FY15 FAS Strategic Initiatives Status Report - February

FAS Strategies (What Success Looks Like)	#	FAS Initiatives	FAS Reporting Responsibility	Year-End FAS Tactics & Metrics* -blue indicates CEC tactic/metric -orange indicates FY15 STAR goal	Status 1/31	Status 2/28	Rev. Complete Date	Comments (Changes from last period in red)
I. Create an exceptional campus physical infrastructure and space management program with the best value delivery and most productive use of resources								
a. LRDP with community involvement; ten-year capital planning process that meets our evolving health science strategic priorities with realistic cost estimates and associated funding strategy.	1	**LRDP**	**Yamauchi**	Complete LRDP and final environmental impact report by 3/31/15				Complete
	2	**Expand UCSF Housing Program**	**Shinnerl**	Complete FY15 milestones for Block 15 and Parnassus programs (UC Hall, 5th Ave and Parnassus)				Block 15 Housing planning on track. Beginning planning for UC Hall.
b. Critical capital projects complete which achieve the optimal use of space, best value delivery and cost efficient, disaster-resilient facilities.	3	**Capital Programs Business System**	**Bade**	Go-live with new Capital Programs Business System by 6/30/15				On-track - UCSF CP and IT resource constraints affecting scope. Schedule impact to be assessed in Jan 2015.
	4	**Parnassus Seismic Program (includes CSB and UCH)**	**Bade**	Complete FY15 milestones toward seismic remediation/ replacement of: 1) UC Hall by 10/30/19, 2) CSB by 9/30/17, 3) Parnassus 3rd/5th Avenue Housing plan by 12/31/14 and 4) 735 Parnassus by 12/31/14				1) Appears UCH completion will be delayed due to a confirmed relocation of Ophthalmology 2) CSB on track 3) 3rd & 5th Ave housing plan delayed 4) 735 Parnassus housing plan complete
	5	**Mission Bay Program**	**Yamauchi**	-Complete 33/34 acquisition by 8/31/14 -Complete Mission Hall construction by 10/31/14 -Plan phase 1 Building by 2/28/15				On-track: 33/34 acquisition completed 8/15/14 Mission Hall construction completed 33/34 Phase 1 building program plans on track
	6	**SFGH Seismic Program**	**Bade**	Complete FY15 milestones toward seismic remediation/replacement of SFGH buildings 1, 9, 10, 20, 30, 40 & 100 by 2019				Interim seismic measures complete; business case and funding plan for Research Building in process. Expected delay in completing Research building by 10/31/19
	7	**Develop Lean Work Process for Commissioning and Turnover of Construction Projects**	**Shinnerl / Bade**	-Complete milestones for a clean turnover of 25A from Capital Programs to Facilities Services by 6/30/15 -Long-term: High satisfaction on occupancy surveys and no capital improvement investment required in first 5 years.			Continue into FY16	Value stream mapping, process mapping and roles and responsibilities work more involved than anticipated; as a result, initiative will likely require continued efforts into FY16
c. Optimal space productivity and reduced remote site occupancy through a data driven, measurement approach that meets campus programmatic space priorities in a cost effective and timely manner.	8	**Laurel Heights Planning**	**Morales**	Close Laurel Heights transaction by 6/30/15				Ahead of schedule
	9	**Lease Consolidation**	**Morales**	Complete target reductions in sq. footage and rental cost for leased space by 6/30/15: 2012: 1.02M / $32M 2013 to 2014: 820K / $26M **2015: 770K / $22M** 2018: 550K / cost TBD				Ahead of schedule
	10	**Enterprise-Wide Space Management Optimization**	**Yamauchi**	Complete requirements & scope plan for Enterprise-wide Space Management by 6/30/15				Conceptual design complete; new Director began; Roadmap approved by Steering Committee and RFP issued; ahead of schedule to begin implementation by 2/1/15.
	11	**FAS Space Optimization**	**Yamauchi**	Complete FAS Space Optimization Plan by 6/30/15				Pending evaluation of MCB and Minnesota Street reconfiguration

