

# **Administrative and Educational Support Report**

**Office of the Comptroller**

**Annual Action Plan  
Annual Assessment Report**

**June 2006 – May 2007**



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

**Unit:** Office of the Vice-President for Business Affairs/Comptroller

**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:** Esequiel Granado, Jr.

**Unit Mission:** The mission of the Office of the Comptroller is to provide accurate, timely and comprehensive financial and accounting data, information, and services to The University of Texas-Pan American departments, students, faculty and staff. The Comptroller staff is dedicated to providing quality service to The University of Texas-Pan American and its customers, adhering to the policies and procedures of the University and abiding by all laws and regulations of the State of Texas.

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

**Division Objective:** Implement Oracle and Banner software.

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
Implement Oracle and Student Information System. (1)	<ul style="list-style-type: none"> <li>• Implement Oracle E-Business Suite for financials and payroll.</li> <li>• Explore opportunities for self-service modules.</li> <li>• Implement new cashiering system which will facilitate the</li> </ul>	<ul style="list-style-type: none"> <li>• Improved efficiency and effectiveness of business processes.</li> </ul>	<ul style="list-style-type: none"> <li>• Go-live for Oracle financials is scheduled for September 1, 2006.</li> <li>• Go-live for Core Cashiering System is scheduled for September 1, 2006.</li> <li>• First Oracle payroll is scheduled for October 1,</li> </ul>	Funding required for implementation of Student Information System.

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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>payment and receipt process.</p> <ul style="list-style-type: none"> <li>• Automate selected business processes.</li> <li>• Implement web-based timekeeping.</li> <li>• Develop streamlined business processes.</li> <li>• Maximize available business resources.</li> <li>• Assess various Student Information Systems for implementation at UTPA.</li> </ul>		<p>2006.</p> <ul style="list-style-type: none"> <li>• First Oracle end-of-year close is scheduled for August 31, 2007.</li> <li>• Go-live for EIS Timekeeping is scheduled for September 1, 2006.</li> </ul>	
<p>Implement Campus Card System. (2)</p>	<ul style="list-style-type: none"> <li>• Develop vendor contract.</li> <li>• Develop Card Office policies and procedures.</li> <li>• Develop interfaces with existing campus systems.</li> <li>• Deploy phased-in approach for system roll out.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased University revenues for campus card program.</li> <li>• Student participation in campus-life events tracked.</li> </ul>	<ul style="list-style-type: none"> <li>• Go-live of Campus Card System is scheduled for August 1, 2006.</li> <li>• Transaction Usage Reports on campus cards.</li> <li>• Identify specifications to interface with cashiering system.</li> </ul>	<p>Funding set aside for card readers and training for departments on functionality and usage.</p>
<p>Increase department awareness of State,</p>	<ul style="list-style-type: none"> <li>• Train departments about requirements and</li> </ul>	<ul style="list-style-type: none"> <li>• Training support for University</li> </ul>	<ul style="list-style-type: none"> <li>• Training is scheduled to be complete by August 15, 2006</li> </ul>	<p>None</p>

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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
University and Comptroller's requirements. (3)	<p>processes that must be adhered to for business transactions.</p> <ul style="list-style-type: none"> <li>Expand outreach with stakeholders by conducting specialized training.</li> </ul>	faculty/staff.		

**University Goal:**

Become an outstanding research institution, emphasizing collaborative partnerships and entrepreneurship.

**Division Objective:**

Implement Oracle grant accounting module.

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
Implement the Oracle grant accounting module. (4)	<ul style="list-style-type: none"> <li>Streamline business processes.</li> </ul>	<ul style="list-style-type: none"> <li>Improved efficiency and effectiveness of business processes.</li> </ul>	<ul style="list-style-type: none"> <li>Go-live for Oracle grant accounting module is scheduled for September 1, 2006.</li> </ul>	None

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<b>University Goal:</b>	Become an outstanding research institution, emphasizing collaborative partnerships and entrepreneurship.
<b>Division Objective:</b>	Improve partnership between Grants and Contracts and Office of Sponsored Research to facilitate the dynamic nature of a research institution.

