The University of Texas Rio Grande Valley

Business Process Working Group

Final Report

Submitted to:
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Executive Summary

The charge of the working group for business processes was to develop a model that will streamline and automate business processes to provide services to all constituents of the University of Texas Rio Grande Valley (UTRGV) based on the guiding principles approved by the Board of Regents. In preparation for the launch of the UTRGV and to ensure the new University is “an emerging research institution of the first class”, business processes were reviewed and assessed for the most effective and efficient method to deliver services to all patrons of UTRGV.

The core concepts developed by the working group centered on the notion that the business processes for UTRGV should be creative and adaptable to the new multi-campus structure. All business processes will be focused on customer service and convenience; and will employ innovative technological tools to offer the best service to the University community. The working group developed a Business Model with seven core principles which resulted in the following five recommendations:

Recommendation #1 – Implement 100% Electronic and Paperless Business Services at UTRGV

With the nationwide movement towards electronic services, it is our recommendation that next generation technology be integrated into business processes at UTRGV. Our recommendation is that “ALL” University business transactions be conducted electronically. From bidding to payment, to the elimination of student payment lines, to disbursement of student refunds and to the receipt of statement of charges to tablets and smartphones, UTRGV will become the showplace for next generation technology for all business services. In going “paperless”, UTRGV will reduce the need for storage facilities by purchasing or developing a documents management system and encouraging the use of shared network sites.

Recommendation #2 – Establish Multi-Campus Service Centers

It is our recommendation that UTRGV create multi-functional business service centers at each location to provide required services to all constituents: students, staff, faculty, and the community. This will eliminate the need for all constituents to travel from one location to another for business activity. In addition, we recommend distributed service centers at each location that will each have a primary function with the capability of interchangeable functionality. This approach will allow UTRGV to take strategic advantage of our existing assets and resources at each location and provide the greatest degree of flexibility in our business processes. The centers will provide an opportunity to develop a highly professional workforce and a platform for professional
development. In addition, a distributive approach will allow for business continuity by simultaneously ensuring quality services to our constituents.

**Recommendation #3 – Implement Purchase Valley First/Best Value**

The Rio Grande Valley is the second poorest region of the United States. With the combined budget of UTRGV being approximately $500 million dollars, our recommendation is to make the strongest effort in facilitating and promoting our procurement process by ensuring that our local vendors have equal opportunity to conduct business with UTRGV. The ultimate goal is to increase the purchasing of services and materials from valley vendors and provide a leadership role in fostering economic and community partnerships by leveraging the purchasing power of the new University. UTRGV will have a large impact on our region’s economic growth and job market. To ensure our regional vendors have an equal opportunity of conducting business with the new University, intensive community outreach will be promoted throughout the south Texas region. Through this initiative, UTRGV will assist in the development of increased student internships, job opportunities and the fostering of scholarship opportunities.

**Recommendation #4 – Employ Excellence in Customer Service/Training and Continuous Improvement**

Our recommendation for business processes in the new UTRGV is to provide all customers excellence in customer service and provide a model for continuous improvement. This will inherently occur as a result of automated and streamlined business process as well as through the business service centers. However, the emphasis on customer service should not stop there; UTRGV should implement a comprehensive training program continuously stressing the culture of excellent customer service. Conducting business with UTRGV should be convenient and a pleasant experience for all customers, students, parents, faculty, staff, and the community. Because our environment is constantly evolving, our processes and services should evolve as well. The concentration on customer service and continuous improvement should be an ongoing mission for UTRGV through the use of professional development programs.

**Recommendation #5 – Establish Business Processes for Research Medical School Infrastructure**

The final recommendation of the working group is to continue the research of business processes for the newly created medical school. Specific processes may vary from the
University’s because of the nature of the School of Medicine and will require further evaluation.

Through innovation and creativity, The University of Texas Rio Grande Valley will be a pioneer in service to students, staff, faculty, and community. In alignment with the Guiding Principles, it is our recommendation that business processes engage existing and new technology to increase productivity; provide efficient services with focus on the customer experience for students, staff, faculty, and the community; and foster economic and community partnerships for the benefit of the region.

