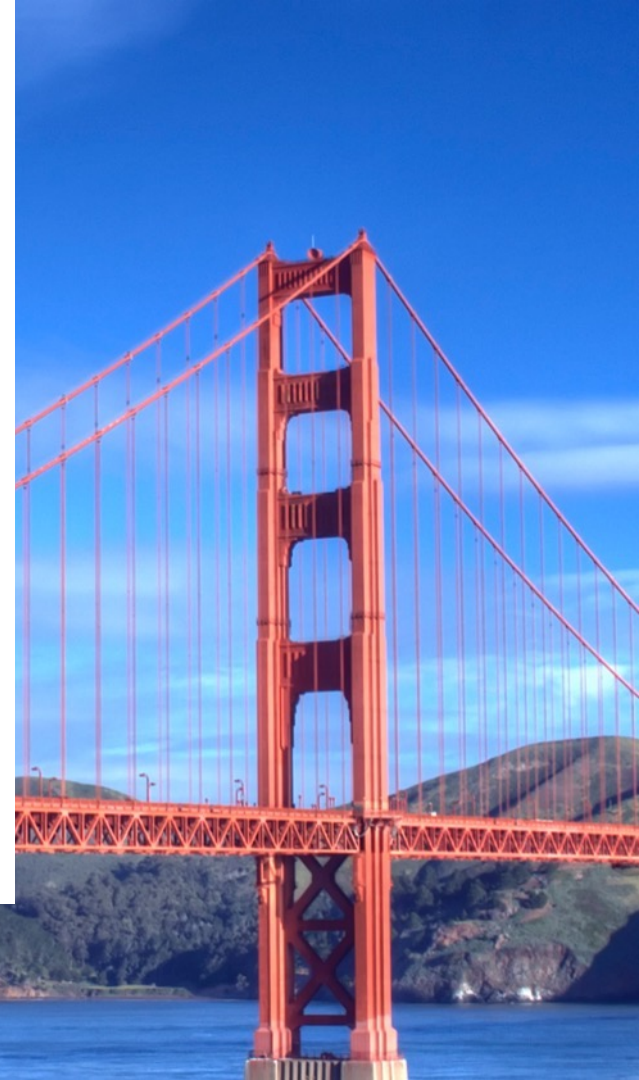




# FAS Managers' Town Hall

Friday June 10, 2022

**NETWORKING QUESTION:**  
*What was the worst place you  
have been stuck?*



# **TODAYS AGENDA**

- **Welcome and Senior Vice Chancellor Update**
- **Celebrating Our People: SVC STAR Awards, Chancellor Awards for Exceptional Service and Retirements**
- **FAS Staff Engagement Survey and Belonging Update**
- **Continuous Improvement Update and Conversation about Supplier Diversity**
- **Financial Update – UCSF and FAS**
- **A conversation with SVC Gore and UCSF Health President and CEO Suresh Gunasekaran**

# FAS DEAI-AR Speaker Series

with **Darrylyn Swift** and **Samira Lopez**  
Thursday, June 30, 2022, 12:10-1pm

**Darrylyn Z. Swift**, an expert in diversity, equity and inclusion strategies, will walk us through an intro to de-escalation concepts and principles and where to find training and resources. **Samira Lopez**, a Psychiatric and Mental Health Nurse and Lead for the Code CARE Support Team at UCSF will talk about the de-escalation program in development.

- Intro to De-escalation
- What is De-escalation
- Principles of De-escalation
- Where to find De-escalation training and resources (UCPD, CARE, FSAP)



## Event Details

Date: Thursday, June 30, 2022  
Time: 12:10 pm - 1:00 pm  
Where: Virtual Event

Join the Diversity, Equity, Inclusion, Accessibility & Anti-Racism (DEIA-AR) Steering Committee for the third event in the 2021-22 Speaker Series:

### An Introduction to De-Escalation

Darrylyn Z. Swift, an expert in diversity, equity and inclusion strategies will walk us through an **intro to de-escalation concepts and principles and where to find training and resources**. Samira Lopez, a Psychiatric and Mental Health Nurse and Lead for the Code CARE Support Team at UCSF will talk about the de-escalation program in development.

(Attendance at this event will count towards the FAS Education and Dialog goal of 50% staff participation in at least one DEIA-AR education event.)

>RSVP ONLINE

[fas.ucsf.edu/fas-deia-ar-education-and-events](https://fas.ucsf.edu/fas-deia-ar-education-and-events)

## Meet our Guest Speakers!



**Darrylyn Z. Swift**

**Darrylyn Z. Swift** has more than 30 years experience developing leadership and management strategies with a keen focus on diversity, equity and inclusion. As organizations and society become more diverse, and misunderstanding, conflicts, tensions and people's desire to understand grows, her approach is to meet the psychological and emotional needs of people to reach a level of understanding, acceptance and value.



**Samira Lopez, RN**, Lead for UCSF's Code CARE Support Team, with a specialty in mental health and psychiatric nursing. She has an extensive background supporting both patients and staff implementing trauma-informed care principles in medical settings.

