

2023 UC ANR Administrative and Support  
Services Customer Satisfaction Survey

[Top VC/Admin Level] - [Sub VC/Admin Level]

**Resource Planning and Management (RPM)**

PRIMARY OPPORTUNITIES			ACTIONS TAKEN/IN PROCESS	OUTCOME/HIGHLIGHTS
Current Year (2020-21)	Current Year (2022-23)	PO Identified		
3.12	3.22	Clarity of policy	<ol style="list-style-type: none"> <li>1. Provide guidance on policies such as: deficit management plan, rate &amp; recharge, Federal AES allocation methodology, academic cost recovery, fiscal close, budget allocation process, budget call, PMF and DCF, MOUs, AREERA, and capital.</li> <li>2. For all future policies, RPM will collaborate with the Controller's Office, gather input from select ANR stakeholders, and ensure the policies are incorporated into ANR administrative handbook and posted on our website.</li> </ol>	To facilitate clear and effective communication of policy
2.87	3.25	Training for clientele	<ol style="list-style-type: none"> <li>1. Host quarterly zoom meetings starting in March 2025 through June 2026, to train business managers on processes such as staffing reconciliation, PMF/DCF forms. Provide annual training for rate &amp; recharge, fiscal close, and budget call. In addition, meetings will be recorded and posted on our website for future training purposes.</li> <li>2. Host annual in-person budget meeting with stakeholders to answer questions, and provide training.</li> <li>3. Develop SOP for budget processes (reference next PO identified)</li> </ol>	Provide ANR clients with necessary training and knowledge to assist their work.
3.02	3.33	Clear procedures	<ol style="list-style-type: none"> <li>1. Create step-by-step SOP documentation for stakeholders: ITF process, staffing reconciliation, endowment revenue recognition, permanent and temporary budget allocation, Capital Project Workflow with Aggie Enterprise, capital payment processing, PMF and DCF forms.</li> </ol>	Help ANR clients become more knowledgeable with ANR processes and procedures.
2.85	3.40	Approval workflow process	<ol style="list-style-type: none"> <li>1. Develop flow charts, SOP's for processes with expected timelines/deadlines.</li> <li>2. Improve response time by having regular check-ins with business managers, financial control leads, unit directors, leadership, and other key stakeholders.</li> </ol>	<p>Improve approval time for key processes.</p> <p>DCF- up to 3 business days            PMF- up to 3 business days            Rate &amp; Recharge- approval by June            Capital- Payment Requests Approvals (PRs) up to 3 business days            Capital- Project Planning Documents (PPDs) up to 5 business days            Staffing reconciliation- quarterly reconciliation with business managers</p>
2.95	3.43	Effectively uses website to provide access to information and services	<ol style="list-style-type: none"> <li>1. Review and update web page on a quarterly basis. Ensure that staff directory, training sessions, procedures, and other existing policies are accurately posted on website.</li> <li>2. Post links to the departments participating in relevant processes or procedures to support cross-departmental coordination.</li> </ol>	Ensure that policies, procedures, point of contacts are properly posted on website so clientele has a better understanding of RPM services.