

Financial & Administrative Services (FAS) Executive Report

September 2019

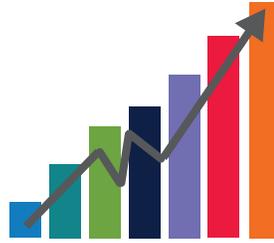


photo: Marco Sanchez

Nihal Narsipur, a UCSF pharmacy fellow in Clinical Pharmacology and Medical Communications, enjoys his new accommodations at *The Tidelands at Mission Bay*.

New housing for students and trainees

CLS Housing Services in partnership with UCSF Real Estate opened *The Tidelands* at 590 Minnesota Street providing much-needed housing units for approximately 300 tenants. When the second building at 600 Minnesota Street opens later this calendar year, it will nearly double UCSF's inventory of campus housing and rental rates will be 30-40 percent below the SF market.

Our vision is to create an environment where people can do their best. This issue highlights a few ways we are working to achieve this.

We are pleased to announce the launch of the **FAS Value Improvement program** which is designed to create value for FAS customers and increase our capacity to serve the growing enterprise while managing our expense growth. The program challenges FAS staff to think creatively about how we can measurably reduce waste, improve process and enable innovation.

Inside in our Spotlight section, you will also see the results of the **FAS-wide customer survey program**, which strives to capture feedback in a way that both respects customers' time and helps us continuously improve. I am pleased this year that FAS continues to see improvements in our customer satisfaction scores as well as an **increase in our staff engagement survey scores**. I see a direct correlation between our effort to create an optimal work experience for our incredible FAS staff and higher customer satisfaction index scores.

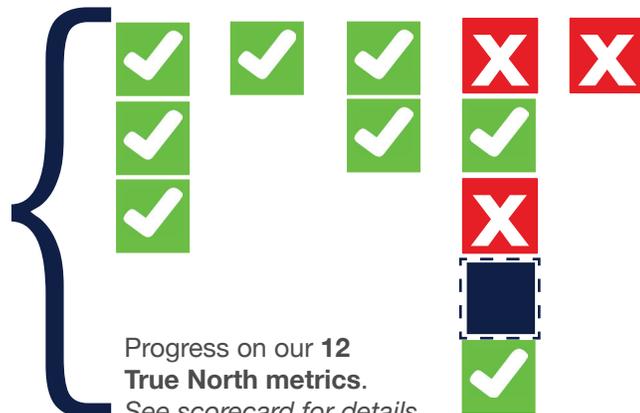
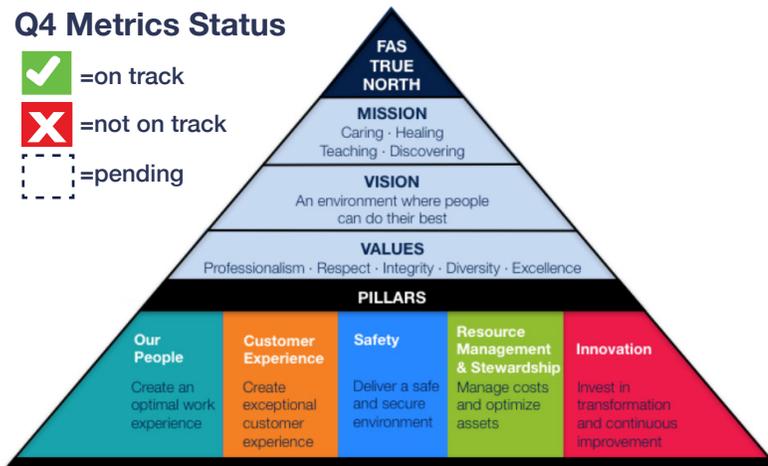
Paul Jenny
Senior Vice Chancellor
Finance and Administration

Questions?
Email SVC@ucsf.edu.

See previous issues:
fas.ucsf.edu/fas-executive-report

Q4 Metrics Status

- =on track
- =not on track
- =pending



FAS TRUE NORTH Progress Strategic Priorities

Optimizing Resource Allocation Models (ORAM)

Completed Phase 1 streamlining recurring recharges and core fund assessments for administrative control points and reducing one-off negotiations of service provider agreements

Culture of Continuous Improvement

Completed year 5 with focus in FY20 on True North goal alignment, more teams practicing Active Daily Engagement and an emphasize on converting learning to application of Lean methods

Parnassus Revitalization

Established Comprehensive Parnassus Heights Plan presenting a bold vision; focus in FY20 on implementation readiness

Value Improvement (VI)

Launched of FAS program to solicit innovative ideas to improve customer value and our capacity to serve the growing enterprise

