

Operational Excellence

Portfolio and Project Updates from the Operational Excellence Program Office

Operational Excellence at Work

Cookies, Kiosks, and Collaboration



Project Manager Kia Afari spread the word as he delivered fresh cookies (shown sampling the goods) to 50 departments across the campus.

The Berkeley Operating Principles team would like to thank the 2,200 employees who participated in CultureCal, the campus-wide brainstorming event that took place Oct. 1-12 with the goal of gathering input for a set of operating principles to guide our administrative work. CultureCal, which included a collaborative website, campus kiosks, and various in-person events, yielded 358 principles, 404 comments, and 22,923 ratings on various principles. CultureCal was the culmination of a series of workshops, forums, and other collaborative activities.



Staff at the UHS Tang Center exemplified the spirit of CultureCal by hosting a team brainstorming session.

The team is now working with groups representing staff, faculty, and students to analyze the feedback and develop operating principles by the end of the year. For additional information, visit <http://culturecal.berkeley.edu>.

Program and Project Updates

Campus Shared Services (CSS) now has available specific information that delineates which services will be provided by the CSS organization, by Central Campus, and at the unit level. The CSS team has also started to post process maps that depict work flows. View this information at: <http://sharedservices.berkeley.edu/using-css/which-services/>, and please check for ongoing updates. Services and associated processes will evolve over the next 24-36 months and be refined through a culture of continuous improvement.

The One Stop Student Business Center announced a new look and name. Opening in Spring 2013, Cal Student Central will provide answers to questions related to financial aid, fees and billing, payments, disbursements, registration and enrollment at one convenient location. Staffed by a cross-trained, service-oriented team, Cal Student Central will ensure timely, efficient responses to student requests. For FAQs, visit <http://sa.berkeley.edu/cal-student-central/faq>.

This fall, UC Berkeley units will refine their FY13 financial forecasts by adding department-level detail to the division-level summary plan they submitted last Spring, as part of the FY13 budget process. To facilitate this effort, the CalPlanning team launched a set of new "Dept ID Report Books" in October and trained 203 financial managers and staff in the use of these books. By referencing these books, financial staff who are not CalPlanning users can actively participate in the Detailed Department Budget Process.

To comply with the UC Office of the President, the OE Executive Committee announced that beginning January 20, 2013, all non-exempt employees covered by the Personnel Policies for Staff Members will transition to a bi-weekly pay cycle and will use CalTime, UC Berkeley's automated timekeeping system, to report the hours they work, including overtime. Inclusion of employees in positions covered by collective bargaining agreements is subject to collective bargaining requirements. Exempt employees will continue to be paid on a monthly basis. For regular updates, visit: <http://caltime.berkeley.edu>.

The bConnected rollout continues with great success. On October 10, the IT Productivity Suite team hosted a training for Google Guides, volunteers who are helping the campus with Google Apps for Education. 50 staff members have signed on as Google Guides. To date, approximately 50,800 faculty, staff, and students have bConnected accounts, including approximately 11,600 with access to the full bConnected suite of applications (bMail, bCal, Drive).

