

# Operational Excellence

Portfolio and Project Updates from the Operational Excellence Program Office

## Operational Excellence at Work

### Campus Shared Services adds HR and B&FS to IT services

On March 7th, Campus Shared Services (CSS) started providing Business & Financial Services (B&FS) and Human Resources (HR) support to more than 3,700 faculty and staff in the Chancellor's Office and some units reporting to the Vice Chancellor for Administration and Finance and the Chief Information Officer. In launching this next phase, CSS drew on the experience and success of the recently formed Information Technology (IT) unit, whose team members are developing the kind of service-oriented practices that will guide all CSS operations.

### High marks for Campus Shared Services IT support

Consistent with a commitment to continuous improvement, CSS surveys all IT clients using standards developed by the nationally recognized Help Desk Institute. Since going live on January 17, CSS IT support staff has earned high marks in Overall Client Satisfaction, Courtesy, Knowledge, Timeliness, and Quality.

According to Jerry Yerardi, Director of CSS IT, the recent average of these scores for CSS IT was 4.8, exceeding the average satisfaction rate of 4.75 (on a five-point scale) for IT support in education. That score means that the majority of clients using CSS are highly satisfied with the service they received. Yerardi is in the process of developing a Client Service Dashboard with satisfaction data that will be posted to the CSS website.



### Collaboration + Teamwork = Excellent Service

End User Device Support (EUDS) Agent Steve Santiago and EUDS Supervisor Micah Bot-Miller take advantage of the new environment of collaboration and teamwork at the Fourth Street location, which according to Josie Galvan, CSS IT Service Desk Supervisor, has greatly contributed to the early success of CSS IT. "It's exciting to see...the team working together and comparing information, solving issues for clients faster than they could have on their own."

Visit <http://sharedservices.berkeley.edu> for updates on client satisfaction and operations as CSS rolls out to our campus community.

## Program and Project Updates

### Cal Answers Student Financials Project Releases

**Inaugural Dashboard.** The Cal Answers team released its first dashboard, which includes student financial aid fast facts, charts, and interactive tables. Available to all on campus, the dashboard provides insights into financial aid trends and supports strategic decision-making on how to facilitate access to an affordable education. The dashboard was introduced at a March 15 Cal Assessment Network session. View the archived session at <http://www.ustream.tv/channel/can-at-berkeley>.

For the latest information on all OE Cal Answers projects, visit the new Cal Answers website at <http://calanswers.berkeley.edu>.

### CalTime Offers Ongoing Training For Exempt Employees

The CalTime Training Team has been offering monthly training demonstration sessions for Exempt Employees. These popular sessions, which focus on time card preparation, review, and approval, are providing valuable support for exempt employees or supervisors who want to enhance their knowledge about CalTime functionality. The Training Demonstrations, as well as more in-depth Classroom Training sessions for new exempt employees, are posted on the UC Learning Center, which is available through the UC Berkeley blu portal at <http://blu.berkeley.edu>

### Cal Student Central Adds Calendar Feature

In the spirit of continuous improvement, Cal Student Central has added to the website a Student Calendar that combines the academic calendar with important dates and deadlines related to registration, financial aid, and tuition/fee payments. One great feature is the ability for students and staff to download the calendar to bCal. Students can also provide feedback about Cal Student Central by clicking on the survey button prominently displayed on the homepage. Visit <http://studentcentral.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**

