

# Financial & Administrative Services (FAS) Executive Report

## December 2019

When Chancellor Hawgood launched his four goals of Innovation, Partnerships, Resilience, and Culture at the 2019 State of the University address, he specifically talked about accelerating digital innovations to shape our future. Digital transformation is one of the key strategic priorities for UCSF Information Technology (IT). It requires deep collaboration between IT and the entire UCSF enterprise—the departments and people that directly deliver on our mission of learning, research, and patient care.

“Connect” was the theme of this year’s IT Sharecase conference, bringing together all those people in the same place to showcase the results of collective collaboration. Inside, please read more about some of the connections made possible by our partnerships across UCSF.

Paul Jenny  
Senior Vice Chancellor  
Finance and Administration

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



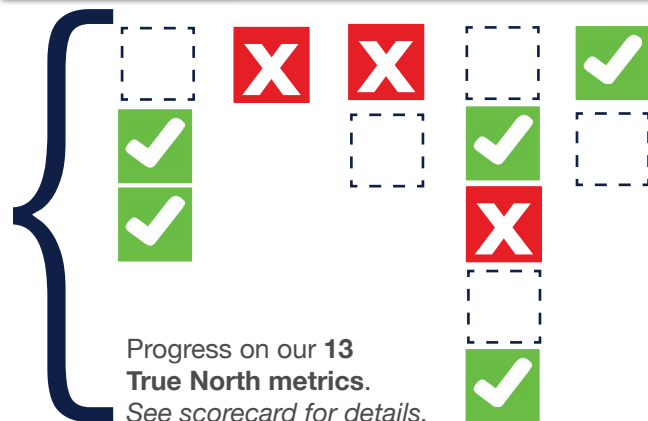
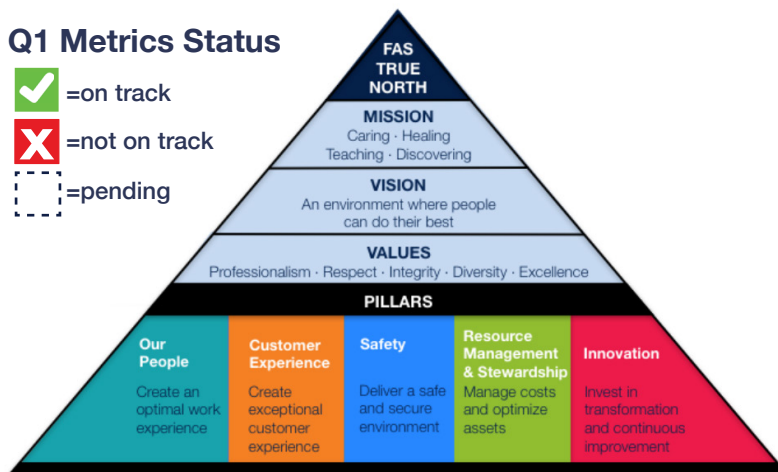
Benioff Children’s Hospital  
Oakland UCSF IT Staff



See previous issues of this report:  
[fas.ucsf.edu/fas-executive-report](https://fas.ucsf.edu/fas-executive-report)

### Q1 Metrics Status

- =on track
- =not on track
- =pending



### FAS TRUE NORTH Progress

#### How are we doing?

- Celebrate**
  - Our People metrics off to a solid start
  - Surplus of \$14.9M ahead of plan (change in net position)
  - ICAMP building assessments ahead of plan
  - Successful launch of Value Improvement with 69 proposals
- Obstacles**
  - Customer Satisfaction Index down 1 point
  - Workplace injuries trending above target rate
  - Variance from plan surplus largely due to vacancy savings

## FAS SPOTLIGHT: IT's SHARECASE 2019

Sharecase is a free, one-day event for everyone that showcases the best of information technology in support of UCSF's mission. Organized around the theme **Connect**, this year's event highlighted the ways we use technology to connect with each other, connect with our patients, trainees and collaborators, and connect to our mission to care, heal, teach and discover.



Sharecase2019Connect

### 3 SHARECASE HIGHLIGHTS

#### Connect for INNOVATION

“ Digital transformation is just transformation, not any different than any transformation. Digital transformation is about data. Quantify the customer need and redefine the measures of success to address the entire customer experience (who does what, when). ”



*Digital Transformation for Organizations,*  
Presenter Thomas Y. Lee, PhD  
UC Berkeley  
Haas School of Business



#### Connect for IMPACT

Homelessness has reached crisis levels and is often misunderstood. Data helps us move beyond the myths of homelessness to make an impact.

