

# Financial & Administrative Services (FAS) Quarterly Executive Report

Highlights from 2017-18

On behalf of all of us in FAS, it gives me great pride to introduce our new quarterly report.

Our goal is to provide a high-level snapshot of the activities that help create an environment at UCSF where people can do their best.

We will update you on our True North progress, big initiatives, how our services impact the UCSF community, and administrative updates.

*Paul Jenny*  
Senior Vice Chancellor,  
UCSF Financial & Administrative Services (FAS)



University Child Care Center at Mission Bay

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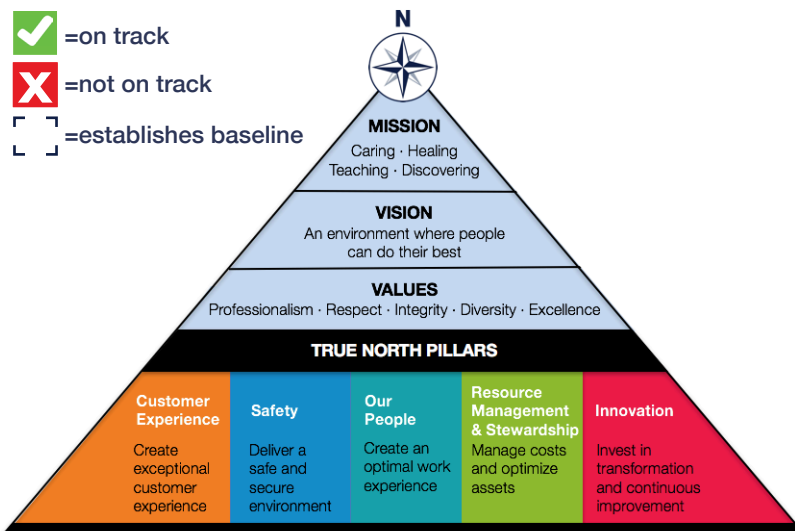
Questions? Email [SVC@ucsf.edu](mailto:SVC@ucsf.edu).

## FAS TRUE NORTH STRATEGIC PRIORITIES PROGRESS

In 2017-18, FAS established Plan-Do-Check-Adjust tools, discipline and behaviors to advance FAS's True North. We are on track to achieve most of our FY18 True North metric targets. See appendix for scorecard.

### Q4 Metrics Status

- =on track
- =not on track
- =establishes baseline



Progress on our **nine True North metrics**.  
See appendix for details.

### FAS Strategic Priorities

FAS has made progress in the inaugural year of advancing **five Strategic Priorities** in support of FAS True North pillars using A3 Thinking.

- **Improve Parnassus**  
Smaller beautification efforts until larger revitalization plan is established.
- **Optimize Resource Allocation**  
Simplify funding models and reduce non value-added effort.
- **Asset Visibility & Management**  
Create operational visibility into data and physical assets to create opportunities to reduce cost and administrative burden on departments and labs.
- **Culture of Continuous Improvement**  
Completed fourth year of Lean journey, including training, coaching, A3 problem solving and experimentation in active daily engagement. Future focus will be on alignment, expansion of active daily engagement, and ongoing training.
- **Achieve Carbon Neutrality**  
Ahead of plan and continuing to reduce emissions as new buildings open.

# FAS SPOTLIGHT: UCSF Real Estate

## Construction Progress

2019



Minnesota St. Graduate Student & Trainee Housing  
Construction complete  
Summer 2019\*



Center for Vision Neuroscience  
Construction complete  
Fall 2019\*



Clinical Sciences Building Retrofit and Renovation  
Construction complete  
End of 2019\*

2020



Joan and Sanford I. Weill Neurosciences Building  
Construction complete Spring 2020\*



Child, Teen & Family Center and Department of Psychiatry Building  
Construction complete  
Late 2020\*

2022

**FY18 Highlights**  
>LDDA finalized (LDDA=Lease Disposition and Development Agreement)  
>Project charter finalized

UCSF Research and Academic Building-ZSFG  
Begin construction Fall 2019\*  
Move-in Summer 2022

\*All dates subject to change.  
"Construction complete" signifies estimated end of construction, which may be different than "move-in" date.

