

Operational Excellence

Portfolio and Project Updates from the Operational Excellence Program Office

Highlights

- Operational Excellence is on track to meet its financial goal; it has achieved \$31.7 million in operating savings as of July 31, 2012.
- The IT Productivity Suite project successfully launched bCal, the campus's new web-based calendar system powered by Google, on July 23.
- CalTime, the web-based automated timekeeping system, will launch in early adopter departments in September.

Program and Project Updates

The IT Productivity Suite project successfully launched bCal on July 23, migrating more than 5,000 CalAgenda users to the new calendar system powered by Google. This milestone was the first step toward a campus-wide integrated, web-based email and calendar solution. Email rollout will begin with early adopter groups in September.

The CalTime project will release a rollout schedule for all campus departments transitioning to the new timekeeping system in August; early adopter departments will begin using CalTime in September.

The BearBuy e-procurement system is now being used by 100% of campus departments. Savings to date total \$27 million across both UC Berkeley and UCSF, nearly \$10.8 million at Berkeley alone.

The Campus Shared Services (CSS) team has finalized a proposal for assigning the 35 campus units/departments into cohorts transitioning to CSS. In early August, the team will review the proposal with unit leaders (Deans and Vice Chancellors) before posting online.

The Advising Council convened its inaugural meeting on May 18. The 25-member council will meet quarterly, with its next meeting set for August 30. Three working groups – Advising Vision, Programming Effectiveness, and Advisor Development – were created and members attended a retreat June 12.

The Student Technology Phase 1 project has completed a system diagram of Student Affairs academic systems and technologies. The diagram provides an integrated view of these systems that had not been available in the past.

On July 5, the CalPlanning tool was updated to support SmartView functionality, which allows users to view, import, manipulate, and share CalPlanning data in Microsoft Excel, Word and PowerPoint.

Through the Energy Management program, operating units will soon be receiving monthly electricity consumption reports and are eligible to receive incentive payments based on their energy use relative to baseline levels.

In August, the Berkeley Operating Principles project will be configuring and testing the software that will be used to gather input from the campus community in co-creating the campus's operating principles this October.

Upcoming Milestones & Events

- Thursday, August 9 – OE Executive Committee
- Thursday, August 16 – OE at Deans & Chairs Retreat
- Wednesday, August 29 – Campus Shared Services Office Hours
- Thursday, August 30 – Advising Council Meeting
- Friday, August 31 – Monthly Advising Council Tea
- Monday, September 24 – Faculty Forum on OE and Shared Services

Portfolio At-a-Glance

Current active projects: 22

Project implementation completed and transitioned to operations: 2 (Unit Restructuring and BearBuy)

