UCSF
University of California
San Francisco

FAS Managers' Town Hall

Delivering Value to the UCSF Plan

November 9, 2011

Agenda

Delivering Value to the UCSF Plan

1. Guest Speaker	Executive Vice Chancellor and Provost, Jeff Bluestone
2. Welcome New FAS Managers	Becky Daro
3. Refit of FAS Strategic Priorities to the UCSF Plan	Becky Daro
4. The New AP / HR Organization	David Odato
5. Gallup Breakout Groups – Sharing Employee Engagement Strategies	Becky Daro with Leadership Team

UCSF's 2014-15 Plan

VISION:

To be the world's preeminent health sciences innovator.

2014-15 Goals

1. Provide unparalleled care to our patients
2. Improve health through innovative science
3. Attract and support the most talented and diverse trainees in the health sciences
4. Be the workplace of choice for diverse, top-tier talent
5. Create a financially sustainable enterprise-wide business model

Strategies

1

Hire and retain the top healthcare providers

Accelerate the translation of groundbreaking science into therapies for our patients

Provide a world-class patient experience

2

Maintain our commitment to excellence in basic science and collaboration efforts within the UCSF research community

Invest in infrastructure that enables UCSF to excel at basic, clinical and population research

Lead and influence biomedical research policy at the national level

3

Increase professional and graduate student financial support

Develop infrastructure to support new experiential, team-based, interdisciplinary learning models

Create a learning environment in which our trainees thrive

4

Establish and communicate clear goals and direction – at all levels

Enhance development opportunities for faculty and staff

Compensate faculty and staff based on performance and at market levels

Create an environment in which faculty and staff can thrive

5

Collaborate with our local community on educational and economic opportunities and health enhancement

Design and implement transparent and effective budgeting and planning processes

Maximize existing revenue streams, develop new ones and continue OE efforts to manage costs

Welcome

- **PMO** – Linda Kittle
- **Police** – Eric Partika
- **CLS Finance Service Center** – Jerome Ripley
- **CLS Facilities Management**
  - Jewel Barton
  - Sal Genito
- **Finance**
  - Teresa Costantinidis
  - Justin Sullivan
  - Tammy Wallace
  - Michael Clune
- **ITS**
  - Joe Bengfort
  - James Hong
  - Doug Berman
  - Dedra Chamberlin
  - Edwin Martin
  - Sean Schluntz
  - Ramesh Doraivelu
- **AP / HR**
  - David Odato
  - And many others to be introduced later…

FAS Has Ten Strategic Priorities To Become a Well Run Business and Support The UCSF Mission

Mission

Advancing Health Worldwide

Which Drives

UCSF Core Priorities

- **Patients / Health**
- **Discovery**
- **Education**

Which Enables

Business

Business – A Well Run Organization

Operational Excellence Priorities

1. Enhance IT Infrastructure & Rationalize Services
2. Streamline Financial Processes & Provide Transparent Management Reporting
3. Enable Research Administration Excellence
4. Deliver Efficient, Seamless HR Administration
5. Collaborate & Continuously Improve To Achieve Efficiencies

Other Business Priorities

6. Plan for UCSF's Physical Development through 2030
7. Create a Sustainable, Resource Efficient Environment

Deliver

Our People

People – Making a Difference Every Day

8. Ensure Public Safety
9. Sustain a Diverse, High Quality Workforce with Great Managers
10. Create a Service Culture

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Refit of FAS Strategic Priorities to UCSF Plan

"Invest in the Vision"

1. **Provide unparalleled care to our patients**
2. **Improve health through innovative science**
3. **Attract and support the most talented and diverse trainees in the health sciences**

"Leverage our Talent"

4. **Be the workplace of choice for diverse, top-tier talent**

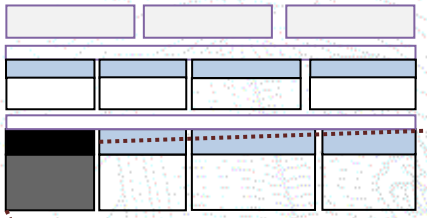
- Establish & communicate clear goals & direction
- Enhance development opportunities for faculty & staff
- Compensate faculty & staff based on performance & at market levels
- Create an environment in which faculty & staff can thrive

"Secure the Foundation"

5. **Create a financially sustainable enterprise-wide business model**

- Continue Operational Excellence efforts to manage costs
- Maximize existing revenue streams and develop new ones
- Collaborate with our local community on education and economic opportunities and health enhancements
- Design & implement transparent and effective budgeting and planning processes