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d. Correct UCSF's most pressing physical infrastructure needs and improve environmental sustainability by managing energy and utility resources in the most efficient manner.	12	**Create a Robust Facilities Renewal Program**	**Shinnerl / Bade**	-Complete milestones to create a lean funding & delivery program for FIN and scheduled renewal / code update programs by 6/30/15 -Long-term: All major UCSF buildings funded for regular 25-year interval renewal/code updates	🟩	🟩		Delay of lean work and condition assessment pilot, but overall on-track
	13	**Energy and Water Efficiency Program (projects, education, improved operations)**	**Shinnerl**	-In FY15 deploy refrigerator/freezer rebate program; deploy pilot energy dashboards and enhanced metering; complete energy efficiency projects; and building occupant education program -Long-term: Water conservation goal of 20% reduction by 2020 and Greenhouse Gas reduction to 1990 levels by 2020	🟨	🟨		21% reduction in energy use per sf and 9% reduction in water use per person achieved in FY14. Delay in 2015 projects due to regulatory issue of one of the major laboratory projects; efforts will be make to find substitute projects to fill in. Operator reporting and education programs on track to help achieve benefits.

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II. Provide a high value system of underlying information technology required to enable UCSF's transformation to a unified, collaborative, data driven organization								
a. Reshape our investment in IT to meet the evolving needs of UCSF by optimizing resources and shifting investment into transformational capabilities.	14	**IT Roadmap**	Bengfort	Establish process according to roadmap with modifications as approved by committees - 6/30/15 milestone TBD	🟩	🟩		On-track - Roadmap projects in process. Regular reviews in place with Budget and Investment Committee. Regular process in place to tract progress with various committee approvals.
	16	**IT Sourcing Strategy and Plan**	Bengfort	Decision: RFP development, release evaluation, BAFO, and award; Vendor contract negotiation and execution; build transition, implement supporting organizational and operational structure for new IT service delivery model by 5/30/16	🟨	🟨	5/30/16	Sourcing partner, Pace Harmon, engaged and finalizing data collection for RFP Jan-Feb '15.
b. Establish roles and processes to facilitate close collaboration between IT and UCSF departments.	17	**Establish Enterprise Wide Data Warehouse and Supporting Skills**	Bengfort	By 6/30/15: Consolidate teams to support data warehousing and analytics support; develop and implement data governance and strategy; put Cogito dashboard into production; finalize UCSF data management plan for research, education, finance and patient care; provide data warehouse and analytics support to Clinical Enterprise Strategic Plan.	🟩	🟩		Team unified, data governance strategy developed, a Cogito-based dashboard complete, data management plan for research, education, finance, and patient care complete and being operationalized, and providing support to Clinical Enterprise Strategic Plan.
	18	**Enterprise System Integration Services**	Bengfort	Implement phase 1 priorities by 6/30/15	🟩	🟩		Pilot complete, team being formed and began integration projects in January to be delivered on time by 6/30/15.
	19	**Customer Engagement Strategy**	Bengfort	Complete phase 1 customer engagement process in key Campus and Med Ctr. Departments by 2/28/15	⬜	⬜		No activity in FY14-15
	20	**Security and Compliance Program**	Bengfort	Establishment of the Data Security Compliance Program and the definition of IT procedures as outlined by 6/30/15	🟩	🟩		DSCP training 85% complete; tracking software implementation in progress; preliminary enterprise mitigation plans complete. Security roadmap in progress and manager starts 1/15/15.
c. Leverage IT infrastructure and optimize processes across UCSF to meet expanding needs at sustainable costs.	21	**Data Network** (includes MC-Campus high speed network integration and wireless refresh)	Bengfort	Consolidate Med Ctr and Campus network services by 6/30/15	🟦	🟦		Competed - the MC and Campus network teams are fully integrated and are operating as a single organization
	22	**Next Generation Voice and Unified Communications**	Bengfort	Complete milestones toward fully integrating MC/Campus teams and expand VOIP services to the Campus	🟩	🟩		On-track - MC and Campus voice teams are fully integrated. Installed VOIP at Mission Hall for 1,800 clients. Anticipate rolling out to additional 1,000-2,000 clients by 6/30/15.
	23	**Complete IT Field Services Consolidation**	Bengfort	Achieve full participation for basic service by 12/31/14, pending proof of service levels.	🟦	🟦		Materially, complete as of 12/31/14. Currently meeting service levels and ITFS will become self-sustaining next fiscal year.
	24	**Comprehensive Data Center Services**	Bengfort	Build out cost-effective and scalable infrastructure environment and expand client base by 6/30/15	🟩	🟩		Purchased and installed the fundamental infrastructure necessary to accommodate new clients; anticipate building out the back-up environment by 5/31/15. Added several new clients which drove revenue higher by 6.5%.
	25	**Leverage Existing IT Utility Applications Across Enterprise,** e.g. Docusign, Document Management System	Bengfort / Fellouris	-Docusign phase 1 go-live on 12/31/14 -Document Management System pilot live by 3/30/15	🟩	🟩		Completed DocuSign rolled out to campus for subcontractor invoices; Donor contributions; and Mission Bay Hospital procurement. Started Med Center rollout of docusign