## Transitions for UCSF Real Estate

UCSF Real Estate (formerly Real Estate, Planning & Capital Programs) joined with UCSF Health Design and Construction to form an integrated unit led by a newly created leadership position.

This transition enables us to better align development, planning, design, construction, and management of all space across UCSF.

New Senior Associate Vice Chancellor of Real Estate/ Vice President UCSF Health Brian Newman will oversee all campus real estate, planning, and capital construction activities, as well as UCSF Health-Major Capital Projects and the Design & Construction Division of UCSF Health Facilities & Support Services.



2 Northpoint  
Real Estate Property gift  
Offices for HR and UDAR  
Opening early 2020

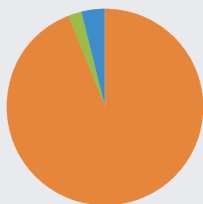


2130 Post Street  
Real Estate Property gift  
Jr. faculty housing  
Opening summer 2020

## Comprehensive Parnassus Heights Plan

UCSF has launched a planning process to define a bold, long-term vision to revitalize its historic Parnassus Heights campus to sustain its excellence across research, education and patient care. An inclusive and thorough RFQ process led to bringing on Perkins Eastman as the planning team lead. Surveys requesting input are going to all campus affiliates and nearby neighbors.

## By the numbers



**200** active projects

- valued <\$5m
- valued \$5m-10m
- valued >\$10m

**\$30m** Operating/recharge budget per year

**\$2.8b** 10-yr capital development plan oversight

**1.5m sq ft** Leased health care facilities, research labs, office, and residential space for which Real Estate provides asset management services

**\$208m** Current year capital project expenditures

**\$65m** Lease costs in Real Estate portfolio

**188**  
Total leases in portfolio = 1.64m square feet

## HOW FAS HELPS

A few ways FAS is creating an environment where people can do their best.

### Campus Life Services

#### More Child Care

Opened the University Child Care Center at Mission Bay, the largest child care facility in San Francisco, featuring 18 classrooms, 7 playgrounds, 2 art rooms, a healthy snack kitchen, and a lactation room for nursing mothers. Serving 272+ children daily, it tripled the capacity of the current program serving Mission Bay, nearly doubling the overall UCSF child care capacity.

### UCSF Finance

#### Increased Funding + Less Congestion

Negotiated a successful Facilities & Administration (F&A) rate agreement with the Federal government through 2020-21.

Expanded the package delivery program to divert more packages through Oyster Point, taking third party trucks off the UCSF campus streets, in support of Long Range Development Plan (LRDP) and UCSF sustainability goals.

### UCSF HR

#### Better Information

Launched UCSF PeopleConnect, new portal for UCSF employees and Health System managers to find HR information, submit HR questions, and follow self-guided steps to complete HR actions.

### UCSF IT

#### Improved Research and Clinical Data

Established central support for two major initiatives: High Performance Computing environment for the UCSF research community and the University of California Clinical Data Warehouse containing 14 million patient records.

### UCSF Police Dept.

#### Community Governance Model

Established the Police Community Advisory Board of 17 influential leader representatives of the UCSF Community, including staff, faculty and students. The board serves as a link between the community and the Police Department, enhancing communication and including broader community perspectives to influence local law enforcement services.

### UCSF Program Mgmt. Office

#### Advancing UCSF Priorities

Provided broad improvement support for 48 projects to 26 customer groups delivering services to advance process improvements, strategy, reorganizations and system implementations.

### UCSF Real Estate

#### Better Space Metrics

Partnered with other campus entities on the development of new space metrics and policy recommendations to improve research and administrative space utilization and productivity.

# ADMIN OUTLOOK

Be on the lookout for these broad change efforts.

