

# Operational Excellence

Portfolio and Project Updates from the Operational Excellence Program Office

## Operational Excellence at Work

### Cal Student Central is helping to transform the student experience

On January 15, Cal Student Central, on Sproul's main floor, opened its doors to a one-stop source of information and assistance concerning financial aid, fees and billing, payments, disbursements, registration, and enrollment. Staffed by a cross-trained, service-oriented team, the center supports timely and efficient responses to student requests. "Our staff will provide the front-line services that students...have received from different offices, some located across campus from each other," says the center's director, Carmen Ortiz, pictured right. The new service center is co-sponsored by Vice Provost Catherine Koshland and Vice Chancellor Harry Le Grande who calls it "a major transformation" – one that "should save students hours of non-productive time traveling across campus



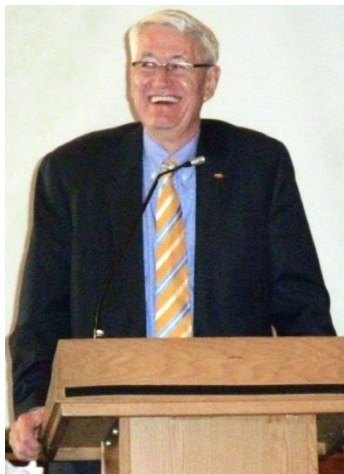
"It's great to see how much student input is incorporated into Cal Student Central," notes ASUC Executive Vice President Justin Sayarath, one of three students who served on the advisory committee. Read the full story on the UC Berkeley NewsCenter (January 23, 2013).

To see how Cal Student Central is helping to transform the student experience, visit: <http://studentcentral.berkeley.edu/>.



to complete administrative tasks." Identifying a one-stop business center as a top priority, students advised Operational Excellence (OE) in its overall planning – expressing their desire, for instance, to interact with staff in a more casual environment. They provided input, as well, on the layout of the space (pictured left), including the configuration of the furniture.

## Program and Project Updates



### A Leadership Celebration of OE

On January 31 at the Alumni House, Chancellor Robert Birgeneau was joined by EVCP George Breslauer, VCAF John Wilton, and Dean Andrew Szeri (the OE Executive Committee) and OE Coordinating Committee members to recognize the accomplishments of the OE Project Teams. The leadership presentations were followed by an inspirational workshop on Authentic Leadership by Dr. Mark Rittenberg, Faculty Director, Berkeley Executive Coaching Institute. – and a guest appearance by Oski, who helped to kick off the discussion on bringing to life our new Berkeley Operating Principles.

**CalPlanning launches Phase 3.** CalPlanning Phase 3 (CalRptg) went live on February 4 — launching the initial group of CalPlanning Phase 3 tools. To prepare staff to make the best use of these powerful new budgeting and financial analysis tools, the CalPlanning team began offering training in mid-January. The trainings are already proving popular as only 71 spaces out of 950 remain in the current multiple offerings of five classes. For additional information, visit <http://budget.berkeley.edu/calplanning/training.html>. Another resource for the 340+ CalPlanning users is the newly-launched Knowledge Base (<https://kb.berkeley.edu/campus-shared-services/>), which creates a community for sharing information on OE technical projects.

### IT Productivity Suite delivers bMail to the Goldman School of Public Policy (GSPP).

Recently, GSPP faculty and staff successfully moved from CalMail to bMail, demonstrating that sound planning along with education are the key to adoption of, and comfort with, our new email platform. To date, 2,700 faculty and staff across campus have been moved to bMail and 11,800 students have made the change themselves (self-migration). For a bMail migration schedule, visit <http://bconnected-project.berkeley.edu>.

