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

Advising Council recognized at regional conference

The higher education advising community is taking notice of UC Berkeley's efforts to align curricular and co-curricular advising across the campus. Rebecca Miller, Implementation Manager for the Operational Excellence Advising Council project, and five members of the project's working groups, presented on various aspects of the Council's work at the 2013 Pacific Region Conference of the National Academic Advising Association (NACADA), held March 18-20 in Los Angeles.

"There was a great deal of interest in our efforts to improve advising, and our amazing advisers gave fantastic presentations about undergraduate advising, student learning outcomes, assessment and more," reported Rebecca. The team made such an impression that conference organizers invited UC Berkeley to host next year's NACADA Regional Conference.

Rebecca is pictured right with Julian Ledesma, Academic Counselor for the Educational Opportunity Program (EOP). Rebecca and Julian presented on *Aligning our "A-List": Coordinating Advising Efforts at UC Berkeley*, with Avisha Chugani, Academic Counselor/EOP, and Erin Wixson, Trainer/Student Affairs. Julian and Erin serve on the Advising Council's Vision Working Group, and Avisha is a member of the Advisor Development Working Group.

This spring, the Advising Council and its three working groups will roll out an advising framework that includes a vision statement and unified principles of advising, as well as recommendations on training and program effectiveness.


The end goal: to give advisers the tools, training, and support they need so that they can provide coordinated, consistent advising for students across their entire Berkeley experience. For additional information visit: http://oe.berkeley.edu/AdvisingCouncil.shtml

Program and Project Updates

Energy Outreach's sticker campaign produces results

Over winter break, 1,100 turn-off-the-light stickers as well as turn-off-the-light posters were put up in Residence Hall 1. Overall in January, February, and March 2013, Residence Hall 1 used less energy than its twin: Residence Hall 2. While Residence Hall 1 shows a baseline of 158kW and Residence Hall 2 shows a baseline of 148 kW, Residence Hall 1 reduced energy more than Residence Hall 2 after the stickers were put up, as showed in the image below. These results are only one example of the project's success in reducing energy consumption across campus. Visit http://mypower.berkeley.edu/ for additional information.
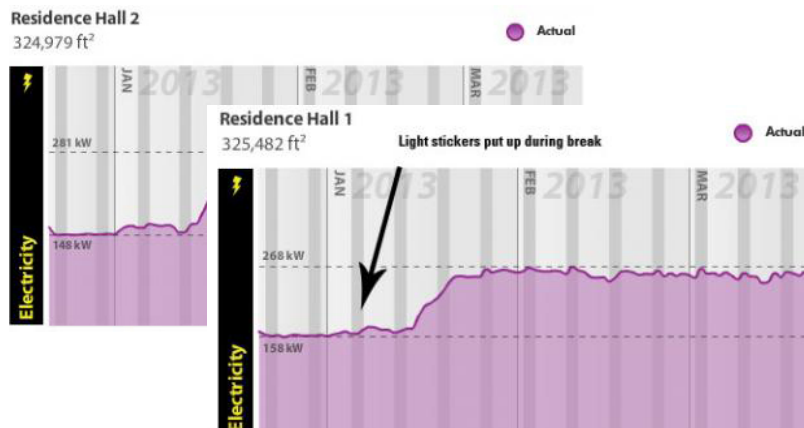
CalPlanning is now in full use. On April 5, all units submitted department-level FY13-14 Operating Budgets in CalPlanning, our campus-wide financial planning and analysis tool, which is enabling richer budget discussions by campus leaders than ever before, as well as more strategic prioritization. With CalPlanning, units are able to submit budget plans, view summarized financial data (CalPlan tool), plan compensation expenses (HCP tool), and run reports (CalRptg and HCPRptg).
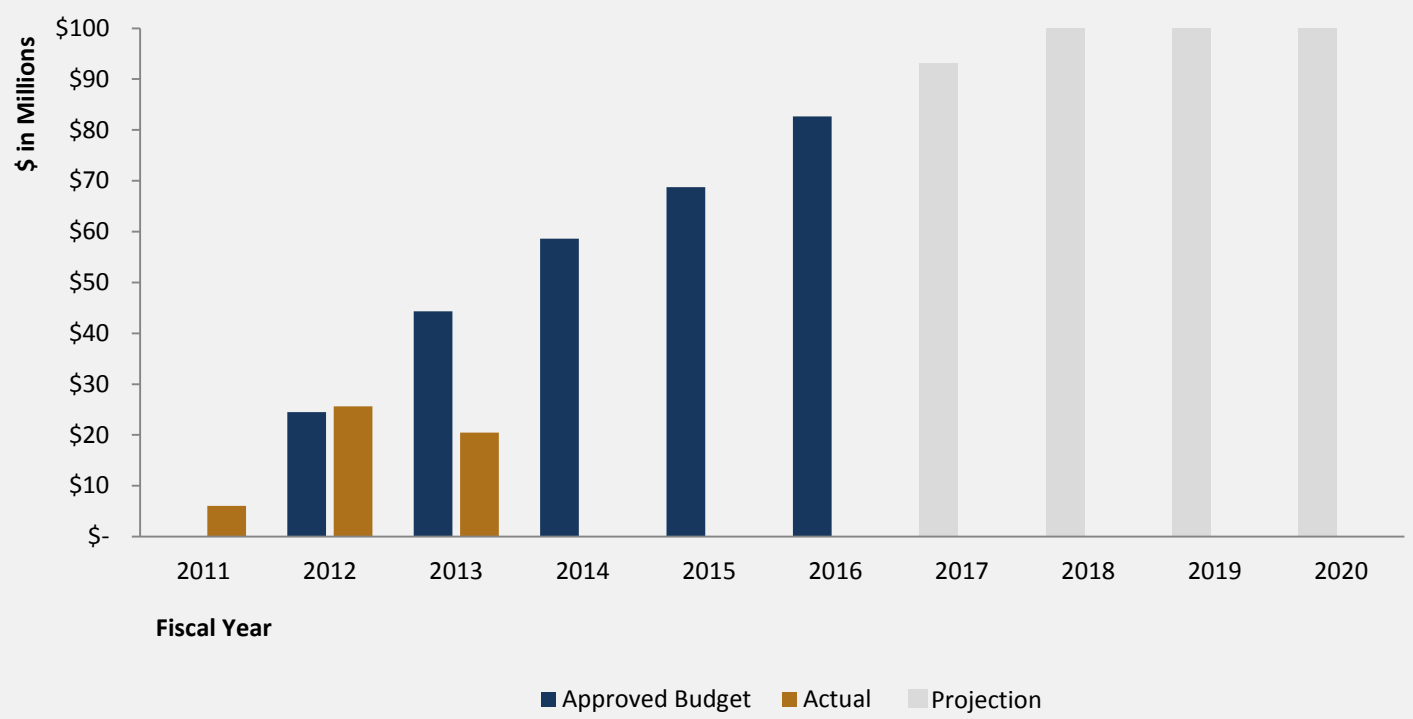
In preparation, CalPlanning held 35 training sessions (six classes) for 200 new and 150 existing users. Units were also supported by the Campus Budget Office, Outreach, and CalPlanning teams with personalized assistance and other resources. For more information, visit the new website: http://budget.berkeley.edu/calplanning.