Total OE investment committed: \$60.2 million

Projected on-going annual savings of approved projects: \$75.4 million

Actual OE investment-to-date: \$20.2 million

Actual savings-to-date: \$31.7 million

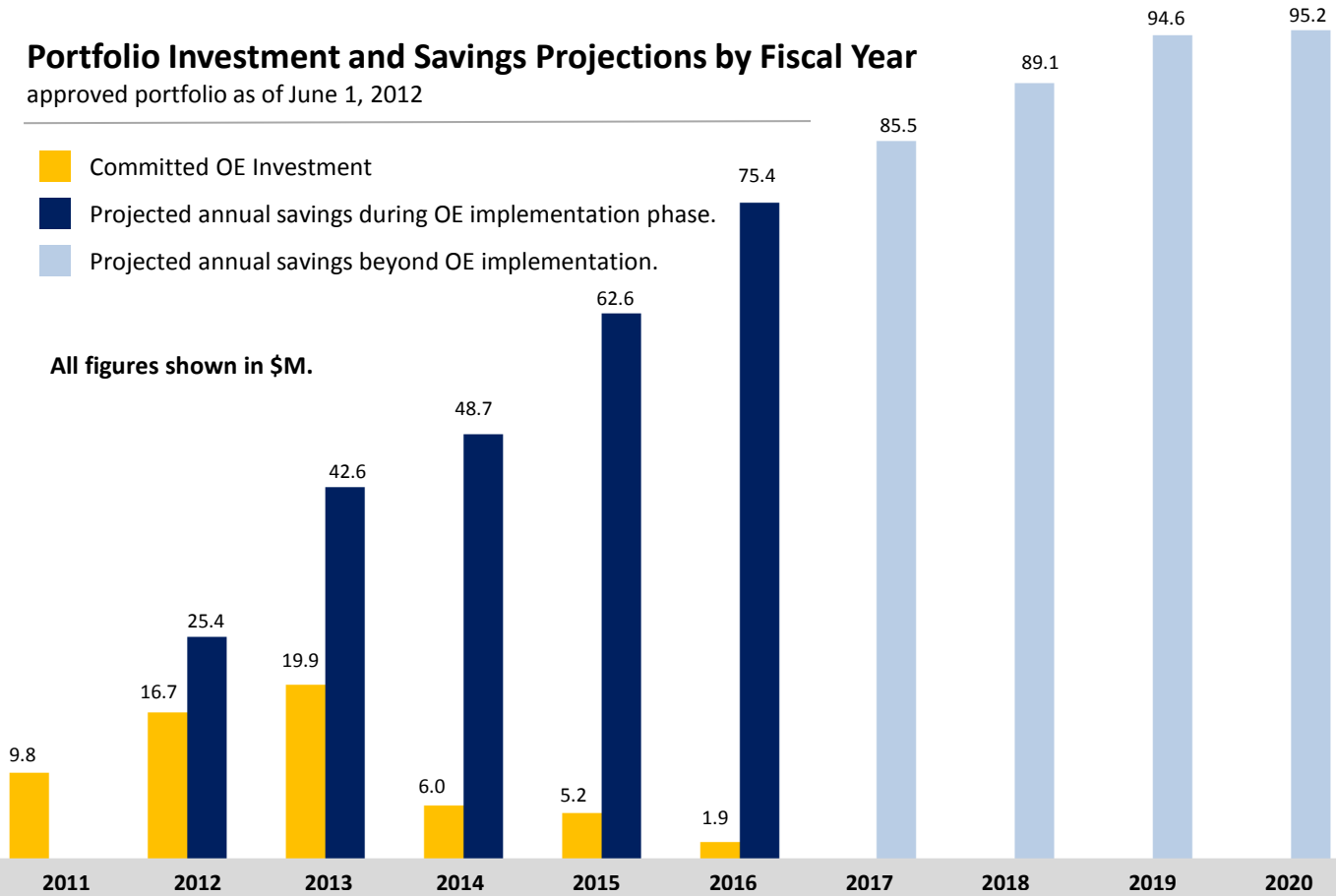


Portfolio Investment and Savings Projections by Fiscal Year

approved portfolio as of June 1, 2012

- Committed OE Investment
- Projected annual savings during OE implementation phase.
- Projected annual savings beyond OE implementation.

All figures shown in \$M.