Hosted by the FAS DEIA-AR Steering Committee

# Celebrating Our People: SVC STAR Awards, Chancellor Awards for Exceptional Service and Retirements





# Senior Vice Chancellor STAR Achievement Awardees



**Kathleen  
Yumul**

**Sarah  
Fidelibus**

**Jeff  
Jang**





**Kathleen Yumul**  
Wellness Manager,  
Campus Life Services  
Wellness & Community





**Sarah Fidelibus**  
Program Manager,  
Program Management  
Office (PMO)



**Jeff Jang**  
Solution Center Supervisor,  
Controller's Office



# Congratulations Chancellor Awardees for Exceptional University Service



**Sue Forstat**

Health Care Facilitator,  
Manager, Human Resources



**Morgan Vaisset-Fauvel**

Landscape & Grounds Program Manager,  
Facilities Services, Campus Life Services



# Congratulations Retirees

## **CLS**

Bob Key  
Cee Cee Shinn  
Dan Freeman  
Ho Biu Lau  
Jen Mannix  
John Nitis  
John Smotrys  
Jose Cortez  
Lashkari Suman  
Marta Fernandez  
Raj Sharma  
Roger Lacayo

## **HR**

Dr. Andrew Parker  
Cheryl Hardin  
Kevin Ching  
Lih Tom  
Marylou Armeli  
Michele Sahl  
Norma Fong  
Pam Hayes  
Rich Martini  
Shirley Silveira

## **Finance**

Alex Mendoza  
Catharine Brock-Healy  
Conrad Carpio  
Maria Mazzei Blednyh  
Syed Younus

## **IT**

Alex Robinson  
Jennifer Vo  
Rosemary Mau

## **PD**

Ben Gordon  
Bob Bohanan  
Salvador Madrigal

## **RE**

Christine Shaff  
Patti Mitchell

**Unmute and celebrate!**

# Welcome FAS staff new to this meeting



**Lei Zheng**

Contracts & Grants Accounting  
(CGA) Support Team Manager

# Welcome new staff



**Dr. Maggie Beers**

Associate CIO for Education  
UCSF IT



**Nick Freyaldenhoven**

Assistant Controller  
Accounting & Reporting



**Valerie Pasqual**

Contracts & Grants Accounting (CGA)  
Service Team Manager



# Welcome new staff



**Mara Bravo**

Program Manager, Program  
Management Office (PMO)



