MEMORANDUM TO: Sharen Tokura

FROM: Rodney Sakaguchi

SUBJECT: NOTIFICATION OF CHANGE IN ORGANIZATION, OFFICE OF THE ASSOCIATE VICE PRESIDENT FOR PLANNING, POLICY AND BUDGET

April 6, 1988

Please find attached a copy of the above-mentioned reorganization proposal which was approved by the President on November 20, 1987.

Feel free to call me if there are any questions regarding this matter.

Attachment
UNIVERSITY OF HAWAII
Office of Planning, Policy and Budget
December 1, 1987

MEMORANDUM

TO: Chester Kunitake
    HGEA

FROM: Rodney Sakaguchi
       Director of Budget

   Colleen O. Sathre
   Director of Planning and Policy

SUBJECT: ORGANIZATIONAL CHANGES RELATING TO THE OFFICE OF THE ASSOCIATE VICE PRESIDENT FOR PLANNING, POLICY, AND BUDGET

The attached proposal was approved by the Board of Regents on November 20, 1987. The document is now submitted to your office for review and consultation.

This reorganization will accomplish the following:

1. The position for the Associate Vice President for Planning, Policy, and Budget will be abolished and a new APT budget analyst position established in its place. Also, the classification of position #18549 will be reviewed and appropriate action taken.

2. The Management Systems Office will report to the Director of Planning and Policy.

3. An Information Technology Office will be established and will report to the Director of Planning and Policy.

4. The Director of Planning and Policy and the Director of Budget will report directly to the President.

We would appreciate your review and comments. If we do not receive any response in two weeks, we will assume that your office has no objections to this reorganization.

Please feel free to call either of us if there are any questions.

Attachment

cc: President Simone
    Director Takushi
PROPOSAL TO REORGANIZE THE OFFICE OF THE ASSOCIATE VICE PRESIDENT, PLANNING, POLICY AND BUDGET

Recommendation

It is recommended that the Board approve a reorganization of the Office of the Associate Vice President for Planning, Policy and Budget that will accomplish the following:

1. The position for an Associate Vice President for Planning, Policy and Budget is abolished and a budget analyst position established in its place.

2. The Management Systems Office reports to the Director of Planning and Policy.

3. An information technology office is established and reports to the Director of Planning and Policy.

4. The Director of Planning and Policy and the Director of Budget report directly to the President.

Effective Date

Effective upon Board approval.

Purpose

The primary purpose of this action is to establish a more direct line of responsibility and accountability between the President and the budgeting and long range planning functions of the University. The majority of decisions made in the University have the potential for impacting resource requirements and long-range institutional plans. It is important that information exchanged between the budgeting and long-range planning functions and the President be carried out in a timely fashion and with sufficient attention to relevant details.

An additional purpose of this recommendation is to address the significant need within the University for a cohesive, comprehensive, state-of-the-art approach to policy and planning for the development and coordination of telecommunications, computers, and information systems. There is a critical need for a concerted effort to advocate and educate within and outside the University on the benefits of information technology for the advancement of instructional, research and service missions of the University. The Hawaii Interactive Television System, which will be managed out of the Office of Information Technology, is an example of a technology application supporting statewide outreach educational purposes.
Assumptions

A principal assumption of this proposal is that the advantages to be gained by the President's closer involvement in planning and budgeting will far outweigh the disadvantages of increasing the President's span of control by one position. This proposal also assumes that, since the new Office of Information Technology has universitywide responsibility, it is appropriate to assign it to a systemwide academic support office and to align it under an organizational structure responsible for long range planning and the University's administrative computing functions.

