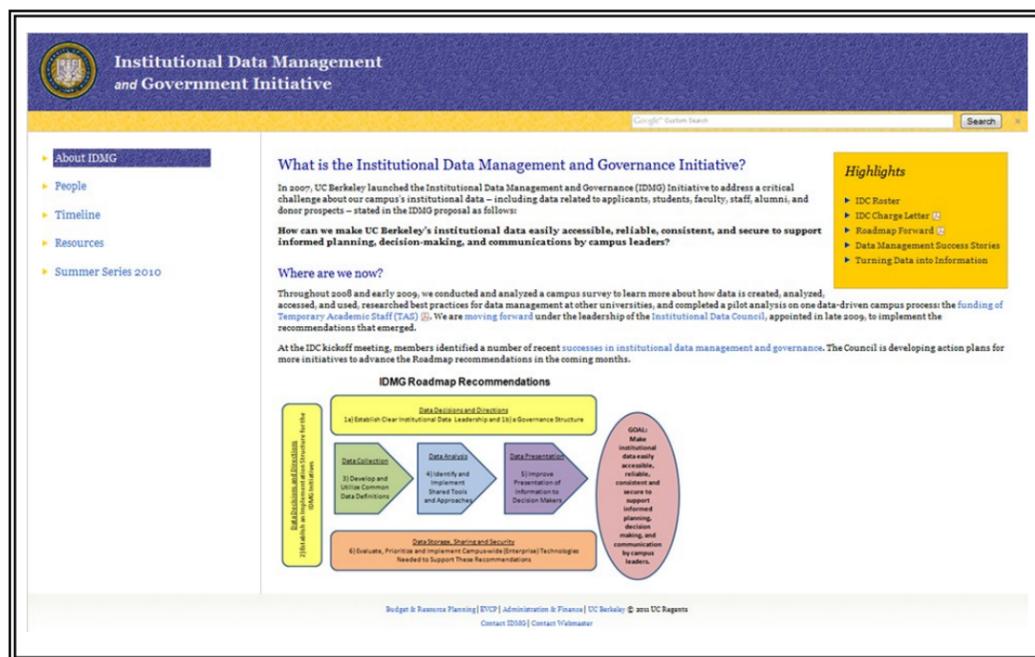


How You Can Help...

1. Get access to Cal Answers and use it as your first source to answer questions for the subject areas available. Identify questions you can't answer, or definitions that need refining and that will help us prioritize future content. More data is coming with HR Census, Equity & Inclusion and OE dashboard projects, as well as OE Procurement, Student Curriculum, Student Financials, and Finance/HR initiatives.
2. Be a force for change in your own organization by educating yourself on data management best practices, adopting those practices in your environment and helping to educate others.
3. Stay open to change. Sometimes with changes that are ultimately good for the university wide environment we need to give up comfortable ways of doing things and unique local benefits.



4. Send us feedback on what you'd like included in the IDMG website to empower you to advance the IDMG initiative. Current ideas include information on standard tools and data sources, articles on best practices, presentation examples and tips, and information on past accomplishments and future goals, as well as a blog to engage and inform our campus community.
5. Learn more about current and upcoming projects and how they might support your work or unit. An upcoming Cal Planning presentation is tentatively planned for the Business Process Analysis Working Group (BPAWG), on Oct. 28th from 3-4:30pm. The Operational Excellence initiatives will be showcased on Oct. 27th at 11am at the MLK Student Union, Pauley Ballroom.
6. Help us with ideas on what else we can provide through CAN, BPAWG and other communities of practice that will support our efforts to advance IDMG. Current ideas include a half-day IDMG seminar on best practices related to using the EDW, information on existing and planned data sets, and support on presentation tips and techniques.
7. Participate in the data projects in your area. As new projects get started, the business analysts will look to key business owners and experts to identify the people to be interviewed and who should serve as subject matter experts. Let those people know that you are interested and have insights to share.
8. Participate in advisory groups or focus groups. In the future we will be putting together some working groups to help move us forward on specific goals.
9. Send us your questions, ideas and thoughts. Contact Josh Blatt, our IDC Program Manager for Institutional Data and Analytics at jblatt@berkeley.edu.



AVC-CFO – Office of
Planning & Analysis

Making Institutional Data Count

How you Can Engage in the Institutional Data Management & Governance (IDMG) Movement

“One cannot think well, love well, sleep well, if one has not dined well.”