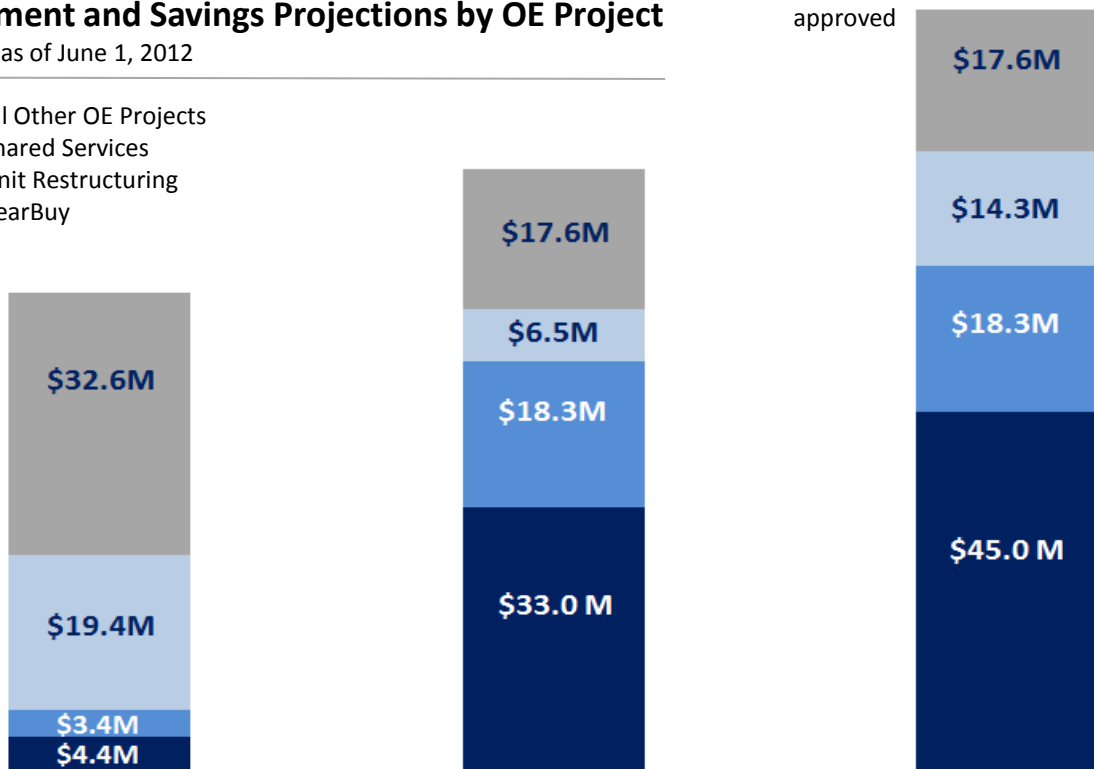


Investment and Savings Projections by OE Project

approved portfolio as of June 1, 2012

- All Other OE Projects
- Shared Services
- Unit Restructuring
- BearBuy

approved



ONE-TIME

ANNUAL SAVINGS

ANNUAL SAVINGS

Project Financial Profile

PROJECT	EXECUTIVE COMMITTEE APPROVAL DATE	COMMITTED OE INVESTMENT \$	OE EXPENSES TO-DATE \$	PROJECTED ONGOING ANNUAL SAVINGS BY FY 2016 \$	ACTUAL SAVINGS TO-DATE \$
ENERGY					
Energy Office	3/11/2011	4,021,000	91,200	2,095,300	
Incentive Program	3/11/2011	2,039,300	411,600	740,000	
Outreach	3/11/2011	482,300	104,900	700,000	
FINANCE					
CalPlanning	3/11/2011	6,157,200	4,522,800	-	
HIGH PERFORMANCE CULTURE					
Berkeley Operating Principles	8/26/2011	175,000	37,200	-	
Metrics	8/26/2011	120,000	-	1,800,000	
Target Talent Development	6/8/2011	595,000	-	-	
IT					
IT Governance	6/8/2011	3,023,000	149,600	-	
IT Productivity Suite ^A	6/8/2011	5,848,000	2,306,800	2,110,000	-
ORGANIZATIONAL SIMPLIFICATION					
Shared Services ^B	3/8/2012	20,720,000	2,493,000	6,900,000	
Timekeeping	4/19/2011	2,916,000	1,491,200	3,200,000	
Unit Restructuring	9/1/2010	3,371,000	2,287,800	18,300,000	20,500,000
PROCUREMENT					
BearBuy ^C	5/23/2011	4,354,400	3,761,600	33,000,000	10,794,000
STUDENT SERVICES					
Car Sharing	5/12/2011	-	-	112,300	
One Stop Business Services Center	12/1/2011	1,000,000	12,800	208,000	
Student Advising Council	11/11/2011	558,700	60,800	2,316,500	
Student Technology Phase One ^D	11/14/2011	458,000	103,000	-	
Tools for Meal Plans	5/12/2011	-	-	747,000	400,000
NON-INITIATIVE PROJECTS					
Application Support Center - Help Desk	11/14/2011	588,000	223,200	-	
Enterprise Data Warehouse - Governance	7/15/2011	357,000	154,800	-	
Enterprise Data Warehouse - Procurement	7/15/2011	2,749,000	1,904,400	2,963,000	
Enterprise Data Warehouse - Student Finances	7/15/2011	728,000	83,600	634,400	

Notes

This report shows the OE-funded portion of each project. Project funding from other than OE sources, if any, does not appear here.

