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

Operational Excellence at Work

Advising Council Celebrates Major Milestone

On May 29, campus leaders shared their appreciation for the 26 Berkeley advisors and student-service professionals who volunteered over the past year to serve on the Advising Council's three working groups. This event marked the conclusion of Phase 1 of the Advising Council project .

Catherine Koshland, Vice Provost for Teaching, Learning, Academic Planning and Facilities, confirmed that her office will continue to convene the Council, a single governing body aligning advising across all curricular and co-curricular areas. "We are committed to making sure your work is carried forward," Vice Provost Koshland said at the event. "Advising is a strategic priority for this campus, today more than ever," she added. "The Advising Council will ensure that the efforts of the many units who make critical contributions to the advising mission across the campus will be coordinated and effective."

Gibor Basri, Vice Chancellor for Equity and Inclusion, thanked the working groups, saying, "You have created a structure to transform the university's advising function."

The working groups' accomplishments included: establishing a common vision for campus advising; creating tools for program assessment; and developing a training curriculum for advisors.

Pictured above: Advising Vision Working Group Members, Kate Chase and Diana Lizarraga

"Participating in this working group left me impressed by the valuable link between students' academic life and 'real life'," said working group member Cathy Kodama of University Health Services.

In Phase 2, which runs through April 2014, the Council will define its long-term role and implement pilot programs for training and assessment.

Program and Project Updates

Campus Shared Services celebrates staff

Campus Shared Services (CSS) kicked off Staff Appreciation Week (June 10-14) with a pancake breakfast served by directors and supervisors from Human Resources, Information Technology, Research Administration, and Business & Financial Service. The breakfast, along with a series of diverse events, which included a Faculty Lecture "watching party" and Drop-In Career Coaching , were organized by the CSS Service Quality and Operational Effectiveness team. For information on campus shared services, visit http://sharedservices.com

CalTime Team launches new website

Accessing CalTime, finding out about training resources, and providing feedback on our campus' electronic timekeeping system are now clearly and easily available through the newly designed CalTime website.

The same URL – http://caltime.berkeley.edu – takes you to the new website, which was redesigned based on feedback from various stakeholders who had great suggestions regarding navigation and content. We encourage exempt employees, supervisors, and timekeepers to visit the website for information on the benefits of using CalTime.

