I. SPONSORSHIP

A. Initiative

<table>
<thead>
<tr>
<th>Initiative</th>
<th>High Performance Culture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiative Manager</td>
<td>Mary Keegan</td>
</tr>
<tr>
<td>Phone</td>
<td>3-6428</td>
</tr>
<tr>
<td>E-Mail</td>
<td><a href="mailto:mkeegan@berkeley.edu">mkeegan@berkeley.edu</a></td>
</tr>
</tbody>
</table>

B. Sponsorship

<table>
<thead>
<tr>
<th>Sponsor Name</th>
<th>Jeannine Raymond</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor Signature</td>
<td>Date</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sponsor Name</th>
<th>Rich Lyons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor Signature</td>
<td>Date</td>
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</table>

<table>
<thead>
<tr>
<th>OE Program Office Signature</th>
<th>Date</th>
</tr>
</thead>
</table>

C. Give the title of the resource

Communications and Collaboration Packages: Staff & Faculty Portal Application Core Development and CalMessages Replacement

II. PROBLEM STATEMENT/CASE FOR CHANGE

A. Identify and describe what needs the proposed solution is seeking to address.

In February-March 2011 the HPC team conducted eight staff focus groups, comprising 120 participants, solicited from the staff who were on the OE listserv. Participants were asked, “What would a High Performance Culture at Berkeley look like? What norms and values do we want to permeate our culture?” The following is a summary of the recurrent themes.¹

“Make information easy to find”

- Employees want access to systems, policies, and procedures that are relevant to their jobs, organized in one place. They do not want to reinvent the wheel. “If I need it for my job, I have easy access to it.”
- Our current maze of campus websites mirror our bureaucratic structure rather than the needs of staff,

¹ Quotes throughout this application are taken from the HPC focus groups conducted February-March, 2011.
faculty, and students who are struggling to find the information resources they need.

- The information received is often conflicting or incorrect, resulting in errors and poor customer service.
- Staff end up searching over and over again for the same information. Unfortunately, when that staff person moves on, her painstakingly acquired knowledge moves with her.

“Keep it simple and clear.”

- The campus lacks standards and systems support for good, clear, campus communications.
- Routine administrative memos, the bulk of administrative communications, vary widely in their readability and in the cognitive load demand that they place on recipients.
- Staff want their messages snappy – specifying the intended audience, the key messages, the required action (if any) is, when it is due, and who to contact for additional information.
- Often deadlines are missed because critical information appears at the end of a long, dense message.
- Messages are not retrieved easily and action item deadlines don’t appear in individuals’ calendars.

“One user-friendly system, with access rights determined by role, to ensure information accuracy & consistency.”

- Our current Portal (Blu) was designed to provide a single sign-on for administrative systems. However, Blu is rarely used by staff who do not have Finance or HR responsibilities and staff with multiple functions may have to access several disparate systems in a day, some integrated with Blu and others, not.
- Blu lacks access to research administration or student systems or any number of specialized databases, such as the EH&S chemical inventory, or integration with other sites of general interest to the Berkeley community, such as the Library catalog or Events calendar.

“Develop better information systems and communication systems.”

- The campus lacks coordinated communications systems to communicate effectively with targeted audiences. CalMessages is built on ten year old technology and does not support effective communication design (for example, only one font can be used – no bold allowed). Messages are sent once a day, at 6:00 p.m; it cannot target meaningful subgroups; it does not support message design, graphics, or translation to other languages, or tags for metadata retrieval.
- Because the system is so limited, access is strictly controlled. Departments therefore routinely send messages through various lists which must be maintained, most commonly through individual employee sign-up. This means staff can easily be left out of the loop.
- There is no one place for campus staff to retrieve messages generated from disparate offices. Information is siloed on department websites, or more commonly, in individual staff members’ email boxes.

“Share knowledge—across units, among levels, between students, faculty, and staff.”

