

**University Financial, Information Technology and Physical Resources
Working Group Meeting
July 8, 2026 at 2:00-3:00pm
Microsoft Teams**

Attendees: Paula Austell, Hillary Campbell, Robert Clarke, Brandon Davidson, Arnold Duenes, Cheryl Friensehahn, Jeremy Head, Raúl Hinojosa, Nate Howe, Kelly Kinnard, Joseph Mauriello, Stephanie McCane, Clark Meyer, Melody Monjazebe, Payal Paliwal, Tiffany Parker, Shane Solis, Brent Tourangeau, Vy Trang, Andrews Williams

Absent: Nicole Harrington, Emily Lacy

- **Introduction of New Chief Audit Executive:** Dr. Raúl Hinojosa introduced Joseph Mauriello as the new Chief Audit Executive at the University of Texas at Dallas, highlighting his prior experience and transition into the role, with Joseph Mauriello sharing his background and commitment to supporting the group.
- **Appointment of Working Group Co-Chair:** Dr. Hinojosa announced that Nate Howe has agreed to serve as co-chair for the University Financial, Information Technology, and Physical Resources Working Group, joining Melody Monjazebe in leading the group's efforts.
- **Overview of SACSCOC Accreditation and Differentiated Review:** Nate Howe, Dr. Hinojosa, and Melody Monjazebe provided an overview of the SACSCOC accreditation process, emphasizing the importance of the differentiated review, the assignment of six principles to the working group, and the need to map group members to these principles for compliance documentation.
 - **Assignment of Principles:** The group was informed that six specific principles (12.6, 13.1, 13.2, 13.3, 13.6, and 13.7) are assigned to this working group, and the goal is to match members to principles based on expertise to ensure comprehensive coverage.
 - **Member Contributions and Expectations:** Nate Howe outlined that members are expected to answer questions about their assigned principles, provide relevant documentation, and raise any concerns or gaps, with the aim of preparing robust responses before the external review.
 - **Timeline and Next Steps:** The group is working toward a fall 2026 deadline for the first draft of materials, with the process extending into 2027 and culminating in an accreditation agency visit in September 2027; members are encouraged to begin reviewing assigned principles and preparing documentation.
- **Demonstration of Accreditation Website and Resources:** Dr. Hinojosa demonstrated the SACSCOC reaffirmation website, highlighting available resources, historical reports, group membership lists, timelines, and the plan to post meeting minutes and documentation for transparency and knowledge transfer.
 - **Website Navigation and Content:** Dr. Hinojosa walked the group through the SACSCOC reaffirmation website, showing where to find the overview, working

group lists, timelines, and prior accreditation reports, and explained that the site will be updated with meeting minutes and additional resources.

- o **Access and Updates:** The website serves as a central repository for documentation, with some materials requiring campus login for access, and Dr. Hinojosa encouraged members to report any errors or missing information for correction.
- **Assignment of Working Group Members to Accreditation Principles:** The working group members discussed and assigned individuals to each of the six SACSCOC principles, ensuring coverage based on expertise and responsibilities, and clarified the types of documentation and questions relevant to each principle.
 - o **Principle 12.6 – Student Debt and Financial Literacy:** Rob Clarke, Hillary Campbell, and Cheryl Friensehahn were assigned to address Principle 12.6, which focuses on how the university educates students about managing debt and repaying loans, including relevant programs and counseling services.
 - o **Principle 13.1 – Financial Resources:** Melody Monjazebe, Joseph Mauriello, and Paula Austell were assigned to Principle 13.1, which requires demonstrating the university's sound financial resources and stable financial base, with discussion of relevant financial indicators, endowments, and audit questions.
 - o **Principle 13.2 – Financial Documents:** Melody Monjazebe and Joseph Mauriello were assigned to Principle 13.2, which involves providing institutional audits, statements of unrestricted net assets, and annual budgets, with Dr. Hinojosa noting the need for clarification on required documentation and benchmarking with other UT system schools.
 - o **Principle 13.3 – Financial Responsibility:** Melody Monjazebe, Joseph Mauriello, Paula Austell, and Cheryl Friensehahn were assigned to Principle 13.3, covering the management of financial resources, operational sustainability, pledges, contributions, and the inclusion of additional team members for specific financial processes.
 - o **Principle 13.6 – Federal and State Responsibilities:** Rob Clarke, Cheryl Friensehahn, Joseph Mauriello, and Melody Monjazebe were assigned to Principle 13.6, which addresses compliance with Title IV and state financial aid audits, with discussion of audit cycles, findings, and the roles of the Bursar and internal audit.
 - o **Principle 13.7 – Physical Resources:** Arnold Duenes, Stephanie McCane, Shane Solis, Brent Tourangeau, Brandon Davidson, Clark Meyer, Payal Paliwal, and Andrew Williams, were assigned to Principle 13.7, which covers the adequacy and management of physical facilities, risk management, inventory, and IT infrastructure, with coordination across facilities and academic units.
- **Document Management and Submission Process:** Dr. Hinojosa described the upcoming launch of a new website for uploading and tagging documentation by Principle, explained the use of the DOX system for organizing evidence, and instructed members to begin collecting relevant documents but to wait for further instructions before submitting.

- o **Document Collection and Tagging:** A new website will be available for members to upload and tag documents according to the relevant accreditation principle, which will then be reviewed and approved for inclusion in the compliance report.
 - o **DOX System Integration:** Approved documents will be loaded into the DOX system, which supports the compliance report by providing accessible footnotes and evidence for both internal and external reviewers.
 - o **Interim Instructions:** Dr. Hinojosa advised members to begin identifying and setting aside relevant documentation but requested that they refrain from emailing or uploading files until the new system is operational to avoid confusion and ensure proper document management.
- **Preparation for Next Steps and Meeting:** Dr. Hinojosa and Nate Howe outlined expectations for members to review assigned principles, begin drafting responses and collecting evidence, and prepare for more detailed discussions in smaller groups at the next meeting scheduled for August 12th.
 - o **Drafting Responses and Collecting Evidence:** Members are encouraged to review the questions for their assigned principles, start drafting narrative responses, and identify supporting documentation or areas of concern to bring to the next meeting.
 - o **Small Group Collaboration:** The next meeting will focus on smaller group discussions to deepen the drafting process, and members are invited to collaborate via Teams or other channels as needed.
 - o **Support and Logistics:** Dr. Hinojosa and Vy Trang offered logistical support and encouraged members to reach out with questions or for assistance as they prepare their materials.

Follow-up tasks:

- **Working Group Membership Updates:** Update the working group membership list on the website to correct any errors and add missing members as discussed. (Dr. Raúl Hinojosa)
- **Documentation Clarification for Principle 13.2:** Obtain clarification from SACSCOC and other UT System liaisons regarding the specific documentation required for Principle 13.2, including benchmarking with UT San Antonio and UT El Paso. (Dr. Raúl Hinojosa)
- **Inclusion of Additional Team Members for Pledges:** Reach out to Debbie Reyna (copying Paula Austell) to confirm her inclusion for information on outstanding donor pledges for Principle 13.3. (Dr. Raúl Hinojosa)
- **Spreadsheet Access for Principle Assignments:** Share the updated spreadsheet link with all working group members so they can review and update their assigned principles as needed. (Dr. Raúl Hinojosa)
- **Accreditation Principles Reference Link:** Share the link to the Principles of Accreditation document with the group for easy access and reference. (Dr. Raúl Hinojosa)