

# **Administrative and Educational Support Report**

## **Materials Management**

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

**June 2007 – May 2008**



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

**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.

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

**Division Objective:** Increase 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
Increase the effectiveness of purchasing process	Improve purchasing process by converting eligible annual service transactions from 1 year to multi-year contracts: <ol style="list-style-type: none"> <li>1. Identify all annual service transactions</li> <li>2. Analyze feasibility of conversion for each type of transaction</li> <li>3. Seek feedback from</li> </ol>	Increase in the number of 1-year recurring service contracts that are eligible to be converted to a multi-year basis	Conversion of at least 50% of eligible annual service transactions to multi-year contracts for FY 2008	Internal resources: Purchasing staff time Business Analyst time IT assistance on Oracle reports as needed

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
	affected users 4. Execute multi-year bid process for eligible services			
Develop improved travel approval process	Identify exceptions, analyze the Oracle workflow process, and modify workflow approval process in accordance with President's delegation of authority for exceptions: 1. Foreign travel approvals  2. Project manager travel  3. Vice Presidents' travel  4. President's travel	Ensure the electronic approval process is in compliance with delegation of authority so that: 1. Workflow routes foreign travel requests to President 2. Project managers do not approve their own travel requests 3. All vice presidents' travel requests are routed to President 4. President's travel requests are routed to designated vice president(s)	Modified Oracle workflow process will show that travel approvals for exceptions are routed and approved in accordance with delegation of authority document by May 31, 2008.	Internal resources: Staff time Business Analyst time IT time External resources: Consultant time

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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 FY08
Meet or exceed State Historically Underutilized Businesses (HUB) Good Faith Effort Goals	Improve HUB utilization in University purchases: <ol style="list-style-type: none"> <li>1. Invite certified HUBs to participate in UTPA vendor forums/fairs</li> <li>2. Publicize vendor forums/fairs to departments</li> <li>3. Identify product/service categories with low HUB utilization in relation to State HUB goals</li> <li>4. Provide assistance to departments on expanding HUB utilization for purchases</li> <li>5. Create a HUB “report card” for each division.</li> <li>6. Work with Computer Center on current Oracle reporting deficiencies</li> </ol>	Level of participation of certified HUBs in University purchases	Increase in percentage of HUB expenditures by at least 2% by May 31, 2008 as compared to last year	Internal resources: Staff time Business Analyst time IT assistance with Oracle reporting
Implement process to improve efficiency of package delivery	Improve processing of incoming packages: <ol style="list-style-type: none"> <li>1. Analyze current manual process</li> <li>2. Research other institutions receiving processes</li> <li>3. Research automated package tracking systems</li> <li>4. Identify best solution</li> <li>5. Implement automated package tracking system</li> </ol>	Reduction in time to process incoming packages	Report of potential reduction in processing time to be completed by May 31, 2008 contingent on the purchase of the package tracking system.	Purchase of automated package tracking system – HEAF funds

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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 FY08
Enhance Oracle's Procurement Module functionality – Phase 2	<p>Evaluate effectiveness of existing bid process functionality including bid documents, bid responses, bid tabulation, and evaluation:</p> <ol style="list-style-type: none"> <li>1. Analyze I-procurement implementation</li> <li>2. Analyze P-card implementation</li> <li>3. Review and compare third-party products that are fully compatible with Oracle</li> </ol>	Progress toward closing gaps identified in Fit-Gap Analysis	Close 100% of gaps identified in Fit-Gap Analysis conducted during Oracle implementation discovery phase	<p>Internal resources:            Staff time            Business Analyst time            IT staff time</p> <p>External resources:            Consultant time not addressed in Phase I implementation</p>
Provide training in needed areas of Materials Management function	<p>Refine process of training for new project managers:</p> <ol style="list-style-type: none"> <li>1. Run monthly Oracle report that identifies new project managers</li> <li>2. Research existing training tools for development of an online training module</li> <li>3. Supplement instructor-led training by creating and implementing an online training module</li> <li>4. Notify new project managers directly of training available</li> </ol>	Extent of development of online training module	Report showing extent of current development and progress on implementation of an online training module by May 31, 2008	<p>Training materials            Staff time            Existing training tools for development of online training module</p>