Significant Facts

1. The present organization of the Office of the Associate Vice President for Planning, Policy and Budget assigns it responsibility for the following functions:
   - Institutional long range planning and policy support;
   - Administrative data processing and information support services;
   - Universitywide and Manoa campus institutional research;
   - Institutional budget preparation and control;
   - Manoa campus budget preparation and control.
   These functions are the responsibility of three units:
   - Office of Planning and Policy
   - Management Systems Office
   - University Budget Office

2. Under the proposed organization, all of the existing functions of the Planning, Policy and Budget Office will remain. However, the position of Associate Vice President for Planning, Policy and Budget will be abolished. The Office of Planning and Policy (which includes the Institutional Research Office) and the Management Systems Office will be combined under the Director of Planning and Policy. Additionally, a new Office of Information Technology will be established and will have responsibility for policy development and planning of universitywide telecommunications, computers and information systems, and for the coordination of systemwide use and development of interactive and closed-circuit television for the purposes of instructional, research and community service outreach education. The Director of the University Budget Office and
APPENDIX A

CURRENT ORGANIZATION CHARTS AND FUNCTIONAL STATEMENTS

. Office of the President
. Office of the Associate Vice President for Planning, Policy and Budget
. Office of Planning and Policy
. Management Systems Office
. University Budget Office
CURRENT ORGANIZATION

STATE OF HAWAII
SYSTEMWIDE ADMINISTRATION
ASSOCIATE VICE PRESIDENT FOR
PLANNING, POLICY AND BUDGET

Office of the Associate Vice President
Position Organization Chart
Chart A

OFFICE OF THE ASSOCIATE VICE PRESIDENT
FOR PLANNING, POLICY AND BUDGET

Associate Vice President, M12-AE, #89094
Secretary IV, SR-16 #13571

Planning, Policy and Institutional Research Office
Chart B

Management Systems Office
Chart C

University Budget Office
Chart D

APPROVED:

[Signature]
FEB 13, 1986
UNIVERSITY OF HAWAII
ASSOCIATE VICE PRESIDENT FOR PLANNING, POLICY AND BUDGET

Functional Statement

The Office of Planning, Policy and Budget is an academic support office that has both functional and support responsibilities. The primary purpose of the Office of Planning, Policy and Budget is to support the Office of the President and the President's line administrative officers in the areas of planning, policy, budgeting, decision support and information management.

The Office has three major subdivisions for: (1) planning, policy and institutional research; (2) management and information systems; and (3) budget preparation and execution.

The Office of Planning, Policy and Budget facilitates the work of the line officers through assistance with budget preparation and execution; provision of accurate and timely information to University decision-makers for planning and management purposes; and provision of administrative computing support services. The office is responsible for managing Universitywide planning including developing, monitoring and revising the Strategic Plan and Agenda for Action, coordinating University planning with the Hawaii State Plan, managing the State Higher Education Functional Plan, overseeing campus academic development planning, and providing planning support. In addition to these internal responsibilities, the office plays a major role in supporting Board information and policy needs.
CURRENT ORGANIZATION

PLANNING, POLICY AND INSTITUTIONAL RESEARCH OFFICE
Director of Planning and Policy
M10-AM, #89173
Secretary IV, SR-16, #17481

PLANNING SECTION
Planning Officer, M05-AM, (new)¹

POLICY SECTION
Policy and Program Officer, M04-AM, #89013
Educational Specialist III, P-09, #80015

INSTITUTIONAL RESEARCH SECTION
Director, M05-AM, #80222
Secretary III, SR-14, #19069
Institutional Analyst IV, P-12, #80223
Institutional Analyst III, P-10, #80220
Institutional Analyst I, P-04, #80213
Computer Specialist II, P-05, #80218

¹Pending classification.
PLANNING, POLICY AND INSTITUTIONAL RESEARCH OFFICE

The Planning, Policy and Institutional Research Office is a systemwide academic support office with responsibility for managing Universitywide planning, providing planning support, coordinating policy development and analysis, and providing institutional research services.

