

# **Administrative and Educational Support Report**

**Budget Office**

**Annual Action Plan**  
**Annual Assessment Report**

**June 2007 – May 2008**



**Annual Action Plan: June 1, 2007–May 31, 2008**

**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. 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:** Support ongoing improvement of information systems/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 FY08
Extend the use of the Oracle Public Sector Budgeting (PSB) module beyond budget revision processing (1)	<ul style="list-style-type: none"> <li>Study the module using available written &amp; online resources.</li> <li>Identify training opportunities and ensure that each team member receives the necessary training.</li> <li>Refine the module implementation plan.</li> </ul>	<p>Gathered feedback from module users prior to go live. Module users will report a high level of satisfaction with the module</p> <p>Use the module for the next budget cycle to manage budget requests &amp; management budget</p>	<p>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.</p> <p>Utilization of PSB module for '09 budget cycle</p>	Contract consultant/module expert. IT division assistance in software modifications that will likely be required.

Annual Action Plan June 1, 2007–May 31, 2008

Unit Objective	Strategy(ies) to Achieve Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	New Resources Needed in FY08
	<ul style="list-style-type: none"> <li>Perform tests on the module and work closely with project consultants and business analysts to resolve issues.</li> <li>Generate training materials for UTPA budget participants customized to how budgeting is done at UTPA.</li> </ul>	decisions.		

**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 FY08
Develop Web application process for the fee cycle (or refine existing application if the IT division can restore it. The IT division reported that the application used in the previous fee process cycle had been deleted). (2)	<ul style="list-style-type: none"> <li>Refine previously determined application requirements.</li> <li>Stay in communication with IT division to ensure that the deleted application is restored.</li> <li>Identify and submit necessary forms needed by IT division.</li> <li>Identify user volunteers to provide guidance and</li> </ul>	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.	Department staff time, including IT division application developer time & expertise.

Annual Action Plan June 1, 2007–May 31, 2008

Unit Objective	Strategy(ies) to Achieve Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	New Resources Needed in FY08
	to refine application requirements. <ul style="list-style-type: none"> <li>Follow through with specific issues as a result of the cooperative work with the application development team and the volunteer team.</li> </ul>			

**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 FY08
Enhance Oracle Public Sector Budgeting module – Phase II	Evaluate existing processes and prioritize items and work with other business affairs departments, and IT, to prioritize all division items.	Finalize the task list by October 31, 2007 and identify as high, medium or high priority.  Complete all high priority items from the identified list of gaps.	Number of high priority items addressed from list	Contract consultant(s)

# FY08 AES Assessment Results Reports

## UTPA

### Admin - Budget Office

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

**Unit Head:** Juan Claudio Gonzalez

**Division:** Division of Business Affairs

Intended Outcomes	Means of Assessment & Criteria for Success / Tasks	AES Assessment Results	Use of Result & Follow-Up
<p>Admin - Budget Office - Improvement of information systems: extension of PSB module use - We will extend the use of the Oracle Public Sector Budgeting (PSB) module beyond budget revision processing. [determination was made that the use of PSB for anything but Budget Revisions was not advisable]</p> <p><b>Outcome Types:</b> Administrative - Fiscal Year 2008</p> <p><b>Start Date:</b> 06/01/2007</p> <p><b>End Date:</b> 08/31/2008</p> <p><b>Outcome Status:</b> No Longer Desired</p> <p><b>Strategies:</b></p> <ol style="list-style-type: none"> <li>1. Study the module using available written &amp; online resources.</li> <li>2. Identify training opportunities and ensure that each team member receives the necessary training.</li> <li>3. Refine the module implementation plan.</li> <li>4. Perform tests on the module and work closely with project consultants and business analysts to resolve issues.</li> <li>5. Generate training materials for UTPA budget participants customized to how budgeting is done at UTPA.</li> </ol>	<p><b>Assessment Method:</b></p> <ol style="list-style-type: none"> <li>a. Feedback from module users.</li> <li>b. Use of the PSB module.</li> </ol> <p><b>Criterion for Success:</b> Module users will report that they are at least "fairly satisfied" on a measure of user satisfaction.</p> <p>Utilization of the PSB module for the FY09 budget cycle.</p>	<p>10/10/2008 - The module was assessed by the department and a PSB consultant was hired to deepen the department's knowledge of the module. As a result, it was determined that the Oracle PSB module was not a viable option for UTPA. Other options are being explored.</p> <p><b>Result Type:</b> Criterion Not Met</p> <p><b>Next Step:</b> Mark Outcome as No Longer Desired</p>	<p>10/10/2008 - Other options are being explored. Specifically, the purchase/use of Oracle Hyperion will be assessed in fiscal year 2009.</p>
<p>Admin - Budget Office - Support ongoing improvement of information systems. - We will enhance the Oracle Public Sector</p>	<p><b>Assessment Method:</b></p> <ol style="list-style-type: none"> <li>1a. Number of high priority items</li> </ol>	<p>10/10/2008 - The following enhancements were put in place.</p>	<p>10/10/2008 - fiscal year 2009 enhancement assessment is</p>