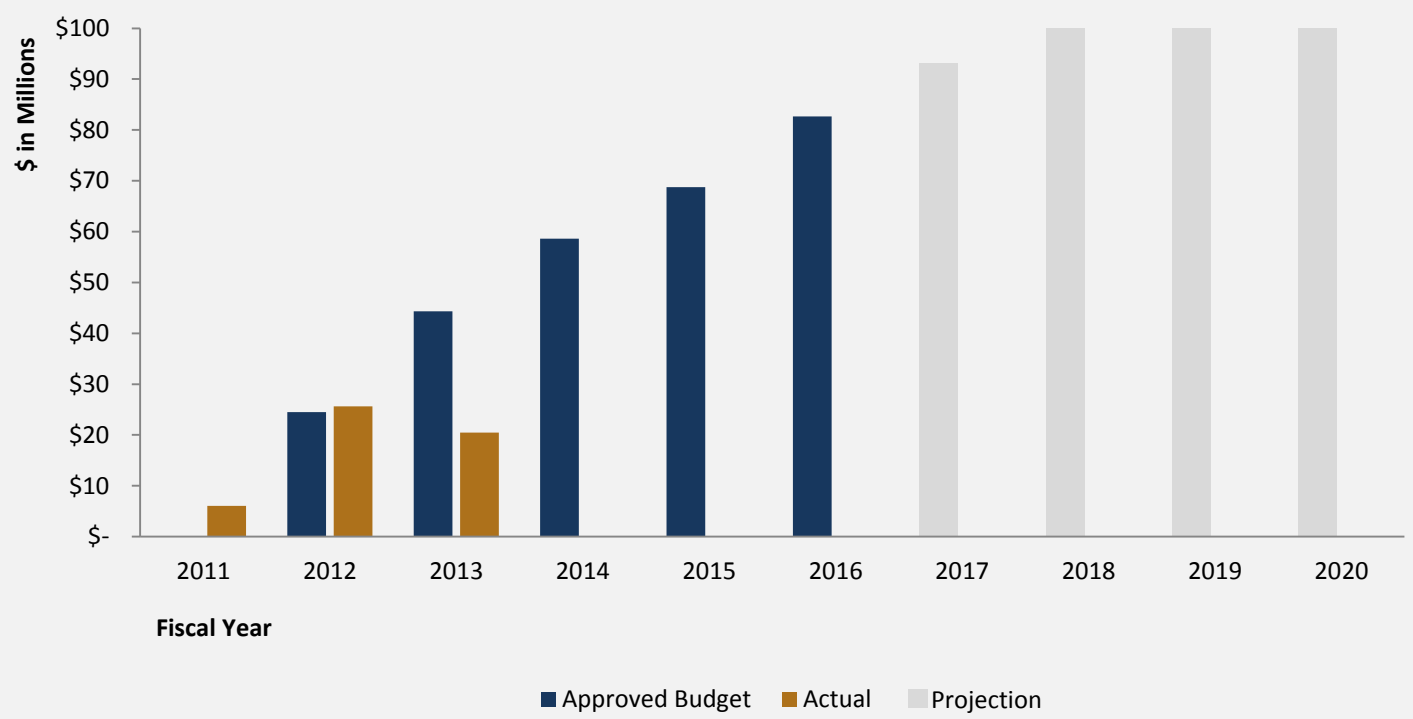


### Portfolio At-A-Glance

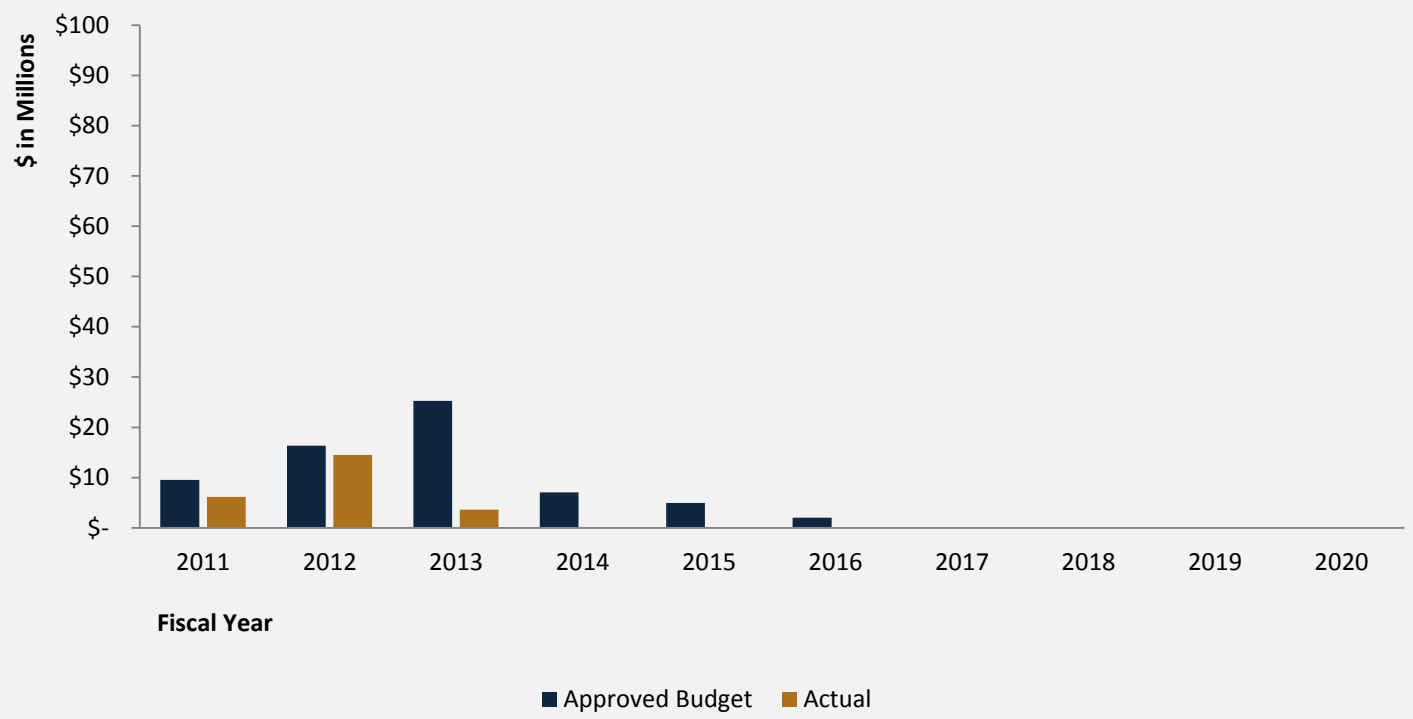
**Current active projects: 16**  
**Paused / Pending: 3**  
**Project transitioned to operations: 5 (Unit Restructuring, BearBuy, Application Support Center, Cal Student Central, Tools for Meals)**  
**Total OE investment committed: \$65.4 million**  
**Projected on-going annual savings of approved projects: \$82.5 million**  
**Actual OE investment-to-date: \$32.2 million**  
**Cumulative savings-to-date: \$59.5 million**



