As we have embarked on a new fiscal year, I would like to take this opportunity to update the UC Santa Barbara campus on our recent accomplishments and next steps with our Operational Effectiveness (OE) Initiative.

On April 21st, the Coordinating Committee on Budget Strategy reviewed the OE Final Summary Report of key proposals developed by our Phase I working groups. This report was the culmination of the efforts of over 60 staff and faculty from across campus working in dedicated teams, gathering the input and feedback from hundreds of staff, faculty and constituents on ways to make our campus operations more effective and efficient.

A summary of the report can be found on the OE website at:
http://oe.ucsb.edu/index.php/resources/
The report itself can be found at:

I commend the hard work and collaborative effort that went into the report and the proposals it contains. The summary report also identified potential opportunities to realize additional improvements by sharing common services on campus. In the next phase (Phase II) of Operational Effectiveness, we will focus our planning efforts on this shared services concept.

While a difficult budget climate continues to confront us, I am confident that continuing this collaborative, innovative effort demonstrates the resolve we all share to emerge stronger and more vibrant as a campus and as a community from these challenging times.

Sincerely,
Gene Lucas
Executive Vice Chancellor
We are pleased to announce that UCSB will be implementing a new system that will change the way we purchase goods and services and enable our Purchasing Department to respond to buying needs in a more timely and effective manner. The campus has contracted with SciQuest, a leading provider of web-based procurement software, to provide departments with a tool that will improve functionality, leverage our collective buying power, and make it easier to identify and purchase sustainable products.

Over 150 colleges and universities are currently using the SciQuest system, including Cornell, Johns Hopkins, MIT, Stanford, USC, and Yale, as well as University of California campuses at Berkeley, Irvine, Riverside, Santa Cruz, San Diego and San Francisco. These UC campuses have partnered with the Office of the President to create a consolidated and unified approach for managing supplier relationships and increasing UC’s visibility and influence over strategically sourced contracts. Immediate access to spend data among all of the campuses is leading to more effective contract negotiations and the ability to identify cost savings opportunities at a faster pace.

UCSB’s version of this online purchasing system, which has been named UCSB Procurement Gateway, will transition us from traditional retail purchasing to strategic buying and green procurement with streamlined buying that will provide the following advantages:

- Pricing – access contracted prices, terms and conditions to ensure best value
- Selection - find products and services to fulfill your purchasing needs
- Speed - expedite your ordering process by creating one cart that automatically sends orders to suppliers
- Controls - automate approval routing and tracking with full control and accountability
- Payment – manage multiple fund sources, split-funding, and automatic invoice settlement
- Visibility - view the current status of your requisitions and run real-time reports on spending
- Sustainability – reduce paper and gain ready access to green vendors and products

We wish to engage our campus buying community in collaborations to determine workflow needs and design for Gateway. The first step in this process will be to hold demonstrations of online buying tools in October to solicit your recommendations (announcement on dates forthcoming). In subsequent months the campus will undertake the appropriate business and technical tasks to move us towards Gateway deployment at the start of the 2012-13 fiscal year.

Implementation of Gateway provides an exciting opportunity to streamline campus procurement and set a whole new direction and pace for transforming campus business and financial processes. This initiative emerged as a partnership across divisions, and we will continue to work together to ensure the success of this project as we move forward. Jacob Godfrey, our campus Purchasing Manager, will be coordinating implementation. Please watch for additional announcements in the near future.

Spotlight: Student Affairs new Student Information System

Student Affairs is in the process of rolling out a new Student Information Systems conversion/modernization with the first phase of this project scheduled to be completed in the summer of 2012.

Student Affairs is migrating its legacy Admissions, Registration, and Graduate Division applications from a non-relational data base to .net/SQL Server which is a modern relational data base. Once this is complete they will begin modernizing the code and providing middleware services for business processes. This is a 14 million dollar project.