**Terri Hunter-Davis**

Content Strategist  
Human Resources



**Phil Isleta**

Manager, Talent Management  
Human Resources



# Our People: Staff Engagement Update

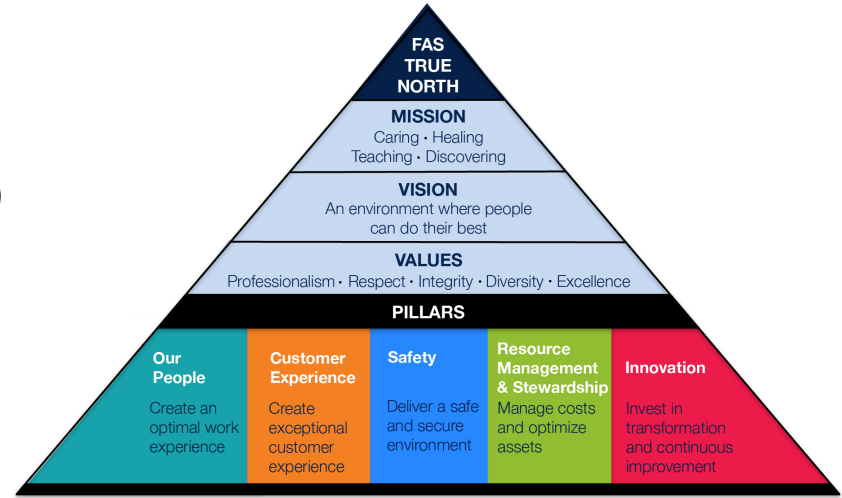


**Kim LaPean**  
Communication and Engagement Manager  
Office of the SVC

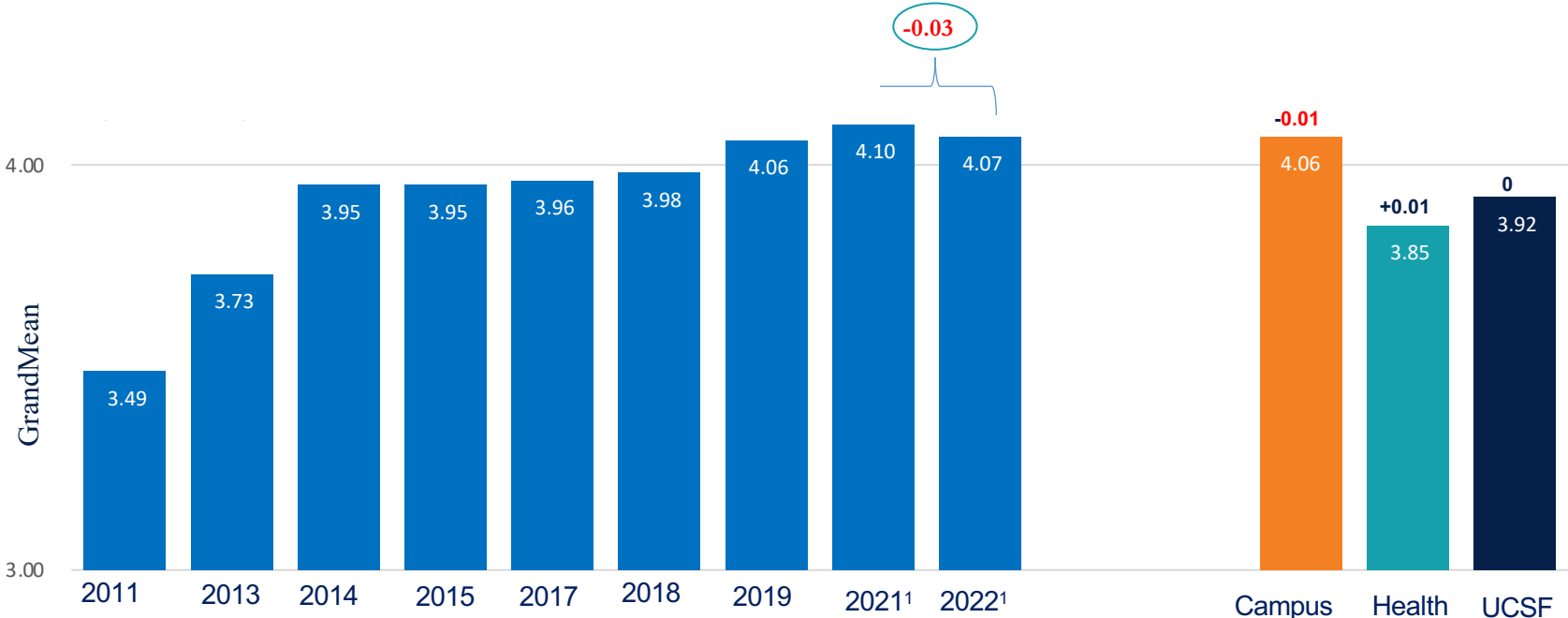
# Our People

**METRIC 1** Improve employee engagement +.01

**METRIC 2** Advance racial equity belonging (4 of 4 tactics)



# FAS Employee Engagement Grand Mean – decreased .03

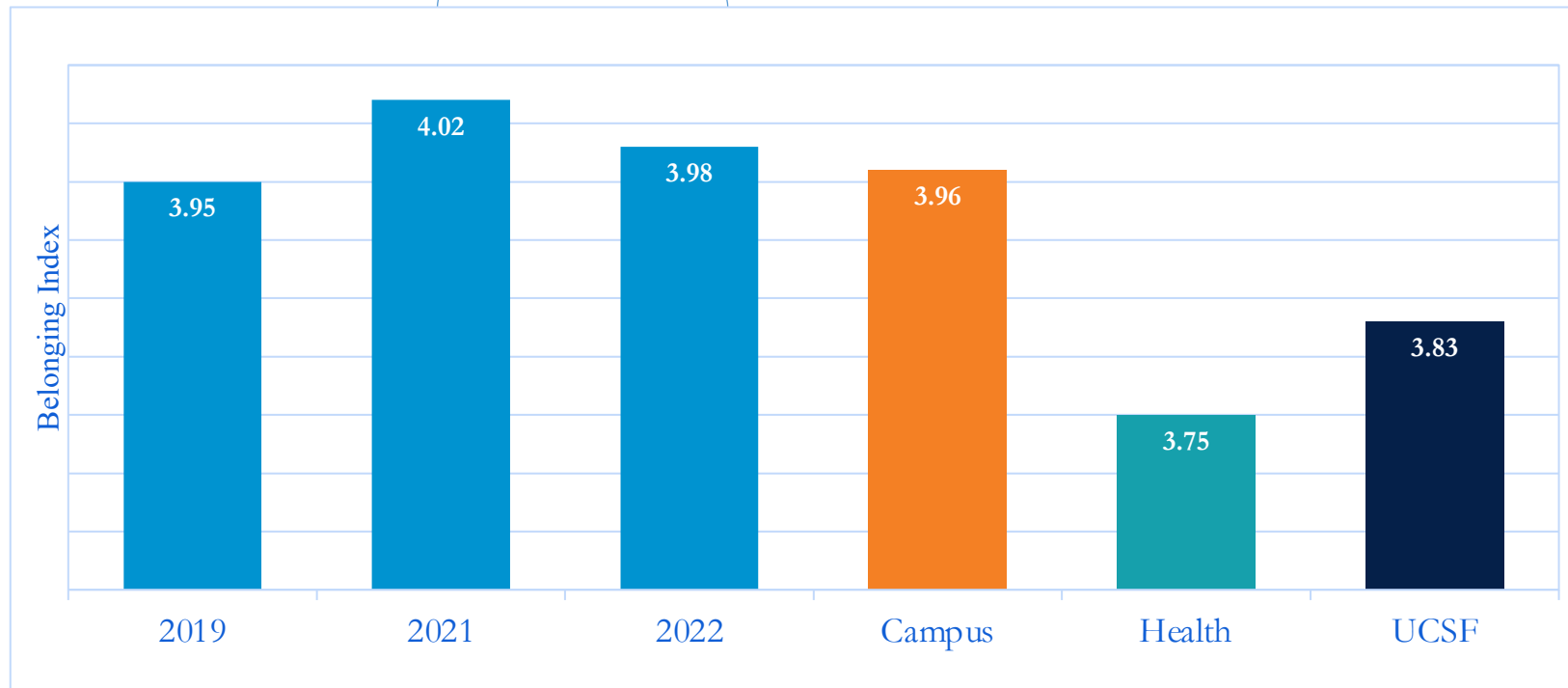


<sup>1</sup> FAS combines campus and Health employees in 2022

# FAS Belonging Index – decreased .04

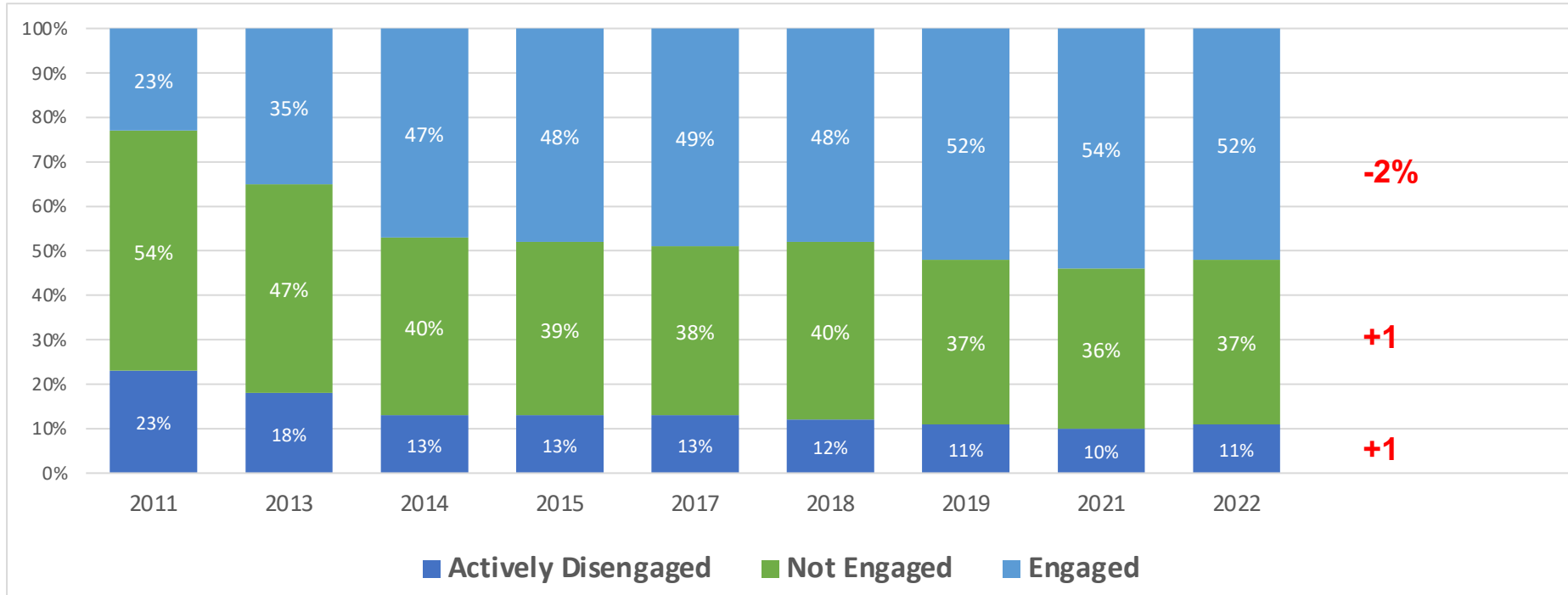
Change

**-.04**



# FAS Engagement Index – Proportion of engaged employees decreased slightly

Change





# Next Steps



<b>Now-August</b>	Share results with your teams
<b>June 30</b>	Deep dive of FAS results with Gallup
<b>Mid-July</b>	SVC all staff email with results
<b>July 28</b>	UCSF Staff Engagement Town Hall 12-1:30pm <a href="#">RSVP</a>
<b>August-September</b>	Action planning– new resources from L+OD <a href="#">Action Planning Guide for Managers</a> And new <a href="#">Engagement Action Labs</a>
<b>October 1</b>	Refreshed Action Plans complete – NEW using HR Umbrella
<b>Ongoing</b>	Check and Adjust