Portfolio At-a-Glance

Current active projects: 24

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

Total OE investment committed: \$65 million

Projected on-going annual savings of approved projects: \$82.6 million

Actual OE investment-to-date: \$24.2 million

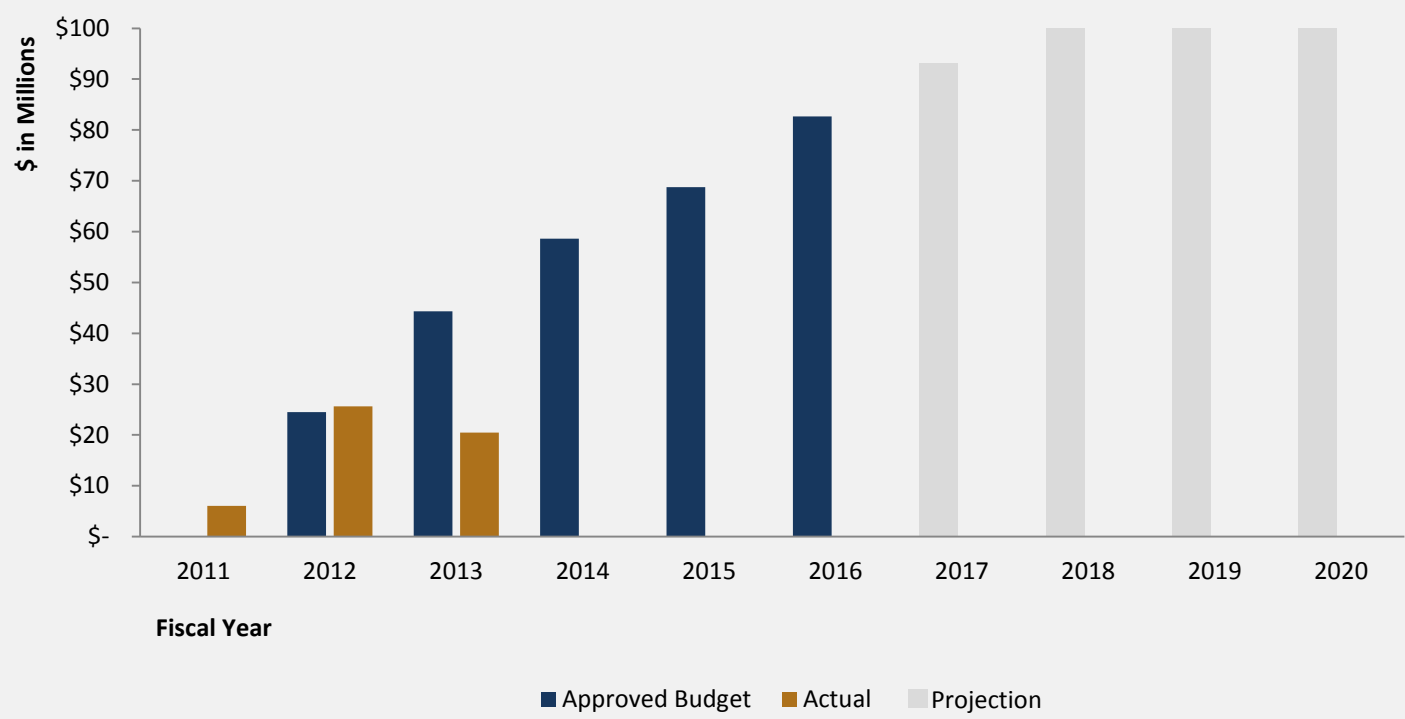
Actual savings-to-date: \$31.7 million



Berkeley
UNIVERSITY OF CALIFORNIA

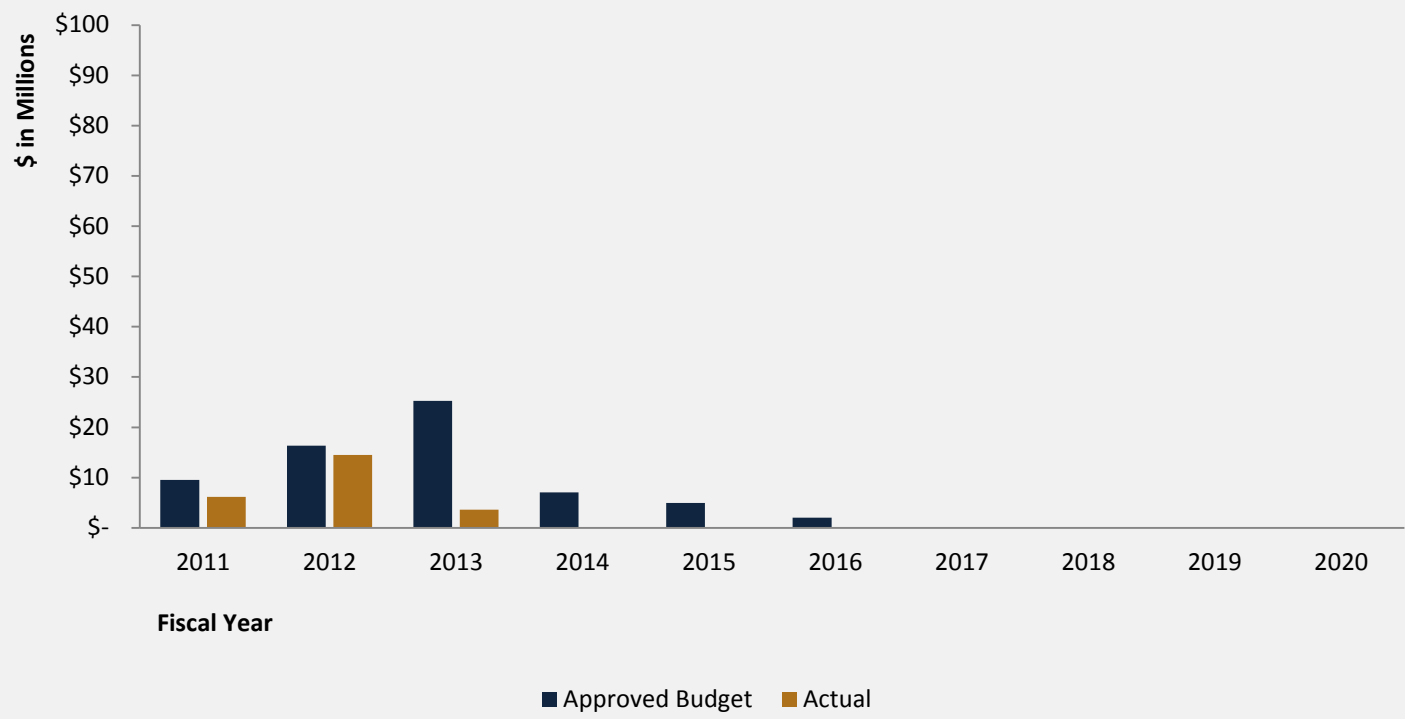
OE Portfolio Annual Savings

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 9/06/12 ^A \$	OE EXPENSES AS OF 9/30/12 \$	PROJECTED ANNUAL SAVINGS BY FY 2016 \$	ACTUAL SAVINGS As of FY12Q4 \$
ENERGY					
Energy Office	3/11/2011	4,021,000	256,100	2,095,300	-
Incentive Program	3/11/2011	2,039,300	463,700	740,000	
Outreach	3/11/2011	482,300	129,400	700,000	-
FINANCE					
CalPlanning	3/11/2011	7,157,200	5,391,100	-	-
HIGH PERFORMANCE CULTURE					
Berkeley Operating Principles	8/26/2011	377,400	92,100	-	-
Metrics	8/26/2011	120,000	1,400	1,800,000	-
Target Talent Development	6/8/2011	595,000	-	-	-
IT					
IT Governance (Paused)	6/8/2011	3,959,000	192,800	-	-
IT Productivity Suite	6/8/2011	5,848,000	2,630,400	3,703,200	-
ORGANIZATIONAL SIMPLIFICATION					
Shared Services ^B	3/8/2012	20,720,000	3,613,900	6,900,000	-
Timekeeping	4/19/2011	3,676,000	1,868,400	7,300,000	-
Unit Restructuring	9/1/2010	3,371,000	2,364,000	18,300,000	20,500,000
PROCUREMENT					
BearBuy ^C	5/23/2011	4,354,400	3,868,200	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	130,000	208,000	-
Student Advising Council	11/11/2011	558,700	116,700	2,316,500	-
