

RPM

PRIMARY OPPORTUNITIES			ACTIONS TAKEN/IN PROCESS	OUTCOME/HIGHLIGHTS
Prior Year (####)	Current Year (2020-21)	PO Identified		
0.00	3.00	Approval time/approval workflow process	Develop flow charts for processes with expected timelines/deadlines, that involves RPM such as: budget call, position control, rate & recharge, project planning document, and fiscal close. Update capital planning master list with added data fields to improve review and approval process. In addition, RPM will collaborate with various units to develop an overarching workflow chart and provide appropriate links to other units websites for major processes (units involved HR, BOC, SWPR, and others).	Improved the capital planning process by modifying the capital planning master list to include expenditure projections and expense reconciliations. Defined approval time for various workflow process on RPM's website including: Document Routed to OPERBUD: Up to 2 Days review and approval by RPM. Staffing Document Approval: Up to 3 Days review and approval by RPM. Salary Analysis for AVP Tran: Up to 2 Days review and provide RPM Exec Director/Assoc Director with salary analysis documentation. Data Change Form now retrieved from WFA Portal: Up to 3 Days review and approval by RPM. <u>Position Management Form: Up to 3 Days review and approval by RPM</u>
0.00	3.00	Effectively uses website and online documentation	Update staff directory, post updated training documents, and update existing policies posted on website.	Updated RPM's website to include director and manager's roles and responsibilities, updated RPM Staff directory, and uploaded various budgetary forms such as the Interlocation Transfer form, UC ANR's funding matrix, and the FY 2023-24 budget Call letter and form.
0.00	3.11	Clear procedures	Post various policies and procedures on website including: rate & recharge, deficit management, staffing reconciliation.	Updated Project Planning Document template to provide information that would streamline the payment review process and capital project workflow. Uploaded the rate and recharge policy and recharge form on RPM's website. Developed budget call process flow chart and posted on RPM's website. Developed standard operating procedures for staff which assisted with reconciliations and management of division's staffing list.
0.00	2.84	Training for clientele	Develop rate & recharge training manuals (template and fiscal close training), host zoom meetings for staffing training, and capital payment processing training	Provided rate & recharge and staffing training for various business managers throughout the fiscal year.
3.65	4.30	Effective Website	Changed landing page	More website visitors

ADDITIONAL OPPORTUNITIES IDENTIFIED (e.g. verbatim/themed comments, secondary opportunities)	ACTIONS TAKEN/IN PROCESS	OUTCOME/HIGHLIGHTS
Understanding my needs and requirements	TBD	TBD
Knowledgeable Staff	TBD	TBD
Moving in a positive direction	TBD	TBD