Operational Excellence
Portfolio and Project Updates from the Operational Excellence Program Office

Operational Excellence at Work

APPLY NOW TO BERKELEY CATALYSTS

Berkeley Catalysts is a new one-year action-learning program that offers a unique professional development opportunity for 50 promising staff (one from each unit) to learn about campus issues while helping to solve them. Taking our Operating Principles as a jumping-off point, each Catalyst will partner with his/her unit leader to focus on a strategic opportunity or challenge for their unit. To do this, Catalysts will attend nine learning labs aimed at honing their leadership and organizational improvement skills, followed by three months of coaching and implementation.

Depending on your unit's interests and time available, Catalysts might, for example, help unit meetings to run more effectively, increase employee engagement, make appreciation "go viral," or streamline processes.

Applications are due September 20. For additional information-- including the program guide (pictured right)--and to apply online, visit ucbcatalysts.berkeley.edu

Berkeley Catalysts
For Excellence in Administration & Operations
A transformative year
for 50 emerging leaders

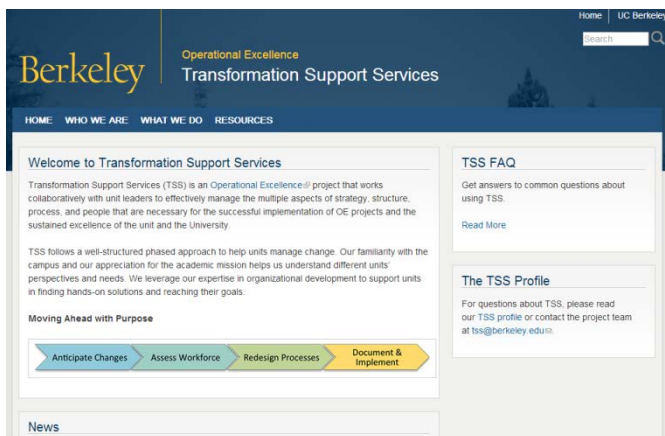**Program Guide**
October 2013 – October 2014

OperatingPrinciples.berkeley.edu

TOGETHER ⊙ INNOVATE ⊙ SIMPLIFY ⊙ ACCOUNTABLE ⊙ SERVICE

Berkeley

Program and Project Updates

Transformation Support Services (TSS) has relaunched its web site, http://tss.berkeley.edu, with a new Resources page that includes templates, checklists, workshop information, and other tools to help units accomplish their goals and realize the benefits of Operational Excellence projects. New resources and FAQ are now being posted weekly, so check back frequently!

The TSS team is composed of campus subject matter experts who offer tailored consulting services to schools, colleges, departments and administrative units in the major areas of organizational development: strategy, structure, people, and processes.

Advising Council Efforts Ramping Up

The Advising Council's efforts to align campus advising are off to a strong start this fall. Bob Jacobsen, Associate Executive Dean for Advising in the College of Letters & Science, is working with the Advising Council and Learning + Organizational Development to pilot new training courses this academic year for the College's advisors. The training is aimed at helping advisors provide undergraduates with a more high-touch, unified advising experience across their time at Berkeley, and to bring together advisors across siloes.

In addition, the new Advising Council Fellows program launched, enabling a group of campus advisors to develop expertise in evaluating advising programs. The Council also launched a new website, advisingmatters.berkeley.edu, which features tools and resources for Berkeley's advising community. In addition, the Advising Framework, a unified vision for Berkeley advising, is gaining visibility through a new poster campaign – a first step in integrating the Framework into operations.

Portfolio At-A-Glance
Current active projects: 14
Paused / Pending: 3
Projects transitioned to operations: 8
**Total OE investment committed: $66 million**
Projected on-going annual savings of approved projects: $82.5 million
Actual OE investment-to-date: $50.3 million
Cumulative savings-to-date: $65.7 million

