
From: Senior Vice Chancellor John Plotts [plots2@UCSF.EDU]
Sent: Wednesday, September 01, 2010 4:31 PM
To: FAS-STAFF@LISTSRV.UCSF.EDU
Subject: Message to the FAS Community

TO THE FAS COMMUNITY

August 31st marked the end of the UC system-wide furlough and salary reduction program. This program was difficult and painful for all of us. It is remarkable that, despite the reduction in work time this past year, our talented and dedicated staff continued to provide and improve essential business services which support the UCSF mission.

First, I would like to thank the staff from every FAS department for proactively managing through this difficult time through careful planning, keeping customers informed, and continuing to adhere to our FAS principle of providing service with CARE.

Second, I would like to highlight some of the major efforts put forth, despite time reduction, to improve future business services for UCSF:

1. We have been an integral part of the Operational Excellence (OE) initiative charged with achieving \$48 million of on-going savings for UCSF over three-years. This has been, and will continue to be, an enormous effort involving the hard work and input from many of our people. FAS will play a major role in the four OE areas:
 - Information Technology,
 - Financial Processes and Reporting,
 - Human Resources, and
 - Research Administration.
2. We opened the FAS HR Service Center. This new model of service will provide an example to future campus-wide service centers (as part of the OE initiative) aimed at ensuring a uniform, high standard of administrative services; enabling employees to achieve expertise in service areas; and enabling the campus to operate more efficiently.
3. We are developing, and will implement over the next three years, improvement strategies in the areas of:
 - Physical Infrastructure,
 - Sustainability,
 - Public Safety,
 - Workforce, and
 - Our FAS Customer Service Culture.

You can expect future communications that describe in more detail our FAS strategies and progress. As a starting point, below you will find an addendum of “FAQs” addressing campus-wide OE questions.

I want to express my gratitude and appreciation to each of you for your continued commitment to FAS and for your service to UCSF despite what I know to be personal and professional hardships imposed by the furlough and salary reduction program.

With my personal thanks,

John E. Plotts
Senior Vice Chancellor
Finance and Administration

Addendum: Campus-Wide OE Frequently Asked Questions

An Operational Excellence Communications work group has been created to develop two-way communication mechanisms to keep the UCSF community informed and solicit broad feed-back. As a first step, a series of “FAQs” have been developed to address common questions. Below you will find OE FAQs and their answers organized into three categories:

- General Questions,
- IT Focus, and
- Research Administration Focus.

These OE questions and answers are targeted to a broad campus-wide audience. Please feel free to send comments to: operationalexcellence@ucsf.edu

General OE Questions

1. Is it true that UCSF is centralizing all administrative services?

No, UCSF is not centralizing all administrative services. However, in order to reduce our costs and to minimize the replication of processes, we must become more efficient and change how we work.

The OE effort is looking into the best way to accomplish this. The initial report to the Chancellor demonstrated cost savings could be achieved by pooling together some of the administrative services which are currently replicated in multiple departments. The current thinking is a cluster-style organizational unit might best meet the Chancellor’s charge. Not only does the work flow need to be streamlined, but the information technology that supports our work needs considerable investment to be more effective.

2. What are Service Centers (Clusters) and how are they going to work?

We do *not* know definitively what a campus-wide service center (also called a cluster) looks like, what services it will provide, what services will remain within a department, where it will be located, how it will be governed or how we will pay for it. These are the questions the OE Work Groups are working through now. The design and activities assigned to a cluster, or grouping of administrative services, are the charge of the OE Work Groups.

We *do* know some fundamentals that are guiding how we develop these pooled administrative services/clusters.

- We do know that the identity and integrity of departments (especially within the Schools) will be preserved.
- We do know that pooling administrative services into groups is more cost effective than replicating that service in multiple departments, ORUs and Interdisciplinary Research Centers.
- We do know that the clusters will be organized to support both the school departments and central departments.
- It is likely that a school department may receive some of its support by functional teams housed within one cluster – ‘one stop shopping’.
- We do know that these new groupings will enable smaller departments access to a service level that they might not have been able to provide for themselves.
- We do know that groupings of subject matter experts into teams will provide a consistent level of service, backup for holidays, illness and unexpected absences. It will also ensure consistent application of policy and procedures.
- We do know that any service that is provided to a department will be required to adhere to strict performance standards. The department will partner with cluster management to provide performance feedback and successful team assignments.
- We do know that it is likely that Research Administration, Staff HR & Academic Affairs and Finance will house some of their services in cluster-style organizations while some activities within each of these functions may remain within the department.

3. When will the OE changes impact me? When will my job change?

The FAS and EVC organizations have already made significant progress in implementing service centers to lead the way in achieving administrative efficiencies and cost savings. The FAS HR Service Center began operations in July and Finance shared services units are anticipated to be rolled out early winter. Some departments will start participating in new Service Centers / Clusters in May, 2011 while other departments may not participate until the last months of 2013.

Administrative jobs within departments (both within FAS and the schools) will change as the service centers, tools and processes roll out throughout the following years. Additional OE benefits include new training programs and the introduction of new job families that have career path opportunities clearly defined, such as with the FAS HR Shared Services Center. The overall OE implementation plan will take place over the course of three years following the broad timeline below:

March, 2010: Comprehensive plans for initiatives vetted and submitted to the Chancellor.

June, 2010: Chancellor announces her decision and charges the campus to move forward with Operational Excellence.

June, 2010: OE Coordinating Committee, chaired by John Plotts and Jeff Bluestone, kicks off next phase of OE effort.

July – December 2010: OE Work Groups translate the Chancellor’s charge into a working reality. Designs and processes for new ways to work are developed and then vetted by the campus, OE Coordinating Committee and Chancellor. Implement changes in organizations such as FAS and EVC.