# FAS Continuous Improvement – Check-in Value Improvement and supplier and vendor diversity



**Stephanie Mackler**  
Chief of Staff  
Office of the SVC



**Marliz Copado**  
Strategic Sourcing, Supplier Diversity  
Anchor Institution Initiative

# FAS Continuous Improvement by the numbers



**62**  
participants

**29**  
ADE teams  
(Active Daily  
Engagement)

**217**  
ADE  
participants

**\$9.7m**  
value created  
VI first round

**67**  
Lean Level 1  
Awardees

2022-  
2024

**6**  
FAS depts

**19**  
projects

**8**  
coaches

4 FSC  
4 PMO

## VALUE IMPROVEMENT

# Congratulations to our FY2019 projects

Billy Reynoso	Day Shift Cleaning Model
Dean Shehu	Ultra Low Temperature Freezer Optimization
Caroline Hedge	Chemical Supply Chain Management
Julie O'Neal	Easy Money: Annual Fund Request Process
Mark Zuasola	New Contract Services BCH Oakland
Melanie Woods	Development of Work Plans for High Frequency Repairs
Chhunleng Tov	Reducing Credit Card Fees
Steven Wiseman	Optimizing the Talent Acquisition Function
Katy Rau	HR Roadmap – Staff Compensation Streamlined Processes
Sean Aloise	Facilities Services Onboarding Smartsheet
Shelley Patton	HR Roadmap – Labor & Employee Relations (LER)

# Congratulations to our FY2019 projects

Jeffrey Chiu	Contingent Labor Managed Services Provider
Felipe Rubio	Adopting New Technologies for Floor Care
Dan Standridge	Tool Check Out Program
Cindy Yoxsimer	Comprehensive Campus Managed Print Services
Mary Anne Hallacy	Lab Freezer Monitoring
William Tarangioli	Leased Campus Building Maintenance
Leebo Pomele	Replacing Old Floor Care Equipment with Updated Technology
Elia Camacho	Enhanced Carpet Cleaning
Michael Jang	Reduce Time to Perform Scheduled Maintenance Work
Erik Wieland	IT Portal
Mono Simeon	Using GIS Mapping to Lower Lab Renovation Cost



# Welcome to our 19 new projects

## FAS Value Improvement Program Overview – FY 22-24

Project Name	Lead	Sponsor	Goal
Financial Management Dashboard	Zuleikha Shakoor	Irene McGlynn	Create better financial management by creating efficient tools to monitor all financial risk indicators to identify, and determine the root cause and correct or mitigate these risks.
Autoclaves as a Service	Eli Perszyk	Paul Landry, Gail Lee	Adopt a centralized business model where autoclave services are provided to academic research, operations are maintained at a high level, risk to staff is minimized and the equipment is operated with minimal utility consumption.
UCSF Lactation Rooms and EMS Scheduling Screens	Caroline Wick	Laura Ishkanian, Cindy Yoxsimer	Adopt and install EMS scheduling screens for lactation rooms to increase productivity and solve problems related to disrupted workflow and internal services.
Campus Life Services Website Overhaul	Jane Huynh, Brian Cosgrove	Cindy Yoxsimer	Update the CLS website Infrastructure to comply with UCSF's updated standards and improve security, accessibility, and customer service.
Commissioning Manual	James Comte	Cesar Sanchez, Paul Laundry	Finalize and deliver a commissioning manual to Facilities related Real Estate Projects to lower cost to operations by improving processes and eliminating wastes in construction.
Facilities Services Incident Notification Tool	Kate Shimshock	Cesar Sanchez	Identify and implement an incident notification tool with scalable, relatable and user-friendly incident notification system.
Lab Services Initiative-Equipment Moves, Adds, Changes	Patrick Borg	Cesar Sanchez	Improve communication of procedures related to lab equipment deliveries and installation to mitigate unplanned equipment orders, service fees, and frustration.
UCSF Campus Custodial Staff Injury Reduction	Billy Reynoso	Cesar Sanchez	Reduce work-related injuries related to improper body mechanics, physical environment, and lack of safety awareness.
Mission Bay Lab Plastics Recycling	Daniel Chau	Billy Reynoso, Gail Lee	Increase diversion rate of lab plastics from going into the landfill by purchasing lab consumables made from recycled plastics and eventually creating a closed-loop process by having the same company recycle non-hazardous lab plastics.
Implementation of Mobile License Plate Recognition (LPR) Technology	Joe Braucher	Amit Kothari	Implement Mobile License Plate Recognition (LPR) to reduce inefficient manual processes, improve customer experience and employee satisfaction.
Bluefin Credit Card Auto Journal	Rachel Francisco	Shannon Turner	Adopt an automatic journal approval process to reduce costs and effort to credit card journal approval processes.
Creating Value through Improved A/R Process	Penny Mitchell	Ellyn McCaffrey, Christine Chiang	Reduce the time it takes to identify and transfer unapplied payments to reduce the number of problematic deposits.
Procurement Contract Management, Storage, Entry	Susan Riddle	Andrew Clark, Vanessa Wong	Create standard and efficient processes for procurement contract management in order to address growing backlog.
Supplier/Vendor Diversity Database Synchronization	Marliz Copado	Andrew Clark, Vanessa Wong	Create a supplier diversity and inclusion program to promote procurement from small, local and diverse businesses.
Accessibility Available to all UCSF Website Visitors	Jill Wolters	John Kealy	Prioritize efforts to make all public-facing websites accessible to all website visitors, reducing opportunities for litigation.
Password Change Self-Service Support	Erik Wieland	Jane Wong	Raise awareness of the self-service password management tool in order to reduce password related IT tickets.
Untapped	Emma Sebastian	Jane Wong	Adapt AI assisted software to provide insight on employee technical skills to guide growth and development, staff in-demand projects requiring specialized skillsets and improve employee satisfaction.
Security Guard Optimization	Eric Banares, Brian Perry	Mike Denson	Utilize roving security guards after normal business hours to increase safety by reducing incidents related to unauthorized access, reduce crime in Mission Hall, and allow vendor's access for deliveries.
FAS Admin Space Optimization	Becky Daro	Erin Gore	Reduce unused office space freed up by the shift to working from home by consolidating FAS offices and relinquishing unused space.