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Portfolio Profile

OE Portfolio Annual Savings
Actual Savings on Track with Projection to Date

Legend: Projected Savings, Actual Savings, Projection
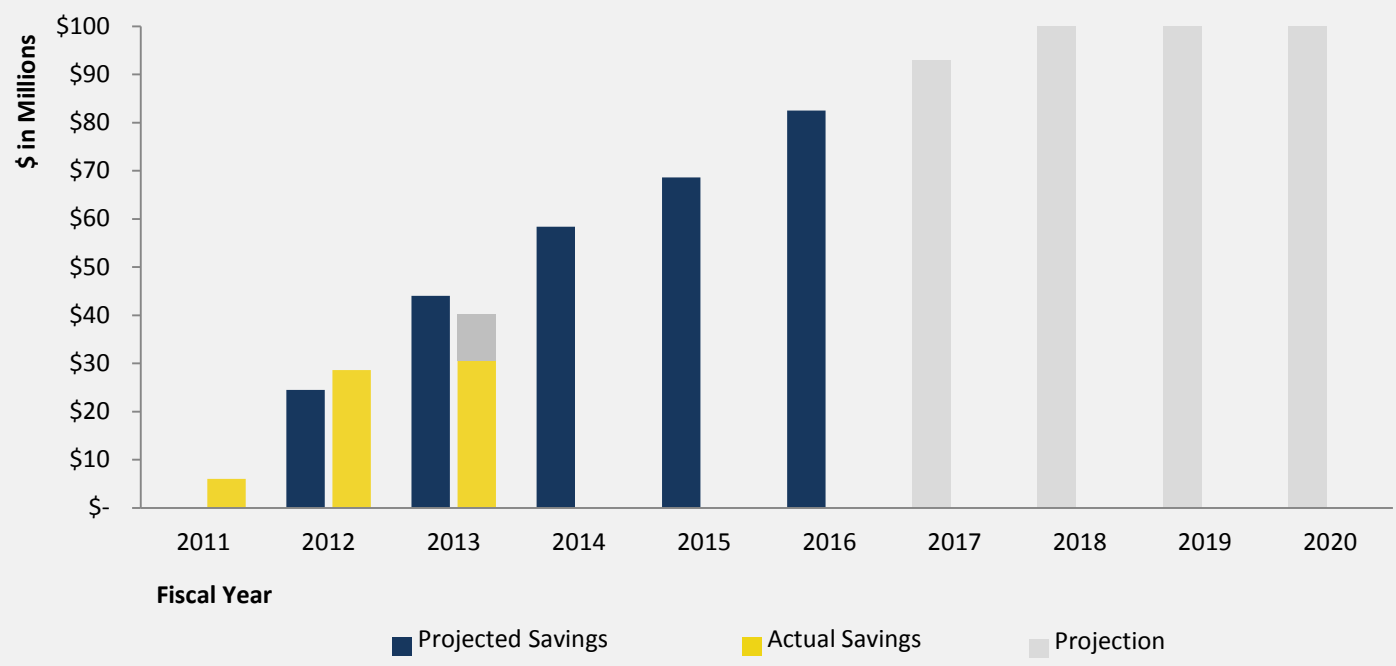
OE Portfolio Annual Investment
Actual Investment Less Than Plan To Date

Legend: Approved Investment, Actual Investment, Projection
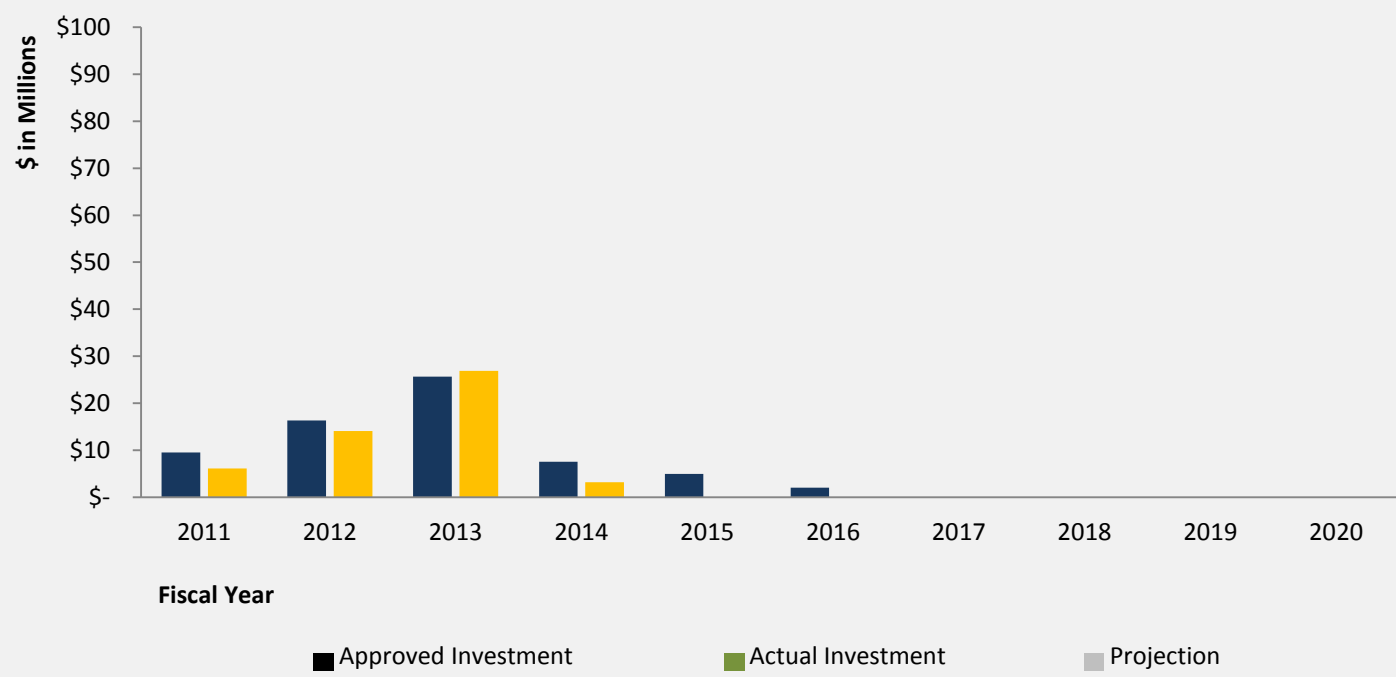
Project Financial Profile