## OE Portfolio Annual Savings Actual Savings More Than Plan To Date



## OE Portfolio Annual Investment Actual Investment Less Than Plan To Date



# Project Financial Profile

PROJECT	EXECUTIVE COMMITTEE APPROVAL DATE	COMMITTED OE INVESTMENT AS OF 1/31/13 <sup>A</sup> \$	OE EXPENSES AS OF 1/31/13 \$	PROJECTED ANNUAL SAVINGS BY FY 2016 \$	CUMULATIVE SAVINGS As of 1/31/13 \$
<b>ENERGY</b>					
Energy Office	3/11/2011	4,021,000	617,600	2,095,300	-
Incentive Program	3/11/2011	2,039,300	615,700	740,000	-
Outreach	3/11/2011	482,300	161,000	700,000	-
<b>FINANCE</b>					
CalPlanning	3/11/2011	7,157,200	6,228,400	-	-
<b>HIGH PERFORMANCE CULTURE</b>					
Berkeley Operating Principles	8/26/2011	377,400	228,000	-	-
Metrics	8/26/2011	120,000	65,300	1,800,000	-
Target Talent Development	6/8/2011	595,000	-	-	-
<b>IT</b>					
IT Governance (Paused)	6/8/2011	3,959,000	193,000	-	-
IT Productivity Suite	6/8/2011	5,848,000	3,244,500	3,703,200	-
<b>ORGANIZATIONAL SIMPLIFICATION</b>					
Shared Services <sup>B</sup>	3/8/2012	20,720,000	6,977,700	6,900,000	-
CalTime	4/19/2011	3,676,000	2,275,500	7,300,000	-
Unit Restructuring	9/1/2010	3,371,000	2,574,700	18,300,000	41,000,000
<b>PROCUREMENT</b>					
BearBuy <sup>C</sup>	5/23/2011	4,354,400	3,883,300	33,000,000	17,976,000
<b>STUDENT SERVICES</b>					
Car Sharing (Pending)	5/12/2011	-	-	112,300	-
Cal Student Central <sup>D</sup>	12/1/2011	1,150,000	752,300	-	-
Student Advising Council	11/11/2011	558,700	196,700	2,316,500	-
Student Technology Phase One <sup>E</sup> (Paused)	11/14/2011	648,000	698,800	-	-
Tools for Meal Plans	5/12/2011	-	-	800,000	562,000
<b>NON-INITIATIVE PROJECTS</b>					
Application Support Center - Help Desk	11/14/2011	588,000	596,100	-	-
Enterprise Data Warehouse (EDW) - Governance	7/15/2011	357,000	265,300	-	-
Cal Answers / EDW - Procurement	7/15/2011	2,749,000	2,223,800	2,963,000	-
Cal Answers / EDW - Student Curriculum	9/6/12	931,000	102,400	1,154,800	-
Cal Answers / EDW - Student Finances	7/15/2011	710,000	332,600	634,400	-
Transformation Support Services	8/9/2012	814,000	1,900	-	-

## Notes

- This report shows the OE-funded portion of each project. Project funding from other than OE sources, if any, does not appear here.
- 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.
- Although fiscal year 2016 is the analysis period for which all Operational Excellence projects are evaluated, annual savings for Cal Student Central are projected to accrue beyond fiscal year 2016.
- The OE Coordinating Committee has recommended that up to \$11 million from the OE investment portfolio be earmarked to fund the anticipated proposal from Student Technology Phase One. The proposal is expected in 2013.

# 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, automated campus-wide timekeeping solution to reduce costs and standardize pay cycles.

### 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 funded a new Institutional Data Manager position to support development of a campus-wide Enterprise Data Warehouse (EDW), its governance, and its policies, and lead the development of a series of subject area reports produced using the Cal Answers tool.

### CAL ANSWERS PROCURE-TO-PAY REPORTING

Procure-to-Pay Reporting will incorporate procurement data into the EDW and generate reports to realize improved analysis capabilities, as well as improved data accuracy, reliability, and security.

### CAL ANSWERS STUDENT FINANCIAL STATEMENT

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

### CAL ANSWERS STUDENT CURRICULUM

Student Curriculum will incorporate student curriculum data into the EDW and generate reports to realize improved analysis capabilities, as well as improved data accuracy, reliability, and security.

### IT GOVERNANCE (PAUSED)

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

### STRATEGIC MANAGEMENT AND METRICS

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

### UNIT RESTRUCTURING

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

### TRANSFORMATION SUPPORT SERVICES

Transformation Support Services will help schools and departments campus-wide define and implement a way of operating that delivers world-class administrative services in a financially sustainable way.

## 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.

### CAR SHARE (PENDING)

Car Share will replace 40 underutilized vehicles with a campus-wide car-share program that will produce savings related to vehicle purchase, maintenance, and insurance.

### 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 and costs.

### 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 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 and 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.

### CAL STUDENT CENTRAL

Cal Student Central offers a one-stop source of information and assistance concerning financial aid, fees and billing, payments, disbursements, registration and enrollment.

### STUDENT TECHNOLOGY PHASE 1 (PAUSED)

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 engaged the campus community in developing 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.

For more information: <http://oe.berkeley.edu>