**Critical Startup Elements**

Establish new ID numbers for:
- Employer Identification Number
- State Agency Number
- DUNNS number

New Banking Services Agreement
Update and review of all UTPA and UTB contracts – See Appendix B
Update Indirect Cost Recovery Proposal
Create access to outside federal and state agencies
Assignment of new ID numbers for employees and students
Working Group Charge

The charge of the Business Processes Working group is to develop a model that will streamline and automate business processes to provide efficient and effective services for the University of Texas Rio Grande Valley based on the guiding principles approved by the Board of Regents.

The working group consisted of five (5) staff members of The University of Texas at Brownsville and The University of Texas at Pan American. The group members are:

Committee Members

**UT - Brownsville**
- Yolanda De La Riva* – Accounting & Finance
- Bill Dodd – Purchasing
- Mary Aten – Budget Office
- Veronica Vera – Office of the VP for Research
- Ernesto Tusa – Academic Affairs

**UT – Pan American**
- Zeke Granado* - Office of the Comptroller
- Frances Rivera – Budget Office
- Mark Saenz – Business Services
- Marcy De Leon – Academic Affairs
- Deborah Guillen – Auxiliary & Print Svc/Staff Senate

* indicates Working Group Designated Co-Chairs

The members of the working group developed a Business Process Model based on core principles for the new University business processes. These core principles were steered by the Project South Texas Guiding Principles.

The Business Process Model will provide a structure for UTRGV to deliver business services utilizing the core principles described below:

1. **Conduct Business Electronically** - Develop strategies to create electronic and automated business processes to provide efficient services to on and off campus customers
2. **Manage Documents Electronically** – Develop strategies to digitize all documents.
3. **Utilize Service Centers** - Identify the best structure, centralized or decentralized, to provide streamlined delivery of service.
4. **Promote Excellence in Customer Service/Training** - Identify various strategies for the delivering of training for all internal and external users; Identify strategies to adopt a culture emphasizing superior customer service.
5. **Purchase Valley First/Best Value** - Develop strategies to maximize positive impacts on the community both economically and educationally.

7. **Endorse an Environment of Continuous Improvement** - Identify a tool for end-users to evaluate the enhanced business processes that will help management assess current practices to provide optimal customer service.
Recommendation #1 –
Implement 100% Electronic and Paperless Business Services at UTRGV

Rationale

In alignment with the Project South Texas Guiding Principles for a new 21st century university, it is our recommendation that we integrate next generation technology into the business processes of the new University of Texas - Rio Grande Valley. Our recommendation is that “ALL” university business transactions be conducted electronically. Under this new and innovative business processes umbrella, the following areas will have the capability to conduct electronic business: 1) Purchasing and Accounts Payable, 2) Accounts Receivable, 3) Budget Development, 4) Grants and Contracts, 5) Financials and Reporting, as well as other business functions not specifically listed. In order to meet the goals of UTRGV and best serve the students, faculty, staff, and community, it is our recommendation that the new University invest in the appropriate IT infrastructure found in Appendix A.

A. Purchasing and Accounts Payable Process

UTRGV should have an electronic and user-friendly system in place to take purchases from requisition to payment. The new University will utilize PeopleSoft as its ERP System and will use its workflow process to ensure all proper approvals and funds checks are in place.

Best Practice Research

Although PeopleSoft provides category management, best practices research indicates SciQuest or a similar product may be an additional tool for a more efficient procurement practice. Research indicates a majority of UT institutions including the health care centers utilize this type of procurement product.

Recommendation

UTRGV should possess an electronic tool to facilitate the departmental shoppers’ search for products or services by designating vendors that have already been properly vetted and contracted. The tool should electronically generate requisitions and purchase orders then disseminate those to vendors via email. Once goods received or services are rendered, the tool should receive and accept vendor invoices and should have the capability to enhance the required three way match for proper payment. The following are software solutions with capabilities to meet the group’s recommendations.
UTRGV should possess an internal purchase tracking system to include delivery status to different campus locations and receiving information on purchases made by the university.

In addition, the University should possess an electronic tool that automates the communication with the travel agency to facilitate booking of airfare, hotel, and rental car. The following are software solutions with capabilities to meet the group’s recommendations.

- Concur – recommended by UT System
- Orbitz
- Corporate Traveler

The University should provide a Procurement Card program that aligns with UT System recommendations/guidelines and current state requirements. The program should provide flexibility and convenience for users.