Intended Outcomes	Means of Assessment & Criteria for Success / Tasks	AES Assessment Results	Use of Result & Follow-Up
<p>Budgeting module.</p> <p><b>Outcome Types:</b> Administrative - Fiscal Year 2008</p> <p><b>Start Date:</b> 06/01/2007</p> <p><b>End Date:</b> 08/31/2008</p> <p><b>Outcome Status:</b> Complete</p> <p><b>Strategies:</b> 1. Evaluate existing processes and prioritize items and work with other business affairs departments, and IT, to prioritize all division items.</p>	<p>actually addressed</p> <p><b>Criterion for Success:</b> Finalize the task list by October 31, 2007 and identify as high, medium or high priority.</p> <p>Complete all high priority items from the identified list of gaps.</p>	<p>&gt;The default on budget revisions was changed to non-permanent</p> <p>&gt;options that were unused but mistakenly checked by users were removed</p> <p>&gt;object codes options available to the users is now restricted only to those that can be used by the end users</p> <p>&gt;account manager approval workflow process was improved</p> <p>&gt;notifications are now generated when the budget office has approved a budget revision</p> <p>&gt;timeout notifications were enacted (vs. rejections)</p> <p>&gt;redundant user approvals were removed</p> <p><b>Result Type:</b> Criterion Met</p> <p><b>Next Step:</b> Continue Current Strategy(s)</p>	
<p>Admin - Budget Office - Process improvement: automation of fee request and processing cycle - We will develop a web application process for the fee cycle</p> <p><b>Outcome Types:</b> Administrative - Fiscal Year 2008 Administrative - Fiscal Years 2009 - 2011</p> <p><b>Start Date:</b> 06/01/2007</p> <p><b>Outcome Status:</b> Active/Ongoing</p> <p><b>Strategies:</b> 1. Refine previously determined application requirements. 2. Work with IT to develop the application as per the requirements identified and concurrently develop user &amp; training</p>	<p><b>Assessment Method:</b> Application users will be surveyed</p> <p><b>Criterion for Success:</b> application users will report satisfaction with the application</p>	<p>10/10/2008 - Documents related to the previously developed web application have been shared with the IT division and several meetings have been held and a prototype application has been developed. Work will continue into FY09.</p> <p><b>Result Type:</b> Criterion Not Met</p> <p><b>Next Step:</b> Continue Current Strategy(s)</p>	<p>10/10/2008 - Although objective was not fully met, work will continue into fiscal year 2009</p>

Intended Outcomes	Means of Assessment & Criteria for Success / Tasks	AES Assessment Results	Use of Result & Follow-Up
documentation. 3. Identify user volunteers to feedback 4. Follow through with specific issues as a result of the cooperative work with the application development team and the volunteer team.			