Specifically, this section of the Office of Planning, Policy and Budget has functional responsibility for:

- Managing Universitywide planning, including monitoring and revising the Strategic Plan and Agenda for Action
- Coordinating University planning with the Hawaii State Plan
- Managing the State Higher Education Functional Plan process
- Handling liaison with State planning task forces
- Overseeing the University Academic Development Planning process
- Developing and implementing an interface between the systemwide planning and budgeting processes
- Supporting planning at the campus level
- Developing and executing planning policies and guidelines
- Developing and coordinating a systematic consideration of policy
- Preparing major policy studies
- Formulating Board and Executive policies across the full array of University activities
- Providing policy interpretation and guidance
- Making accurate and timely information and data analyses relating to students, enrollments, courses, curricula, degrees, etc., available to University decision-makers for planning and management purposes
- Conducting institutional studies and preparing analytical reports on a wide range of subjects including, for example, workload, financial planning, outcomes, student progress, etc.
- Providing decision support designed to improve the integration of planning and budgeting

- Developing and utilizing computer-based analyses that facilitate timely preparation of routine reports and responses to ad-hoc queries

- Assisting users with data interpretation and manipulation

- Managing universitywide student affairs operations

- Establishing and maintaining data element definitions and policy standards
PLANNING

This function involves responsibility for directing and managing Universitywide planning; coordinating academic development planning; serving as the State Functional Plan manager and the University liaison with State planning processes; directing planning and policy initiatives that serve to link planning and budgeting; and serving as the chief planning officer responsible for University planning analyses, policy development, monitoring, refinement, etc.

This function also involves the provision of planning support essential for the development, coordination, and implementation of a Universitywide planning effort under the direction of the Director of Planning and Policy. Support functions include serving as a resource person to assist campuses in the planning process; providing for training and guidance on planning to university personnel; assisting with the development of unit planning processes and guides; serving as a resource for program assessment and evaluation; supporting campus academic development planning; assisting in the development of an analytical framework that links the planning and budgeting processes and facilitates priority-setting and execution at a campuswide level. Assists with the identification, analysis, and development of responses to planning issues facing the university; provides staff support for the monitoring, reporting and revision processes associated with the Hawaii State Plan, the State Higher Education Functional Plan, the Strategic Plan and Agenda for Action.
POLICY

This function involves the analysis of University policy issues and the development and coordination of a systematic consideration of policy with the staff in the Office of Planning, Policy and Budget, the Vice Presidents, Chancellors and their staffs, and campus officers. Specific functions include conducting research and institutional comparisons; preparing background and issue papers; preparing studies, reports, legislative testimony, and briefing papers; formulating policy statements, recommendations for action, and guidelines for implementation; providing policy interpretation and guidance; and handling responses to inquiries and ad-hoc requests. This function involves the analysis of a wide variety of policy issues spanning academic affairs, budget, fiscal, and personnel matters, and in particular systemwide oversight of student affairs policies. Oversight of universitywide student affairs operations is also a functional responsibility of this officer.
INSTITUTIONAL RESEARCH

Responsible for developing and preparing institutional analyses, reports and other similar support services to the University at the direction of the Director of Planning and Policy. Generally, these services include the analysis and dissemination of informational reports and studies, special ad-hoc studies, resource needs analysis and forecasting, and analytical support for the University's academic and financial planning process.

Information Services: Major Functions

1. Developing formats, defining terms, summarizing and analyzing routinized studies, reports and information systems (such as management information reports, UH Fact Sheet, crosswalk tables and Universitywide terms and definitions) that are required for planning, analytical, and management purposes. Working with the Management Information Systems Office in developing and executing automated procedures to streamline the compilation of routine information reports.

2. Designing, researching, analyzing and using new computer systems, computational techniques and analytical methods to respond to UH and external requirements (e.g., OSHA, SHEP), national developments and internal innovations.

3. Collecting, summarizing, analyzing and responding to information needs as required by the University's planning and management policies and processes and as required by external agencies. These include comprehensive information requests (e.g., HEGIS, IPEDS), categories of information needed by campus administration, special legislative requests to the University and other University needs.

4. Conducting, coordinating and consulting for workshops, training seminars and committees to facilitate the dissemination of information and information analysis to UH administrators and campus/program directors as part of the University's overall management program.