The University should process payments through ACH/Direct Deposit. Paper checks should be printed as a last option only.

The University should continue participation/collaboration in UT Supply Chain Alliance to maintain/increase leverage and buying power.

B. Budget Development

UTRGV should have an electronic system that will facilitate budget development through an electronic/automated process. The new University will utilize PeopleSoft as its ERP System and Hyperion as its budget development tool to ensure adherence to budget management policies.

Best Practice Research

Best practices research indicates that in addition to the campus ERP system, Hyperion or a similar product may be a more effective tool for Budget Development. The majority of UT System institutions are moving to implement Hyperion with UTPA among the first to go-live.

Recommendation

UTRGV should implement an automated, user-friendly budget tool to ensure budget development is managed electronically. Hyperion or a similar product has the capability of developing, managing and uploading the final budget to the ERP.
The system should be comprehensive and fully integrated with the ERP to allow for budget preparation with more accuracy to ensure compliance of all requirements and to improve strategic planning initiatives. All required reviews and approvals should be imbedded in the process within the system or connecting workflows. The system should also manage all documents electronically.

A business intelligence (BI) software may assist in planning, budgeting and forecasting. The BI software should be added to enhance ERP and budgeting tool use as well as give the users ease in finding accurate and precise information as needed for better predictability in financial and operational planning and forecasting. The BI software should serve as an overlay to the ERP system to simplify the data to allow non-business users and departments to navigate and quickly identify key information specific to their needs. The BI software should assist administration in making to best financial decisions UTRGV and allow users to provide updates on the status of projects. The BI software should provide a robust reporting tool to be easy to use for departments and non-business users. It should also provide complex reports required by UT System, the State or any other agency.

C. Accounts Receivable – Student and Non-Student AR

UTRGV should have a fee structure and student billing system capable of assessing the appropriate charges in real time so that when a student registers, the bill is automatically generated and is readily accessible to the student for all applicable terms. UTRGV should have an electronic means to generate, process, and disseminate invoices. The AR system may be a component or module to the ERP system.

Best Practice Research

Research indicates that the “Now” generation of students requires all relevant information be immediately accessible at all times. Overwhelming evidence shows that this new generation relies more heavily on mobile devices and less and less on personal computers. According to a recent survey by Educause, 60% of the U.S. student population has a smart phone with a data plan. UTRGV should have technology to offer student statements and accept payments via the means preferred by students. An accounts receivable module to the ERP system can help maximize cash and reduce liabilities. PeopleSoft Receivables provides a means for campus users to monitor and review AR items.

Recommendation

In order to most efficiently process student payments, UTRGV should have a payment gateway and cashiering system to process receipt of online and manual payments. The gateway should fully integrate with the PeopleSoft financial and student systems.
The new University should provide students an electronic means to view balances and submit payment for tuition, fees, and miscellaneous charges. Student billing information should be readily available through avenues familiar and easily accessible to students via mobile electronic devices.

The new University should take advantage of social media outlets to communicate with students and provide notification of statement availability and due dates. UTRGV should standardize the methods of communication with students, for example, through official university email addresses, to best facilitate transactions for students.

As a counterpart to student receivables, the new University should also handle disbursements electronically. The primary means of disbursing student refunds or student aid should be direct deposit or ACH.

The AR system should track aging of receivables and allow campus users quick access to balances and payments made. Collection efforts should be automated and recorded by the system.

The AR system should also provide a means for customers to submit electronic payment of invoices. The AR system should fully integrate to the ERP system and general ledger to record and account for non-invoiced payments on financial transactions.

D. Grants and Contracts

UTRGV should have an automated process to manage grants and contracts. The system should automate the process from pre-award to post-award status including capturing all information needed to manage the account and any requirements or restrictions. The process should be a fully integrated system or a module to the selected ERP system.

Best Practice Research

The grants module in PeopleSoft will be used by the new University. Best practice research indicates a separate, integrated system may be required to facilitate best financial management of grants and contracts.

Recommendation

UTRGV should have an electronic grant/contract management system or module. The system should capture all necessary information during the pre-award or proposal stage of the project and carry forward the required information through contract completion.
The system should also provide an accurate calculation of indirect or burden costs based on the unique stipulations of the grant or contract.