Portfolio At-A-Glance
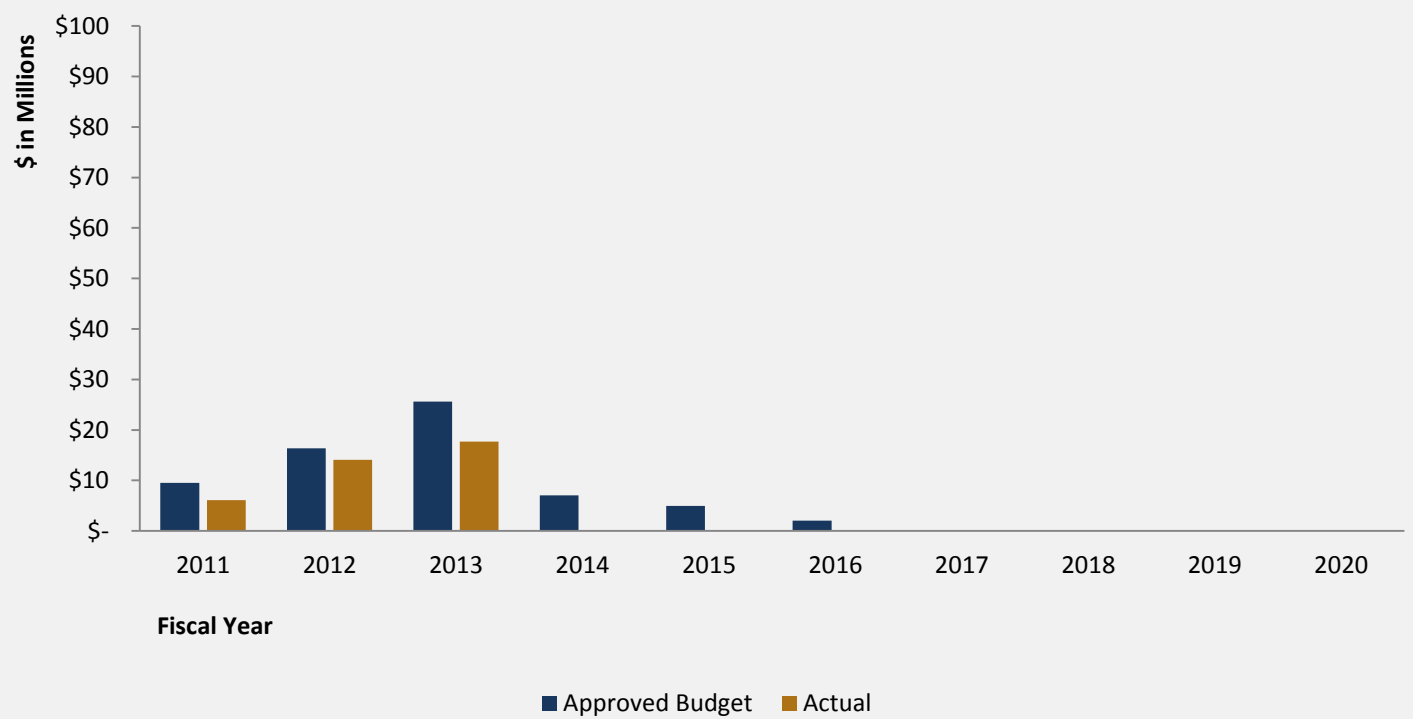**Current active projects: 17**
Paused / Pending: 3
Project transitioned to operations: 5 (Unit Restructuring, BearBuy, Application Support Center, Cal Student Central, Tools for Meals)
Total OE investment committed: $65.4 million
Projected on-going annual savings of approved projects: $82.5 million
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