- There is no common online space to share information and collaborate across units or sub-groups. Staff have few ways in which to share core policy and practices or to provide just-in-time information and documents.
- Often online information is either procedural in nature, or a written policy. There is little support that bridges the two and provides policy interpretation and application.
- UC Berkeley is a complex environment, often requiring staff to understand and apply complex federal and state regulations and University policy to unique situations. Information sharing and collaboration tools and a shared knowledge base are critical, particularly as staff move to shared service centers and we lose staff to retirements.

“Use systems to keep things simple.”

- The campus lacks the core technical infrastructure that enables systems to talk to each other. This core infrastructure is required to simplify and streamline our operating environment. This is a critical gap which results in laborious staff work-arounds, duplicative and/or bad data, and much staff frustration.
- Infrastructure needs for the Information Access and Collaboration package include HCM/CalNet, web services
to this data, open and universal calendaring services and interfaces for the entire Cal community, and
identity, role, and group management.
• A mandate to simplify can serve as the call to address this long-standing need.

B. Describe the solution that is being proposed to meet the identified need(s).

The recommended solution consists of communications tools to enable staff to make faster, better-informed
decisions, consisting of a new Portal and a modern Cal messaging system.

1. **Staff & Faculty Portal and Collaboration Environment**: A new Administrative Communications Environment
built on the Sakai 3.0 Online Academic Environment\(^2\), will leverage the current campus investment in the
Student Portal and proposed UC Berkeley Academic Commons by extending functionality to all staff and
faculty.

This is a foundational communications technology which is required to support effective and efficient services
to faculty, students, and staff, especially as we move into a Shared Services environment. Unifying the
communications environment for staff, students, and faculty has the added benefit of reinforcing the
message that we are one interrelated community with the universal goal of achieving excellence in teaching,
research, and administrative operations. The diagram below shows how these services are interrelated:

![Diagram showing interrelated services](image)

**“One campus, one Cal—excellence through collaboration.”**

The Portal will meet the following needs:

• Easy-to-find information customizable to the individual’s role, organizational identity, and work needs.
• Integrated tools to manage and access calendaring, messaging, to do’s, and the various administrative
  systems.
• Easy-to-access and transparent avenues and tools for information flow down, up, and across the
  organization at the unit as well as campus levels.
• Help tie together a widening scope of information, applications and people.

\(^2\) UC Berkeley has been an integral member of the Sakai consortium since 2004. Our campus’ instance of Sakai- the bSpace collaboration
and learning environment – hosts approximately 5,000 ongoing administrative collaboration spaces, in addition to the 2,300 course sites
each semester. bSpace supports about 45,000 users each semester. The Sakai international higher education community is now
collaborating to develop a new platform, Sakai Open Academic Environment (OAE). The core application code that underlies the existing
bSpace is being redeveloped in such a way as to provide an excellent platform to support many core administrative needs on campus, while
also including modern, web 2.0 collaboration tools.
• Help unify user interaction across on-premises and cloud-based applications.
• Enable IT groups to deploy burgeoning Web 2.0-style collaboration and social software in well-governed, cohesive and safe environments.

The need for a robust staff Portal has long been identified. Blu, the current administrative Portal, serves primarily as a point of access to administrative systems (BFS, BAIRS, HCM) with some functionality for individual staff (eLearn, personal profile updates, RSS feeds from the campus NewsCenter). It is not available to students and is rarely accessed by faculty. The development of a modern, fully functioning Portal will fill this critical gap and position the campus to take advantage of emerging technology. According to Gartner, Portals “will play an even more critical role with the next wave of technology investments. Done right, the enterprise Portal is the enterprise’s on-ramp to the cloud and will serve as home base for an expanding variety of cloud-based and on-premises applications, sites and services.”

“Be strategic, think ahead.”

We are living in a 2.0 world while our systems are stuck in the 90’s. Staff under 30 expect a Google and a Facebook-like experience, with the ability to access information quickly from desktop or cell phone and to collaborate across boundaries. Staff over 30 expect this too. The technology now exists to make it happen. An effective and efficient operating environment demands that we do so.