The management of grants and contracts includes the compilation of varied reports for funding agencies or project managers. A dynamic reporting tool will be required to facilitate these requirements. The reporting tool may be a component of the grants module to the ERP system or a part of the business intelligence system recommended for the budget development process. Since a significant number of grant and contract managers are not familiar with accounting systems or reports, business intelligence software is recommended in order to translate accounting information and dissect reports for specific sets of information. A suggested model of a customized grants and contracts management system may be viewed from the collaboration between UT Southwestern and Huron/Click Commerce.

E. Financials and Reporting

UTRGV should have an accounting structure/Chart of Accounts to facilitate electronic/automated processes. While PeopleSoft may dictate some processes, the structure should be set up in such a way that transacting, reconciling, and reporting are as electronic and automated as possible.

The new University should have a system in place that produces reports required by UT System, the state, the federal government and internal policies. The reports generated should also provide management the required data to make informed decisions in the best interest of the University. Automated reports will require careful and accurate set up of the accounting structure and chart of accounts. The reporting functions may be provided by the ERP system or a Business Intelligence Software. BI Software can serve as an overlay to the business platforms and would provide for easier data analysis by all users.

Best Practice Research

Best practice research indicates that PeopleSoft provides a financial reporting tool and that a majority of UT institutions are currently implementing or using PeopleSoft. In addition to PeopleSoft, business intelligence is emerging as a valued resource by higher education institutions.

Recommendation

UTRGV should possess a business intelligence software to provide a robust, easy to navigate, and customizable reporting option. A business intelligence software should be designed to analyze and report data to further automate compliance and offer improved financial controls.
A business intelligence software should provide project managers and stakeholders the ability to quickly retrieve data and create customizable, interactive visual tools for decision making.

With more accurate, better managed financial data, a business intelligence software would streamline and expedite account reconciliations, University monthly projections, and the end of year Annual Financial Report.

**F. Human Resources/Payroll**

**Rationale**

UTRGV should have an electronic and paperless way for applicants to submit their application and then allow the information on the application to move through the hiring process. The system should allow an applicant to search for openings/vacancies and submit their application. The system should then feed the information to Payroll for compensation and finally allow the employee to evaluate and select benefit options.

**Best Practice Research**

Best practice research indicates that an HR/Payroll module or accompanying system improves efficiency and streamlines hiring processes as well as improves talent management. Universities are using applicant tracking systems to attract top talent and more effectively manage positions.

**Recommendation**

UTRGV should have an applicant tracking system to allow for more efficient hiring processes. In addition to recruitment, an applicant tracking system should automate the onboarding process. The system should feed new hire information to the ERP system and Payroll Office for automated processing of the hiring document and allocation of compensation in the University’s financial system. The applicant tracking software should schedule new employee orientation and provide automated instructions to the new employee regarding information required by the University, forms to be signed or any miscellaneous communication required. In addition to the applicant tracking system, an electronic means to enter federally required I-9 information is recommended to further streamline the hiring process. Since all UT System employees are currently able to revise optional employee benefits electronically, UTRGV should have an electronic, automated means to feed new hire information to the UT System for electronic selection of employee benefits.
G. Other Business Functions - Treasury

UTRGV should have electronic, streamlined processes to process bank information and facilitate the reconciliation process of bank accounts, investments, and endowments.

Best Practice Research

Best practice research indicates that more and more business or cash transactions are handled electronically. In addition to the ERP and financial systems, electronic communication with banking systems is essential for effective cash management.

Recommendation

UTRGV should have an interface or similar mechanism to allow the University’s financial system to accept bank information for reconciliation of bank accounts. The interface or mechanism should facilitate communication between the University and the bank, UT System for investments and UTIMCO for endowments. With information received via the interface or mechanism, the financial or business intelligence software should provide reporting options for analysis and better decision making as it pertains to investments and cash management decisions. Because the bank accounts, investments, and endowments are each unique with specific handling requirements and reporting systems, the most feasible solution to automating communication between the systems would be a flexible interface.

H. Other Business Functions – Fixed Assets

UTRGV should have an integrated fixed assets management system to provide accurate tracking and reporting of the University’s assets and their financial value.