### Problem Statement & Target

**Problem Statement:** Accurate certification status for SLD (small, local, diverse) businesses is not consistent in our current supply base. Seventy five percent of users surveyed in 2021 reported that it was difficult to very difficult to find SLD businesses for purchases. Thus, resulting in underutilization of our diverse suppliers.

**Target:** Our UCSF community will have awareness of and ease of access to updated certified suppliers which is validated for accuracy by Supplier.io and will be determined by periodic surveys.

### Metrics and Value – Actuals and Targets

*Data actual through FY22 Q3, March 2022*



\$ ROI to date: \$0K benefit - \$0K expense = (\$0K) \$ROI



### Root Cause(s) and Countermeasures

Root Cause(s)	Countermeasure(s)
The W-9 form omits local certifications as well as supplier diversity council certifications	Explore limitations and capabilities of the system in conjunction with understanding the correlation with the W-9 form
People are challenged by finding SLDs	Promote visibility of SLDs by creating helpful tools and indicators in BearBuy (explore a Supplier.io punchout)
Limited awareness of UCSF supplier diversity spend goals	Create communication, marketing and educational tools

### Results, Next Steps, Escalation

**Results/Lessons Learned:** We identified the need for a specific and targeted survey of purchasing decision makers and end users to guide our assumptions. Changing systems is difficult.

- High Level Next Steps:**
1. Assess Supplier.io certification accuracy of current supply base in order to create a priority list of action items.
  2. Create a list of purchasing decision makers and end users for targeted surveys to define tools needed.
  3. Collaborate with Health to share best practices with supplier diversity efforts

**Barriers/Obstacles requiring escalation:** Our team identified a need to add a member with P2P system expertise.

# Financial Update – UCSF and FAS



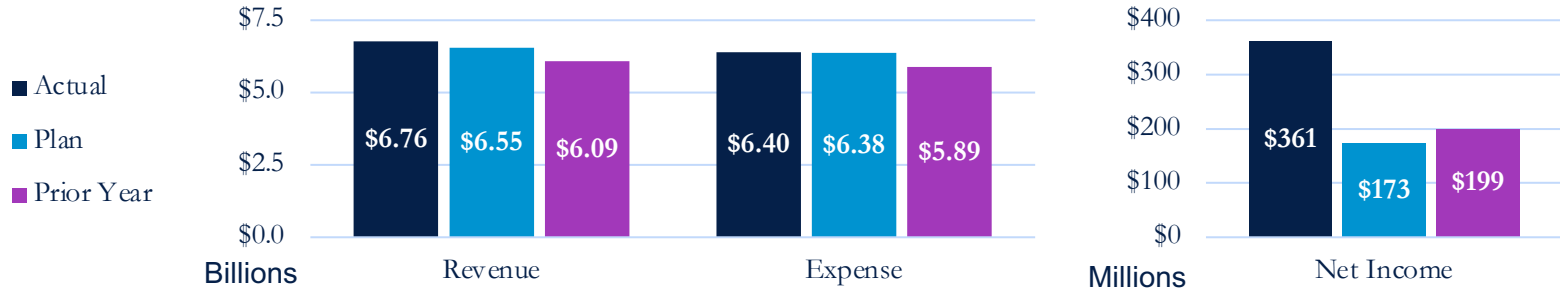
**Mike Clune**  
Senior Associate  
Vice Chancellor and  
Chief Financial Officer