# FY08 AES Assessment Results Report

## UTPA

### Admin - Materials Management

**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 Head:** Norma Dryer

**Division:** Division of Business Affairs

Intended Outcomes	Means of Assessment & Criteria for Success / Tasks	AES Assessment Results	Use of Result & Follow-Up
<p>Admin - Materials Management - Purchasing Process Efficiency - We will increase the effectiveness of purchasing process</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> Active/Ongoing</p> <p><b>Strategies:</b></p> <ul style="list-style-type: none"> <li>- Improve purchasing process by converting eligible annual service transactions from 1 year to multi-year contracts:</li> <li>- Identify all annual service transactions</li> <li>- Analyze feasibility of conversion for each type of transaction</li> <li>- Execute multi-year bid process for eligible annual services</li> </ul>	<p><b>Assessment Method:</b> Conversion of at least 50% of eligible annual service transactions to multi-year contracts for FY 2008</p> <p><b>Criterion for Success:</b> Increase in the number of 1-year recurring service contracts that are eligible to be converted to a multi-year basis</p>	<p>10/07/2008 - Track number of annual recurrent contracts that were converted to multi-year contracts.</p> <p><b>Result Type:</b> Criterion Not Met</p> <p><b>Next Step:</b> Continue Current Strategy(s)</p> <p><b>Resources Needed - Classified</b> Purchasing staff time, Business Analyst time, IT assistance on Oracle reports as needed</p>	<p>11/24/2008 - Strategy will continue for FY 2009</p>
<p>Admin - Materials Management - Travel Approval Process - We will develop improved travel approval process</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>Assessment Method:</b> Modified Oracle workflow process will show that travel approvals for exceptions are routed and approved in accordance with delegation of authority document by May 31, 2008.</p> <p><b>Criterion for Success:</b> Ensure the electronic approval process is in compliance with delegation of authority so that:</p> <ol style="list-style-type: none"> <li>1. Workflow routes foreign travel requests</li> </ol>		

Intended Outcomes	Means of Assessment & Criteria for Success / Tasks	AES Assessment Results	Use of Result & Follow-Up
<p><b>Strategies:</b>  1. Identify exceptions, analyze the Oracle workflow process, and modify workflow approval process in accordance with President's delegation of authority for exceptions:  - Foreign travel approvals  - Project manager travel  - Vice Presidents' travel  - President's travel</p>	<p>to President  2. Project managers do not approve their own travel requests  3. All vice presidents' travel requests are routed to President  4. President's travel requests are routed to designated vice president(s)</p>	<p>10/07/2008 - Travel requests for foreign travel, project manager, VPs and Presidents now are in compliance with delegation of authority.  <b>Result Type:</b>  Criterion Met  <b>Next Step:</b>  Mark Outcome as Complete  <b>Resources Needed - Classified</b>  Internal resources: Staff time, Business Analyst time, IT time. External resources: Consultant time</p>	<p>09/30/2007 - Oracle workflow changes were implemented on September 2007. Now manual authorization are no longer needed.</p>
<p>Admin - Materials Management - State Historically Underutilized Businesses (HUB) Good Faith Effort Goals - We will meet or exceed State Historically Underutilized Businesses (HUB) Good Faith Effort Goals  <b>Outcome Types:</b>  Administrative - Fiscal Year 2008  <b>Start Date:</b>  06/01/2007  <b>End Date:</b>  08/31/2008  <b>Outcome Status:</b>  Active/Ongoing  <b>Strategies:</b>  1. Improve HUB utilization in University purchases:  - Invite certified HUBs to participate in UTPA vendor forums/fairs  - Publicize vendor forums/fairs to departments</p>	<p><b>Assessment Method:</b>  Increase in percentage of HUB expenditures by at least 2% by August 31, 2008 as compared to last year  <b>Criterion for Success:</b>  Level of participation of certified HUBs in University purchases</p>	<p>10/07/2008 - Increase in percentage of HUBs remains the same as last FY.  <b>Result Type:</b>  Criterion Not Met  <b>Next Step:</b>  Continue Current Strategy(s)  <b>Resources Needed - Classified</b>  Internal resources: Staff time, Business Analyst time, I T assistance with Oracle reporting</p>	<p>11/24/2008 - Strategy will continue to Fiscal Year 2009</p>