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
Improve communication with departments involved in research activities. (5)	<ul style="list-style-type: none"> <li>Improve communication with Office of Sponsored Research and re-assess roles and responsibilities between Grants &amp; Contracts and Office of Sponsored Research.</li> <li>Improve communication with Principal Investigators and their support staff.</li> </ul>	<ul style="list-style-type: none"> <li>Improved efficiency and effectiveness of business processes for research grants.</li> <li>Recommendations will be submitted to VPBA and Provost</li> </ul>	<ul style="list-style-type: none"> <li>Approved recommendations will be implemented.</li> </ul>	Additional resources will be needed to carry out recommendations.

<b>University Goal:</b>	Become an outstanding research institution, emphasizing collaborative partnerships and entrepreneurship.
<b>Division Objective:</b>	Develop and support skill sets necessary to support the needs of Research institution.

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
Provide grant management training. (6)	<ul style="list-style-type: none"> <li>Assist in the implementation of the Training Post module.</li> </ul>	<ul style="list-style-type: none"> <li>Assist with the training of University faculty/staff</li> </ul>	<ul style="list-style-type: none"> <li>Training Post module will be completed by August 2006</li> </ul>	None

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	<ul style="list-style-type: none"> <li>Assist in the implementation of Oracle grant management training.</li> </ul>			
Develop business policies and processes that facilitate the needs of a research-based institution. (7)	<ul style="list-style-type: none"> <li>Assist with implementation of UT System guidelines for grant management.</li> </ul>	<ul style="list-style-type: none"> <li>Compliance with UT System mandate.</li> </ul>	<ul style="list-style-type: none"> <li>Implementation is scheduled for September 2006.</li> </ul>	None

**University Goal:**

Provide students with a quality educational experience that enables them to complete their educational goals in a timely fashion.

**Division Objective:**

Provide a more suitable environment for learning and student life.

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
Safeguard equipment on campus that is required to facilitate student instruction. (8)	<ul style="list-style-type: none"> <li>Educate students, faculty and staff on State requirements for safeguarding equipment.</li> <li>Incorporate inventory mandates in annual building supervisors' meeting.</li> </ul>	<ul style="list-style-type: none"> <li>Decreased in the number of assets reported missing, lost, or stolen.</li> <li>Faster turn-around time to complete annual inventory.</li> <li>Improved method of</li> </ul>	<ul style="list-style-type: none"> <li>Analyze the number of assets reported as missing, lost, or stolen for various years.</li> <li>Inventory Certifications are due back to Assets Management from the APOs on March 31<sup>st</sup>.</li> <li>Compare Information</li> </ul>	None

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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
	<ul style="list-style-type: none"> <li>Collaborate with Information Technology for more effective methods of safeguarding equipment.</li> </ul>	tracking computers	Technology computer records vs. asset listings in Oracle.	
Communicate to students about services provided by the Office of the Comptroller. (9)	<ul style="list-style-type: none"> <li>Develop a survey for students about services.</li> <li>Communicate multiple methods of payment available to students.</li> <li>Increase participation by the Office of the Comptroller in Student Orientations and other student-related events.</li> </ul>	<ul style="list-style-type: none"> <li>Web-based survey to be offered on departmental web page.</li> <li>Working with Orientation department to communicate payment methods available to students.</li> </ul>	<ul style="list-style-type: none"> <li>Review survey responses and share information with appropriate department.</li> <li>Monitor the number of students dropped.</li> <li>Customer satisfaction reports and other forms of feedback are used to monitor effectiveness of and to improve UTPA's systems</li> </ul>	Funding may be needed for web-based tool
Improve services provided to students. (10)	<ul style="list-style-type: none"> <li>Provide customer service training to the Office of the Comptroller staff.</li> <li>Provide additional services that will enhance and/or support student life activities on campus.</li> <li>Work with other departments to provide enhanced services to students.</li> </ul>	<ul style="list-style-type: none"> <li>Formal cashiering system training.</li> <li>Cashiers trained for campus card system to allow for "one-stop" for students.</li> <li>Worked with Parking Services to promote remote parking usage.</li> <li>Worked with departments on campus to collect</li> </ul>	<ul style="list-style-type: none"> <li>Expedite payment process for students at centralized location</li> <li>Increase usage of the remote parking lots</li> <li>Increase participation in debit card program</li> <li>Recommend infrastructure needs to improve parking and transportation services</li> <li>Centralize payments and reduce risk of potential fraud</li> </ul>	<p>Capital funding for parking and transportation enhancements</p> <p>Purchase of card readers to expand access to the debit card program</p>