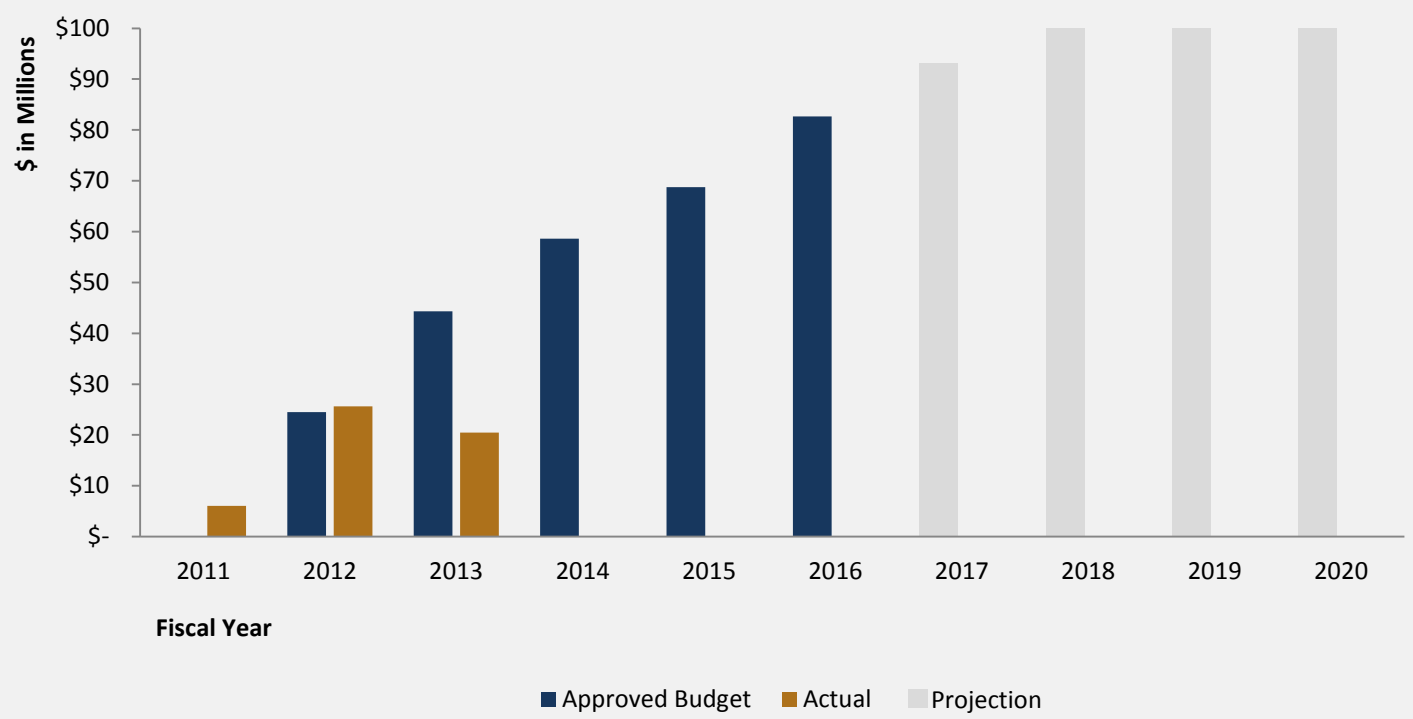
**Projected on-going annual savings of approved projects: \$82.5 million**