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III. Be the workplace of choice for diverse, top-tier talent								
a. **UCSF People:** Deliver on UCSF People strategies:								
i. Establish and communicate clear goals and direction	26	**Reward and Recognition Program**	Odato	By 6/01/15, work with Control Points and compensation committee to finalize FY16 program	🟩	🟩		Consider engaging outside expert to advise. Working with Control Points to discuss possible changes to the program.
	27	**Implement Programmatic Consistency for Staff as UCSF Integrates into Health Sciences** (base pay, incentive program, recognition program, time-off programs, policies, etc.)	Odato	By 4/30/15: Get compensation committee endorsement for proposal and integrate into 10-year Financial Plan	🟩	🟩		Presented incentive program plan to Compensation Committee on 12/2/14 with agreement to continue discussion in February.
ii. Enhance development opportunities for faculty and staff	28	~~**Strategic Development of Internal Leaders (formerly Succession Mgmt.)**~~ **Expand Learning and Development Access and Offerings**	Odato	1) Implement a communications plan to increase awareness to L&OD services 2) Expand offerings by introducing three new topics that address clients' top priorities and conduct a total of 6 training sessions on these topics.	🟩	🟩		On track with new goal: Replaced this goal with one that indirectly addresses strategic development at all levels.
	29	**Learning & Development Programs n Foundational Skills for All Staff Levels**	Odato	By 6/30/15, implement trainings: 8 professional (non-managers), 8 front line & 2 for leadership (middle and directors)	🟩	🟩		On-track: Ongoing
iii. Compensate faculty and staff based on performance and at market levels	30	**Career Tracks (name change)**	Odato	-Implement 100% of the IT and Finance Job Families by 6/30/15 -Develop job families, including market pricing positions, for all non-represented staff by 12/31/17	🟨	🟨		On-track for IT job families by 6/30/15. Expect completion of Finance job family by end of 2015.
iv. Create an environment in which faculty and staff can thrive	31	**Employee Engagement - UCSF**	Odato	By 6/30/15, codify action planning and implementation as an annual process: re-take the survey	🟩	🟩		On-track - completed post survey trainings. Beginning on implementation of spring 2015 survey with Gallup.
b. **FAS People:** Leaders in developing the next generation of diverse talent.	32	**Employee Engagement - FAS Implementation**	All	FY15 Campus Star Goal: Increase Accountability Index score by Threshold: +.10; Target: +.15; and Maximum: +.20 -Complete action plans for all designated FAS managers and input into Gallup tool by 10/31	🟩	🟩		-100% (or 76 of 76) of designated FAS work groups have completed action plans to improve employee engagement. -Next survey May 7 through May 29
	33	**Strategic Development of Internal Leaders - FAS Implementation**	All	Revise succession plans and development plans for tiers 1 & 2 by 9/30/14 and conduct quarterly development check-ins for rest of FY15	🟨	🟩		-Provided development by including leaders in Wilton and Lean trainings and taking part in FAS strategic planning process. -L&OD to present development opportunities at 3/23 Leadership Meeting.