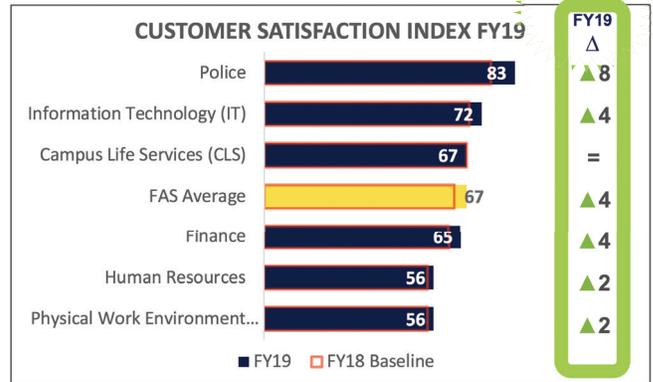
FAS SPOTLIGHT: Customer Satisfaction Index (CSI)

Financial and Administrative Services (FAS) is using your feedback to improve the customer experience. Below is a snapshot of our year-over-year progress.

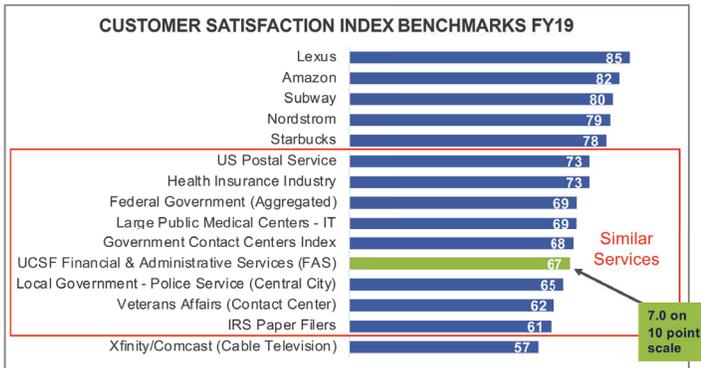
YEAR-OVER-YEAR CSI

78% of our services improved year-over-year (47 of 60)

- 62% of our services rated ≥ 70 (37 of 60)
- 10% of our services rated < 60 (6 of 60)
- Increased satisfaction led to increased sentiment of partnership and trust
- Consistent with benchmarks, the more complex the customer relationship, the lower the score. An exception was Campus Life Services where the more services used, the higher the CSI.



BENCHMARKING



CSI conversion:
 $((CSI - 1/9) * 100)$

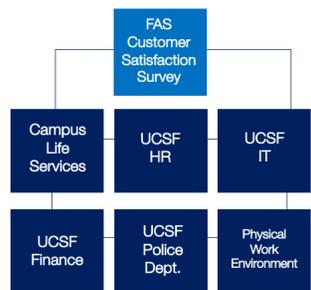
RATING	CSI
1 = Poor	0
2	11
3	22
4	33
5	44
6	56
7	67
8	78
9	89
10 = Excellent	100

- FAS score=average of 6 surveys
- 10 pt scale converted to 0-100 score reflects average score (not percent satisfied or top box)
- Internal service scores often lower (usually 50s, 60s & 70s) due to the complex nature of service delivery

FEEDBACK IN ACTION

Finance's BearBuy Office Hours

Bear Buy's new office hours provide a friendly forum for users to ask questions, talk about purchasing best practices, and receive guidance on how to effectively use the system. Since launching the twice-monthly hours at Mission Bay and Parnassus in 2018, the Financial Operations team has met with more than 150 users, providing answers and building relationships with customers.



*Combines Facilities and Real Estate services

CLS Wellness & Community Roadshows

Survey feedback confirmed that it was time to highlight the newly transformed Wellness & Community unit (formerly Arts & Events) and their wellness program offerings. The team hosted three road shows to reintroduce themselves, highlight program offerings, and share a summertime popsicle with the campus community.



CLS Facilities Service Request Portal

Every completed work request provides an opportunity to hear from our customers and improve. We leveraged technology to 1) build an internal system to better track feedback and identify areas with the greatest opportunities to improve and 2) renew our customer service portal to make it easier to use, with new features, a short intro video and a button that calls the service center if needed.



IT's Better Process for New Phones

Customers told us that getting a new phone was a frustrating experience. Based on feedback, IT implemented process changes that included an emphasis on internal training for our onsite field service team and our offshore team. By making this change, our satisfaction scores increased 13 points.



