Operational Excellence

Portfolio and Project Updates from the Operational Excellence Program Office

Operational Excellence at Work
Resource Center increases energy-savings savvy

Office of Sustainability student interns Rachel Balmy and Nik Crain display one of the six campaign posters that inject a dose of whimsy into a serious topic—how everyone on campus can help to conserve energy.

Who knew that saving energy could be easy, fun, and community building? On November 15, the Energy Management Initiative, an Operational Excellence project (OE), demonstrated just that at a very well attended open house to acquaint the campus community with its new Resource Center. Located in 192 Barrows Hall (near the breeze way), the Resource Center provides the campus community a place to gather, learn, and promote ways to further UC Berkeley's energy savings efforts.

Educational campaigns play a key role in alerting the campus to simple changes that can make a huge difference in reducing energy consumption—such as turning off computers or switching to CFL (compact fluorescent light) bulbs.

To help spread the word, the team has stocked the Resource Center with booklets, stickers, flyers, buttons, and posters from a recently launched campaign that features a number of familiar UC Berkeley faces—including members of the Women's Basketball Team and John Wilton, Vice Chancellor for Administration and Finance—demonstrating what they can do to be more energy efficient.

For additional information on what you and your department can do to save energy—and on the incentive program that rewards energy conservation at the unit level—visit http://mypower.berkeley.edu/.

Program and Project Updates

Since late November, Mobile Sync stations have been traversing the campus to promote bConnected, UC Berkeley's implementation of Google Apps for Education: bMail (Mail), bCal (Calendar), and bDrive (Drive). Clad in white "Google Guide" T-shirts, the Mobile Sync team's primary focus is to help campus users sync smartphones and tablets to their bConnected accounts, as well as assist with setting up Google "keys" for mobile access. The Mobile Sync Station will be on campus from 10:00 a.m. to 2:00 p.m. every Tuesday, Wednesday, and Thursday, through Wednesday, December 19. Up-to-date locations of the mobile Sync Station can be found at http://twitter.com/UCbConnected. Or visit http://ist.berkeley.edu/bconnected.

On November 16, Campus Shared Services (CSS) facilitated a Staff Forum that was attended by more than 100 participants who engaged in a lively and productive discussion on how the transition to a shared services function will affect them. Led by CSS Chief Operating Officer Thera Kalmijn and Communications Manager Sybil Wartenberg, the discussion touched on a variety of topics ranging from the revised roll-out for Early Adopters to transportation to the new Fourth Street location to job functions. Visit http://sharedservices.berkeley.edu for information on these topics, as well as ongoing updates.
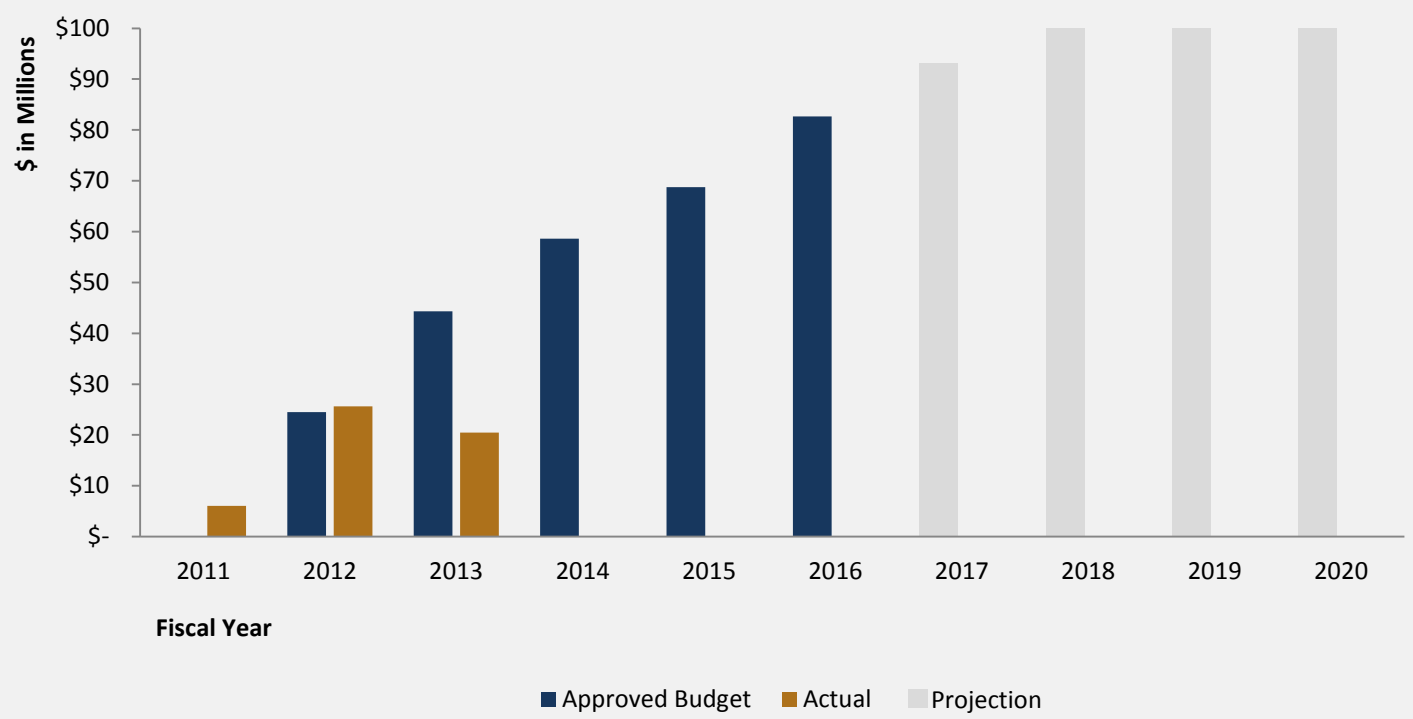