Intended Outcomes	Means of Assessment & Criteria for Success / Tasks	AES Assessment Results	Use of Result & Follow-Up
<ul style="list-style-type: none"> <li>- Identify product/service categories with low HUB utilization in relation to State HUB goals</li> <li>- Provide assistance to departments on expanding HUB utilization for purchases</li> <li>- Create a HUB "report card" for each division.</li> <li>- Work with Computer Center on current Oracle reporting deficiencies</li> </ul>			
<p>Admin - Materials Management - Package Delivery Efficiency - We will implement process to improve efficiency of package delivery</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> Active/Ongoing</p> <p><b>Strategies:</b></p>	<p><b>Assessment Method:</b> Report of potential reduction in processing time to be completed by August 31, 2008.</p> <p><b>Criterion for Success:</b> Reduction in time to process incoming packages</p>	<p>10/07/2008 - Scanning tracking system was identified and purchased. System will be installed and data will be gathered to assess the impact of the new system.</p> <p><b>Result Type:</b> Inconclusive</p> <p><b>Next Step:</b> Continue Current Strategy(s)</p> <p><b>Resources Needed - Classified</b> Internal resources: Central Receiving staff, Systems Analyst time generate system impact</p>	<p>11/24/2008 - Data Collection to measure impact of new system.</p> <hr/> <p>09/30/2008 - System purchased.</p>
<p>1. Improve processing of incoming packages:</p> <ul style="list-style-type: none"> <li>- Analyze current manual process</li> <li>- Research other institutions receiving processes</li> <li>- Research automated package tracking systems</li> <li>- Identify best solution</li> <li>- Implement automated package tracking system</li> </ul>			
<p>Admin - Materials Management - Oracle Procurement Module - We will enhance Oracle's Procurement Module functionality. Phase 2</p> <p><b>Outcome Types:</b> Administrative - Fiscal Year 2008</p>	<p><b>Assessment Method:</b> Close 100% of gaps identified in Fit-Gap Analysis conducted during Oracle implementation discovery phase</p> <p><b>Criterion for Success:</b> Progress toward closing gaps identified in Fit-Gap Analysis</p>	<p>10/07/2008 - Identification of gaps has not been quantified, bid module has not been explored.</p> <p><b>Result Type:</b> Criterion Not Met</p> <p><b>Next Step:</b> Continue Current Strategy(s)</p> <p><b>Resources Needed - Classified</b></p>	<p>11/24/2008 - Oracle Phase II Projects for Materials Management</p>

Intended Outcomes	Means of Assessment & Criteria for Success / Tasks	AES Assessment Results	Use of Result & Follow-Up
<p><b>Start Date:</b> 06/01/2007</p> <p><b>End Date:</b> 08/31/2008</p> <p><b>Outcome Status:</b> Active/Ongoing</p> <p><b>Strategies:</b> 1. Evaluate effectiveness of existing bid process functionality including bid documents, bid responses, bid tabulation, and evaluation: - Analyze I-procurement implementation - Analyze P-card implementation - Review and compare third-party products that are fully compatible with Oracle - Improve current Purchasing Oracle training to accomodate user needs.</p>		<p>Internal resources: purchasing staff, business analyst time. External resources: Oracle consultants</p> <p><b>Resources Needed - Salaries:</b> 2nd Business Analyst to be dedicated to Oracle bid module, i-procurement and p-card integration.</p>	
<p>Admin - Materials Management - Training Needs - We will provide training in needed areas of Materials Management function</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> Active/Ongoing</p> <p><b>Strategies:</b> 1. Refine process of training for new project managers: - Run monthly Oracle report that identifies new project managers - Research existing training tools for development of an online training module - Supplement instructor-led training by creating and implementing an online training module - Notify new project managers directly of training available</p>	<p><b>Assessment Method:</b> Report showing extent of current development and progress on implementation of an online training module by May 31, 2008</p> <p><b>Criterion for Success:</b> Extent of development of online training module</p>	<p>10/07/2008 - Current training needs to be revised and updated.</p> <p><b>Result Type:</b> Criterion Not Met</p> <p><b>Next Step:</b> Continue Current Strategy(s)</p> <p><b>Resources Needed - Classified</b> Training materials, purchasing staff</p> <p><b>Resources Needed - Maintenance &amp; Operation:</b> Existing training tools for development of online training module</p>	<p>11/24/2008 - 1. Improve SPO trainign program 2. Gather information of training needs 3. Develop automated training programs</p>

<b>Intended Outcomes</b>	<b>Means of Assessment &amp; Criteria for Success / Tasks</b>	<b>AES Assessment Results</b>	<b>Use of Result &amp; Follow-Up</b>