~Virginia Woolf

Once upon a time, the Land of Cal was ruled by wise and benevolent leaders. They wanted to make the best decisions for their people, but they were always hungry. Every day, they went to the executive dining room and ordered the most flavorful appetizers, entrees and desserts on the menu. Every night, they dreamed of sumptuous feasts and then special ordered the elaborate dishes of their dreams. But even though they had assembled the most talented team of chefs in the land, their stomachs still grumbled.

The chefs were tearing out their hair. They were used to well-stocked pantries and kitchens. But in the Land of Cal, the vegetables and grains were stored on Oxford, the meats were housed on Hearst, and the spices could only be found on Bancroft. All day long, instead of cooking delicious meals, they ran to and from these outlying buildings, porting ingredients back and forth to their many cramped and ill-equipped kitchens. Sometimes, when they arrived at the vegetable and grain pantry, the only person with the key was nowhere to be found. Other times, at the meat pantry, the staff were too busy preparing their own meals to provide just the right ingredient to finish a particular dish. And all too often, some relatively common yet essential spice could not be located anywhere on campus at all.

Meanwhile, the leaders lingered on and on in the dining room, waiting for meals that arrived cold or without a crucial ingredient or never arrived at all. Finally, one day, the leaders had had enough. They charged a team of talented chefs to tell them how to fix the problem, and they created the Institutional Data Management and Governance (IDMG) Initiative...

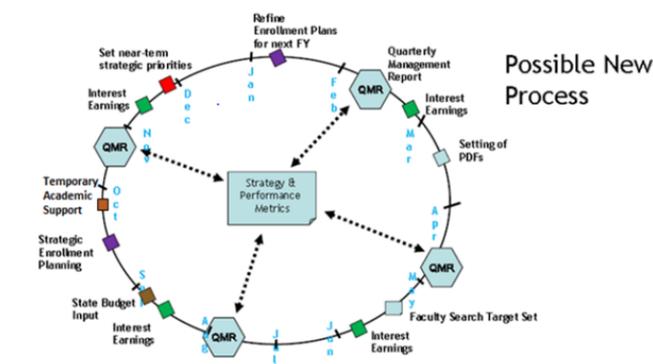
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The goal of IDMG is to make institutional data easily accessible, reliable, consistent and secure to support informed planning, decision-making, and communication by campus leaders. From the land of shadow systems, hours spent searching for data, and conversations focused on methodology...not content, we have a path to transform data into information and information into insight.

And Cal Assessment Network (CAN) members, along with members of other communities of practice, including but not limited to the Business Process Analysis Working Group (BPAWG) and the Policy Analysts Roundtable have supported us along the way. Your active participation in the 2010 IDMG Summer Series (which in addition to hundreds of participants who attended in person, has over 750 archived views as well), and that with your participation in the recent Cal Answers and Information Dashboard sessions are helping make our dreams a reality.

Now, more than ever, campus leadership is calling for “one question, one answer.” Through today’s discussion, we want to share other ways you can get involved and help us help the campus achieve our goals around IDMG.