Analytical Services: Major Functions

1. Preparing brief analyses, supported by charts and graphic displays, of the Management Information Reports.

2. Developing and utilizing analytical techniques to support the University's institutional and campus-level planning process. This may include quantitative unit activity and resource profiles, simulated resource projection models, workload indicators and analysis, enrollment projections, program efficiency measures, quantitative resource allocation measures, surveys of alumni, and student progress and outcomes analyses.
3. Developing, testing, maintaining and utilizing a variety of analytical techniques to support the integration of institutional and academic planning, with budgeting and financial planning to include cost/efficiency analyses, current service and/or workload financial projections, inflation analyses, computer plotting, historical/current/planned data displays and revenue projections.

4. Providing analytical support, training and consultation to campuses in academic and financial planning and analysis and the utilization of analytical techniques and systems.

5. Providing technical support and consultation in the training and dissemination of computer models and statistical techniques as required for operations and strategic planning.
The Management Systems Office is a systemwide office responsible for providing administrative data processing and information support services to both systemwide and campus administrators.

**Administrative Information Services Section**

- Analyzes management information requirements and develops computer program specifications.
- Recommends data definition policies and standards.
- Assists users in accessing data files and developing their own reports.
- Coordinates requests for computer services.
- Manages computer contracts and expenditures.
- Assists in internal office management.

**Administrative Information Systems Section**

- Works with key operational units to define data processing requirements and develop solutions/plans for present/future needs.
- Provides systems analysis and feasibility studies on request.
- Designs and develops computer programs and documentation.
- Maintains EDP applications including production of routine management information reports.
- Trains users in the use of the system.
- Provides computer program maintenance.
- Provides data entry services to convert source documents into machine readable form.
- Coordinates computer report schedules.
- Secures necessary computer time and resources.
- Prepares and submits computer jobs into the computer.

**Technical Support Section**

- Operates and maintains minicomputer systems.
- Monitors performance of administrative computer systems and modifies configuration and workload as needed.
- Establishes computer utilization procedures and recommends policies.
- Implements and maintains computer hardware and software packages.
- Maintains central database.
- Maintains the on-line teleprocessing environment.
- Maintains and manages machine-readable program libraries.
- Controls security of on-line systems, data bases, physical facilities and backup tapes.
- Conducts research and development of new products.
- Installs and troubleshoots computer terminals and data transmission equipment, and maintains the data communications network.
- Provides technical staff training and technical assistance to the staff and users.
- Serves as the liaison to the UH Computing Center.

User Training and Support Services
- Provides training, technical services, and a bi-monthly newsletter to a selected group of administrative users sharing a computer system.
- Assists users in reviewing their requirements and determining specific solutions which best meet their present and future needs, and recommends acquisition of new software by MSO as appropriate.
- Coordinates and conducts demonstrations and information sessions as required.
- Conducts training in the use of various minicomputer software packages and maintains training records of users and staff.
- Operates digital phototypesetter and provides typesetting services to system offices and minicomputer users.
- Assists in testing software packages prior to release.
- Coordinates MSO form design and ensures standardization.
UNIVERSITY BUDGET OFFICE

The University Budget Office has overall responsibility for the preparation and execution of the University's operating budget and preparation of the University's CIP budget. The office serves as staff to the President via the Associate Vice President for Planning, Policy and Budget. As such, the office advises the President on budgetary policies and issues.

Also, the office serves as budget staff to those vice presidents with operational responsibilities over UH Manoa. The office assists the vice presidents in such matters as evaluating budget requests and evaluating expenditure plans and variance reports.

Functions of the office are grouped generally into budget preparation and budget execution.