**22** units per **100** households

California has 22 units available for every 100 **extremely low income households**

**44%** age **50+**

44% have their **first episode of homelessness** after age 50

**3-4** fold increased risk for **Black Americans**

Homelessness is a **racial justice issue:** Black Americans at 3-4 fold increased risk of homelessness

*Homelessness: Data Informed Solutions,*  
Presenter Margot Kushel, MD  
UCSF Center for Vulnerable Populations

#### Connect for INCLUSIVITY

##### 5 Ways to Make Email More Inclusive For Blind Users

1. Avoid using repetitive characters as 'decorations' or separators, like using a lot of dashes with spaces. It could be an annoyance to screen reader users.
2. Hyperlink to the appropriate descriptive text, not "Click here" text.
3. Don't send image-only emails (header images are okay).
4. Always use the "Alt Text" field to convey the meaning of images.
5. Rethink using tables in email to control layout, as screen readers have difficulty interpreting.

*Digital Accessibility: A Blind User's Experience with Email,*  
Presenters Jill Wolters, Web Standards Program Manager, UCSF IT  
and UCSF blind screen reader consultant Marc Sutton

### BY THE NUMBERS

**1369** registrations

**63** sessions

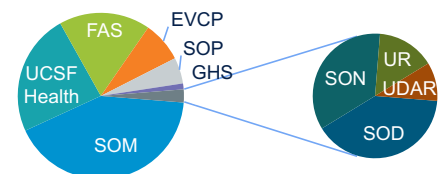
**850** lunches

**64** volunteers

**51** booths

**8** months of planning

**\$40k** sponsorship & prizes



## HOW FAS HELPS

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

### Campus Life Services

#### Improving Shuttle Service for Riders and Drivers

Transportation Services implemented several shuttle service improvements in response to the changing and growing transit needs of the UCSF community. The improvements include extended hours and streamlined service on some routes, and revised timetables on all routes that more accurately reflect shuttle arrival and departure times, based on current road conditions. Drivers' shifts and routes were modified to create additional routes and shorter breaks between split shifts. Visit Transportation online for updated routes and timetables.

### UCSF Finance

#### Showcasing the Ten-Year Financial Plan

UCSF Finance held their annual Ten-Year Plan Roadshow designed to showcase a projection of financial activity for the consolidated enterprise (campus and UCSF Health). Good news: we are on track! The plan examines all major revenue sources, expenditure needs and key balance sheet components (i.e., cash and investments, capital facilities investments, debt, etc.).

### UCSF HR

#### Protecting Our Community

In partnership with Diversity and Outreach, Risk Management, Legal Affairs, Ethics and Compliance, Audit and Advisory Services, Academic Affairs, and the Ombuds, HR revised and strengthened the policy on Violence and Bullying to include language to define and prohibit bullying and abusive conduct and clarify where to report this behavior. The revision makes existing expectations around violence and bullying clear and strengthens accountability.

### UCSF IT

#### Expanding Outlook to Benioff Children's Hospital Oakland

East and West Bay IT completed the migration of GroupWise email system used by Benioff Children's Hospital Oakland to UCSF's Exchange (Outlook), a crucial step in the One Bay effort. ~4,000 users transitioned to Outlook with minimal user impact. Benefits include consistent branding to patients, donors and colleagues, the ability to onboard employees to UCSF with no email changes, as well as visibility into availability when scheduling meetings.

### UCSF Police Dept.

#### Expanding RAD Program

RAD (Rape Aggression Defense) program is offered by UCSF Police Department on a quarterly basis, soon expanding to monthly classes. RAD includes educational components comprised of lecture, discussion, and physical resistive strategies. RAD sessions will be held in January 2020 at UCSF at Mission Center Building MCB, Fresno, and UC Hastings.

### UCSF Program Mgmt. Office

#### Helping Faculty Envision the Future of Research Space at Parnassus

Supporting the Vice Chancellor for Research, PMO staff are facilitating the Parnassus Research Space Planning Task Force to create recommendations for use of research space in the future revitalization.