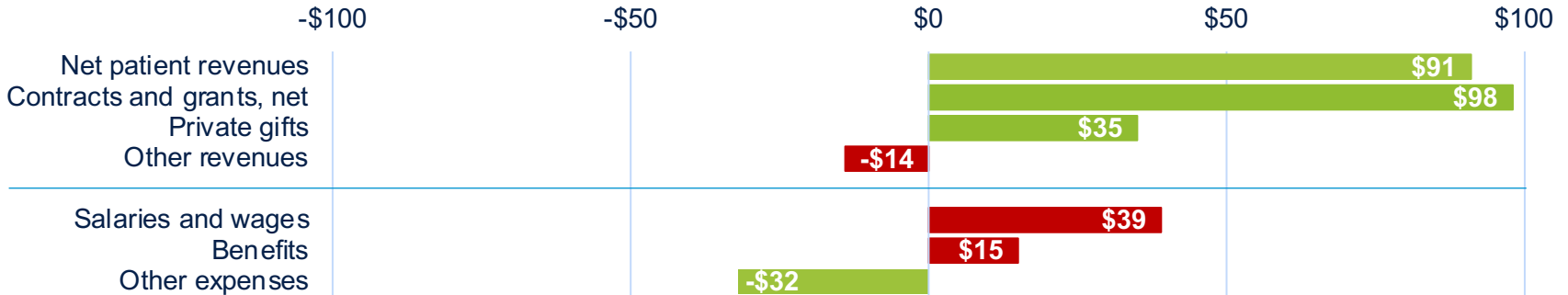
**Linda Moran**  
Director,  
FAS Finance Service Center

# UCSF is experiencing another strong year, with growth in revenue and strong net income ahead of plan

## Revenue, Expense and Net Income, 201-22 Q3 Year-to-date



## Revenue and Expense Variance Detail (millions)



# Our major revenue sources remain solid...

Source	Outlook
Patient care	● Volumes are generally strong
Sponsored research	● Revenue, pipeline, and federal support remain solid
Philanthropy	● Continuing strong support for UCSF
State funds	● Pending State budget provides a 5% base budget adjustment
Investment earnings	● Recent market volatility
Auxiliary revenue	● Recovery for auxiliaries <del>will be</del> is slow

...but we face some significant cost pressures, including construction cost escalation, rising borrowing rates, housing and seismic remediation obligations, IT investment needs, and operating cost challenges



University of California  
San Francisco

# Finance and Administration Financial Results

April 2022

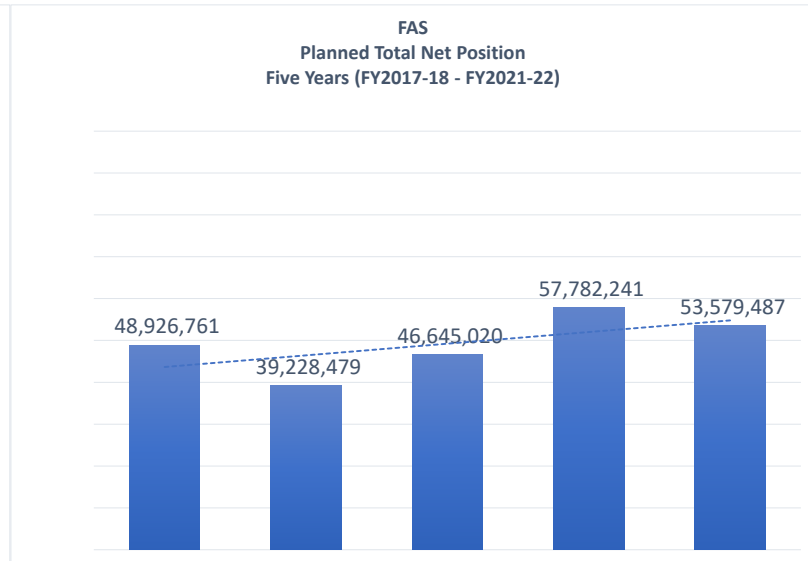
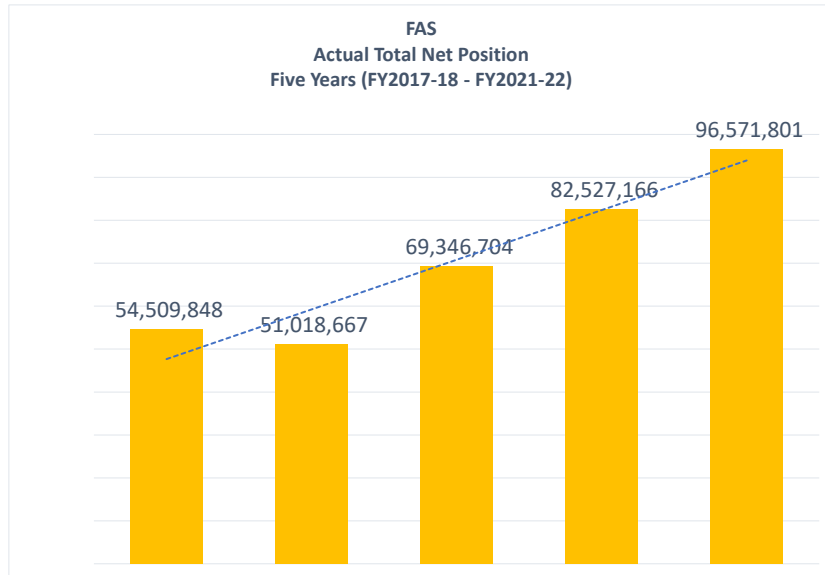
Linda Moran  
Director, Finance Service Center

