THE PAPERLESS MISSION
Caltech Paper Consumption

Procurement
- $110,000
- 75 tons
- 30,000 reams of paper
- 15,000,000 sheets of paper

Impact @ 75 tons
- 2,600 miles of paper (LA – DC)
- 1,200 trees
- 40,000,000 gallons of water (60 olympic swimming pools)

Waste & Recycling
- 200 tons recycled
- 400 tons thrown out
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**Impact @ 75 tons**
- 2,600 miles of paper (LA – DC)
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**Impact @ 150 tons**
- $220,000
- 5,200 miles of paper (LA – Madrid)
- 2,400 trees
- 80,000,000 gallons of water (120 olympic swimming pools)
Recycling at Caltech

RECYCLING AT CALTECH
Three Stream Recycling

CRV Beverage Containers
“CRV” or “CA Cash Refund”

Mixed Paper
no food soiled paper

Other Recycleables
no electronic or hazardous waste
REDUCING PAPER RELIANCE

PROCUREMENT SERVICES
Our Motivating Rationales

- Greater efficiency/process automation
- Improved customer service/satisfaction
- Create more value
- Reduction in paper/storage
- Reduce costs
Paperless Initiatives

- TechMart – Caltech’s eProcurement System
  - Implemented in 2005
  - Reduced paper Purchase Requisitions by 95%
    - 2004: 5,464
    - 2010: 231
  - Supports electronic attachment of all PO documentation
  - Electronic routing/approval
  - Simplifies document retrieval; specifically, for audit
Paperless Initiatives

- eFax Corporate – Internet Fax Service
- Customer since 2005
- Allows us to send and receive faxes by email as a PDF document
- eFax number assigned to every Purchasing Buyer and A/P Processor
- efaxcorporate.com
Paperless Initiatives

- Image Now – Document Imaging and Workflow
- Implemented in 2007
- Imaged documents: Invoices, Travel Expense Reports, and P-Card Transaction Approval Reports
- Electronic routing/approval
- Simplifies document retrieval; specifically, for audit
Paperless Initiatives

- Exegis – Certificate of Insurance Management Solution
  - Anticipated implementation by year-end
  - Automates the request, routing, and processing of certificates of insurance
  - Enables on-demand access
Challenges

- Change management/culture shift
- Electronic solutions
  - Annual costs
  - Technical support and administration
- Audit compliance
  - System approval
  - Record retention requirements
Opportunities

- A/P email dedicated to receiving invoices (pending DCAA approval)
- ePayables – automating supplier payment (early planning phase)
- A/P automation – front-end solution for electronically receiving invoices (pending demo)
- Automation of Payment Request form in TechMart (early planning phase)
GOING ALMOST PAPERLESS

INTERNATIONAL STUDENT PROGRAMS
Going *Almost* Paperless

- Not a goal in and of itself

- Broader movement towards “Sustainable Work Environment”
Maximizes use of resources so that we can do the work we need to do

Office processes and procedures that do not maximize our available resources hinder our ability to achieve our mission
Our Motivating Rationales

- If the government can do it, why can’t we?
- Strengthen use of electronic communications tools
  - Website
  - Email
- Be more efficient
- See if we could do it
What We Learned

- Required rethinking of every aspect of our office
- File Retention
  - Student files
  - Office files
- File Storage
  - Shared drive
  - Forms & handouts
- Processes & Procedures
  - Admissions
  - Employment authorization
  - Archiving records
What We Learned

- Better utilization of office resources
- Copier = Scanner
- Outlook
  - Client folders
  - Email templates
  - Office files
- PDF & MS Word
  - Fillable forms
  - I-9 manual
- Less Equipment
  - No label makers
  - No 2-hole punches
What We Learned

- More effective and efficient communications with our community

- Stronger Online Presence
  - Visa application info
  - Arrival checklist
  - Employment info
  - Document info

- Email Standardization
  - Templates only require sender’s email address
  - Links (not attachments) embedded in email
What We Learned

- Collaboration with other offices
- Requesting Electronic Resources
  - Admission letters
  - Supporting documents
- Shared Equipment
  - Copier/Scanner being used by others on floor
What We Learned

- Required us to rethink our working styles
- If it is important, put it on the shared drive
- Work off electronic notes versus printed notes
- No files on desk to prompt action; track email communications via Outlook
- Easier to consult on cases from wherever
What We Learned

- More mobile with our work environment
- All office documentation accessible online
  - Secure VPN connection
What We Learned

- Improvements in work environment
- Good-bye file cabinets, hello comfy couches! 😊
- No files lying around or in file cabinets with personal data
  - Exception = I-9 files
Questions / Comments?