Portfolio At-A-Glance

Current active projects: 17
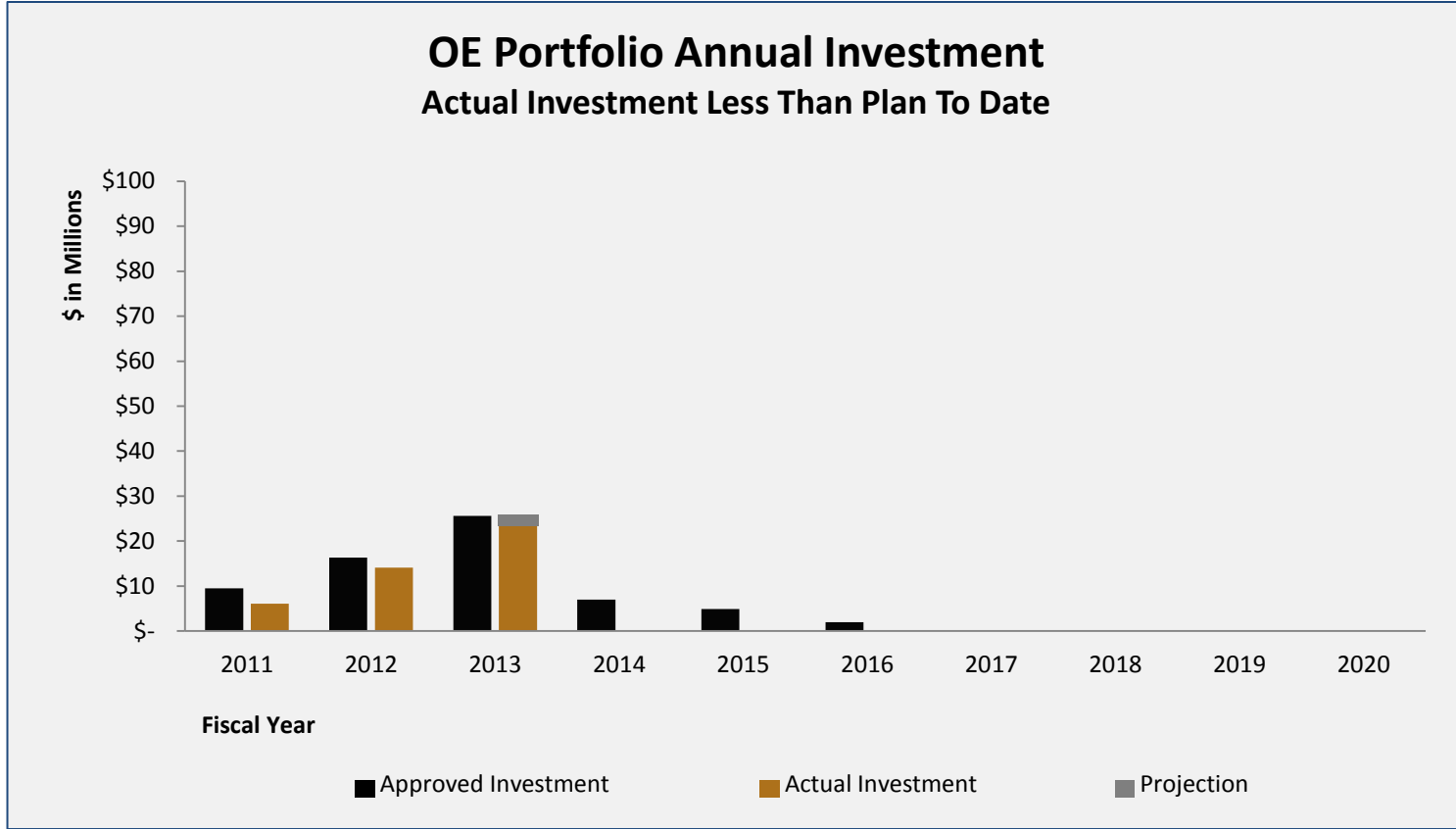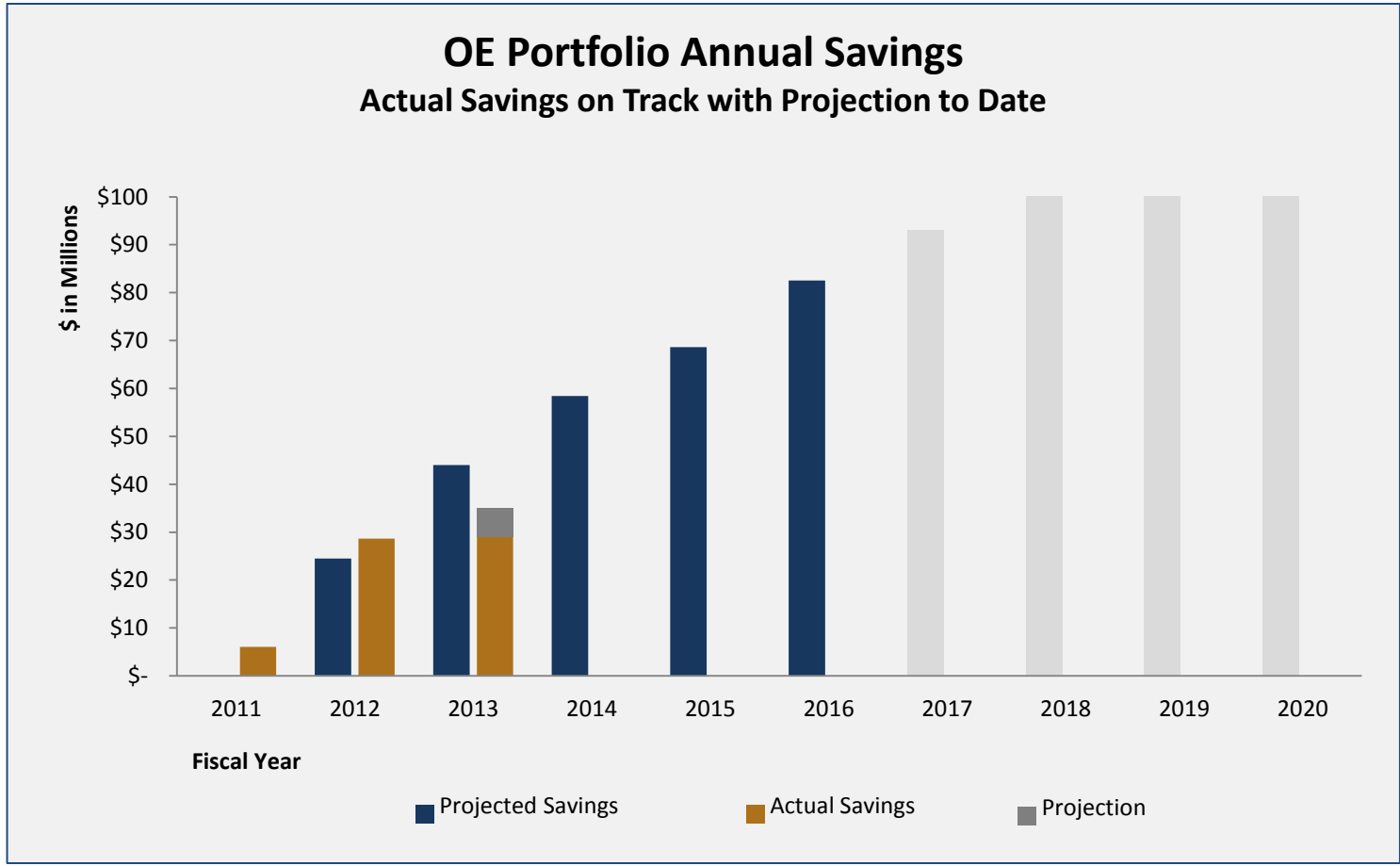**Paused / Pending: 3**
Project transitioned to operations: 5 (Unit Restructuring, BearBuy, Application Support Center, Cal Student Central, Tools for Meals)
Total OE investment committed: $65.4 million
Projected on-going annual savings of approved projects: $82.5 million
Actual OE investment-to-date: $41.7 million
Cumulative savings-to-date: $63.6 million