Refit of FAS Strategic Priorities to UCSF Plan



Continue Operational Excellence efforts to manage costs

FAS Strategic Priorities & Initiatives:

OE IT
- Consolidate Email
- Consolidate Help Desks
- Enhance Campus Network
- Consolidate Desktop Support
- Consolidate Data Centers
- Single Sign-On

OE Finance
- FAS Fin Svc Ctr Process Improvements
- BearBuy
- Blackline (Balance Sheet Reconciliation)
- Central Recharge Proposal Unit
- Financial Processes & Policies

OE Research
- iMedris
- Research Clusters

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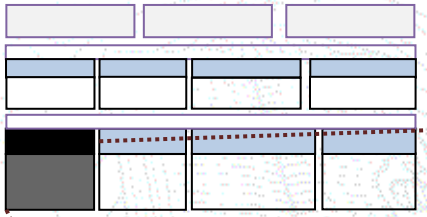
Refit of FAS Strategic Priorities to UCSF Plan



Continue Operational Excellence efforts to manage costs

FAS Strategic Priorities & Initiatives (cont'd):

OE HR

- Academic PAFs
- UCOP HRIS/PPS Replacement Project
- Campus HR Shared Services

Collaborate & Continuously Improve to Achieve Efficiencies

- Promote Teleconferencing
- FAS Print Management
- Surplus Sale Consolidation w/ UCB
- Opportunities for Administrative Efficiencies w/ MC, UCOP, Other Ucs

Plan for UCSF's Physical Development

- Lease Consolidation
- FAS Space Optimization
- CPMS

Refit of FAS Strategic Priorities to UCSF Plan

Collaborate with our local community on education and economic opportunities and health enhancements

FAS Strategic Priorities & Initiatives:

Plan for UCSF's Physical Development

- LRDP

Create a Sustainable & Resource Efficient Environment

- Energy Management Projects
- Water Efficiency

Refit of FAS Strategic Priorities to UCSF Plan

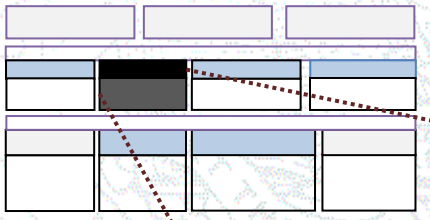
Design and implement transparent and effective budgeting and planning processes

FAS Strategic Priorities & Initiatives:
OE Finance

- Enterprise-wide Planning & New UCSF Business Model
  - Ten Year Financial Plan (Kaufman-Hall Model)
  - Recommendations for revenue strategies
  - Funding Streams: Operating Fund Redistribution (formerly 19900 Funds Flow)
  - Funding Streams: Systemwide assessment distribution (begins November)
  - Pooled Benefits Rate
  - Data Access & Transaction Security

- Financial Management Reporting & Budgeting Project (MFRBP)
  - PI Portfolio
  - Budget Tool
  - Financial & Operational Management Reporting
  - COA
  - Modeling Tool

Refit of FAS Strategic Priorities to UCSF Plan



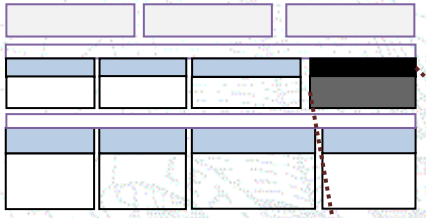
Enhance development opportunities for faculty and staff

FAS Strategic Priorities & Initiatives:

Sustain a Diverse, High Quality Workforce

- Career Path & Job Families
- Succession Planning
- Training Management
- Learning & Development Strategy (focus for FY11-12)

Refit of FAS Strategic Priorities to UCSF Plan



Create an environment in which faculty and staff can thrive

FAS Strategic Priorities & Initiatives:

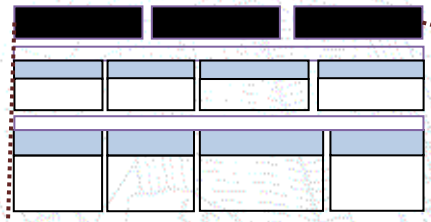
Sustain a Diverse, High Quality Workforce

- Great Manager (Employee Engagement focus for FY11-12)

