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# FAS Managers' Town Hall

November 8, 2012



# Agenda

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- **Welcome & Introduction** J. Plotts
- **Guest Speaker** J. Castro, Vice Chancellor,  
Student Academic Affairs
- **Welcome New Town Hall Participants** B. Daro
- **Mission Bay Block 25A, Academic Building** L. Yamauchi, E. Morales, M. Bade
- **Remarks and Q & A** J. Plotts



# Welcome

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- **Police**
  - Captain Kenneth “Mike” Denson, Captain Field Services Division
  - Jeff Godown, Technical Services Director
- **ITS**
  - Sian Shumway, Director Field Services
- **Program Management Office**
  - Fred Selk, COA Program Manager
  - Ron Campbell, Senior Trainer for Finance3 Projects
- **Senior Vice Chancellor Office**
  - Tom Richardson, Finance Manager



# We Must Stay Focused On Addressing Long-Term Priorities

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- **Proposition 30 passes – reduces one element of ambiguity**
- **Longer-term challenges remain to be addressed**
  - Facilities – seismic remediation and lease consolidation
  - Healthcare reform
  - Federal budget
  - Increasing personnel-related costs, driven by post-employment benefits
  - Campus department and PI's resources stretched
  - Students already paying higher fees
  - Competition for talent (faculty, students and staff)
- **Our job is clear: We must continue to focus on excellent service delivery with maximum efficiency at a time of rapid change and diminishing resources**
- **Prioritization – Trade-offs between what we will do and what we won't do to best meet UCSF priorities**

# We Have Worked Hard This Past Year To Develop UCSF's Business And Financial Planning Framework

## UCSF's Broad Strategies

Enterprise-wide priorities establish the foundation for Business and Financial Planning

Process conducted every 3-5 years

Patients

Discovery

Education

People

Business

Provides high-level

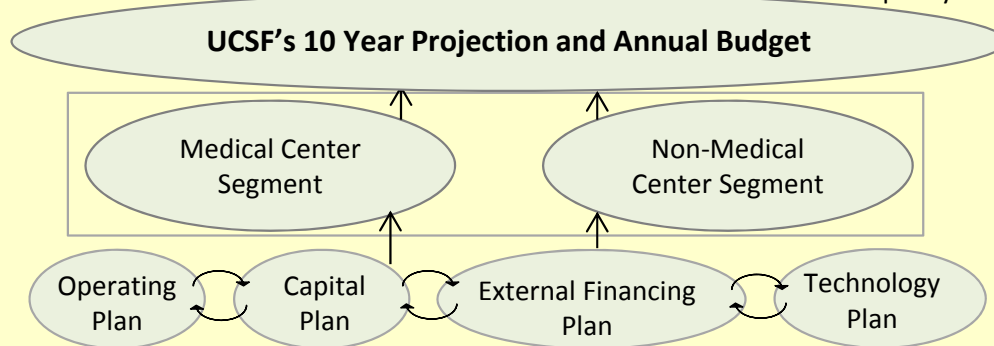
organizational priorities, goals, specific tactics and metrics

## UCSF's Business and Financial Planning: 10 Year Horizon

Establishes the broad framework for directional decision-making, prioritization and resource allocation.  
Process starts in May; concludes in October

### Annual Budget and Financial Projection

- Macro level. Line of sight over a decade
- Informed by Dept. Business Plans
- Incorporates investments for programmatic, capital and technology priorities
- Highlights balance sheet and cash flow considerations:
  - Unrestricted cash
  - Debt capacity



Coordinated and Inter-Related

### Departmental Business Plans – 5 Year Horizon

Process starts in January; concludes in June

#### Current State

- Strengths
- Issues/Concerns

#### Financial Forecast

- Consistent assumptions
- Current initiatives

#### Future State

- Top opportunities
- Business Case Analysis

Medical Center

Chancellor's Business Plan

Executive VC/Provost

School of Medicine

Financial/Admin Services

Development/Alumni Relations

School of Pharmacy

Diversity/Outreach

Strategic Comm/Univ Relations

School of Dentistry

Global Health Sciences

Legal Affairs

School of Nursing

QB3

# Common Principles We Must Continue To Embrace To Be Successful

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## 1. Talent and Leadership Development

- Engage each other
- Understand personal goals and aspirations
- Align goals with development opportunities
- Develop people while advancing the organization

### Recent Examples:

- Round 2 of Succession planning - Work is underway for HR to partner with FAS Leadership Team to improve the process
- IT Innovation contest – ITS created a great way to tap into and develop talent and ideas to benefits the organization

# Common Principles We Must Continue To Embrace To Be Successful

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- 2. Enterprise-Wide Focus** – A relentless focus on doing what is right for UCSF, not necessarily ourselves or individual departments.

## Recent Examples:

- 10-year Projection, Annual Budget and 10-Year Capital Plan - Encourages enterprise-wide thinking and problem-solving
- 3-year lease consolidation plan and business case to decrease leased space by 16% by 2014



# Common Principles We Must Continue To Embrace To Be Successful

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- 3. Collaboration & Teamwork** – When we come together as a team, we can accomplish remarkable things.

## Recent Examples:

- Going live with BearBuy e-procurement system at UCSF and UCB
- Progress on Academic Building (Mission Bay Block 25A)
- Significant efforts underway to implement OE Finance 3 projects (Chart of Accounts, Reporting and Budgeting)
- Ongoing implementation of energy efficiency projects across campus and with Medical Center



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4. **Service Excellence at a Reasonable Cost** – This is not either/or, but both. Every FAS department is meeting the challenge to reevaluate their service delivery.

## Recent Examples:

- New HR Service Delivery model – Implemented between January and May 2012; first customer survey conducted in October to establish baseline from which to track process and make service improvements
- The “See it...Fix it” program - Facilities Services staff report safety, maintenance or other deficiencies
- Sourcing Strategy - Doubling the volume of cross docked parcels from 300 to 700 and improved delivery turnaround from next day to same day

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5. **Innovation** – We need to challenge ourselves and our staff to be creative in solving problems and be open to new ideas.

Recent Examples:

- Sharecase
- IT Innovation contest (also mentioned as great way to develop talent)
- Audit Analytics - Audit Services has improved their use of computer tools for analyzing information and providing insight to management



# Conclusion

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- **Stay focused**
- **Thank you!**