Best Practice Research

Research indicates that PeopleSoft provides an asset management module that is being implemented as part of the ERP system by other UT System institutions.

Recommendation

UTRGV should have an integrated electronic means of monitoring University assets. A fixed assets management module should provide effective tracking of physical and financial assets also in addition to provide required information for reporting and budgeting for future
acquisitions. The module should improve the efficiency of processing capital assets and the accuracy of depreciation and value determinations.

I. Other Business Functions – Student Loan Management

UTRGV should have a comprehensive student loan management system to track awards and balances, provide reports, facilitate payments, and automate collections.

Best Practice Research

Research indicates that while student loan management solutions are available, some universities are steering toward outsourcing student loan management systems.

Recommendation

UTRGV should have an electronic, robust student loan management system. The system should provide an automated, electronic process to track student loan awards, balances and payments, and take the loan through the collections process if necessary. The system should have an automated means of submitting financial information to the University’s ERP and be able to receive files from the student information systems. It should also provide automated financial reports, collections reports, receivable reports, and any federal or System reports needed. The system should also be able to produce reports for credit bureaus, the National Student Loan Data System, and the IRS. In addition to providing automated services to University users, the system should create electronic billing statements, distribute statements to students and provide an electronic payment option including automated allocation of payments to different loan types with different collection requirements. It is the recommendation of this group that service not be outsourced until further research is completed.

Challenges and Opportunities in Conducting Business Electronically

As we transition to a business process model that operates on an electronic platform, we must find ways to effectively educate, train, inform, and motivate the end users to utilize the University’s electronic platform for all business transactions. Interactive and dynamic training programs should be developed for each participant group in the University’s business transactions including vendors, students, faculty, and staff.
J. Managing Documents Electronically

Rationale

One of the core principles identified that will apply to all business processes at UTRGV is the development of strategies to digitize all processes and documents in an effort to maximize efficiency, increase access, maintain uniformity, enhance space utilization, and eliminate the need of utilizing paper (going green). This initiative applies to all official documentation that is required for records retention and will ensure all business processes continue to abide by state/federal policies.

There are different options to managing documents electronically. The different business departments will need to evaluate and assess their processes, policies, and procedures in order to identify the proper and most efficient option to manage documents electronically; whether it be a process developed in-house, an external program/software or outsourcing.

Best Practice Research

- Texas Tech: Contacted Texas Tech who shared their experiences and research on both official records e-document systems and managing non-records documents.
- University of North Texas:
  - We reviewed the Records Management Interagency Coordinating Council (RMICC) and the University Records Management Committee reports from June 2012 that include the work plan of the committee to develop the Texas State Universities Records Retention Schedule and to develop best practices for the development of a model University records management program.
  - We researched UNT’s current Records Management website that includes information and training material for managing and storing electronic records.
- Virginia Commonwealth University: We reviewed their current Records Management website that has ample information on the ImageNow software used for electronic document storage.

Recommendation

It is recommended that a program/system such as ImageNow and LaserFiche and/or the development of an in-house mechanism currently used by Universities such as UNT, Texas Tech and VCU be purchased or developed in order to conduct and manage documents electronically.
All three universities identified have very strong records management tools and training materials available.

The use of shared network sites such as sharepoints, thin client computers or computer programs, a cloud and/or other sharing technology is recommended to be used for storage of documents for records retention purposes. The ease of sharing documents without the need of putting personal/large files in e-mails maximizes efficiency. This will minimize the amount of information stored in desktops and will make sharing documents and record filing very easy to manage.

Challenges and Opportunities

- Transitioning from current paper forms to an all-electronic way of conducting business.
- Training will need to be enforced throughout the University on the different business processes and the retention of records.
- Identification of records to store to abide by the records retention schedule.
- Identifying a system/program that may be uniform and beneficial for all if not most of our business processes.
Recommendation #2 –
Establish Multi-Campus Service Centers

Rationale

With the formation of UTRGV, services must continue to be provided to all campus constituents. Each location will be responsible for providing access to all business functions. This will eliminate the need for campus constituents to travel from one location to another for business activity.