Ensure Public Safety

- Mission Bay public safety plan for Campus & Med Ctr.
- Emergency Care & Shelter
- Business Continuity Planning
- Mass Notification
- Seismically Resilient 911 ECC
- Global Anti-Terrorism Project

Refit of FAS Strategic Priorities to UCSF Plan



Provide unparalleled care to our patients	Improve health through innovative science	Attract and support the most talented and diverse trainees in the health sciences

FAS Strategic Priorities & Initiatives:

OE IT: Enhance Service & Data for Researchers

Capital Infrastructure Projects:

- Patient Parking (Mission Bay, Mt. Zion, Millbury Union)
- Faculty Office Building
- Seismic Projects (UC Hall, Clinical Sciences Building, SFGH)
- Capital Renewal, Code and Life Safety Upgrades

FAS Delivering Value to UCSF's 2014-15 Plan - DRAFT

"Invest in the Vision"

1 Provide unparalleled care to our patients

2 Improve health through innovative science

- Enhance Service & Data for Researchers

3 Attract and support the most talented and diverse trainees in the health sciences

Capital Infrastructure Projects:
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"Leverage our Talent"

4 Be the workplace of choice for diverse, top-tier talent

Establish & communicate clear goals & direction – at all levels

Initiatives:
- TBD

Enhance development opportunities for faculty & staff

- Career Path & Job Families
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- Training Management
- Learning & Development Strategy

Compensate faculty & staff based on performance & at market levels

- TBD

Create an environment in which faculty & staff can thrive

- Great Manager

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"Secure the Foundation"

5 Create a financially sustainable enterprise-wide business model

Continue Operational Excellence efforts to manage costs

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- Identity & Access Mgt. (Single Sign-On)
- Application Rationalization

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Initiatives:
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Operational excellence Update TO FAS Town Hall

The New AP/HR Organization

November 9, 2011

OE AP/HR

- **Goal of restructuring initiative**
  - Improve service, availability and quality
  - Standardize processes and provide supporting on-line tools to increase efficiency
  - Create a professional career path for Staff HR and AP professionals including job families, standard job descriptions, salary equity and market competitiveness
  - Reduce costs ($5M-$8M)

- **Organizational Structure**
  - Five shared services clusters with customer departments serviced in similar programmatic groupings
  - Generalists to handle routine and some advanced consultative and transactional activities
  - Specialists in Staff HR and Academic Personnel to handle complex areas
  - Leverage relationship between Staff Specialty Center and Medical Center HR where appropriate