**Actual OE investment-to-date: \$35.9 million**

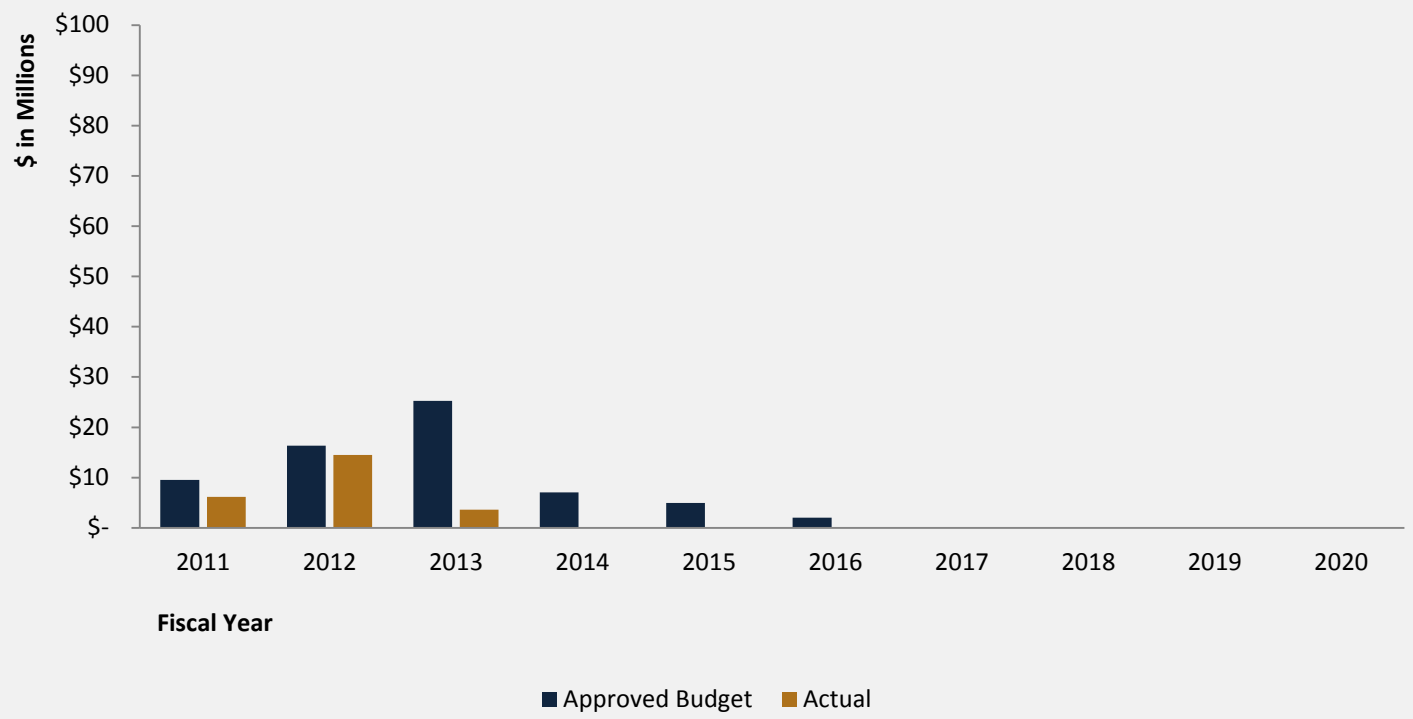
**Cumulative savings-to-date: \$59.5 million**



## 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 2/28/13 <sup>A</sup>	OE EXPENSES AS OF 2/28/13	PROJECTED ANNUAL SAVINGS BY FY 2016	CUMULATIVE SAVINGS As of 2/28/13
		\$	\$	\$	\$
<b>ENERGY</b>					
Energy Office	3/11/2011	4,021,000	694,000	2,095,300	-
Incentive Program	3/11/2011	2,039,300	671,800	740,000	-
Outreach	3/11/2011	482,300	166,500	700,000	-
<b>FINANCE</b>					
CalPlanning	3/11/2011	7,157,200	6,560,900	-	-
<b>HIGH PERFORMANCE CULTURE</b>					
Berkeley Operating Principles	8/26/2011	377,400	253,600	-	-
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	192,700	-	-
IT Productivity Suite	6/8/2011	5,848,000	3,349,000	3,703,200	-
<b>ORGANIZATIONAL SIMPLIFICATION</b>					
Shared Services <sup>B</sup>	3/8/2012	20,720,000	9,315,500	6,900,000	-
CalTime	4/19/2011	3,676,000	2,562,100	7,300,000	-
Unit Restructuring	9/1/2010	3,371,000	2,595,800	18,300,000	41,000,000
<b>PROCUREMENT</b>					
BearBuy <sup>C</sup>	5/23/2011	4,354,400	3,889,100	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	867,200	-	-
Student Advising Council	11/11/2011	558,700	215,500	2,316,500	-
Student Technology Phase One <sup>E</sup> (Paused)	11/14/2011	648,000	752,100	-	-
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	592,400	-	-
Enterprise Data Warehouse (EDW) - Governance	7/15/2011	357,000	282,300	-	-
Cal Answers / EDW - Procurement	7/15/2011	2,749,000	2,286,400	2,963,000	-
Cal Answers / EDW - Student Curriculum	9/6/12	931,000	172,400	1,154,800	-
Cal Answers / EDW - Student Finances	7/15/2011	710,000	430,700	634,400	-
Transformation Support Services	8/9/2012	814,000	3,900	-	-
<b>Notes</b>					
<p>A. This report shows the OE-funded portion of each project. Project funding from other than OE sources, if any, does not appear here.</p> <p>B. 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.</p> <p>C. 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.</p> <p>D. 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.</p> <p>E. 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.</p>					

# 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>