January – April 2011: Develop detailed rollout and implementation plans for the schools. Volunteer school departments aligned for initial phase of the OE effort.

May 2011: First school departments participate in a new way to work.

July 2013: OE becomes fully implemented throughout UCSF.

OE IT Focus

Achieving the objectives of campus-wide Information Technology improvements is being welcomed, endorsed and encouraged across campus. The question for the OE IT initiatives is not “*Do we have to make the change?*” The question is “*When can this happen?*” There are a number of focus areas in information technology. As a start, four IT Work Groups – Helpdesk, Email, Network/Wireless, and Procurement – have just begun to tackle these priority issues with an objective to achieve results within a year.

1. Right now I have to carry around a bunch of different phone numbers to call if my computer crashes. I never seem to get anyone when I really need them. Is this ‘fix’ on someone’s ‘to do’ list?

The goal of the Helpdesk Work Group is to make it much easier for you by having only one point of contact when something goes wrong. It won’t make any difference if you are a student, staff, or faculty. You should be able to get help via one telephone number, email, web, chat, or maybe walk-in location. This level one Helpdesk should be able to address the majority of the problems with first-call-resolution (e.g., password changes, minor problems) and will triage the rest to the appropriate level 2 and level 3 support centers. The hours of support will also be extended.

2. I had one email address. Then I moved to another job and now I have another email address. I have problems getting my mail.

In order to simplify some very basic IT support issues, we will restructure the UCSF Active Directory and subsequently consolidate all Campus and Medical Center email/calendar services (including disaster recovery) into a single Microsoft Exchange environment (preferably outsourced). As a result, everyone at UCSF will have an email identity which will be some permutation of first and last name. This unique email identity can be attached to one or several SMTP addresses (e.g. @ucsf.edu or @ucsfmedctr.org) depending on business needs. These actions should alleviate problems with email receipt and provide a better experience especially when moving from one part of UCSF to another.

3. It is hard enough to work around old systems but it seems that a stable network should be a given. Plus, I just want to be able to take my laptop to a meeting and get connected easily.

We are working on a plan that will upgrade the wired and wireless campus network with the long-term goal of providing the entire UCSF community with a high-speed, reliable, secure, and sustainable voice and data network. The first phase of this effort will focus on the architecture and deployment of modern equipment for the campus data network with an emphasis of blanketing the campus with ubiquitous wireless coverage. We will pay for this improvement with funds generated by the \$35 data recharge program.

4. Costco is on the way home. Why can’t I stop there and buy a laptop for our new Postdoc?

We know we have some real work to do in making computer purchases a better experience and have already made significant progress in negotiating campus-wide and UC wide strategic sourcing contracts along with improving the purchasing process. UCSF is one of the areas’ largest employers and we can use that advantage for better pricing, better support services, delivery, etc. We lose those benefits when staff buy goods independently for UCSF rather than as part of the UCSF procurement system. We recognize we have to make it beneficial to you, as the client, to utilize the IT Tech Stores. Our plan is for a central procurement/vendor management office to proactively provide you support for IT expenditures across all of UCSF (including the Medical Center). We have one OE Work Group that is focusing solely on making this more effective and a more user friendly transaction.

OE Research Administration Focus

The schools are intensely involved in the changes taking place in Research Administration. FAS plays an enabling role in the design of Research Clusters and in the implementation of the RAS PreAward System. Both initiatives will benefit the schools by improving the quality and consistency of service to Principle Investigators, lowering costs and decreasing processing time.

1. Other administrative areas at UCSF are much more 'broken' than Research Administration. Why are we even working on Research Administration?

Research Administration has benefited from really positive changes over the past several years and all the more reason to keep the momentum going. Supporting the faculty in their research is a cornerstone of UCSF and one that merits our best efforts at continual and significant improvement.

The OE Research Administration Work Group has a three pronged approach:

- Streamline the current pre-award process by making the proposal development, submission and award set up as easy and clear as possible and eliminating unnecessary back and forth including duplicative signatures'
- Create a Research Administration job family where all related positions will be designed and updated to reflect the new way to work. In addition, ensure equitable review across all positions and provide clearly defined career ladders and transparent advancement that encourage a highly professional level of service, and
- Implement training and ongoing education which ultimately will result in appropriate levels of professional certification and signature authority.

The implementation of the new RASII research system supports the new way to work in research administration by knitting together process and technology.

2. Our department's pre-award works fine, our faculty is really happy. Moving that support to a cluster can't be good.

Our department struggles with supporting our Faculty's research. We don't have someone who can focus on getting their research stuff done.

These two comments reflect very common and valid concerns throughout the academic departments. They strike at one of the principles the Chancellor has highlighted - the importance of departments having equal access to outstanding administrative support.

The OE Research Work Group is developing a solution that taps into the existing expertise within departments and enables other departments to take advantage of it. No one wants to dismantle existing excellence, but we need to figure out a way that it can be leveraged to benefit all departments and their faculty.

3. What is happening to Post- award? And award set-up?

Post-award is complicated because it is inextricably interconnected with pre-award and with Finance. To make sure that it is being reviewed and thoroughly evaluated with the depth it warrants, a separate subgroup will be formed with both Research Administration and Finance team members.

Although significant progress has been made in developing award setup recommendations, no conclusions or recommendations have yet been made in the post-award area. The challenges, created by the participation of multiple organizations (Contracts & Grants, EMG, departments and possible Clusters), need to be carefully considered to ensure simple and effective post-award and award set-up processes which balance the needs for efficiency, compliance, controls and accurate accounting. Key players from each of these constituencies will work closely together to develop carefully vetted recommendations.