OE AP/HR Update

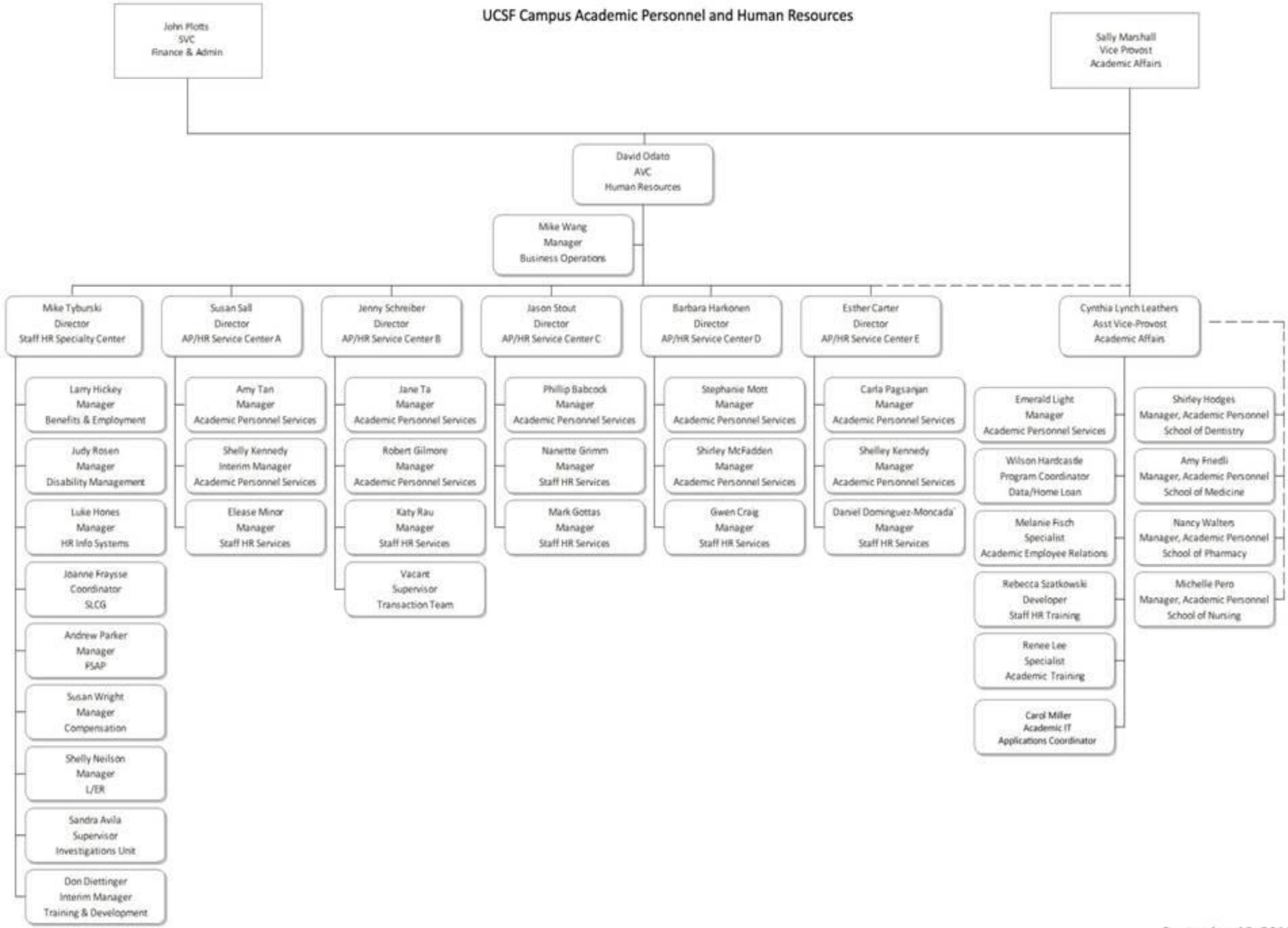
- **Recruitment**
  - Competitive recruitment of approximately 175 positions, 85% of which have been filled internally
  - Assignment was based on candidate qualifications, relationship/knowledge of client departments, applicant preference and organizational needs
  - AP/HR workforce is now assigned to positions within the AP/HR job families that leads to enhanced professionalism and a career path
  - Not everyone got a job in the new organization – either there were fewer positions than applicants, or the candidates were not qualified; unsuccessful candidates and their MSOs were contacted individually by one of the directors
  - The remaining unfilled positions are open for external recruitment; UCSF employees may also apply

- **Go Live dates depending on space readiness**
  - Cluster A – January 25, 2011, LHTs
  - Clusters B and E, April 2011, LHTs
  - Clusters C and D, May 2011, MCB
  - VPAA, December/January, LHTs (depending on space readiness)
  - Staff Specialty Centers, November-ongoing as clusters go live, LHTs

OE AP/HR

- **Funding Model**
  - Many adjustments to incorporate multiple stakeholder feedback; model complete and costs being updated to reflect final recruitment and go-live dates
- **Transition Planning**
  - Roles and responsibilities of new AP/HR organization and departments for redesigned processes (staff, academic and post doc) vetted, revised and finalized with multiple departmental stakeholders
  - Departments who will be served by Cluster A are actively engaged in critical path activities to achieve the January go-live
  - Training strategy complete and materials development underway
  - AP/HR Advisory Board to be formed prior to go-live
- **Technology**
  - Managerial Self-Service (MSS) on-line tool to support customers and links between customer and service provider being enhanced/tested
  - MSS tool will provide visibility into work load and time to completion, and support monitoring of Service Level Agreements

UCSF Campus Academic Personnel and Human Resources



September 19, 2011

AP/HR Service Clusters

Service Cluster A

- Susan Sall, Director
- Amy Carter, Manager
- Amy Tom, Manager
- Elease Minor, Manager

Service Cluster B

- Jenny Schreiber, Director
- Jane Ta, Manager
- Katy Rau, Manager
- Robert Gilmore, Manager

AP/HR Service Clusters

Service Cluster C

- Jason Stout, Director
- Phillip Babcock, Manager
- Nanette Grimm, Manager
- Mark Gottas, Manager

Service Cluster D

- Barbara Harkonen, Director
- Gwenn Craig, Manager
- Shirley McFaden, Manager
- Stephanie Mott, Manager