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				IV. Create a safe and thriving environment which collaborates with our community to enrich wellness and promote public safety				
a. A safe, crime-free environment and disaster-resilient enterprise through strong community partnerships, enforcement and education	34	**Mission Bay Public Safety Plan**	**Roskowski**	Implement new Campus / Medical Center cost-share formula and staffing to support Mission Bay Expansion - last year of multi year initiative				Complete – the new police services cost-share formula was implemented in FY 2014-15 budget. New personnel associated with Mission Hall have been hired.
	35	**Public Safety Communication Technology**	**Roskowski**	By 6/30/15, implement year one of five year public safety technology plan which includes mobile in-field technology to improve officer access to data and mobile audio visual recording devices				On-track - Equipment purchased for In-Car computer system and Officer audio visual recording devices. Implementation in process.
b. Deliver campus life programs and services that enrich wellness, build community and contribute to an environment in which faculty and staff can thrive.	36	**People as a Priority: Work Place Resources and Best Practice Improvements**	**Shinnerl**	-Project 1: Improve marketing & communication of UCSF benefits by 11/30/14 -Project 2: Create new services & programs that will attract and retain the best & brightest to UCSF by 6/30/15				Plan to meet with HR to discuss transition of web communications pilot from CLS to HR ownership. Gap analysis complete between UCSF and "best employer" services. Target of 1/31/15 to share recommendations of desirable services that could be offered by CLS.
	37	**Campus Wellness Program**	**Shinnerl**	WorkFit: Show statistically significant improvement in WorkFit participant's self-perceived health and work engagement by program conclusion Wellness Challenges: assumed savings in medical care costs and productivity improvements based on data outcomes (ROI of $1 investment: $3 assumed savings)				On-track: WorkFit with Facilities Services in process; Sugar beverage policy recommendation presented to leadership; Feb Step it Up Challenge ready to launch; working with UCOP on system wide Wellness strategic Plan.
	38	**Mission Bay Hospital Transportation Plan**	**Shinnerl**	Complete parking and shuttle operations for the opening of the new Mission Bay hospital in January 2015				Complete

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V. Advance transparent and effective enterprise-wide business planning and financial management								
a. Enterprise-wide resource planning for setting priorities and enabling resource allocation decisions.	39	**Enterprise-Wide Resource Realignment**	**Costantinidis**	-Improve the enterprise-wide funding model for all core fund sources.				UCOP working with CAS (Cost Allocation Services) on composite benefit rate; Completed restructuring of Chancellors Resource Handling in new COA; Faculty FTE Management Model on track.
	40	**Revenue Growth Opportunities**	**Costantinidis**	-Complete Balance Sheet management milestones by 6/30/15 -Complete Grants and F&A Cost Recovery milestones by 6/30/15				Balance Sheet: STIP distribution project on hold; Endowment and deficit fund balance review underway. Grants and F&A: F&A Recovery analysis underway
b. State-of-the-art financial systems that provide accurate and consistent reporting and enable best practice decision-making at all organizational levels.	41	**myReports Phase 2 - Enhance Reporting**	**Ellis**	By 6/30/15: -push down quarterly ledger entries from the central level to the Control Point level in order to produce quarterly financial reports by Control Point -Develop and deliver three new reports in MyReports				On-track- Three new reports in My Reports is completed.
	42	**UPlan Phase 2 & 3 - Usability Enhancements**	**Costantinidis**	Streamlined budgeting process and enterprise-wide financial and managerial reporting capability				Completed implementation of SmartView. Planning for Employee Planning enhancements underway to be implemented by 3/31/15.
	43	**Peoplesoft Process & System Upgrade, includes RAS / EMF / invoicing for sponsored projects**	**Ellis**	Complete the PeopleSoft upgrade plan by 6/30/15 for implementation of FY16 upgrade to version 9.2				On-track
c. Effective stewardship through internal controls and risk management tools that mitigate and reduce financial loss.	44	**Continuous Controls Monitoring Program**	**McGlynn**	By 6/30/15, build inventory of scripts and promote adoption; implement institutional review process at select departments, and explore expansion to Schools, Medical Center and others.				Collecting feedback from schools to gauge interest in partnering with Audit and Advisory Service on writing scripts for continuous monitoring.
	45	**On-Line Reconciliation Tool**	**Ellis**	-Progress toward On-Line Reconciliation Tool go-live in Jan 2016 (subject to CBT re-prioritization)				Not started

