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.

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
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.
**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 produce 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.