2. CalMessages Replacement: systems & communications support for focused and findable administrative memos (new CalMessages), localized for discrete audiences.

The CalMessages replacement project is related to the Portal, in that it will benefit from the foundational infrastructure work. The new system would include the following features:

- Support targeted messages to discrete audiences
- Visually appealing information design
- Support for graphics and HTML
- Online wizard to help (but not require) the writers of administrative memos to standardize the layout of message components, thus reducing cognitive load.
- Ability to push messages into the Portal environment
- Metadata tagging for archiving and easy retrieval
- Support for multiple languages

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3 See the Chancellor’s Staff Advisory Council (CSAC) Report to the Chancellor, 2003; and the assessment of campus administrative communications report, prepared for the Vice Chancellor, Administration, by Public Affairs Communications Breakfast Club, Administrative Communications Network, and CORWE., 2006
4 Jim Murphy, Gartner Research, Key Issues for Enterprise Portals, 2010, Publication ID G00175398.
5 37% of Facebook users are between 35 – 65 according to InsideFacebook.com
C. Describe the alternate approaches you evaluated in the process of developing this proposal and why those alternatives were not selected.

1. **Stay as we are**: This is unacceptable for a number of reasons. Our systems are antiquated and uncoordinated. Information is scattered and difficult to find. The campus is significantly shrinking its workforce. Long-term staff are leaving. Staff who remain will likely be in new departments or in new roles. They need an information and communications system that is nimble, user friendly, and that meets modern standards. We can no longer afford to work in a “work-around” environment that exposes the campus to risk and drives good people away.

2. **Use a different technology**: The recommended approaches were chosen because they build on currently existing efforts to achieve the desired outcomes.

   There is any number of vendors who provide Portal environments, including Oracle/PeopleSoft, uPortal (another open source system), and MyTritonLink, used by UCSD, which is built on a large content management system, Vignette. The proposal to use Sakai OAE was more promising because it brings together Portal and collaboration capabilities in one system, as well as the learning tools familiar to students and faculty.

   Leveraging the campus investment in Sakai 3.0 will enable Cal to have a common collaboration environment for the entire campus learning community (next generation bSpace); utilizing the back-end data integration work being done to map students to student advisors in specific departments and extending that to map the communications flow down through the administrative hierarchy; utilizing tools such as “the group tool,” to facilitate communication within professional groups (e.g. Finance professionals) as well as Shared Services Teams (e.g., Center 5) or communities of practice; integrating with other open source tools such as the Bedework replacement of Oracle calendar; and having more control and influence in the product because Berkeley is actively contributing to its design and development.

3. **Wait for system-wide Portal implementation**: In the context of replacing the payroll system and acquiring an HR information system discussion has begun at the system wide level about an employee Portal. Whatever we do needs to be aligned with that. We could delay the Portal effort to 2012.

### III. IMPACT AND STRATEGIC ALIGNMENT

A. Describe how the proposed solution aligns with the OE goals:

- Reduce administrative costs and enable the campus to direct more resources to teaching and research
- Advance an effective and efficient operating environment
- Instill a culture of continuous improvement that leads to high quality performance and outcomes

- These communications tools will enable staff to make faster, better informed decisions.
- One hour/month of increased efficiency = $3.8M in savings.
- Improved information access will support more rapid sharing and dissemination of information and practices.
- These tools will enable cross-departmental collaboration and partnerships and reinforce the message that we are one interrelated community with a common mission
- These tools will support staff who are new to the campus, new to their jobs, or new to their re-organized department with a communications environment and tools which are individualized for them, thus reducing staff time wasted in finding information and developing their own lists of bookmarks and work-arounds.
- Adopting standards for effective written communications will lighten the cognitive load of faculty, staff, and students who currently must parse communications which are often verbally dense.
- Integrating the CalMessages replacement with back end databases will ensure that messages reach their intended audience.
- The Portal’s modern technology will make it relatively straightforward to develop “widgets” that meet emerging needs.
IT effectiveness will be increased through one integrated team with expertise around a common Academic Commons technical platform to provide more functionality for less; avoiding unnecessary and duplicative integration and customization costs that come from multiple systems accessing the same data; and aligning the technology infrastructure for staff, student, and faculty calendaring, identity management, and enterprise web services.