Berkeley
UNIVERSITY OF CALIFORNIA

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	EXECUTIVE COMMITTEE APPROVAL DATE	COMMITTED OE INVESTMENT AS OF 5/31/13[A] $	OE EXPENSES AS OF 5/31/13 $	PROJECTED ANNUAL SAVINGS BY FY 2016 $	CUMULATIVE SAVINGS As of 5/31/13 $
ENERGY					
Energy Office	3/11/2011	4,021,000	959,900	2,095,300	-
Incentive Program	3/11/2011	2,039,300	843,800	740,000	-
Outreach	3/11/2011	482,300	189,800	700,000	-
FINANCE					
CalPlanning	3/11/2011	7,157,200	7,178,100	-	-
HIGH PERFORMANCE CULTURE					
Berkeley Operating Principles	8/26/2011	377,400	332,800	-	-
Metrics	8/26/2011	180,000	121,000	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	3,980,900	3,703,200	4,122,000
ORGANIZATIONAL SIMPLIFICATION					
Shared Services [B]	3/8/2012	20,720,000	13,616,000	6,900,000	-
CalTime	4/19/2011	3,676,000	3,326,900	7,300,000	-
Unit Restructuring	9/1/2010	3,371,000	2,407,500	18,300,000	41,000,000
PROCUREMENT					
BearBuy [C]	5/23/2011	4,354,400	3,916,600	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	1,013,500	-	-
Consolidated Financial View	1/23/2013	200,000	86,000	-	-
Advising Council	11/11/2011	558,700	295,000	2,316,500	-
Student Technology Phase One [E] (Paused)	11/14/2011	648,000	670,400	-	-
Tools for Meal Plans	5/12/2011	-	-	800,000	562,000
NON-INITIATIVE PROJECTS					
Application Support Center - Help Desk	11/14/2011	588,000	593,200	-	-
Enterprise Data Warehouse (EDW) - Governance	7/15/2011	357,000	337,200	-	-
Cal Answers / EDW - Procurement	7/15/2011	2,749,000	2,556,700	2,963,000	-
Cal Answers / EDW - Student Curriculum	9/6/12	931,000	364,000	1,154,800	-
Cal Answers / EDW - Student Finances	7/15/2011	710,000	667,600	634,400	-
Transformation Support Services	8/9/2012	814,000	77,700	-	-

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