setup a structure to allow budget staff to independently determine and take action on	7	Less direct supervision by unit head & increased contentment of staff	Staff meeting discussions of tasks being worked by each staff member	Tracking & prioritizing analysts' various assignments is inefficient.	Improved structure is in-place and being used (refinement is ongoing)

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needed tasks. (3)					

Additional Resources Needed (if any) that were requested for FY06 during the budget cycle: \$4,200 in operating funds and \$3,500 in travel funds to support two additional staff members (financial analysts) approved during fiscal year 2005.