- Savings for these projects has begun and will be reported in Q4, 2012.
- Although fiscal year 2016 is the analysis period for which all Operational Excellence projects are evaluated, annual savings for Shared Services are projected to increase beyond fiscal year 2016 and achieve \$14.3 million in annual operating savings by fiscal year 2020.
- Although fiscal year 2016 is the analysis period for which all Operational Excellence projects are evaluated, annual savings for BearBuy are projected to increase beyond fiscal year 2016 and achieve \$45 million in annual operating savings by FY 2019. BearBuy savings to date include both one-time and on-going savings.

Operational Excellence Projects

OPERATIONS IMPROVEMENT

APPLICATION SUPPORT CENTER

The Application Support Center provides dedicated helpdesk support to the BearBuy, CalTime, CalPlanning and Campus Shared Services implementation projects.

CALPLANNING

CalPlanning will enhance financial analysis, shift emphasis to decision support, and streamline the budget and planning processes.

CALTIME

CalTime will implement a single campus-wide timekeeping solution to reduce costs and standardize pay rules.

CAMPUS SHARED SERVICES

Campus Shared Services will develop a single, trusted source for human resources, finance, research administration, and IT support that is currently distributed unevenly in more than 200 locations across campus.

ENTERPRISE DATA WAREHOUSE (EDW) GOVERNANCE

EDW Governance funds a new Institutional Data Manager position to support development of a campus-wide Enterprise Data Warehouse, its governance and policies.

EDW PROCURE-TO-PAY REPORTING

EDW Procure-to-Pay Reporting will incorporate procurement data into the EDW to realize significant savings and efficiencies as well as improved data accuracy, reliability, and security.

EDW STUDENT FINANCIAL STATEMENT

EDW Student Financial Statement will incorporate and integrate student financial data into the EDW to realize improved analysis capabilities, as well as improved data accuracy, reliability and security.

IT GOVERNANCE

IT Governance will help the University to strategically address, prioritize, and coordinate new IT efforts with ongoing projects, processes, and operations.

METRICS

Metrics will develop guiding principles for the development and implementation of administrative performance metrics.

UNIT RESTRUCTURING

Unit Restructuring implemented “spans & layers” analysis and methodology to create a flatter organizational structure campus wide.

PROCUREMENT & COST CONTROL

BEARBUY

BearBuy is an e-procurement system that streamlines processes, increases efficiencies, and realizes significant long-term cost savings for campus purchasing.

ENERGY OFFICE

The Energy Office is tracking, overseeing, and managing campus energy use and offering financial incentives to operating units to reduce energy consumption.

ENERGY OUTREACH

The Energy Outreach project is implementing an outreach program focusing on individual action to reduce energy use.

ENERGY POLICY

The Energy Policy project is establishing a Campus Energy Policy to articulate guidelines and standards relating to all aspects of campus energy use.

IT PRODUCTIVITY SUITE

IT Productivity Suite enhances collaboration between faculty, staff and students by offering access to a set of best-in-class IT tools from Microsoft, Adobe, Google and more.

TOOLS FOR MEAL PLANS

Tools for Meal Plans is implementing several tools to bring more efficiency to residence hall dining food & beverage procurement and management.

IMPROVING THE STUDENT EXPERIENCE

ADVISING COUNCIL

Advising Council will align advising services and develop standards for performance, communication and assessment in curricular and co-curricular advising.

ONE STOP STUDENT BUSINESS CENTER

One Stop will create a first point of service contact for the most common student business transactions.

STUDENT TECHNOLOGY PHASE 1

Student Technology will create an implementation plan for delivering a more seamless and full-service online experience for Berkeley students.

HIGH-PERFORMANCE CULTURE

BERKELEY OPERATING PRINCIPLES

The Berkeley Operating Principles will engage the campus community to develop a set of principles to guide and inspire staff in their work supporting UC Berkeley’s mission.

TARGET TALENT DEVELOPMENT

Target Talent Development will enable the University to focus its learning and development efforts on positioning the workforce to meet the future needs of the University.

Find more information about OE projects online at <http://oe.berkeley.edu>