BUDGET PREPARATION

- Works with planning staff in preparing biennial BOR/Executive Budget objectives. Prepares similar objectives for the preparation of the supplemental budget as appropriate.
- Prepares and recommends for approval by the President, Biennial and Supplemental Budget Preparation Policies and Instructions.
- Administers a system for the evaluation of campus operating and capital improvement budgets by appropriate academic administrators.
- Coordinates the formal documentation of the BOR approved budget request.
- Coordinates the presentation and justification for the BOR approved budget request and budget ceilings before the Department of Budget and Finance and the Governor.
- Prepares legislative testimony in support of the University's budget request as approved by the Governor. Monitors the progress of the budget through the Legislature and recommends follow up action as appropriate.
- Works with campus fiscal personnel in preparing and updating budgetary details in support of the budget request and in support of the budget as approved by the Legislature.
- Coordinates the preparation of the University's variance report.
APPENDIX B

PROPOSED ORGANIZATION CHARTS AND FUNCTIONAL STATEMENTS

- Office of the President
- Office of Planning and Policy
- University Budget Office
STATE OF HAWAII
SYSTEMWIDE ADMINISTRATION
OFFICE OF PLANNING AND POLICY

OFFICE OF PLANNING AND POLICY
Director of Planning and Policy
M10-AE, #89173
Secretary IV, SR-16, #17481

PLANNING OFFICE
Academic Planner
M05-AM, (new)
#998989

POLICY OFFICE
Policy and Program Officer,
M04-AM, #89013
Educational Specialist III,
P-09, #80015

INSTITUTIONAL RESEARCH OFFICE
Director
M05-AM, #80222
Secretary III, SR-14, #19069
Institutional Analyst IV,
P-12, #80223
Institutional Analyst III,
P-10, #80220
Institutional Analyst I,
P-04, #80213
Computer Specialist II,
P-05, #80218

MANAGEMENT SYSTEMS OFFICE
See Chart A

INFORMATION TECHNOLOGY OFFICE
Director, M08-NM, #98970
Secretary III, SR14, #98450
Educational Specialist III,
(Instructional IV)
P09 #98972
Educational Specialist III,
(Training and Support)
P09 #98971
Public Information Officer I,
P05 #98976
Electronics Engineer I,
P12, #98974

APPROVED
President, University of Hawaii
Date: ____________
OFFICE OF PLANNING AND POLICY

Functional Statement

The Office of Planning, Policy is a systemwide academic support office with responsibility for: (1) managing Universitywide planning and providing planning support, (2) coordinating policy development and analysis, (3) providing institutional research services, (4) providing administrative data processing and information support services; and (5) coordinating universitywide development and use of telecommunications technology.

The office supports the Office of the President and facilitates the work of the President's line administrative officers through provision of administrative computing support services and accurate and timely information for planning and management purposes. The office is responsible for managing Universitywide planning including developing, monitoring and revising the Strategic Plan and Agenda for Action, coordinating University planning with the Hawaii State Plan, managing the State Higher Education Functional Plan, coordinating campus academic development planning, and providing planning support. The office coordinates the use and development of telecommunications, computers, and information systems including interactive and closed circuit television using the Hawaii Interactive Television System. In addition to these internal responsibilities, the office plays a major role in supporting Board information and policy needs.

Specific functional responsibilities include:

- Managing Universitywide planning, including monitoring and revising the Strategic Plan and Agenda for Action
- Coordinating University planning with the Hawaii State Plan
- Managing the State Higher Education Functional Plan process
- Handling liaison with State planning task forces
- Coordinating the Universitywide Academic Development Planning process
- Developing and implementing an interface between the systemwide planning and budgeting processes
- Supporting planning at the campus level
- Developing and executing planning policies and guidelines
- Developing and coordinating a systematic consideration of policy
- Preparing major policy studies
- Formulating Board and Executive policies across the full array of University activities

- Providing policy interpretation and guidance

- Making accurate and timely information and data analyses relating to students, enrollments, courses, curricula, degrees, etc., available to University decision-makers for planning and management purposes

- Conducting institutional studies and preparing analytical reports on a wide range of subjects including, for example, workload, financial planning, outcomes, student progress, etc.

