

Standardized support for faculty and principal investigators across the UC Berkeley Campus.

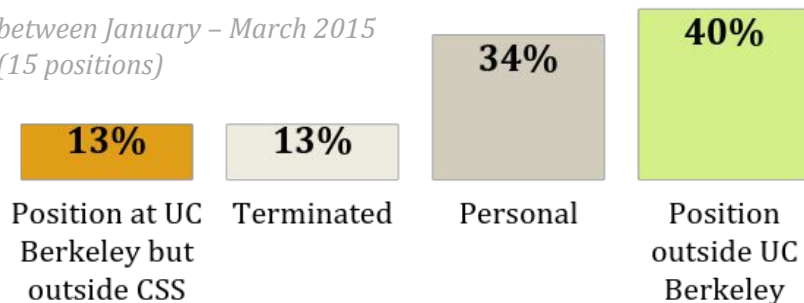
Staffing Levels, Turnover and Retention

Staffing Levels: 16 total vacancies currently (of ~150 total RAs)

- Beginning of 2015: 8 open RA positions
- Mitigation: workload redistributed and efficiencies gained for 6 positions. 1 RA hired. 1 remaining vacancy.

Turnover rate: 10%

between January – March 2015
(15 positions)



Retention plan underway

1. Establish clear and consistent RA roles and responsibilities (completed)
2. Conduct team building and morale boosting activities (in progress, ongoing)
3. Review and balance staff workloads (in progress, ongoing)
4. Standardize processes to gain efficiencies (in progress, ongoing)
5. Cluster (2 completed, another in need of space); Mentor (in progress, ongoing)

Training plan

New Staff Boot camps

- 90 trained in basic UC Berkeley practices
- Roles and responsibilities now include accountability and training

Under development:

- *By Jan 2016:* Electronic knowledge base
- *Fall 2016:* RA Customer Service Training

Research Administration Professional Development Program (RAPDP)

- Sponsored by VCR and CFO
- Still unfunded and delivered by current RAs/Central Offices; Budget requested (Cost ~\$300K/yr)

In progress:

- *By April 23, 2017:* Pilot training: 20 RAs
- *By June 2017:* Train all 165 RAs, supervisors and managers

Standardized support for faculty and principal investigators across the UC Berkeley Campus.

PI Portfolio <http://calanswers.berkeley.edu/PIPortfolio>

Objective: Provide faculty with a user-friendly tool that displays their fund balances, details and forecasts in one place

Benefits

- Easier for PIs, leaving more time for research and teaching
- Better spending decisions
- Better compliance with sponsors
- Improves consistency and accuracy across departments
- Streamlines process for Research Administrators

Issues

- Faculty adoption and awareness of tool, benefits, and/or attributes

Progress

- *July 2014-February 2015:* PI Portfolio put on hold due to launch of other campus system (“contracts and grants module”)
- *March 2015:* Began preparations for next phase: projections and sponsored accounts receivables
- *April 2015:* New templates presented to focus group

Next

- *May 2015:* Developers to update current tool, create a mock-up of projection tool, and review with CSS-RA
- *Summer of 2015:* Review and test with focus group
- *Fall 2015:* Launch full PI portfolio tool that displays fund balances, details and forecasts in one place

Travel and Entertainment Project

A collaborative effort with the campus CFO, Controller's Office, CSS and Unit Leaders.

- Policy Clarification and Simplification
 - Done: Documented policy clarifications for Domestic Travel
 - Eliminated: receipts under \$75 (except lodging, air fare, car rental), proof of mileage, conference agenda
 - Clarified: daily spending limits (\$71/day for domestic), car rental liability insurance is covered when rented through a Berkeley contracted agency
 - Up next: Clarify options for booking travel online and benefits of each; policy for international travel and entertainment
- Metrics
 - Done: reviewed submissions to CSS to assess reasons for delayed reimbursement
 - Done: Established baseline for 'days to completion' (process time for CSS and Controller's Office)
 - If submitted in complete order: 9.2 days
 - If submitted not in complete order: 12.8 days
 - Up next: Evaluate submission process; develop Customer Satisfaction Survey
- Business Process / Roles & Responsibilities
 - Done: Defined how the process should ideally work
 - Done: Implemented 'trust the traveler' philosophy during transaction review
 - Done: Issued processor checklist for domestic travel and entertainment
 - In progress: training supervisors and staff on 'trust the traveler' philosophy
 - Up next: clarify and finalize roles/responsibilities; develop communications/training on roles/responsibilities; finalize international travel processor checklist
- Communication / Change Management
 - Done: Leveraging a work group that includes campus leaders (e.g., CAOs) to provide guidance of project
 - Done: Communicated first round of policy clarifications
 - Up next: Clarify options for booking travel online and benefits of each; direct bill options and other policy clarifications; create a travel website including a FAQ guide

CSS Human Resources

- Management change: Added Deputy Director (March – August 2015) to enable faster delivery of service improvements
- HR process changes in progress: Focusing on both changes that deliver results quickly and long-term efforts
- Validated HR priorities with CAOs and CSS advisory groups
- Summer Session and Summer Salary: standardized process
- Metrics
 - We have posted the first set of metrics to the CSS website at <http://sharedservices.berkeley.edu/metrics-reporting/>