Brett Larsen, a member of the Departmental Onsite Computing Support (DOCS) team, assists Peggy Huston, OE Program Director, with downloading bCal to her smartphone.
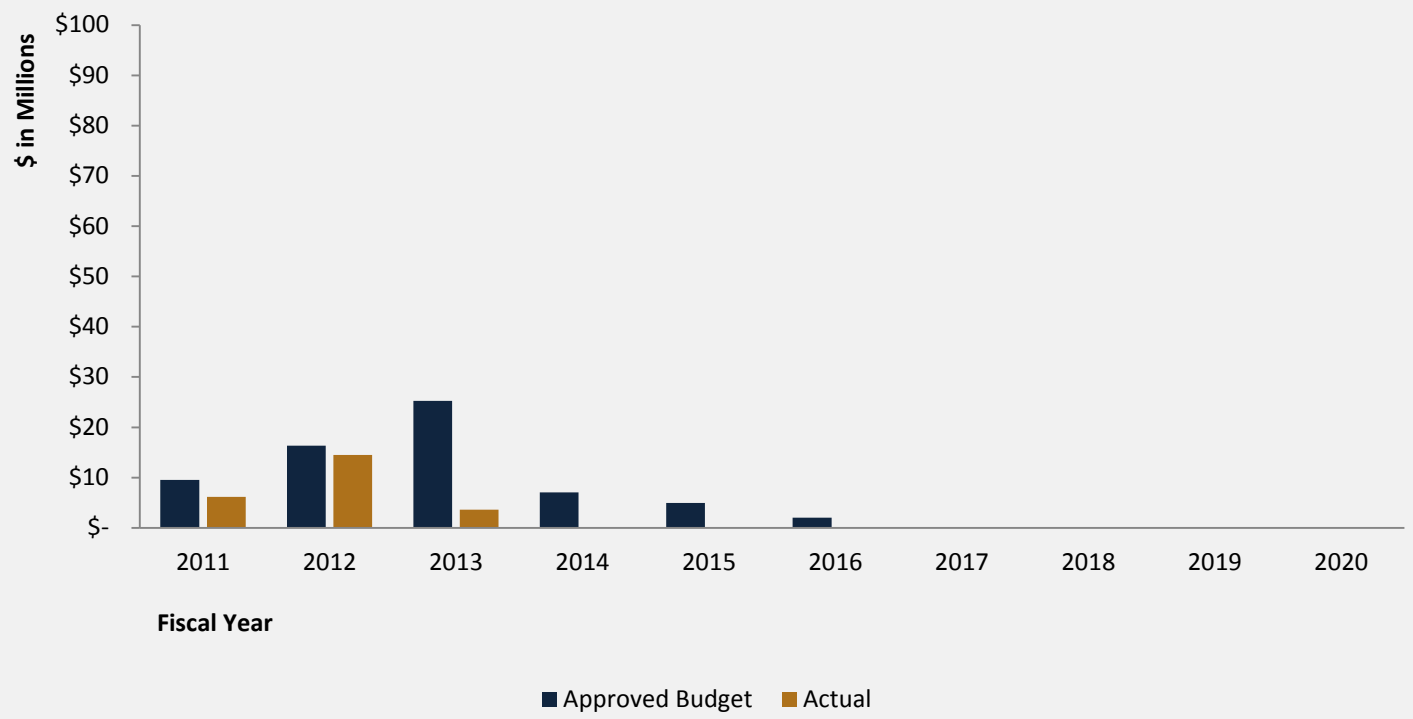
Portfolio At-a-Glance
Current active projects: 24
Project implementation completed and transitioned to operations: 2 (Unit Restructuring and BearBuy)
Total OE investment committed: $65.2 million
Projected on-going annual savings of approved projects: $82.6 million
Actual OE investment-to-date: $27.4 million
Cumulative savings-to-date: $55.1 million