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	<ul style="list-style-type: none"> <li>Enhance online payment process.</li> <li>Conduct transportation study to include infrastructure needed for future expansion of service.</li> </ul>	<ul style="list-style-type: none"> <li>cash raised for new functions.</li> <li>On-line payment for debit card program accepted.</li> <li>Bid responses for parking and transportation study issued and assessed.</li> </ul>		

**University Goal:**

Enhance UTPA's engagement with the community to meet challenges and maximize opportunities

**Division Objective:**

Increase Business Affairs outreach with internal divisions for mutual appreciation of respective missions.

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
Conduct University surplus auctions on an annual basis. (11)	<ul style="list-style-type: none"> <li>Identify equipment and other items with low demand within the campus to be sold at the auction.</li> <li>Advertise auction on campus (via e-mail) and in local newspaper.</li> </ul>	<ul style="list-style-type: none"> <li>List generated of items to be sold for VPBA and President to approve.</li> <li>Comptroller's secretary to sends e-mail to all UTPA faculty/staff notifying employees of auction.</li> </ul>	<ul style="list-style-type: none"> <li>Auction is scheduled for Saturday, July 22<sup>nd</sup> 2006.\</li> <li>E-mail to be sent the week prior to the auction.</li> <li>Newspaper to advertise the auction on the Sunday prior to the event</li> </ul>	None

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**University Goal:**

Collaborate with K-12 schools to enlarge the pool of applicants who are personally prepared and academically qualified for higher education.

**Division Objective:**

Create an environment for P-12 schools to become collaboratively engaged with UTPA.

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
Donate items, as permitted by law, to non-profit organizations for instructional purposes. (12)	<ul style="list-style-type: none"> <li>Provide information and guidance to non-profit instructional organization on procedures to follow when requesting donations.</li> <li>Obtain the proper approval from the VPBA as mandated by State law on behalf of the organization requesting the donation.</li> </ul>	<ul style="list-style-type: none"> <li>Information packets for non-profit organizations that include State and UT System regulations on disposal of assets.</li> <li>Proper documentation on file with VPBA's approval on all donations</li> </ul>	<ul style="list-style-type: none"> <li>Donations are done on a case-by-case basis.</li> <li>Monitor all donations periodically for appropriateness.</li> </ul>	None
Enhance Comptroller's services in relation to Concurrent Enrollment Program. (13)	<ul style="list-style-type: none"> <li>Improve communication with High School to University Services and Records &amp; Registration.</li> <li>Improve communication with Concurrent Enrollment participants.</li> </ul>	<ul style="list-style-type: none"> <li>Better efficiency and effectiveness of business processes.</li> <li>Timely and accurate invoicing of Concurrent enrollment activities.</li> </ul>	<ul style="list-style-type: none"> <li>Go-live for Oracle accounts receivable module is scheduled for September 1, 2006</li> </ul>	None

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**University Goal:**

Infuse Inter-American and global perspectives throughout the University community.

**Division Objective:**

Expand the university community's involvement in Inter-American and global issues.

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
Explore means of enhancing services to meet the needs of international students. (14)	<ul style="list-style-type: none"> <li>Encourage Food Service contractor to prepare multi-cultural themed meals.</li> <li>Encourage Food Service contractor to participate in international student campus activities.</li> <li>Assess the need for establishing a Friday shuttle route to the Hidalgo International Bridge.</li> </ul>	<ul style="list-style-type: none"> <li>Contracted Food Service provider participating in international themed campus activities.</li> <li>Shuttle route to Hidalgo International Bridge.</li> </ul>	<ul style="list-style-type: none"> <li>Provide contact information and advance notice to Food Service Contractor of international themed campus activities.</li> <li>Track and monitor rider participation of shuttle route to Hidalgo International Bridge.</li> </ul>	<ul style="list-style-type: none"> <li>None</li> <li>Establish contact with U.S. Border contact for designating drop off/pick up location at the Hidalgo International Bridge.</li> </ul>

**Annual Assessment Report is due on  
June 15, 2007.**

**It will be posted by June 30, 2007.**