# FAS financial results are \$45 million better than plan this year

	2021-22 Plan	2021-22 Forecast	Var \$	Var %
Revenue	437,280	434,471	(2,810)	-0.6%
Expense: payroll	253,357	220,765	(32,593)	-12.9%
Expense: non-payroll	195,984	183,322	(12,661)	-6.5%
<b>Income/(Loss) from Operations</b>	<b>(12,061)</b>	<b>30,384</b>	<b>42,444</b>	<b>351.9%</b>
Total Other Changes	(19,089)	(16,613)	2,476	13.0%
<b>Change in Net Position</b>	<b>(31,150)</b>	<b>13,771</b>	<b>44,920</b>	<b>144.2%</b>
Total Net Position - Beginning	82,527	82,527		
Total Net Position - Ending	51,377	96,298	44,920	87.4%
In thousands, Forecast @ 5/17/22				

# FAS Net Position has doubled in five years

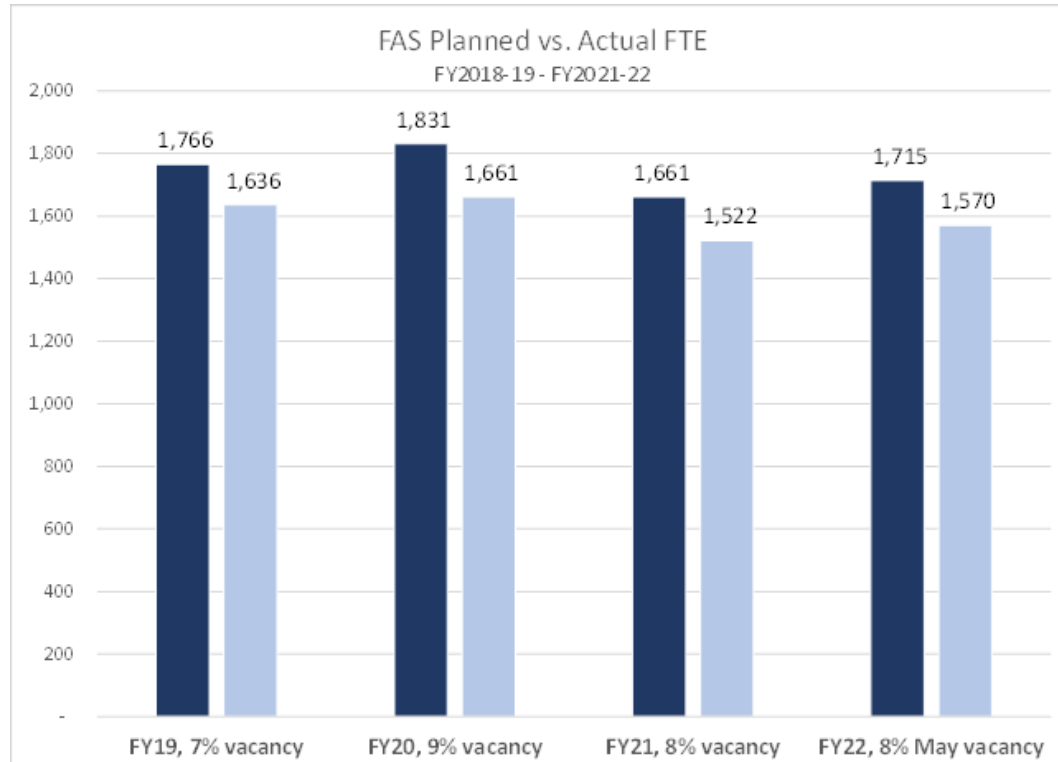
...yet our financial plans have not reflected this change





# FAS plans for full staffing

- ...yet we have vacancies of 8%, and \$33 million of payroll savings this year



# Next Steps

Understand new landscape, transform operations and funding to continue optimal support of UCSF

## Spring

### Spring 2022

- SVC commits to FAS self-investment of \$5.5 million in support of Auxiliary recovery
- Request Chancellor consider funding \$2.6 million HR and some IT critical operating needs (see ATT7)

## Summer

### Summer 2022

- IT: work with IT colleagues to develop IT Cloud and IT Analytics proposals implementation and funding plan
- CLS: work with CLS colleagues to conduct business recovery analyses:

## Fall

### Fall 2022

- Study core allocation, permanent allocation and annual methodology for accurate fund deployment
- Incorporate refinements based on client feedback for even more efficient and informative budget process

# A Conversation with SVC Erin S. Gore and UCSF Health President/CEO Suresh Gunasekaran



We'll see you this Fall!