B. Identify any other anticipated benefits in implementing the proposed solution.

A common staff/faculty/student environment reinforces our identity as one campus learning community. Campus events, News Center stories, and staff/faculty/student achievements can easily be accessed from one location. By using open technology we can draw on the talent of students to help develop the core technology as well as “widgets” and mini-applications.

Savings will be achieved by retiring Blu and CalMessages and reallocating those resources to other needs.

C. Identify the risks of not implementing the solution.

The campus cannot afford to be locked in rigid, expensive, siloed systems, especially during a time of reduced budgets and significant organizational change. Moving to Shared Services is a high risk strategy. Currently, Berkeley’s communications gaps are filled (with more or less success) by individuals who “know who to call and how things are done.” This will change with Shared Services implementation, as staff leave, taking their institutional knowledge with them. Remaining staff will either be in new working groups, providing service to multiple departments, or in departments, requiring service for functions they previously performed directly. The worst possible outcome would be for each of the Shared Services centers and functional areas to develop their own communications environments. Faculty will demand the same level of service from a reduced number of staff. Our administrative communications systems need to make it easy to provide such service.

An additional risk is the fraying of the community bonds and sense of purpose that engage staff, faculty, and students in the University’s mission. An increasingly younger staff will demand a computing and communications environment that mirrors their consumer experience, one in which content is skinned, rather than read. A robust, interactive, user-centered communications environment is a critical tool in keeping communication flowing throughout the University community.

D. Describe the constituency that is intended to benefit from the proposed solution (e.g. students, faculty, staff, 1-many units)

Staff, faculty, and students in all units will benefit from this solution.

E. Describe the extent to which this proposed solution is a collaborative effort either within campus or with external partners.

Systems development is a collaborative effort with 1) the Academic Commons local implementation of Sakai 3.0 (a collaboration of Student Affairs IT and Support Services, Educational Technology Services, the Office of the Registrar, and IST). We anticipate that systems development will involve adding staff to that core team.

Functional and content requirements will be developed in collaboration with campus Communications, Human Resources, Finance, Administration, Research Administration, and Faculty as well as Department Staff.

If we wait until 2012 then development of our employee Portal would be in collaboration with system-wide efforts.
F. If applicable, describe how the proposed solution may enable additional projects to be considered.

By using standards based, open technology and providing the framework for accessing tools as well as communications, we anticipate that the Portal will be the access point for any number of emerging tools, including time reporting; SyQuest purchasing (BearBuy); research administration tools; individual, department, and campus metrics; and tools to encourage sustainability. It would support the proposals from IST to provide an Enterprise Data Warehouse and will be a major influence on and consumer of Web Services and identity management services.

G. What is the impact of the proposed solution on the existing systems and processes? Does it eliminate the need for existing systems and processes?

The proposed solution will enable the campus to retire Blu and Cal Messages. The major impact will be to integrate existing efforts (for example Bedework calendar implementation) in a cost-effective, efficient way and to eliminate the need for duplicative and difficult to maintain static Portals for departments and Shared Service Centers.

H. What is the impact on the proposed solution on the workload?

<table>
<thead>
<tr>
<th>Profile/Impact in hours</th>
<th>Current Workload</th>
<th>1-time workload requirement</th>
<th>Ongoing workload requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td></td>
<td></td>
<td>Minimal – should be easier than current</td>
</tr>
<tr>
<td>Staff</td>
<td></td>
<td>Learning Portal functionality and how to access existing and new tools</td>
<td>Minimal – should be easier than current</td>
</tr>
<tr>
<td>Faculty</td>
<td></td>
<td>Learning Portal functionality and how to access existing and new tools</td>
<td>Minimal – should be easier than current</td>
</tr>
</tbody>
</table>

IV. WORK PLAN AND PROPOSED SOLUTION DESIGN

A. Provide a statement of:

• Deliverables — results the solution must deliver to achieve the stated objectives.
• Constraints — factors that may limit the options for providing the solution (e.g., an inflexible deadline).