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Portfolio Profile

OE Portfolio Annual Savings
Actual Savings More Than Plan To Date

Bar chart showing $ in Millions versus Fiscal Year (2011–2020). Legend: Approved Budget, Actual, Projection.

OE Portfolio Annual Investment
Actual Investment Less Than Plan To Date

Bar chart showing $ in Millions versus Fiscal Year (2011–2020). Legend: Approved Budget, Actual.

Project Financial Profile

PROJECT	EXECUTIVE COMMITTEE APPROVAL DATE	COMMITTED OE INVESTMENT AS OF 11/30/12[A] $	OE EXPENSES AS OF 11/30/12 $	PROJECTED ANNUAL SAVINGS BY FY 2016 $	CUMULATIVE SAVINGS As of 11/30/12 $
ENERGY					
Energy Office	3/11/2011	4,021,000	378,100	2,095,300	-
Incentive Program	3/11/2011	2,039,300	540,400	740,000	-
Outreach	3/11/2011	482,300	145,200	700,000	-
FINANCE					
CalPlanning	3/11/2011	7,157,200	5,811,100	-	-
HIGH PERFORMANCE CULTURE					
Berkeley Operating Principles	8/26/2011	377,400	149,800	-	-
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	192,800	-	-
IT Productivity Suite	6/8/2011	5,848,000	3,040,300	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	2,085,000	7,300,000	-
Unit Restructuring	9/1/2010	3,371,000	2,396,900	18,300,000	41,000,000
PROCUREMENT					
BearBuy [C]	5/23/2011	4,354,400	3,882,800	33,000,000	13,788,000
STUDENT SERVICES					
Car Sharing	5/12/2011	-	-	112,300	-
One Stop Business Services Center	12/1/2011	1,150,000	216,000	208,000	-
Student Advising Council	11/11/2011	558,700	157,900	2,316,500	-
Student Technology Phase One [D]	11/14/2011	648,000	566,500	-	-
Tools for Meal Plans	5/12/2011	-	-	747,000	400,000
NON-INITIATIVE PROJECTS					
Application Support Center - Help Desk	11/14/2011	588,000	480,200	-	-
Enterprise Data Warehouse - Governance	7/15/2011	357,000	234,000	-	-
Enterprise Data Warehouse - Procurement	7/15/2011	2,749,000	2,129,400	2,963,000	-
Enterprise Data Warehouse - Student Curriculum	9/6/12	931,000	10,100	1,154,800	-
Enterprise Data Warehouse - Student Finances	7/15/2011	710,000	238,000	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 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 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