Best Practice Research

- Cornell University
- University of New Hampshire - Utilizing Business Service Centers which are located throughout the different campuses without duplication of services.
- University of Ohio

Recommendation

It is our recommendation that UTRGV create multi-functional business service centers at each location to provide required services to all constituents: students, staff, faculty, and the community. This will eliminate the need for all constituents to travel from one location to another for business activity. In addition, we recommend distributed service centers at each location that will each have a primary function with the capability of interchangeable functionality. This approach will allow UTRGV to take strategic advantage of our existing assets and resources at each location and provide the greatest degree of flexibility in our business processes. The centers will provide an opportunity to develop a highly professional workforce and a platform for professional development. In addition, a distributive approach will allow for business continuity by simultaneously ensuring quality services to our constituents.

Challenges and Opportunities

- Training of back office and experts/generalist at each of campuses.
- Utilize existing assets and resources
Implement Purchase Valley First/Best Value

Rationale

As indicated in our guiding principles, The University of Texas Rio Grande Valley will “provide a leadership role in fostering economic and community partnerships”. As we assessed our current business processes, we identified that one of our core principles is to ensure our regional/local vendors have an equal opportunity of participating in bidding processes and an equal opportunity in general for conducting business with UTRGV. By providing our local vendors proper information and access to our procurement processes, while still abiding by state and federal procurement policies, UTRGV will have a larger impact in our region’s economy and job market.

There have been several impact studies conducted throughout the past years that provide a multiplier rate between 3 and 5. If UTRGV significantly increased purchases from valley vendors, a greater economic impact would be fostered throughout the valley.¹

Best Practice Research

The following are just a couple of examples of how institutions of higher education and other state agencies are promoting local/regional partnerships with local vendors:

- The University of Vermont: Top priority is providing ample information on their bidding processes and making business with local vendors as simple as possible. They also promote local economic development by partnering with more than 140 local businesses to accept their student debit card (used for University bookstore, dining facilities).
- The City of San Antonio’s Purchasing Guide website provides a centralized site with all information necessary for vendors to conduct business with the City of San Antonio.

Recommendation

Our recommendation is to encourage and educate local vendors to transition to an electronic means of doing business. This provides the University an opportunity to help develop and grow local business and the community it serves. UTRGV will make the strongest effort in facilitating

¹The University of Texas System; impact on the Rio Grande Valley; May 2011.  

Economic Impact of The University of Texas-Pan American Report; Office of Institutional Research and Effectiveness, November 2010.  
http://www.utpa.edu/news/index.cfm?newsid=4245
and promoting our procurement process by ensuring the necessary information is centrally located and easily accessible for our regional and local businesses. The ultimate goal is to increase the current percentage rate of business conducted between our local businesses and UTRGV therefore increasing revenue in the entire South Texas region. UTRGV should deploy a marketing campaign to educate the campus community and those doing business with the University on the new electronic business processes workflow model.

**Challenges and Opportunities**

- Creating an efficient format of presenting all necessary information to our local vendors.
- Training to local businesses on bidding and procurement processes.
- Aligning our current procurement process with the core principles set forth by this group.
- Creating a Master Vendor list and updating it on a regular basis for our registered vendors and categorize the business to the appropriate commodity group(s).
- Giving vendors access to update their profile (having security measures at all times) with everything done electronically through the website.
- Working closely with Community Engagement to increase communication and awareness and to reach out to local vendors.
- Supplying bilingual information and training
Recommendation #4 –
Employ Excellence in Customer Service/Training and Continuous Improvement

A. Excellence in Customer Service/Training

Rationale

Develop strategies for delivering training to all internal and external users emphasizing a culture of superior customer service.

Best Practice Research

- Google – Tier 1 & Tier 2 Help Desk
- Disney Institute – Engagement Model
- International SEPT Program – Service Blueprinting
- UT Austin Professional Development Center – Customized Training

Recommendation

It is our recommendation to develop a comprehensive training program which delivers training to all internal and external users emphasizing superior customer service. This program will include a robust professional development program for internal users (institutional personnel) in which skills and knowledge are purposely selected and addressed in order to meet the institutional strategic goals. The program should have the ability to make business transactions and interactions with the institution customer focused, personalized, and a technologically inclined experience for external users (vendors and students).

