

Administrative and Educational Support Report

Materials Management

Annual Action Plan
Annual Assessment Report

June 2004 – May 2005



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

Unit: Department of Materials Management

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:** Frances A. Rios

Unit Mission: The Department of Materials Management strives to provide efficient and responsive procurement and related services to University departments with exceptional customer service and with the highest standards of ethics.

Unit Goal: To provide cost-effective and efficient services for University departments while ensuring compliance with relevant University, UT System, State, and Federal purchasing regulations.

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
To provide cost-effective and efficient purchasing services (1)	7	Decrease low value transaction workload in the Purchasing Department	<ul style="list-style-type: none"> • Conduct customer surveys. • Benchmark other UT components. • Study transactions processed by Purchasing Dept. buyers. 	<ul style="list-style-type: none"> • Customer feedback • Benchmarking other UT components • Performance reports on transaction types processed by Purchasing Dept. buyers 	None
	7	Encumbrance of small purchase orders at the point of creation	<ul style="list-style-type: none"> • Seek customer feedback. • Conduct customer 	<ul style="list-style-type: none"> • Customer oral feedback • Customer surveys 	None

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			surveys. • Perform an analysis of current manual process.	• Analysis of manual small order process including after-the-fact encumbrance	
To provide efficient and cost-effective travel services (2)	7	Cost savings in travel system expenditures	• Perform an analysis of current travel transactions processed. • Perform an analysis of total UTPA expenditures for the UT System on-line booking system and service fees charged by the full-service travel agency.	• Analysis of travel transactions processed by users via the on-line booking system vs. the contracted travel agency. • Analysis of total dollars paid for participation in the UT System on-line booking system vs. the service fee difference between the on-line booking system and the full-service travel agency.	None
	7	Reduction in service fees	• Perform an analysis of all travel agency pricing proposals received in response to requests for new pricing proposals.	• Analysis of pricing proposals received from travel agencies in response to request for new pricing proposals.	None



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Unit Objective (Priority: #1 is highest)	Link to UTPA Objective	Expected Outcome	Assessment Criteria, Evaluation Methods	Assessment Results (Use actual data to describe annual performance)	Use of Results (What change was made?)
To provide cost-effective and efficient purchasing services (1)	7	Decrease low value transaction workload in the Purchasing Department	<ul style="list-style-type: none"> Customer feedback Benchmarking other UT components Performance reports on transaction types processed by Purchasing Dept. buyers 	Performance reports indicated that approximately 80% of transactions processed through the Purchasing Dept. were less than \$2,000. The 80% volume accounted for only about 20% of the total dollar value of all purchases handled by Purchasing buyers.	In order to alleviate Purchasing Dept. requisition backlogs and to permit user departments to make small purchases more expeditiously, the dollar limitation for the small order program was raised from \$2,000 to \$3,000.

Unit Objective (Priority: #1 is highest)	Link to UTPA Objective	Expected Outcome	Assessment Criteria, Evaluation Methods	Assessment Results (Use actual data to describe annual performance)	Use of Results (What change was made?)
				Customer complaints & surveys indicated that the existing dollar limit was inadequate.	
	7	Encumbrance of small purchase orders at the point of creation	<ul style="list-style-type: none"> • Customer oral feedback • Customer surveys • Analysis of manual small order process including after-the-fact encumbrance 	90% of customer surveys indicated that the manual system was too cumbersome and preferred automation of the process. Manual system created a risk of insufficient funds to cover purchases.	The manual small order program was converted to an on-line system which provides for immediate encumbrance of funds for small orders.
To provide efficient and cost-effective travel services (2)	7	Cost savings in travel system expenditures.	<ul style="list-style-type: none"> • Analysis of travel transactions processed by users via the on-line booking system vs. the contracted travel agency. • Analysis of total dollars paid for participation in the UT System on-line booking system vs. the service fee difference between the on-line booking system and the full-service travel agency. 	Only 10% of travel transactions were processed on the on-line booking system. The majority of university travel was being handled through the contracted travel agency. The savings in service fees from using the on-line booking system did not offset the cost of annual system maintenance.	The decision was made to discontinue UTPA's participation in the on-line booking system.
	7	Reduction in service fees	<ul style="list-style-type: none"> • Analysis of pricing proposals received from travel agencies 	By changing travel agencies, UTPA would realize an overall	UTPA changed travel agencies.

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			in response to request for new pricing proposals.	savings of approximately 50% in annual fees.	

Additional Resources Needed (if any) that were requested for FY06 during the budget cycle: None