Eye on Ticketing & Events

The OE Conferences and Ticketing Committee from Phase I has partnered with Associated Students to begin a pilot program for a new event management system in development by AS. AS is coordinating among the various event planners and ticketing providers to ensure the system meets everyone’s needs. The hope is to eventually incorporate ticket sales into the event management system. For questions about the pilot program contact: webdev@as.ucsb.edu.
The Office of the president has established a goal to deploy a single payroll system and a single human resources system across all ten campuses and five medical centers that meets the core needs of each location while capturing the efficiencies, improved data and cost-savings associated with unified systems.

In September 2011, Oracle PeopleSoft Payroll/HCM Suite was selected to replace the current PPS system. As part of the UC Working Smarter initiative, the University has entered into an agreement with Oracle America, Inc., to deploy its hosted PeopleSoft payroll and HCM suite to replace the eleven variations of UC’s current 30-year old Payroll Personnel System. This project will take about three years to complete, and implementation activities are now underway, beginning with training for core project team members.

The Early Adopters/First Wave implementers for the PPS replacement solution have been identified and include UC Santa Cruz, UC San Diego, and UCLA, in conjunction with UC Merced and UCOP, whose payrolls are run by UCLA. Implementing the new system in several waves manages risk, builds momentum and provides a proof of concept, enabling each subsequent wave to execute more efficiently and effectively.

UCSB has identified Karl Heins, Chief Information Security Officer, as the project manager, and is currently in the process of evaluating which wave to begin implementation on the campus.

This Month’s Operational Effectiveness Q & A

**Q: What is the difference between OE Phase I and Phase II?**

A: Phase II is focused on four key operational areas: IT, Procurement, Payroll & Personnel Systems, and Financial Services. Focusing our efforts here will help our campus better prepare for the implementation of new business software systems, with the ultimate goal of dramatically improving the effectiveness of our campus operations.

**Q: Are there other campuses working on similar effectiveness projects?**

A: Systemwide is adopting a new PPS/HRIS system for payroll, personnel, and a human resource information system. Each campus is collaborating on the rollout to the new system which will happen in varying phases.

For more information visit: http://workingsmarter.universityofcalifornia.edu

**Spotlight: Kronos Timekeeping Rollout**

The OE Payroll and Personnel Systems Working Group is in the process of developing a timeline for rolling Kronos out to the campus. Kronos will be rolled out in two waves with Administrative Units rolling out by the end of 2012, and Academic Units rolling out at the beginning of 2013. The working group hopes to have full campus participation by the end of Academic Year 2012-13.

More information will be released to campus as the rollout plan is developed.

**Eye on Shops Consolidation**

At the end of Phase I the OE Shops Consolidation team recommended each Dean/AVC overseeing shops to evaluate opportunities for consolidation, collaboration, and coordination. Marc Fisher, Senior Associate Vice Chancellor, is evaluating the Facilities Management and Housing & Residential Services shops. David Marshall, Dean, Humanities and Fine Arts, is evaluating the Humanities and Fine Arts shops, and Pierre Wiltzius, Dean, of Science, and Rod Alferness, Dean, College of Engineering, are partnering to evaluate the Science and Engineering Shops.
Upcoming OE Events

• Campus Purchasing System Kickoff Event
  The kickoff will be held in the University Center Corwin Pavilion on Wednesday, October 19, from 11 a.m. -12 noon. This will be the first in a series of opportunities to engage our campus community in the development of Gateway.

• Co-Chair/Project Leader Report Outs
  The co-chairs and projects leaders will meet quarterly to report out on each project. At this time any questions, concerns, or opportunities for partnerships will be discussed and developed by co-chairs and the project leaders. The next report out session will be held in mid-November.

• Final Presentations to CCBS
  The co-chairs hope to present their Phase II final report to CCBS in May of 2012. At this point future development of the OE Initiative will be discussed.

We want to hear from you

To leave us your comments or suggestions, please email: oe@vcadmin.ucsb.edu.