AGENDA

1. Campus updates
2. Campus future state design overview
3. Questions
CAMPUS UPDATES
CAMPUS UPDATES

1. Requirements analysis fit/gap
2. Implementation planning
3. Campus future state process design alignment
Future State Process Design =

WHAT & WHERE
<table>
<thead>
<tr>
<th>UCSB</th>
<th>employee requests verification</th>
<th>request received</th>
<th>research records</th>
<th>verification received</th>
</tr>
</thead>
</table>

**EMPLOYMENT VERIFICATION**

*(current state)*
EMPLOYMENT VERIFICATION
(with UCPath Center)

UCSB

employee requests verification

verification received

UCPath Center

request received

research records
BACKGROUND

January - March 2014
All UC locations consolidated business process issues and decisions.

March-June 2014
System-wide summits were held to agree on the following:
  • UCPath Center vs. campus responsibilities
  • High-level system design

May-July 2014
Future state processes approved by system-wide steering committee
THANK YOU!
Campus Business Processes = Who & How
SCOPE

Approximately 150 business processes to review

- 50 will be fully centralized at UCPC (e.g. Direct Deposit processing)
- 50 no/min. impact on departments (e.g. Death Benefits administration)
- **50 large impact on departments** (e.g. New Hire)
EMPLOYMENT VERIFICATION
(future state)

<table>
<thead>
<tr>
<th>UCSB</th>
<th>UCPath Center</th>
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<tbody>
<tr>
<td>employee requests verification</td>
<td>request received/ unable to verify</td>
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<td>referred to campus</td>
<td></td>
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<tr>
<td>research records</td>
<td>verification received</td>
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**GOAL**

For every business process *with departmental impact*, develop documentation that informs our project scope and project plans *at the task level*.

- Who is going to do what?
- How?
- Who will need to be trained in what?

*Scope is on transactional processes*
GUIDING PRINCIPLES

Recommendations will support:
• Highest data quality
• Least amount of time
• Avoid duplication of efforts
• Adherence to policies and procedures

Avoid:
• Accidental bureaucracy
• Current business issues
• Potential bottlenecks

Promote:
• Smooth interaction and communication
• Compliance with existing policies
**PROCESS**

- **Business Alignment Team** provides background information, central perspective

- **Future State Process Design Team** provides departmental perspective and requirements

- **Business Alignment Team** and **Future State Process Design Team** discuss, agree on future state recommendations

- Recommendation submitted to **Strategic Advisory Committee** for review and feedback

- Future state approved by **Steering Committee, Sponsors**
Sona Baboolal, Payroll
Cindy Doherty, Academic Personnel
Lan Nguyen, Payroll
Lisa Romero, Human Resources
Cynthia Seneriz, Human Resources
Joann Stark, Payroll
Catherine Uster, Human Resources
Carrie Vallone, Project Management Office
Robert Jacobs, Project Management Office
Maria Ayllon, Project Management Office
FUTURE STATE PROCESS DESIGN
TEAM

Lisa Blanco, Sociology
Kim Dwire, Housing & Residential Services
Teresa Everett, College of Letters & Science
Ryan George, Library
Robin Jenneve, Electrical & Computer Engineering
Cheryl Kelly, Institutional Advancement
Kathy Murray, Film and Media Studies
Cathy Pollock, College of Engineering
Lynne Pritchard, Psychological & Brain Sciences
Kathy Scheidemen, Earth Research Institute
Briana Villasenor, Student Affairs
STRATEGIC ADVISORY COMMITTEE
(based on role)

Maria Ayllon, Project Management Office
Linda Flegal, Mathematical, Life & Physical Sciences, College of Letters and Science
Allyn Fleming, Planning & Administration, Student Affairs (Co-Chair)
Tilly Govender, Social Sciences, College of Letters and Science
Alan Grosenheider, Library
Karen Hanson, Office of Research
Jo Little, College of Creative Studies
Mary Lum, Humanities & Fine Arts, College of Letters and Science
David McHale, Facilities Management
Lynn McLaughlin-Hill, Office of the Vice Chancellor for Administrative Services
Diane O'Brien, Office of the Chancellor
Carol Parsons, Office of Academic Programs
Juli Pippin, College of Engineering (Co-Chair)
Dorothy Satomi, Gevirtz Graduate School of Education
Lisa Sedgwick, Academic Affairs (Co-Chair)
Martin Shumaker, Housing & Residential Services
Eric Sonquist, Institutional Advancement
Robert Tarsia, Audit and Advisory Services
Christian Villasenor, Graduate Division
UCSB UCPATH STEERING COMMITTEE
(based on role)

Jim Corkill, Controller
Cynthia Seneriz, Acting Human Resources Director
Cindy Doherty, Academic Personnel Director
Elise Meyer, Business Operations & Planning Director, ETS
Yaheya Quazi, Enterprise Systems Integration Director, ETS
UCSB UCPATH SPONSORS
(based on role)

David Marshall, Executive Vice Chancellor
Marc Fisher, Vice Chancellor, Administrative Services
Pam Lombardo, Acting Assoc Vice Chancellor, Admin Services
Todd Lee, Assistant Vice Chancellor of Budget & Planning
Denise Stephens, Interim Chief Information Officer
TIMELINE

Balance schedule and quality

• 1 year completion goal
• Can’t wait until everything is settled
• Need to start now and adjust as needed