DELIVERABLES:

1. Staff & Faculty Portal (Academic Commons)

The Academic Commons is in development now for students and academic advisors and will be released as a pilot in Fall 2011. The first production release will be Fall 2012. The beta versions of the Commons have been implemented on campus and are being developed with departmental staff and students as active design participants, stakeholders, and testers. The Academic Commons platform will provide the core functionality for the Staff and Faculty Portal (See the Student Service Initiative’s resource request, UC Berkeley Academic Commons, for full details.)

Following are a list of features that can be extended to all staff and faculty. In some cases the Academic Commons itself will provide the functionality; in others it will expose and link to the interface provided in other applications (e.g. BFS, HCM).

- Visually compelling and content-rich user experience, including content from the Berkeley News Center
and events calendar. This content will be available publicly, without requiring the user to login.
- Identity management, including access management, integration with key data and services, and roles
- and groups assignment.
- Group collaboration spaces, that can be pre-populated with members (for example, all Finance Analysts, all Service Center clients, or staff communities of practice)
- Integrated user profile (institutional and personalized information)
- Basic messaging between users
- Push Events and Task views
- Advisor notification tool (could be extended to other staff roles)
- Webcasts
- Access to existing administrative systems
- Pre-populated “favorite” web links and access to administrative systems by role
- Integration with select social media tools: Google Calendar and Docs, and Facebook
- Cohesive Calendaring (administrative, campus events, personal)

Other tools that could be exposed through the Portal include BearBuy, travel and entertainment processing notification, as well as the new tools recommended by the HPC initiative such as automated evaluation tools, individual development plans, and departmental metrics dashboards. Detailed requirements will be defined during the design phase.

2. CalMessages Replacement

The new CalMessages project is related to the Portal, in that it will benefit from the foundational infrastructure work. The new system would include the following features:

- Support targeted messages to discrete audiences,
- Visually appealing information design
- Support for graphics and HTML
- Online wizard to help (but not require) the writers of administrative memos to standardize the layout of message components, thus reducing cognitive load.
- Ability to push messages into the Portal environment
- Metadata tagging for archiving and easy retrieval
- Support for multiple languages

A full list of requirements will be developed in the design stage. This planning work will also include an assessment of whether to purchase or build this functionality.

CONSTRAINTS:

- This project relies on the ability to provide data from existing systems. This may be more difficult than expected. We don’t have a proven track record in the delivery of production enterprise service delivery.
- This request does not include funding for other systems (for example Calendaring for all) that are required for the full vision to be achieved.
- The Portal is the entryway to a wide range of communication systems, tools, and information sources that have traditionally been organized independently. To achieve the vision as described, the campus will need to carefully consider its organization, governance, and project coordination.

B. Provide a work plan for the proposed solution with high-level steps to complete the solution, including timeline. (Try to limit your plan to no more than seven steps.)

Assumes funding for CalMessages received July 1, 2011 and funding for Portal in 1213. Assumes revised budget and timeline at the end of the design phase.
<table>
<thead>
<tr>
<th>MILESTONE: Design Phase</th>
<th>TIMELINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. ID Project Management oversight</td>
<td>July 2011</td>
</tr>
<tr>
<td>2. ID stakeholders for scope and requirements gathering</td>
<td>July 2011</td>
</tr>
<tr>
<td>3. Conduct requirements gathering and analyze dependencies</td>
<td>August – December 2011</td>
</tr>
<tr>
<td>4. Research alternative and interrelated solutions (ex Calendaring systems, HRIS portal, Academic Commons)</td>
<td>October – February 2012</td>
</tr>
<tr>
<td>5. Conduct gap analysis</td>
<td>February-March 2012</td>
</tr>
<tr>
<td>6. Submit proposed solutions, roadmap, and budget</td>
<td>April 2012</td>
</tr>
</tbody>
</table>