Thank you for what you have done already and for what you are yet to do,

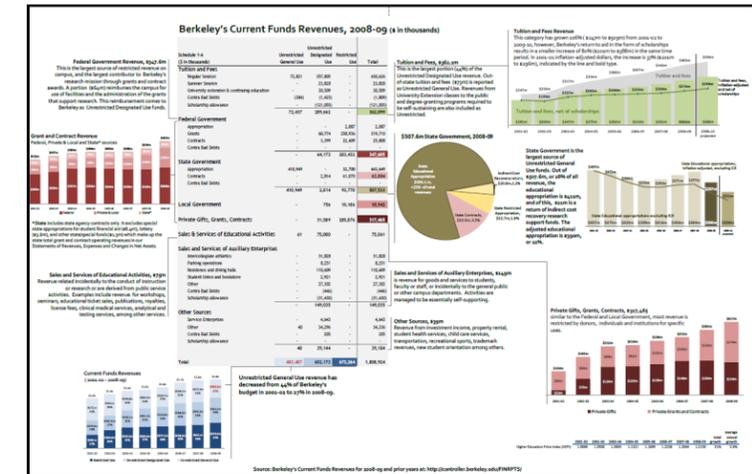


# Institutional Data Management and Governance (IDMG) Initiative

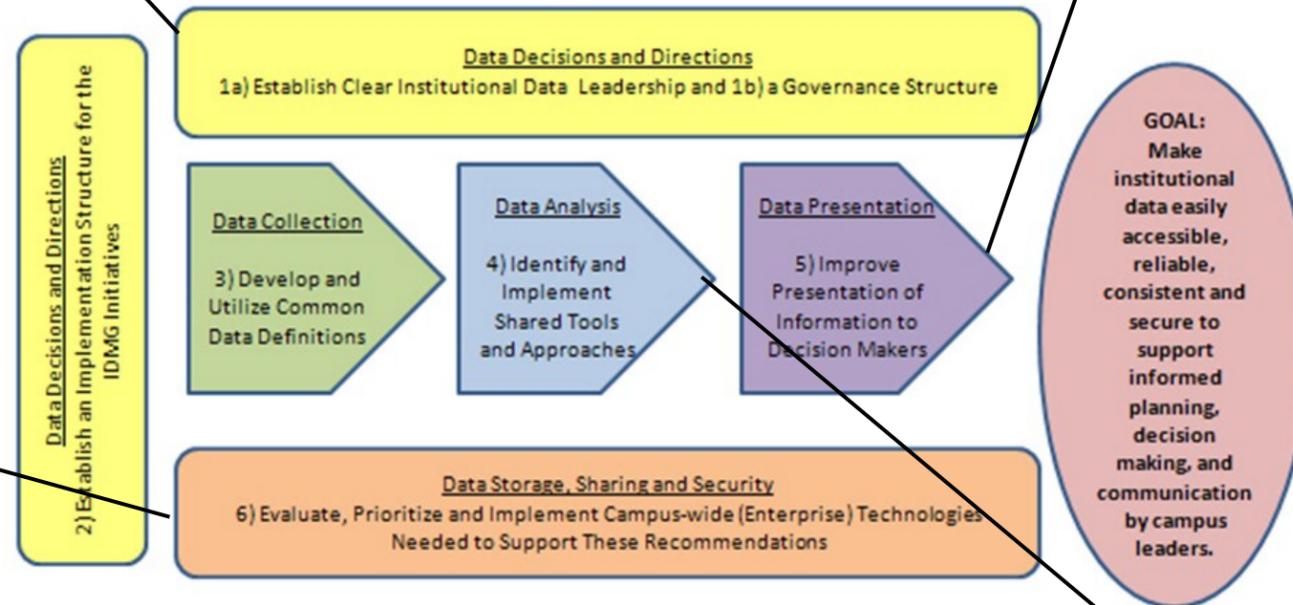
Some of the progress we have made...

## Data Presentation Support to Help Us Communicate Our Results:

Edward Tufte Seminar which led to the creation of the 2010 IDMG Summer Series: 8 part series on tips, techniques and tools on how to present information better. To access archived video streams and the materials (including those presented to the right), go to the IDMG website (<http://idmg.berkeley.edu/>)  
Stephen Few Seminar which led to the creation of the July 2011 CAN Information Dashboard session.



## IDMG Roadmap Recommendations



## IDC Council Membership:

### IDC Members

- Erin Gore, Associate Vice Chancellor – CFO (Chair)
- Gibor Basri, Vice Chancellor – Equity & Inclusion
- David Blinder, Associate Vice Chancellor – University Relations
- Pamela Brown, Executive Director – Office of Planning and Analysis
- Cathy Koshland, Vice Provost – Academic Planning and Facilities
- Harry Le Grande, Vice Chancellor – Student Affairs
- Jeannine Raymond, Assistant Vice Chancellor – Human Resources
- Delphine Regalia, Acting Controller
- Tyler Stovall, Dean – Undergraduate Division, College of L&S
- Andrew Szeri, Dean – Graduate Division
- Shel Waggener, CIO and Associate Vice Chancellor-IST