- Providing decision support designed to improve the integration of planning and budgeting

- Developing and utilizing computer-based analyses that facilitate timely preparation of routine reports and responses to ad-hoc queries

- Assisting users with data interpretation and manipulation

- Managing universitywide student affairs operations

- Establishing and maintaining data element definitions and policy standards

- Providing administrative data processing services and managing administrative information systems

- Handling all technical support requirements associated with administrative computing

- Providing user training and support services for administrative computing

- Developing strategic plans, programs, and policy guidelines for the acquisition and operation of telecommunications, computers, information systems and instructional technologies.

- Developing and coordinating universitywide use of interactive, closed circuit television for educational purposes, including the use of the Hawaii Interactive Television System (HITS).
PLANNING

This function involves responsibility for directing and managing universitywide planning; coordinating academic development planning; serving as the State Functional Plan manager and the University liaison with State planning processes; directing planning and policy initiatives that serve to link planning and budgeting; and serving as the chief planning officer responsible for University planning analyses, policy development, monitoring, refinement, etc.

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POLICY

This function involves the analysis of University policy issues and the development and coordination of a systematic consideration of policy with the staff in the Office of Planning, Policy and Budget, the Vice Presidents, Chancellors and their staffs, and campus officers. Specific functions include conducting research and institutional comparisons; preparing background and issue papers; preparing studies, reports, legislative testimony, and briefing papers; formulating policy statements, recommendations for action, and guidelines for implementation; providing policy interpretation and guidance; and handling responses to inquiries and ad-hoc requests. This function involves the analysis of a wide variety of policy issues spanning academic affairs, budget, fiscal, and personnel matters, and in particular systemwide oversight of student affairs policies. Oversight of universitywide student affairs operations is also a functional responsibility of this officer.
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Information Services: Major Functions

1. Developing formats, defining terms, summarizing and analyzing routinized studies, reports and information systems (such as management information reports, UH Fact Sheet, crosswalk tables and Universitywide terms and definitions) that are required for planning, analytical, and management purposes. Working with the Management Systems Office in developing and executing automated procedures to streamline the compilation of routine information reports.

2. Designing, researching, analyzing and using new computer systems, computational techniques and analytical methods to respond to UH and external requirements (e.g., OSHA, SHEP), national developments and internal innovations.

3. Collecting, summarizing, analyzing and responding to information needs as required by the University's planning and management policies and processes and as required by external agencies. These include comprehensive information requests (e.g., HEGIS, IPEDS), categories of information needed by campus administration, special legislative requests to the University and other University needs.

4. Conducting, coordinating and consulting for workshops, training seminars and committees to facilitate the dissemination of information and information analysis to UH administrators and campus/program directors as part of the University's overall management program.

Analytical Services: Major Functions

1. Preparing brief analyses, supported by charts and graphic displays, of the Management Information Reports.

2. Developing and utilizing analytical techniques to support the University's institutional and campus-level planning process. This may include quantitative unit activity and resource profiles, simulated resource projection models, workload indicators and analysis, enrollment projections, program efficiency measures, quantitative resource allocation measures, surveys of alumni, and student progress and outcomes analyses.
3. Developing, testing, maintaining and utilizing a variety of analytical techniques to support the integration of institutional and academic planning with budgeting and financial planning, to include cost/efficiency analyses, current service and/or workload financial projections, inflation analyses, computer plotting, historical/current/planned data displays and revenue projections.

4. Providing analytical support, training and consultation to campuses in academic and financial planning and analysis and the utilization of analytical techniques and systems.