What and Why?	What's Next?	Who is Impacted?
<b>Password change</b> Essential to data security	Wave 2 and 3 rollout	Initially higher risk accounts, eventually entire UCSF community
<b>UCPath deployment</b> Common UC system to support HR, payroll and benefits activity	Technical outreach, business/functional outreach, targeted communications	Primary system owners, control points, subject matter experts, governance groups
<b>Staff engagement support</b> Make UCSF a great place to work	Town halls, focus groups and workshops	Entire UCSF community
<b>HR assessment (Aon)</b> Options to enhance service/delivery to support growth	Analysis and recommendations	Project team and a subset of customers
<b>PeopleConnect Management Actions</b> Streamlined interface of current system, with Salesforce platform to maximize our need for flexibility	New HR transaction requests initiated in PeopleConnect Management Actions (end of October 2018)	HR and current Service Request System (SRS) users/people who submit HR transactions

## UCSF LEAN IMPROVEMENT STORY

### Customer Experience Pillar

How UCSF IT reduced the wait time for new computers



#### Problem

New computers at UCSF were **deployed in about 6-8+ weeks (or months)** and required **multiple processes** and channels.

#### Idea

In 2016, IT engaged in a lean improvement process with a **goal of decreasing delivery days** to get a new computer, **decreasing the number of re-opened tickets**, and **increasing customer satisfaction**.

#### Result

Over the next 18 months, IT **implemented an action plan** and leveraged the “Plan, Do, Check, Adjust (PDCA)” to make continual improvements. They **surpassed their goal**.



#### BEFORE (2015)



6-8+ weeks (or months!)



Multiple channels and processes

#### AFTER (2018)



<5 days (or hours!)



One-stop-shop

## FAS TRUE NORTH SCORECARD FY2017-18

Metric <i>(Metric description)</i>	Executive Sponsor	As of 6/30/17	Q4	FY18 Full Year	1-Year Target by 6/30/18	Related Strategic Priority
<b>CUSTOMER EXPERIENCE</b>						
<b>FAS Customer Satisfaction Index</b> <i>(FAS Average expressed on 1-100 scale)</i>	Becky Daro	N/A	65	63	Establish baseline	Resource Allocation, Continuous Improvement, Improve Parnassus
<b>SAFETY</b>						
<b>Lost work days due to injury</b> <i>(Expressed as # of lost days paid out)</i>	David Odato	5,208	251	2,054	5,052 ^	
<b>IT Security-related privacy breaches requiring individual and/or regulatory agency notification</b> <i>(Expressed as # of breaches)</i>	Joe Bengfort	0	Results communicated internally		0	
<b>OUR PEOPLE</b>						
<b>FAS Employee Engagement</b> <i>(Expressed on 1-5 scale)</i>	Paul Jenny	FAS Grand Mean: 3.96 <i>(Gallup 43rd percentile)</i>	n/a	FAS Grand Mean: 3.98 <i>(Gallup 46th percentile)</i>	>3.96	Continuous Improvement
<b>FAS Voluntary Turnover Rate</b> <i>(Expressed as % of all FAS Career Staff, excl. retirement)</i>	David Odato	6.7%	1.6%	5.3%	≤ 5.9%	
<b>RESOURCE MANAGEMENT &amp; STEWARDSHIP</b>						
<b>UCSF consolidated change in net position</b> <i>(Expressed in dollars)</i>	Teresa Costantinidis	(\$205M)	\$351M	\$529M	\$135M *	Asset Visibility
<b>Ratio of FAS expense to UCSF Enterprise expense</b> <i>(Expressed as % of UCSF Enterprise expenses)</i>	Teresa Costantinidis	5.8%	n/a	5.7%	6.0%	Continuous Improvement
<b>Carbon neutrality index</b> <i>(Expressed in metric tons of CO2 emitted)</i>	Gail Lee	114,070	n/a	105,850	≤ 113,356	Carbon Neutrality
<b>INNOVATION</b>						
<b>FAS Units Tracking KPIs</b> <i>(Expressed as % of FET DRs' units tracking KPIs on visibility boards)</i>	Mara Fellouris	N/A	17.9%	17.9%	Establish baseline	Continuous Improvement

As of 10/1/18

^ Original target revised to 5,052 to reflect a correction to the FY17 result; target remains to achieve a 3% reduction over FY17 result.