Learn more-

Customer Satisfaction Index (CSI) Basics: <http://tiny.ucsf.edu/csibasics2019>

Customer Satisfaction Index (CSI) 2019 results: <http://tiny.ucsf.edu/csireresults2019>

HOW FAS HELPS

A few ways FAS is creating an environment where people can do their best.

Campus Life Services

Communicating Chase Center Impacts

CLS launched a new website eta.ucsf.edu to help the UCSF community plan for the expected traffic impacts to Mission Bay, especially given the opening of the Chase Center but also because of general growth in the area. The site provides a calendar of planned events using a color coded system to quickly highlight the level of expected impact. The calendar is a simple way for members of the UCSF community to plan ahead and adjust their schedules or commute modes, if possible, to avoid particularly bad traffic days.

UCSF Finance

Implementing UCPATH Change Agent Network

In collaboration with HR and PMO, Change Agents will begin meeting monthly in September to help connect all employees to key information about preparing for UCPATH. The Change Agent Network will complement formal communication (e.g., create a feedback loop to identify information gaps, track progress, etc.) and training activities to help cascade key messages from the project team and build momentum for upcoming changes.

UCSF HR

Enhancing Talent Acquisition Scale and Service

Talent Acquisition has launched a transformed service model and team structure to help hiring leaders fill open roles with top tier talent more quickly. We have two distinct recruiting roles: recruiters focused on managing either specialized/more difficult to fill roles, or vacancies with strong talent availability. We're providing more robust support for hiring leaders including additional phone screening and assessments for some roles, more in-depth consultative recruitment training for the entire team, and have welcomed a total of five new recruiters.

UCSF IT

Making Managing Passwords Easier with New Free Tool

IT partnered with Keeper Security to allow free access to their password vault, making it easier to manage the recent password changes. Keeper generates strong passwords, auto-fills passwords across apps and sites with KeeperFill™ and organizes passwords on all platforms and devices. Anyone with a UCSF email account enrolled in Duo can register online by completing the "Create Your Keeper Account" form.

UCSF Police Dept.

Adding Body-Worn Cameras

Body-Worn Cameras were rolled out to all UCSF Police Officers in April 2019. Officers have been fully trained on operating the equipment, and technical services assistants will be receiving on-going training on body-worn camera law, policies, Public Records Act and best practices. These cameras will record field activity during the course of official police duties.

UCSF Program Mgmt. Office

Helping Improve Clinical Trials Activation Time

In partnership with the Office of Research, PMO staff facilitated an intensive process improvement effort on the clinical trials activation process. The team identified new staffing, processes, systems, and activation time targets. Implementation, while still underway, has already allowed the Office of Clinical Trials Activations to reduce the time it takes to open a clinical trial, resulting in reduced frustration for faculty and staff, and improved options for patients.

UCSF Real Estate

Collecting Property Tax to Return Funds to UCSF

Real Estate Services staff identify and collect property tax rebates for UCSF leased spaces, returning millions of dollars annually that can instead be spent on teaching, research and patient care.

ADMIN OUTLOOK

Be on the lookout for these broad change efforts.

What and Why?	What's Next?	Who is Impacted?
Changes to Outlook Enhancements to Outlook on the web	New features including dark mode and calendar improvements.	Everyone who uses Outlook online
MyExpense Update Updated user interface coming soon	Larger print, more apparent line-item receipt buttons, and improved alert functions. Currently in testing phase. Look for updates in the Supply Chain Management newsletter.	UCSF campus employees and guests submitting reimbursement requests via MyExpense .
HR Roadmap Seven priority focus areas resulting from Kincentric (formerly Aon) assessment, and aligning to top priorities identified by HR customer service survey	Staff Compensation and Classification launching Straight Replacement/Like Job process in December; workstreams focusing on Leave & Disability, investigation cycle time, manager training, HR Business Partners (Health focus initially); and technology improvements. Roadmap communications toolkit is launching to keep the UCSF community informed.	Varies by workstream; changes should improve HR experience for all UCSF employees
UCPath Common UC system to support HR, payroll and benefits activity	System configuration and testing of business processes and functionality; payroll validation; UCSF communications and stakeholder engagement. The UCPath website launches September 17.	Configuration/Testing: Primary system and process owners (central HR, Controller, IT; limited department HR and Finance staff); UCSF employees and stakeholders through the UCPath Change Agent Network

UCSF LEAN IMPROVEMENT STORY: Taking Lean to a Virtual World

Innovation Pillar The Academic Research Systems team in UCSF IT embraced a virtual solution to stay connected and be more productive.

Problem

What wasn't working?
A year after incorporating Lean processes into their work, the Academic Research Systems in UCSF IT realized that using paper Vis Boards didn't work well with the remote team and complex workstreams.