$ in Millions

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020

Fiscal Year

■ Approved Budget ■ Actual ▪ Projection

OE Portfolio Annual Investment
Actual Investment Less Than Plan To Date

$ in Millions

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020

Fiscal Year

■ Approved Budget ■ Actual

Project Financial Profile

PROJECT	EXECUTIVE COMMITTEE APPROVAL DATE	COMMITTED OE INVESTMENT AS OF 3/31/13[A] $	OE EXPENSES AS OF 3/31/13 $	PROJECTED ANNUAL SAVINGS BY FY 2016 $	CUMULATIVE SAVINGS As of 3/31/13 $
ENERGY					
Energy Office	3/11/2011	4,021,000	774,600	2,095,300	-
Incentive Program	3/11/2011	2,039,300	721,700	740,000	-
Outreach	3/11/2011	482,300	174,300	700,000	-
FINANCE					
CalPlanning	3/11/2011	7,157,200	6,727,000	-	-
HIGH PERFORMANCE CULTURE					
Berkeley Operating Principles	8/26/2011	377,400	276,500	-	-
Metrics	8/26/2011	120,000	65,300	1,800,000	-
Target Talent Development	6/8/2011	595,000	-	-	-
IT					
IT Governance (Paused)	6/8/2011	3,959,000	192,700	-	-
IT Productivity Suite	6/8/2011	5,848,000	3,727,600	3,703,200	-
ORGANIZATIONAL SIMPLIFICATION					
Shared Services [B]	3/8/2012	20,720,000	10,082,800	6,900,000	-
CalTime	4/19/2011	3,676,000	2,692,700	7,300,000	-
Unit Restructuring	9/1/2010	3,371,000	2,606,600	18,300,000	41,000,000
PROCUREMENT					
BearBuy [C]	5/23/2011	4,354,400	3,889,300	33,000,000	17,976,000
STUDENT SERVICES					
Car Sharing (Pending)	5/12/2011	-	-	112,300	-
Cal Student Central [D]	12/1/2011	1,150,000	904,600	-	-
Consolidated Financial View	1/23/2013	200,000	900	-	-
Student Advising Council	11/11/2011	558,700	241,600	2,316,500	-
Student Technology Phase One [E] (Paused)	11/14/2011	648,000	804,300	-	-
Tools for Meal Plans	5/12/2011	-	-	800,000	562,000
NON-INITIATIVE PROJECTS					
Application Support Center - Help Desk	11/14/2011	588,000	593,300	-	-
Enterprise Data Warehouse (EDW) - Governance	7/15/2011	357,000	299,600	-	-
Cal Answers / EDW - Procurement	7/15/2011	2,749,000	2,372,100	2,963,000	-
Cal Answers / EDW - Student Curriculum	9/6/12	931,000	250,400	1,154,800	
Cal Answers / EDW - Student Finances	7/15/2011	710,000	476,100	634,400	-
Transformation Support Services	8/9/2012	814,000	4,200	-	-

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.

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 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