C. What are the data requirements for the proposed solution?

Need assistance from IST. Sources include HCM, CalNet, calendaring system

D. What are the technical requirements for the proposed solution?

Sakai OAE platform
Bedework calendar for faculty, staff, and students.
Web services architecture for campus
Identity management
Additional technical requirements to be defined in implementation phase
Alignment with UC Employee Portal

E. What are the greatest risks for the proposed solution and the plan to reduce or eliminate the risks?

<table>
<thead>
<tr>
<th>RISK</th>
<th>MITIGATION PLAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Portal does not meet user requirements</td>
<td>Identify and involve stakeholders and SME’s in the user requirements and user interface design process.</td>
</tr>
<tr>
<td>2. Staff &amp; faculty do not use the Portal, thus negating its potential usefulness</td>
<td>Ensure that they have a reason to go there; gateway to administrative and communications systems; provide news they can use; one-stop access.</td>
</tr>
<tr>
<td>3. Sakai 3.0 does not deliver basic functionality</td>
<td>Mitigated by current campus funding for Portal and Berkeley’s participation in Sakai consortium. Core functionality is on track to be delivered in summer 2011.</td>
</tr>
<tr>
<td>4. CalMessages replacement does not meet user needs.</td>
<td>Involve stakeholders and SME’s in gap analysis and product review.</td>
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<td></td>
<td></td>
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<tr>
<td>---</td>
<td>---------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>5.</td>
<td>Lack of timely decisions or clear direction</td>
</tr>
<tr>
<td>6.</td>
<td>Lack of alignment between Academic Commons roadmap and the service goals of functional units</td>
</tr>
<tr>
<td>7.</td>
<td>Resources not provided at the end of the design stage to fulfill the full scope of the project</td>
</tr>
<tr>
<td>8.</td>
<td>Lack of alignment with UC employee Portal</td>
</tr>
</tbody>
</table>

F. How does the proposed work plan allow for evaluation and course correction to ensure the outcomes meet the campus needs?

Open, modern technical architecture to allow for iterative development in response to emerging user requirements; ongoing governance and advisory groups; online feedback mechanisms for users to make requests.
v. CHANGE MANAGEMENT

A. What is the change management plan to successfully implement the outcomes of the proposed solution?

<table>
<thead>
<tr>
<th>(1) Portal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Impacted Groups</strong></td>
</tr>
<tr>
<td>In pilot: Pilot implementation departments will be named during the planning phase.</td>
</tr>
<tr>
<td>On-going: All staff and faculty.</td>
</tr>
</tbody>
</table>

**New Roles:**
During the initial development and roll-out, a half-time project manager will be required. On an ongoing basis, a product manager role will be required for the Academic Commons. The proposal anticipates that this role will be filled by an existing staff person. The product manager will periodically review requests for additional functionality, UI changes, and user feedback and work with stakeholders and the Academic Commons team to incorporate requested changes. This role will be critical to keeping the AC current and relevant to users.

**Governance**
The Associate Vice Chancellor for Public Affairs and Communications is sponsor and will determine the governance structure.

**New Competencies Required**
A distinction needs to be made between competencies required to access and use the Academic Commons and the competencies required to use the tools that are access through the commons. For example, BFS and BearBuy will be accessed through the Commons; competencies required for those tools will be determined by the functional owners.

Competencies to use the Portal itself include the ability to understand and follow links, to login to systems, to add and remove bookmarks, to customize the user’s view, and the like.

**How New Competencies will be Attained**
- Presentations will be held for department staff. Forums and webcasts demonstrating the systems, with active participation staff who participated in the pilot.
- Extensive online, context sensitive help will be provided, including video demonstrations of the tools. Knowledge base to house FAQ’s, how-to’s, and articles.