What did we do about it?

One team member recommended experimenting with [GitHub](#), a virtual platform primarily used for sharing source code in a secure environment. The platform's dynamic project management tools allowed them to:

- 1) replicate the "Kanban" work flow online
- 2) manage and document complex workstreams
- 3) create an online space for collaboration and virtual huddling to support a remote work team

Ideas

Results

The small workgroup saw increased productivity. **GitHub will be rolled out to the broader UCSF community later this year.**

GITHUB DASHBOARD

The screenshot shows a GitHub project board for 'ucsf-research-tech / security'. The board is organized into six columns: NEW IDEAS, TO DO, WORK IN PROGRESS, ESCALATION, ON HOLD, and DONE. Each column contains several task cards. For example, in the 'NEW IDEAS' column, there is a card for issue #65 opened by Rhetus. In the 'TO DO' column, there are cards for issues #71, #67, and #68. The 'WORK IN PROGRESS' column has cards for issues #14, #54, and #17. The 'ON HOLD' column has cards for issues #3, #63, and #61. The 'DONE' column has cards for issues #68, #70, and #70. Each card includes a title, assignee, and various tags like 'Attack surface', 'Internal proc...', and 'Challenge'.

columns mirror Kanban workflow
tags help track + search



Metric (Metric description)	As of 6/30/18	Q1	Q2	Q3	Q4	FY19 Year to Date	1-Year Target by 6/30/19
OUR PEOPLE							
M1 FAS Employee Engagement (Expressed on FAS Grand Mean scale of 1-5)	3.98 (Gallup 46th percentile)	Results available annually at FY end				4.06 (Gallup 50th percentile)	4.03 (Gallup 50th percentile)
M2 FAS Voluntary Turnover Rate (Expressed as % of FAS Career Staff, excl. retirement)	5.3%	1.7%	1.1%	0.5%	1.5%	4.8% ¹	≤ 6.0%
M3 FAS Internal Hiring Rate (% of FAS open positions filled with candidates from UCSF)	24%	22.6%	38.0%	25.4%	23.8%	26.7%	26%
CUSTOMER EXPERIENCE							
M4 FAS Customer Satisfaction Index (FAS Average expressed on 1-100 scale)	63 (6.7 on 10 point scale)	67	66	67	66	67 (7.0 on 10 point scale)	64 (6.8 on 10 point scale)
SAFETY							
M5 Campus Workplace Injuries, Count (Expressed as # incidents per 100 FTE)	479 2.4	164 0.8	94 0.4	158 0.7	63 0.3	479 2.3	465 2.3
M6 Cyber Security Framework Maturity Score (Expressed as sum of ratings for 20 categories on 0-5 scale)	52	Results available annually in February		58 (Improved in 7 & decreased in 2 of 20 rating categories)		58	57 (Improve in 5 of 20)
RESOURCE MANAGEMENT & STEWARDSHIP							
M7 % FAS Units with Long Term Balanced Operating Budgets (Are we closing the gap?)	37%	Results available annually after budget cycle			47%	47%	100%
M8 FAS Change in Net Position (What is the gap, in \$M?)	(\$9M)	14.7M	(\$15.7M)	11.8M	(14.5M)	(3.2M)	(\$15M)
M9 FAS Variance from Plan Change in Net Position (Is our Plan accurate and executed well?) (Expressed as % of Plan Revenue)	1.4%	13.9%	-7.3%	10.7%	-6.2%	2.7%	< ±2% from 0
M10 Carbon Neutrality Index (Expressed in metric tons of CO2 emitted)	92,003 ² (revised)	CY results available annually after FY end				Pending ³	87,080
M11 % ICAMP Building Assessment Program (Expressed as a % total square feet of 25 UCSF-owned buildings)	0%	First result Q3		3.4%	7.0%	7.0%	5.8%
INNOVATION							
M12 FAS Units Tracking KPIs (Expressed as % of units tracking KPIs on visibility boards to problem solve and improve)	17.9%	NA	16.2%	49.0%	49.0%	49.0%	50%

¹ FY19 Voluntary Turnover results have been re-calculated using a ratio to headcount instead of to FTE, as previously reported. In the instance of Voluntary Turnover, research of results queried at fiscal year-end led to the understanding that, over the course of the year, correction to individual records are sometimes made. The list of separated individuals is held constant and not updated to reflect the identified changes.

² FY18 Carbon neutrality results revised after year-end.

³ FY19 Carbon neutrality results to be updated after third party verification complete.

FAS True North

FY19 metrics measure our progress