5. Providing technical support and consultation in the training and dissemination of computer models and statistical techniques as required for operations and strategic planning.
PROPOSED ORGANIZATION

DIRECTOR (MQ7-MM) 82003
ASST MGR ICS (P13) 80224
INST ANALYST II (P08) 80216
SECRETARY II (SR12) 21280
SECRETARY II (SR12) 15463
CLERK/TYPIST II (SR08) 35466(S)

ADMINISTRATIVE INFORMATION
SYSTEMS SECTION
UH COMPUTER SP V  P11
     80063
     80048
UH COMPUTER SP IV  P09
     80050
     80060
     80044
     81855(S)
UH COMPUTER SP III  P07
     80035
     80016
     81908
UH COMPUTER SP II  P05
     81649(S)
     81905
KEY EQUIP SUPV I  SR12
     00749
KEY EQUIP OPER I  SR08
     14347
     15489
     18023
     12880
     07464
     14348

ADMINISTRATIVE INFORMATION
SERVICES SECTION
INST ANALYST III  P10
     80214
UH COMPUTER SP IV  P09
     80049
UH COMPUTER SP II  P05
     81494

TECHNICAL SUPPORT
SECTION
UH COMPUTER SP V  P11
     80062
UH COMPUTER SP IV  P09
     80047
     80042
     80049
UH COMPUTER SP III  P07
     81854(S)
     81856(S)
     81907
UH COMPUTER SP II  P05
     81231
COMP OPER I  SR13
     11870

USER TRAINING AND SUPPORT
SERVICES SECTION
UH COMPUTER SP V  P11
     80058
     80040
UH COMPUTER SP IV  P09
     81648(S)
The Management Systems Office is a systemwide office responsible for providing administrative data processing and information support services to both systemwide and campus administrators.

**Administrative Information Services Section**
- Analyzes management information requirements and develops computer program specifications.
- Recommends data definition policies and standards.
- Assists users in accessing data files and developing their own reports.
- Coordinates requests for computer services.
- Manages computer contracts and expenditures.
- Assists in internal office management.

**Administrative Information Systems Section**
- Works with key operational units to define data processing requirements and develop solutions/plans for present/future needs.
- Provides systems analysis and feasibility studies on request.
- Designs and develops computer programs and documentation.
- Maintains EDP applications including production of routine management information reports.
- Trains users in the use of the system.
- Provides computer program maintenance.
- Provides data entry services to convert source documents into machine readable form.
- Coordinates computer report schedules.
- Secures necessary computer time and resources.
- Prepares and submits computer jobs into the computer.

**Technical Support Section**
- Operates and maintains minicomputer systems.
• Monitors performance of administrative computer systems and modifies configuration and workload as needed.
• Establishes computer utilization procedures and recommends policies.
• Implements and maintains computer hardware and software packages.
• Maintains central data base.
• Maintains the on-line teleprocessing environment.
• Maintains and manages machine-readable program libraries.
• Controls security of on-line systems, data bases, physical facilities and backup tapes.
• Conducts research and development of new products.
• Installs and troubleshoots computer terminals and data transmission equipment, and maintains the data communications network.
• Provides technical staff training and technical assistance to the staff and users.
• Serves as the liaison to the UH Computing Center.

User Training and Support Services

• Provides training, technical services, and a bi-monthly newsletter to a selected group of administrative users sharing a computer system.
• Assists users in reviewing their requirements and determining specific solutions which best meet their present and future needs, and recommends acquisition of new software by MSO as appropriate.
• Coordinates and conducts demonstrations and information sessions as required.
• Conducts training in the use of various minicomputer software packages and maintains training records of users and staff.
• Operates digital phototypesetter and provides typesetting services to system offices and minicomputer users.
• Assists in testing software packages prior to release.
• Coordinates MSO form design and ensures standardization.
The Office of Information Technology is responsible for developing strategic plans, programs and policy guidelines for the acquisition and operation of telecommunications, computers, information systems and instructional technologies for the University.

Specific functional responsibilities include:

- Coordinating and monitoring policy and project planning; including the coordination of the computer resources of the Management Systems Office, UH Computing Center, and the campuses.

- Coordinating systemwide use and development of interactive and closed-circuit television for instruction, research and community service, including the coordination, development and use of Hawaii Interactive Television System (HITS) for University outreach purposes.

- Working in cooperation with campus officials, creating a unified data and video communications network for the UH system with "gateways" to library facilities and national and international networks.