### UCSF Real Estate

#### Providing Data for Emergency Planning

Created a Geographic Information System (GIS) based web portal that consolidated wildfire, power outage and road closure information with UCSF locations to aid with emergency planning and response during the Kincadee wildfire. The web platform was designed so that it can also be used for future disasters and emergency events.

# ADMIN OUTLOOK

Be on the lookout for these broad change efforts.

What and Why?	What's Next?	Who is Impacted?
<b>Composit Benefit Rates</b> Composite Benefit Rates webpage launched on the budget and resource management website, with resources to guide the user experience and FAQs	Composite Benefit Rates will launch in conjunction with UC Path, June 1, 2020.	Everyone on UCSF payroll
<b>Optimizing Resource Allocation Models (ORAM)</b> An effort to streamline fund flows in support of administrative activity and ensure funding allocations align with Chancellor's priorities	Solving the issue, reduction in internal transactions, unified campus-wide budget process, creation of new accountability measure and focus on customer service.	Primary impacts on FAS departments and customers
<b>Reporting Requirements for Foreign Receipts</b> Student Financial Aid (SFA) and Contracts and Grants Accounting (CGA) is working with Office of Ethics and Compliance to monitor and respond to the proposed changes by the Dept. of Ed.'s Section 117 reporting requirements for foreign receipts.	Response will be coordinated by the University of California Office of the President (UCOP). The council on Governmental Relations (COGR) and other professional organizations are compiling an industry-wide response.	If the changes are unchecked, the level of effort from SFA, UDAR, and CGA will increase significantly in preparing this semi-annual report.
<b>HR Comp &amp; Classification New Recruitment Types</b> - The new Straight Replacement and New Position, Like Job process launched December 9, reducing instances of classifying the same or like jobs multiple times, standardize workflow, and clarify roles and responsibilities	People Leaders should complete training in the UC Learning Center (LMS) to support their teams; UCSF HR is hosting several weekly Zoom drop-in Q & A sessions through January to support clients.	Campus People Leaders and HR Liaisons
<b>UCPath Deployment</b> Common UC system to support HR, payroll and benefits activity	UCSF deployment has been revised to June 1, 2020. Additional testing cycles to be added to confirm data conversion and systems integrations. Training for campus and Health stakeholders begins March 2020.	Primary system and process owners-cutover preparation, and training. Department administrators, all Campus and Health managers and supervisors, and all employees - will receive information for go-live.

## UCSF LEAN IMPROVEMENT STORY: Building Solutions through A3 Thinking

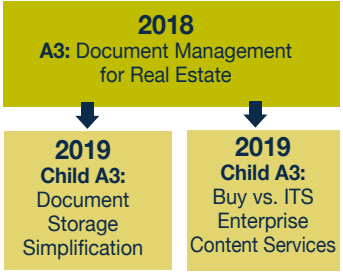
UCSF Real Estate invested in A3 thinking to begin building solutions to the challenge of being able to find the right document at the right time.

### Problem

#### What wasn't working?

UCSF Real Estate runs on information. When four units merged into one to create the department, each team had its own document storage tools and locations.

<b>12+</b>	<b>3-15 mins</b>	<b>&lt;12%</b>
locations documents stored	spent searching for one document	work hours annually searching for documents



#### What did we do about it?

Real Estate wants to reduce the number of places documents are stored and have better ways to manage document storage. They are leveraging A3 thinking to:

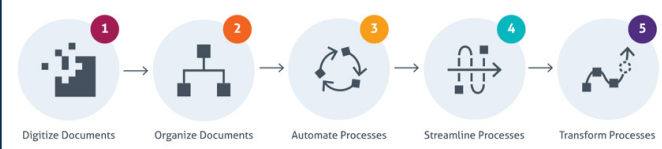
- 1) **Standardize processes and workflows** for document storage and access.
- 2) **Identify and adopt a platform** that supports the best practices in document management.

#### Steal This Idea: A3 as a Communications Tool

Most of the Real Estate staff has now taken the Lean Fundamentals training, which grounds them in the basics of problem-solving. A3s are a critical communication tool to clearly explain the problems they are tackling and what they are doing about them.

### Results

Real Estate identified the workflow for document storage transformation:



The new Child A3s will help simplify their workflows and adopt a platform, with some small improvements happening already:

1. **Reducing the number of locations** where files are kept.
2. Ensuring we **keep records as long as needed (but not longer)** by following the UC Records Retention Schedule.
3. Making documents easier to find with **standard naming conventions**.