**Communication Plan**
- There will be ongoing campus communications to staff and faculty about impending changes.

**Engagement**
- Staff from pilot departments will be deeply involved in testing, providing feedback, and contributing to the knowledge base.

**Resistance & Mitigation Plan**
- We anticipate that we will learn much from the roll out of the student Academic Commons regarding the communication and training required. Our change management will draw on that experience.

- Key administrative systems will only be available through the Academic Commons. These include access to staff member’s personal information as well as administrative systems. Therefore, we anticipate that all staff will use the AC at a base level. However, to be successful, the AC needs to be home base for most staff. Therefore, it will be designed with rich content that is available without the need to login, including much of what is available in Berkeley’s home page. The difference will be that users will be able to select content that is relevant to them. This should make the AC “sticky.”
(2) CalMessages Replacement

Impacted Groups
In pilot: AVC Public Affairs and Communications, Chancellor and EVCP’s offices, and one or two central administrative units
On-going: All faculty, staff, and students as recipients; Department communications staff as generators.

New Roles
No new roles will be required once implemented.

Governance
The Associate Vice Chancellor for Public Affairs and Communications is sponsor and will determine the governance structure.

New Competencies Required
Competencies required for the CalMessages replacement depend on role. As a consumer of messages, the main competency required will be the ability to use search dialogue boxes to retrieve relevant messages. As the provider of messages, competencies will be required to choose the correct audience(s), add metadata correctly, write clear, succinct administrative memos, and if desirable, use other features of the tool, such as HTML.

How New Competencies will be Attained
- Training on business writing will be provided as part of the campus’s regular offerings.
- Presentations will be held for department staff. Forums and webcasts demonstrating the systems, with active participation staff who participated in the pilot.
- Extensive online, context sensitive help will be provided, including video demonstrations of the tools. Knowledge base to house FAQ’s, how-to’s, and articles.
- Hands-on training will be provided for “power users,” of the CalMessages replacement, primarily those with communications responsibilities.

Engagement Plan
- A working group with communications staff from departments will be established to develop procedures and best practices for using the tool.

Resistance & Mitigation Plan
- Communication consumers will not have to change behaviors, they will just be the recipients of better written, better formatted, and easily retrieved memos.
- We anticipate that communication professionals will be eager to use the new tool so that their messages can easily reach targeted audiences. They have been asking for this for years.

B. What incentives and/or disincentives are proposed to influence behavioral changes necessary for the successful outcome of the proposed solution?

- Modern, user-centered design, with an intuitive user interface.
- For staff, the incentive of having a single gateway to all online services, calendar integration, access to their collaboration groups.
- Students, faculty and student services staff will already be using the Portal and can serve as evangelists.
- For CalMessages replacement, the ability to target specific audiences and incorporate even basic formatting should prove to be powerful incentives to use the system.
C. Who has been identified as the change leaders and implementers to carry out the changes necessary for the successful outcome of the proposed solution?

- Leaders: AVC Public Affairs and Communications, CIO.
- Implementation Planning Team: Representatives from academic and non-academic units, e.g., Academic Commons core team (IST, ETS, AVC Communications, and SME’s from functional units and equivalents from non-academic units).
- Implementers: AVC Communications staff, implementation staff from each central unit, in consultation with departmental staff for user requirements.

VI. FUNDING MODEL AND BUDGET

A. Could the proposed solution move forward with partial funding? If yes, describe the revised scope, including the associated savings impact.

The Portal could move forward very slowly, costing the University more, as it will take longer to retire legacy systems and to create a critical mass of functionality and meaningful web presence on the Academic Commons.

For the CalMessages replacement, it may be possible to find a vendor solution to send attractive emails, but the backend data work would need to be done to enable senders to target messages.