PROJECT	Status	EXECUTIVE COMMITTEE APPROVAL DATE	OE BUDGET AS OF 8/31/13 [A] $	OE EXPENSES AS OF 8/31/13 $	PROJECTED ANNUAL SAVINGS BY FY 2016 $	CUMULATIVE SAVINGS AS OF 8/31/13 $
ENERGY						
Energy Office		3/11/2011	4,021,000	1,166,800	2,095,300	
Incentive Program		3/11/2011	2,039,300	935,900	740,000	-
Outreach		3/11/2011	482,300	209,700	700,000	-
FINANCE						
CalPlanning	Completed	3/11/2011	7,157,200	7,417,500	-	-
HIGH PERFORMANCE CULTURE						
Berkeley Operating Principles		8/26/2011	695,800	410,900	-	-
Metrics		8/26/2011	180,000	558,800	1,800,000	-
Target Talent Development		6/8/2011	595,000	600	-	-
IT						
IT Governance	Paused	6/8/2011	3,959,000	192,800	-	-
IT Productivity Suite		6/8/2011	5,848,000	4,300,500	3,703,200	4,122,000
ORGANIZATIONAL SIMPLIFICATION						
Shared Services [B]		3/8/2012	20,720,000	16,210,200	6,900,000	-
CalTime		4/19/2011	3,676,000	5,115,400	7,300,000	-
Unit Restructuring	Completed	9/1/2010	3,371,000	2,226,300	18,300,000	41,000,000
PROCUREMENT						
BearBuy [C]	Completed	5/23/2011	4,354,400	3,917,000	33,000,000	19,988,000
STUDENT SERVICES						
Car Sharing (Pending)		5/12/2011	-	-	112,300	-
Cal Student Central [D]	Completed	12/1/2011	1,150,000	1,060,200	-	-
Consolidated Financial View	Completed	1/23/2013	200,000	140,900	-	-
Advising Council		11/11/2011	558,700	360,400	2,316,500	-
Student Technology Phase One [E]	Paused	11/14/2011	648,000	625,400	-	-
Tools for Meal Plans		5/12/2011	-	-	800,000	562,000
NON-INITIATIVE PROJECTS						
Application Support Center - Help Desk	Completed	11/14/2011	588,000	593,800	-	-
Enterprise Data Warehouse - Governance		7/15/2011	557,000	393,000	-	-
Cal Answers - Procurement	Completed	7/15/2011	2,749,000	2,741,800	2,963,000	-
Cal Answers - Student Curriculum		9/6/2012	931,000	693,200	1,154,800	
Cal Answers - Student Finances	Completed	7/15/2011	710,000	868,300	634,400	
Transformation Support Services		8/9/2012	814,000	138,800	-	-

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. 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.
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.
F. BearBuy savings are reported as of March 31, 2013. Updated information will be reflected in the next report (i.e., financials through 7/31/13).

Operational Excellence Projects

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 subject area reports 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 for improved analysis capabilities, data accuracy, and reliability.

CAL ANSWERS STUDENT FINANCIAL STATEMENT
Student Financial Statement will incorporate student financial data into the EDW and generate reports for improved analysis capabilities, data accuracy, and reliability.

CAL ANSWERS STUDENT CURRICULUM
Student Curriculum will incorporate student curriculum data into the EDW and generate reports for improved analysis capabilities, data accuracy, and reliability.

INFORMATION TECHNOLOGY (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 produces 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 implemented 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 campus energy use.

IT PRODUCTIVITY SUITE
IT Productivity Suite enhances collaboration among 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 implemented tools to increase efficiency in 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 a plan for delivering a more seamless and full-service online experience for Berkeley students.

CONSOLIDATED FINANCIAL VIEW
This project will draw upon extensive student input to develop a preliminary systems analysis as a first step in developing a project plan for providing students with an online financial statement that contains a consolidated view of fees, financial aid, and payments.

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