

Administrative and Educational Support Report

Budget Office

**Annual Action Plan
Annual Assessment Report**

June 2006 – May 2007



Annual Action Plan: June 1, 2006–May 31, 2007

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 **Unit Head:** Juan C. Gonzalez

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

University Goal: Optimize institutional effectiveness and efficiency consistent with high quality organizational standards.

Division Objective: Implement Oracle and Banner software – Phase I.

Unit Objective	Strategy(ies) to Achieve Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	New Resources Needed in FY07
Have Oracle Public Sector Budgeting (PSB) module ready for use. (1)	<ul style="list-style-type: none"> Study all aspects of the PSB module using available written & online resources. Identify training opportunities and ensure that each team member receives the necessary training. Continue to refine the 	Feedback will be gathered from module users prior to go live. Module users will report a high level of satisfaction with the module.	Module users (prior to go live date) will report that they are at least “fairly satisfied” on a measure of user satisfaction with the PSB module.	Contract consultant (time was not allocated for assistance in using module live for the first time)

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	<p>module implementation plan.</p> <ul style="list-style-type: none"> • Perform tests on the module and work closely with project consultants and business analysts assigned to the module to resolve issues. • Generate training materials for UTPA budget participants customized to how budgeting is done at UTPA. 			

University Goal:

Optimize institutional effectiveness and efficiency consistent with high quality organizational standards.

Division Objective:

Increase the value added, customer service and goodwill value to business practices.

Unit Objective	Strategy(ies) to Achieve Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	New Resources Needed in FY07
<p>Develop Web application process for the fee cycle. (2)</p>	<ul style="list-style-type: none"> • Broadly assess application requirements. • Submit computer request form in order to schedule the application development effort. 	<p>Following the development period, fee cycle participants using the Web application will report a high level of satisfaction with the application.</p>	<p>Fee cycle participants using the web application will report that they are at least “fairly satisfied” on a measure of user satisfaction with the application.</p>	<p>Staff time.</p>

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	<ul style="list-style-type: none"> Identify user volunteers to provide guidance and to refine application requirements. Follow through with specific issues as a result of the cooperative work with the application development team and the volunteer team. 			

University Goal:

Optimize institutional effectiveness and efficiency consistent with high quality organizational standards.

Division Objective:

Support ongoing improvement of information systems.

Unit Objective	Strategy(ies) to Achieve Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	New Resources Needed in FY07
Enhance Oracle Public Sector Budgeting module – Phase II	Evaluate Phase I processes and prioritize items for Phase II	<p>Complete Fit-Gap Analysis.</p> <p>Compose report describing how gaps identified in the Fit-Gap Analysis were addressed.</p>	<p>Complete Fit-Gap Analysis by December 31, 2006.</p> <p>Complete Fit-Gap Analysis report and submit to division head by May 31, 2007.</p>	



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Division: Business **Unit Head:** Juan C. Gonzalez

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

University Goal: Optimize institutional effectiveness and efficiency consistent with high quality organizational standards.

Division Objective: Implement Oracle and Banner software – Phase I.

Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	Assessment Results (Use actual data to describe annual performance)	Use of Results (What change was made?)
Have Oracle Public Sector Budgeting (PSB) module ready for use. (1)	Feedback will be gathered from module users prior to go live. Module users will report a high level of satisfaction with the module.	Module users (prior to go live date) will report that they are at least “fairly satisfied” on a measure of user satisfaction with the PSB module.	Unable to measure at this time; the module is not fully functional and only the budget revisions piece is working. The piece to actually prepare the new year budget is not. Tasks have been identified to fully implement this module.	Ongoing discussions within Business Affairs division and with IT division

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Division Objective:	Increase the value added, customer service and goodwill value to business practices.

Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	Assessment Results (Use actual data to describe annual performance)	Use of Results (What change was made?)
Develop Web application process for the fee cycle. (2)	Following the development period, fee cycle participants using the Web application will report a high level of satisfaction with the application.	Fee cycle participants using the web application will report that they are at least "fairly satisfied" on a measure of user satisfaction with the application.	Informally, none of the cycle participants reported that they were less than "fairly satisfied". Although the web application was used, we have determined that improvements are needed.	Need further assessment of the application. Unfortunately, the IT division tells us that the application was deleted - it may have to be re-written.

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Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	Assessment Results (Use actual data to describe annual performance)	Use of Results (What change was made?)
Enhance Oracle Public Sector Budgeting module – Phase II	Complete Fit-Gap Analysis. Compose report describing how gaps identified in the Fit-Gap Analysis were addressed.	Complete Fit-Gap Analysis by December 31, 2006. Complete Fit-Gap Analysis report and submit to division head by May 31, 2007.	"Fit-Gap Analysis was completed in March 2007. Gaps have not been addressed due to personnel and funding restraints. Module not fully ready for use"	Approval for Business Analyst assigned 1/2 time to module to go to 100%.