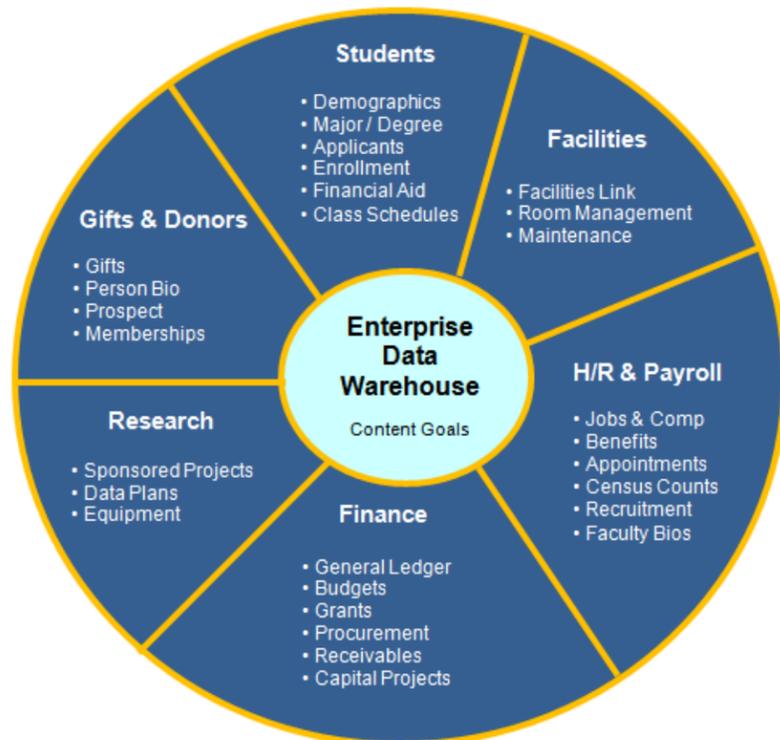
### IDMG Initiative Sponsors and Task Force Co-Chairs

- George Breslauer, Executive Vice Chancellor and Provost
- John Wilton, Vice Chancellor-Administration and Finance

### IDMG Initiative Design and Coordination

- Josh Blatt, Program Manager for Institutional Data and Analytics
- Katherine Mitchell, Organization Development Consultant (CORWE)

## Data Storage and Access Tools:



### Facilities Link:

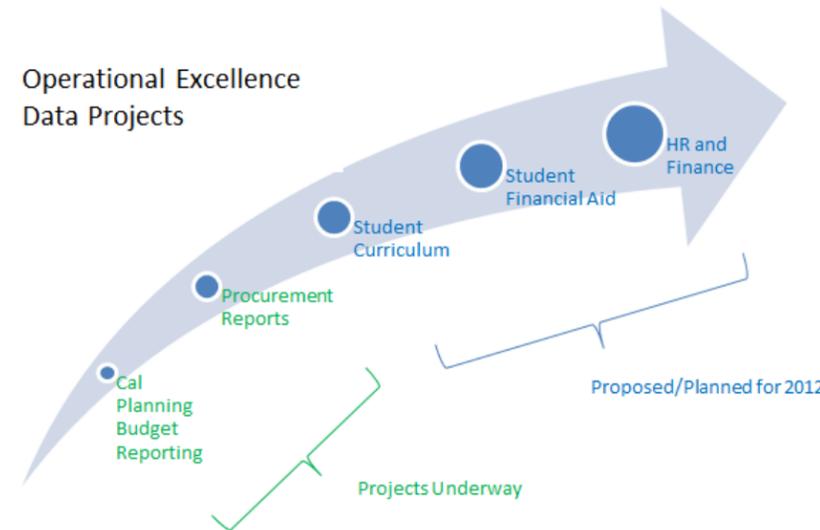
A web-based space-management tool that provides information about buildings, rooms, departmental assignments, and capital improvement projects, as well as downloadable floor plans, campus maps, and space analysis reports.

For more information, go to <http://smcp.chance.berkeley.edu/>

### BAIRS:

A Hyperion tool that provides financial and human resource information that will eventually be incorporated into the EDW and accessible through Cal Answers.

## Operational Excellence Data Projects



## Data Analysis Tools to Help Us Answer Today and Tomorrow's Questions:



The new reporting portal for Berkeley's Enterprise Data Warehouse which includes a campus dashboard tool to provide standard answers to frequently asked questions, along with an analytical query tool to respond to more complicated questions.

For more information, go to <http://ist.berkeley.edu/edw/>

## Cal Planning

A web-enabled, automated way for unit financial offices and department planners to develop annual budgets

A familiar Excel-like interface by which department users estimate, data-enter, annotate and submit their current year forecast and next fiscal year budget, including position/employee roster.

Interactive and dynamic tools for unit financial offices to work with departments and submit their consolidated budget to the University Budget Office

Reporting capabilities for analyzing and understanding the budget, including comparisons of prior, current and future year budgets, which will help us move from the old budget process to the new.



A campus survey tool used by the Office of Planning and Analysis, Graduate Division, Equity & Inclusion, Faculty Welfare, Operational Excellence, and other institutional research offices on campus and around the UC system. For more information, go to <http://cases.berkeley.edu/>