Student Technology Phase One ^D	11/14/2011	648,000	363,700	-	-
Tools for Meal Plans	5/12/2011	-	-	747,000	400,000
NON-INITIATIVE PROJECTS					
Application Support Center - Help Desk	11/14/2011	588,000	391,900	-	-
Enterprise Data Warehouse - Governance	7/15/2011	357,000	202,900	-	-
Enterprise Data Warehouse - Procurement	7/15/2011	2,749,000	2,037,100	2,963,000	-
Enterprise Data Warehouse - Student Curriculum	9/6/12	931,000	-	1,154,800	
Enterprise Data Warehouse - Student Finances	7/15/2011	710,000	162,800	634,400	-
Transformation Support Services	8/9/2012	814,000	-	-	-

Notes

- A. This report shows the OE-funded portion of each project. Project funding from other than OE sources, if any, does not appear here.
- 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.
- 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.
- D. 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 toward the end of 2012.

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

EDW STUDENT CURRICULUM

Cal Answers Student Curriculum, part of the EDW suite of initiatives, will provide managers across the campus with a shared and centrally supported reporting resource for analyzing student demand, enrollment needs, curricula changes, and faculty workload.

IT GOVERNANCE (PAUSED)

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

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

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.

ONE STOP STUDENT BUSINESS CENTER

One Stop (Cal Student Central) 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.

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