AP/HR Service Clusters

Service Cluster E

- Esther Carter, Director
- Daniel Dominguez-Moncada, Manager
- Shelley Kennedy, Manager
- Carla Pagsanjan, Manager

Business and Operations

- Mike Wang

Academic Personnel

Academic Personnel

- Cynthia Leathers, Director
- Emerald Light, Manager
- Wilson Hardcastle, Program Coordinator Data/Home Loan
- Melanie Fisch, Academic Employee Relations Specialist
- Carol Miller, Academic IT Coordinator
- Renee Lee, Academic Training Specialist
- Rebecca Szatkowski, Staff HR Training Developer

Staff Specialty Center

Staff Specialty Center

- Mike Tyburski, Director
- Sandra Avila, Lead Investigator
- Don Diettinger, Acting Manager, Learning and Development
- Larry Hickey, Manager, Benefits and Employment
- Luke Hones, Manager, HRIS
- Shelley Nielsen, Manager, ER/LR
- Andrew Parker, Manager, FSAP
- Judy Rosen, Manager Disability Management
- Susan Wright, Manager, Compensation

How Do You Drive Engagement?

Gallup Impact Planning Process:

Key Steps:

1. Discuss
2. Select
3. Plan
4. Follow-Up

FAS Work Groups Selected Each Q So Far

Q12. Opportunities to learn and grow	5
Q11. Progress in last six months	4
Q10. I have a best friend at work	11
Q09. Coworkers committed to quality	0
Q08. Mission/purpose of company	3
Q07. At work, my opinions seem to count	0
Q06. Someone at work encourages my development	6
Q05. Supervisor/someone at work cares	0
Q04. Recognition last seven days	9
Q03. Do what I do best every day	3
Q02. Materials and equipment I need to do my work right	3
Q01. I know what is expected of me at work	1

Q10 – I have a best friend at work

- A strong predictor of performance:
  - Top scoring work groups on Q10 achieve 1-2 percentage points higher profitability, 5-10% higher customer ratings, and 20% fewer accidents

- Why it matters: Friends are more likely to be **cooperative**, **share information, suggestions and opinions, accept feedback**, **tolerate disagreements**, and be **supportive**

- It's not about making people be friends; it's about creating a workplace where friendship is possible

- Action plans focus on enhancing the quality of relationships between employees, in turn nurturing trust and loyalty

Q4 – In the last seven days, I have received recognition or praise for doing good work

- Employees who do not feel adequately recognized are twice as likely to say they will leave their company in the next year

- How much is enough: You can never give too much recognition if it is honest and deserved – Gallup rule of thumb is once per week per person because it encourages team members to repeat positive behaviors

- Action plans focus on creating a culture of recognition:
  - Forms of recognition are specific, predictable, frequent, and instantaneous
  - Praise comes from every direction
  - Everyone knows how others like to be recognized

Q6 – There is someone at work who encourages my development

- "Development" does not mean "promotion," it means helping individuals find roles that fit their unique combination of skills – not about putting in what is left out, but **drawing out what is left in**
- Requires commitment from both the manager and the employee
- Mentors do not have to be your boss
- Action plans focus on finding roles to fit an individuals unique strengths

Q12 – This last year, I have had the opportunities at work to learn and grow

- Something about human nature hates to be stuck in one place – Q12 is about finding **new educational opportunities and new experiences**

- Employees who learn have better ideas

- Action plans focus on identifying team and individual learning goals and finding opportunities to advance them:
  - Training & seminars
  - Increased responsibility
  - Special projects
  - Finding more efficient ways to do a current job

Breakout Groups – 30 Minutes

Goal: Understand team specific issues and share action ideas that will or could be implemented for your team

1. Introductions: Name & Department

2. Review Gallup description of what this item means

3. Discuss what this item means for you or your team? What is the need that you are trying to address? For example:
    - Q10 “We never have time to get together as a group” or “We feel isolated in our separate locations”
    - Q4 “We are a bunch of lone wolves who have to deal with demanding customers on our own”
    - Q6 “Conversations with my boss are about specific problems, not about my development”
    - Q12 “I don’t feel like there is anything new I can learn in my job”

4. Share ideas of actions you could implement to address this item for your work team – Pick something specific you could check on after 1 quarter to verify it has a happened (**S**pecific, **M**easurable, **A**ttainable, **R**ealistic & **T**imely)

5. Email summary to rebecca.daro@ucsf.edu