B. What is the plan for sustainable funding to support ongoing operations of the proposed solution?

Some resources can be repurposed as Blu and CalMessages are retired. The ongoing funding needs to be assessed as part of the detailed design phase as will the ability to identify opportunities for reallocation of resources rather than new spend.

C. Please download and fill out the OE Resource Request Budget Template located at [location] and follow the instructions on the first worksheet in the workbook to complete the budget ant line descriptions. Include both completed sheets with the Resource Request.
VI. ASSESSMENT PLAN

Please use the table below to detail your metrics.

<table>
<thead>
<tr>
<th>METRIC CATEGORY</th>
<th>SPECIFIC MEASURE</th>
<th>MEASURE BASIS</th>
<th>DATA COLLECTION METHOD</th>
<th>DATA COLLECTION FREQUENCY</th>
<th>FUNCTIONAL OWNER OF DATA COLLECTION</th>
<th>LARGER GOAL TO WHICH METRIC RELATES</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXAMPLES:</td>
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<tr>
<td>FINANCIAL PERFORMANCE</td>
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<tr>
<td>1 Reduction in average price of office supplies</td>
<td>Avg price</td>
<td>Per item</td>
<td>Look at vendor catalogs</td>
<td>Quarterly, first day of each quarter</td>
<td>Procurement Director</td>
<td>Overall reduction of 15% in average price of office supplies</td>
</tr>
<tr>
<td>OPERATIONAL PERFORMANCE</td>
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<tr>
<td>1 Reduction in average processing time per transaction</td>
<td>Avg person-hours required</td>
<td>Per transaction</td>
<td>Survey of transaction processors</td>
<td>Semi-annually</td>
<td>Director of Billing</td>
<td>Reduction of 20% in average transaction processing time</td>
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<tr>
<td>OPERATIONAL PERFORMANCE</td>
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<tr>
<td>1. Streamlining communications through a new Portal.</td>
<td>Search path analysis</td>
<td>TBD</td>
<td>Analytics (ex. Google)</td>
<td>Annually</td>
<td>AVC Public Affairs and Communications</td>
<td>Increased number of messages read by target audience; increased response to message (i.e., meeting deadlines); increased staff knowledge of leader messages.</td>
</tr>
<tr>
<td>2. Replacement of CalMessages</td>
<td>Analysis of system usage (by department, target audience, etc.)</td>
<td>Number of diversity of messages</td>
<td>System derived</td>
<td>Annually</td>
<td>AVC Public Affairs and Communications</td>
<td>Reduced number of help desk interactions as messages become clear, information is easier to find, and collaboration tools enable connections with knowledgeable staff.</td>
</tr>
<tr>
<td>Portal &amp; CalMessages Replacement</td>
<td>Number of variety of help desk calls to service providers</td>
<td>Per help desk submission</td>
<td>Service unit reports</td>
<td>Annually</td>
<td>Service Units (BFS, HR, Shared Service Center, etc.)</td>
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<tr>
<td>PRODUCT / SERVICE QUALITY</td>
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<tr>
<td>2</td>
<td>Number &amp; frequency of collaboration tools used</td>
<td>Per tool</td>
<td>System derived</td>
<td>Annually</td>
<td>AVC Public Affairs &amp; Communications; IST</td>
<td>Collaboration tools are being used</td>
</tr>
<tr>
<td>EMPLOYEE SATISFACTION</td>
<td>Information &amp; communicatio measures</td>
<td>Per classification, dept</td>
<td>ServiceUnit surveys</td>
<td>Bi-annually or more</td>
<td>Service Centers</td>
<td>Info &amp; answers easy to find</td>
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<tr>
<td>1</td>
<td>Employee satisfaction measures</td>
<td>Per employee</td>
<td>Campus Climate Survey;</td>
<td>Annually</td>
<td>HR?</td>
<td>Employees feel connected to mission/UC</td>
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<table>
<thead>
<tr>
<th>CUSTOMER SATISFACTION</th>
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<th>PUBLIC RESPONSIBILITY</th>
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<th>SUPPLIER PERFORMANCE</th>
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