Challenges and Opportunities

- Determining best model comprehensive training program
- Coordinating an on-going effort to disseminate the culture of superior customer service, provide strategically selected skills to personnel, and facilitating the transition to newer technologies to better serve both internal and external users.
- Transitioning to a customer focused business environment
- Engaging internal and external users at a higher level
- Training for students will allow the institution to better serve the primary customer and enhance the student experience as it relates to business transactions
- Internships for students provide opportunities to gain work experience.
• Training for vendors will allow the institution to foster stronger business relationship and promote the optimization of business processes as we move towards a more technologically driven business environment
• Training for staff and faculty will allow the institution to promote a culture of superior customer service, increase retention, foster career paths and enhance the work experience

B. Endorse an Environment of Continuous Improvement

Rationale

UTRGV will create an environment for continual improvement by identifying initiatives and tools for end-users and service providers to evaluate and enhance the current business processes.

Best Practice Research

• University of Alberta (Canada)- Custom ERPs that communicate with PeopleSoft
• LEAN Process (Six Sigma)
• International SEPT Program – Service Blueprinting

Recommendation

It is our recommendation to incorporate a quality management system into the institutional culture which emphasizes continual improvement of all business processes in which all stakeholders play a pivotal role in the development and improvement of business practices. This will allow for optimal business services and the achievement of institutional goals.

Challenges

• Disseminating the new culture and providing the appropriate platforms for improvement
• Identifying possible areas of improvement in the business processes
• Applying feedback to processes and indicating changes to stakeholders
Recommendation #5 –
Establish Business Processes for Research Medical School Infrastructure

The University of Texas Rio Grande Valley’s School of Medicine should conduct its university business processes in line with all other University colleges. Budget development, purchasing and accounts payable, accounts receivable, and all other business procedures for the School of Medicine will be conducted electronically and will have an emphasis on superior customer service and continuous improvement. Specific processes may vary from the University’s because of the nature of the School of Medicine and will require further evaluation. However, because UTRGV will not include a hospital, the School of Medicine should not require unique business processes.
Appendix A

**Recommended IT investments:**

PeopleSoft Financial - ERP System
- Accounts Receivable module
- Fixed Assets module
- Grants and Contracts Module

PeopleSoft Student – Student Information System
- Integrated electronic communications system for student billing

SciQuest e-procurement system – or similar product

Concur Business Travel Management system – or similar product

Payment gateway, cashiering system, and online payment system

Hyperion Budget Development system

Business Intelligence Software

Applicant Tracking System

Non-Resident Alien software such as Windstar, Glacier, or similar product

I-9 submission software

ImageNow, Laserfiche Document Imaging or similar product

Document Storage Solution
February 7, 2014

From: Alex Valdez  
Director Procurement Management  

To: Marco Saenz  
Executive Director of Business Services  

RE: Current and Future Contracts

It has been brought to my attention by the Vice President of Business, Affairs Martin Baylor, that the Office of General Council through a directive from the Chancellor’s Office have precluded the University from engaging in any business contracts that extend past August 2015. The only contracts that UTPA will be able to engage in will be those that are mutually beneficial to both UTB and UTPA. With this issue in mind, along with participating in discussions with the Office of General Counsel, it seems that both our office and theirs have been asked to bring up this contract issue to the individuals participating in the ongoing working groups that represent both Universities.

Items discussed with OGC to be raised with Working Groups:

- UT-RGV is a new entity that is a result of dissolving UTPA and UTB
- A “Successor” or “Assumption” clause added to current contracts will not be allowed because UT-RGV is an entirely new entity, not the result of a merger or acquisition
- Access to Permanent University Funds is only allowed through the creation of the new University, not the merger of the two existing ones
- The ability to procure contracts for an entity that does not exist will make it difficult to determine future needs
- Having all contracts ending on the same date may leave the new University without Services and or Support for products ranging from Software, Food and Beverage Services to Construction
- Limited staff (UTPA (2), UTB Staff to be determined) to renew and create all Contracts for the new University
- Limited leverage with vendors and higher cost for all current contracts to be created with an August 2015 end date
- OGC is checking to see if the new University Officials will have the power to assume existing contracts come September 1st 2015

The Office of General Council will be raising these same issues with the UT System working group for the new University. I look forward to results of your discussion with your Workgroup.