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VI. Provide service delivery excellence, from the customers' point-of-view, at the best total competitive cost								
a. Provide service delivery excellence, from the customers' point-of-view, through continuous improvement.	46	**Customer Service Improvement**	Roskowski / All	Complete FAS Customer Survey in Fall 2014 and use feedback to create department service improvement plans by 6/30/15	🟩	🟩		-FAS Overall satisfaction increased slightly from 4.00 in 2012 to 4.02 in 2014. 20 of 29 (69%) survey units maintained or improved their overall satisfaction scores. -Service improvement action plans due 5/30/15
b. Rationalized administrative and operational infrastructure to reduce redundancies and achieve cost savings.	47	**UC Path (and related HR systems)**	Fellouris / Odato / Bengfort / Ellis	Complete FY15 milestones toward an assumed go-live for UCSF deployment in October 2016. Revised estimate of December 2017. Still 6/30/15 for P-FILE and initial pilot of Case Mgmt Tools	🟩	🟩	12/31/17 go-live for UCPath	Go live for OP has shifted to 12/15 which will cause UCSF estimated go-live to shift to 12/17. Date still being finalized by OP. Proceeding with P-FILE digitalization. Goal of campus files completion by 6/30/15 may shift by a couple of months due to resource issues with the document management support team. That in turn will push out Medical Center file completion from September to November. Pilot CRM is for LER and currently on track to be completed by 6/30/15.
	48	**Utilize Lean Methods to Remove Waste and Increase Efficiency**	Bengfort	Progress toward training IT staff on Lean principles and completing 15 IT process Lean events by FYE 2017 (milestone TBD)	🟩	🟩		Lean training for staff will not commence until after 7/1/15. Completed three lean events on IT processes in FY - expected to resume in FY16.
	49	**Paperless Invoicing & Payment Process**	Ellis	Convert 70% of our eligible vendor paper invoices to electronic invoicing by 6/30/15	🟨	🟨		Need to evaluate vendor onboarding criteria.
	50	**MAXIMO - UCSF-Wide Facilities Business System**	Shinnerl	Initial system application functioning in time for completion of new Mission Bay Hospital; subsequent rollout to Campus and CLS facilities in FY16	🟩	🟩		Med Ctr requested go-live of locations in phases (Mt Zion 1/15, Owens St 4/15 and Moffit-Long 7/15). No impact to Campus go-live plans or budget.
	51	**P200 Working Smarter**	Hine	-Deliver $17.5MM in supply chain benefits to UCSF for FY15 (17% higher that FY14 target of $15MM) -Implement programs to drive $200 MM in annual procurement/supply chain savings system wide by 2018	🟩	🟩		on track
	52	**Medical Center Supply Chain Collaboration**	Hine	Complete FY15 milestones to rollout BearBuy, implement common physical supply chains, and increase joint sourcing for non clinical products and services to drive incremental process and procurement benefits to Med Ctr and Campus	🟨	🟩		Very good success in joint IT sourcing. Got approval for BearBuy pilot within central IT
	53	**FAS Supply Chain / Warehouse Integration**	Hine	Complete FY15 milestones toward reengineering of distribution, storage and mail to streamline, integrate and automate operations. Leverage to reduce truck traffic on campus, while increasing service levels and lowering costs to customers	🟨	🟩		Distribution programs on track. Will operate at auxiliary for one more year, then complete transition to recharge.
	54	**Research Supply Chain Collaboration**	Hine	1) Implement pilots: a) Research core equipment maintenance; b) Genomic sequencing UC collaboration; transitioning to UC Life Science COE c) LARC on hold until LARC ready 2) Bio repository / bio specimen sw RFP launched 3) CCF integrating with SCM	🟩	🟩		On track

KEY

🟩 on track

🟨 watch item; needs monitoring to avoid critical path slippage

🟥 critical path slipping; needs intervention

⬜ not started

🟦 complete