Operational Excellence at Work

Cal Student Central is helping to transform the student experience

On January 15, Cal Student Central, on Sproul’s main floor, opened its doors to a one-stop source of information and assistance concerning financial aid, fees and billing, payments, disbursements, registration, and enrollment. Staffed by a cross-trained, service-oriented team, the center supports timely and efficient responses to student requests. “Our staff will provide the front-line services that students...have received from different offices, some located across campus from each other,” says the center’s director, Carmen Ortiz, pictured right. The new service center is co-sponsored by Vice Provost Catherine Koshland and Vice Chancellor Harry Le Grande who calls it “a major transformation” – one that “should save students hours of non-productive time traveling across campus to complete administrative tasks.”

Identifying a one-stop business center as a top priority, students advised Operational Excellence (OE) in its overall planning – expressing their desire, for instance, to interact with staff in a more casual environment. They provided input, as well, on the layout of the space (pictured left), including the configuration of the furniture.

CalPlanning launches Phase 3. CalPlanning Phase 3 (CalRptg) went live on February 4 — launching the initial group of CalPlanning Phase 3 tools. To prepare staff to make the best use of these powerful new budgeting and financial analysis tools, the CalPlanning team began offering training in mid-January. The trainings are already proving popular as only 71 spaces out of 950 remain in the current multiple offerings of five classes. For additional information, visit http://budget.berkeley.edu/calplanning/training.html. Another resource for the 340+ CalPlanning users is the newly-launched Knowledge Base (https://kb.berkeley.edu/campus-shared-services/), which creates a community for sharing information on OE technical projects.

IT Productivity Suite delivers bMail to the Goldman School of Public Policy (GSPP). Recently, GSPP faculty and staff successfully moved from CalMail to bMail, demonstrating that sound planning along with education are the key to adoption of, and comfort with, our new email platform. To date, 2,700 faculty and staff across campus have been moved to bMail and 11,800 students have made the change themselves (self-migration). For a bMail migration schedule, visit http://bconnected-project.berkeley.edu.

A Leadership Celebration of OE

On January 31 at the Alumni House, Chancellor Robert Birgeneau was joined by EVCP George Breslauer, VCAF John Wilton, and Dean Andrew Szeri (the OE Executive Committee) and OE Coordinating Committee members to recognize the accomplishments of the OE Project Teams. The leadership presentations were followed by an inspirational workshop on Authentic Leadership by Dr. Mark Rittenberg, Faculty Director, Berkeley Executive Coaching Institute. — a guest appearance by Oski, who helped to kick off the discussion on bringing to life our new Berkeley Operating Principles.

Portoflio At-A-Glance

Current active projects: 16
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: $32.2 million
Cumulative savings-to-date: $59.5 million
OE Portfolio Annual Savings
Actual Savings More Than Plan To Date

OE Portfolio Annual Investment
Actual Investment Less Than Plan To Date
## Project Financial Profile

<table>
<thead>
<tr>
<th>PROJECT</th>
<th>EXECUTIVE COMMITTEE APPROVAL DATE</th>
<th>COMMITTED OE INVESTMENT AS OF 1/31/13 $</th>
<th>OE EXPENSES AS OF 1/31/13 $</th>
<th>PROJECTED ANNUAL SAVINGS BY FY 2016 $</th>
<th>CUMULATIVE SAVINGS As of 1/31/13 $</th>
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<td><strong>ENERGY</strong></td>
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### 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 $6.3 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.
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.

CAMPUSSHARED 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 a series of subject area reports produced 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 to realize improved analysis capabilities, as well as improved data accuracy, reliability, and security.

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

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

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
BEARBOTHER
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 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.

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 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 engage 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