- Facilitating faculty access to appropriate research and training activities, and instructional technology; disseminating information about computers, information and telecommunication innovations and technology.

- Providing leadership and serving as the University's technical expert in liaison for telecommunications, acquisitions and on such projects as the selection, installation, implementation and management of University telephone systems.

- Providing guidance in the integration of various new and existing information and telecommunication technology, for example, developing a plan for low-cost, high-quality computer-aided printing publishing capabilities for all University campuses for use by both the administration and faculty.

- Serving as a liaison among University senior executives and campus administrators on issues relating to telecommunications, computers and information systems.

- Chair and provide leadership for the University Advisory Committee on Computers and Telecommunications and the University Coordinating Council for HITS.

- Develop effective functional relationships with state, national, and international organizations and institutions.
PROPOSED ORGANIZATION

STATE OF HAWAII
SYSTEMWIDE ADMINISTRATION
ASSOCIATE VICE PRESIDENT FOR
PLANNING, POLICY AND BUDGET

University Budget Office (PROPOSED)

DIRECTOR OF BUDGET
#89196 M10-NM

Secretary III
#18549 SR-14

BUDGET PREPARATION
Budget Specialist V
#80153 P-11
Budget Specialist V
#81820 P-11
Budget Specialist V
(New) P-11

BUDGET EXECUTION
Budget Specialist VI
#80151 P-13

Clerk-Typist II
#35234 SR-08

Budget Specialist V
#80156 P-11
Budget Specialist V
#80157 P-11
Budget Specialist V
#81509 P-11

1 Classification to be reviewed.
2 Classification to be reviewed.
The University Budget Office has overall responsibility for the preparation and execution of the University's operating budget and preparation of the University's CIP budget. The office serves as staff to the President. As such, the office advises the President on budgetary policies and issues.

Also, the office serves as budget staff to those vice presidents with operational responsibilities over UH Manoa. The office assists the vice presidents in such matters as evaluating budget requests and evaluating expenditure plans and variance reports.

Functions of the office are grouped generally into budget preparation and budget execution.

**BUDGET PREPARATION**

- Works with planning staff in preparing biennial BOR/Executive Budget objectives. Prepares similar objectives for the preparation of the supplemental budget as appropriate.

- Prepares and recommends for approval by the President, biennial and supplemental budget preparation policies and instructions.

- Administers a system for the evaluation of campus operating and capital improvement budgets by appropriate academic administrators.

- Coordinates the formal documentation of the BOR approved budget request.

- Coordinates the presentation and justification for the BOR approved budget request and budget ceilings before the Department of Budget and Finance and the Governor.

- Prepares legislative testimony in support of the University's budget request as approved by the Governor. Monitors the progress of the budget through the Legislature and recommends follow-up action as appropriate.

- Works with campus fiscal personnel in preparing and updating budgetary details in support of the budget request and in support of the budget as approved by the Legislature.

- Coordinates the preparation of the University's variance report.
BUDGET EXECUTION

- Develops and recommends for President's approval, policies and instructions for the allocation and expenditure of appropriated funds.

- Defends University allotment ceilings before the Department of Budget and Finance and the Governor.

- Develops and recommends for approval by the President, expenditure allocations for UHM, the Community Colleges, and Hilo/West Oahu College, taking into consideration legislative add-ons, legislative reductions, executive restrictions, and presidential and BOR policies.

- Develops and recommends for approval by vice presidents with UHM operational responsibilities, expenditure allocations for UHM operating units.

- Monitors expenditures at the school, college, and institute levels for UHM and at the appropriation level for the remainder of the University, on a quarterly basis for compliance with statutory requirements, legislative intent, and executive, presidential and BOR policies.

- Coordinates the preparation and submittal of all University quarterly allotment requests in accordance with law. Prepares quarterly allotment requests for UH Manoa programs.

- Review proposals for reorganization. Recommend organizational changes as appropriate.