Financial & Administrative Services (FAS) Executive Report
September 2020

Carmelina's Taqueria is one of the dedicated retail services serving the UCSF community.

Reflecting on the last fiscal year and envisioning the future looks a lot different in 2020. While the current crisis required us to make painful choices to meet our financial challenges, it also creates the opportunity to consider fundamental changes to the future of how we work. All of our departments are pivoting the services we provide to adapt to the reality of our budget constraints while also meeting the emerging needs of the UCSF community. Inside are a few examples of service changes underway. We are also halfway through the first year of our Value Improvement program. I am proud of the dedicated work across the organization to add value and cost savings. See our update on the back page to learn more about the progress of our 22 current projects.

What can we learn from this disruption? And, more importantly, how can FAS help? We want to keep the conversation going. I'd love to hear from you! My virtual door is always open.

Paul Jenny
Senior Vice Chancellor
Finance & Administration

Questions?
Email SVC@ucsf.edu.

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

FAS TRUE NORTH Progress
How are we doing?

FY20 Results

✅ =on track

❌ =not on track

☐ =pending

delay until FY21 | ❌ | ✅ | ❌ | ✅

✅ | | delay until FY21 | ✅ | ✅

✅ | | | ❌

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| | | | ✅

Progress on our **13 True North metrics**.
See scorecard for details.

True North Year-End Progress

Celebrate:
- Campus workplace injuries decreased to 2.0 per capita vs 2.3 in FY19, due to fewer workers onsite.
- ICAMP building assessment program ahead of schedule with 96% complete.
- Value Improvement program successfully launched 22 projects with 36.4% showing measurable value at year end, despite COVID delays (see back page).

Obstacles:
- FAS average Customer Satisfaction Index down 1 after a strong increase in FY19.
- Carbon emitted continued its long-term downward trend, but is expected to miss FY20 target due to higher energy demand from new buildings coming online.
- While FAS's surplus (change in net position) of $18.3M significantly beat plan, our variance from plan ($22.7M) is 4.6% of revenue which is not within our target range of +/- 2%.

What's new FY21:
Going forward, we are working to update a few of our True North metrics and targets to refocus on evolving enterprise priorities.

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UCSF

FAS Service Update

A high-level summary of changes to FAS services in FY21 as a response to COVID/budgetary constraints.

Audit + Advisory Services

Audit & Advisory Services continues to provide independent and objective assurance, advisory, and investigative services to the University community and the Board of Regents which are designed to add value and improve the organization's operations.

- Transitioned to a mostly **remote workforce**.
- **Responding to changes in the internal control environmen**t due to COVID-19. Future projects will be framed in consideration of those impacts.

UCSF Finance

Controller's Office

- **Controller's Office Solution Center transitioned seamlessly to remote work** without a disruption in answering and tracking customer calls.
- **Contactless payment options** were offered to departments who process credit card transactions to allow UCSF staff to maintain physical distancing while collecting payments.
- **Continuous updates and guidance** were provided to the research community regarding allowability of expenses charged to sponsored research projects.

Supply Chain Management

The disruption caused by the COVID pandemic gave Supply Chain Management (SCM) the opportunity to make changes that had been under development but not yet implemented. The changes were made to improve service, reduce costs, protect jobs, provide career paths, and keep staff from needless exposures to COVID.

- **Transition to electronic processes** - The lack of access to offices combined with the hiring freeze created an opportunity to transition more processes completely online, such as invoicing through Bear-Buy and electronic payment to suppliers.
- **Supply Chain Management (SCM) customer support** is now being managed by the SCM Response Team as of September 1. Requests for support are required to be created through two new online intake forms, one for the UCSF community and one for suppliers and external customers.

Campus Life Services

Campus Life Services (CLS) Tech
- **Expanding the use of the UCSF Mobile app** to offer virtual onboarding, department orientations, and other virtual campus experiences, as well as creating dedicated opt-in communication channels.

Conference & Event Services
- **Repurposing conference spaces** for essential needs and special programming such as patient waiting rooms and YMCA Learning Camps.

Documents & Media
- Pivoting from traditional offset & digital printed materials to **digital solutions** (web, app, presentation design, digital signs, electronic files) to meet remote needs of customers.
- **Shipping to home addresses and providing onsite scheduled curbside pick-ups** for convenience and safety.

Facilities Services
- **Reducing recharge rates to customers** by as much as 20% due to the implementation of the ORAM budget methodology to streamline administrative funding.
- Opening all **new buildings with daytime only custodial cleaning services**, and transitioning existing buildings to daytime only services over the next 12 months, when possible.
- **Monitoring building occupancy** so as to adjust HVAC and water systems to maximize energy efficiencies.
- **Prioritizing the cleaning of high-touch areas** such as doorknobs and elevator buttons.

Family Services
- Partnering with the YMCA to **offer onsite Learning Camps** specifically for UCSF families to help with distance learning while schools are closed.
- Promoting **expanded resources for childcare and eldercare** service options to assist families.
- Continuing to **improve health and safety protocols** at UCSF child care centers, including the recent implementation of a new mask policy for children and a surveillance testing program for staff.

Fit Rec
- Offering several **virtual memberships** including a free 7-day trial of virtual fitness classes including yoga, Zumba, barre and more. Join by 10/31 and pay $0 enrollment fee - save $25. **Outdoor Fitness programs** (kayak and paddleboard rentals, F45 Track, and personal training) and **private virtual yoga classes for UCSF workgroups** now available.

Retail
- **Keeping UCSF Retailers open** for takeout service and outdoor seating.

UCSF HR

Human Resources is an integral partner in UCSF's response and recovery efforts.
- **Launched resources** such as decision tools, training, and FAQs to help managers and employees navigate COVID-19-related paid leave policies, flu vaccine requirements, and the widespread shift to telework. Partnered with UCSF experts to create and launch a **toolkit of telework resources**.
- **Created resiliency resources** to support the UCSF community through crises, launched remote work trainings for managers and employees, and developed the ABCs of Leading at UCSF Today, which are action labs for managers and supervisors focused on COVID-19, racial injustice, and financial health.
- **Conducted a UCSF pulse survey** to understand perceptions of UCSF's response to the pandemic, financial crisis, and racial injustice; recommendations are being developed in consultation with UCSF leaders.

UCSF IT

To meet the needs of UCSF's remote workforce, **IT focused on standardization with Office 365**.
- Realizing that this represents a significant change in behavior, IT aims to increase the usage of the product by assembling the right onboarding team, creating a collaboration improvement team, partnering with champions and early adopters, and engaging with departments to help. Roadmap includes focusing on specific business scenarios and initiatives, providing a Teams partner, and developing quick-start kits.

UCSF Program Mgmt. Office

PMO is providing leadership on enterprise-wide change efforts and continuous improvement.
- Despite COVID challenges, many of the **FAS Value Improvement projects** were able to make progress over the past several months, creating more than $1M in value for FAS and customers so far through process improvements.
- Managing several **enterprise-wide Task Forces** to create recommendations for key areas of UCSF's recovery and resilience, including telework and managing remote teams, as well as child and dependent care.

UCSF Police Dept.

UCSF Police Department and Homeland Security/ Emergency Management (HSEM) have remained on the frontline to ensure the safety, security, and equality of our diverse UCSF community during challenging times.
- **Activated the UCSF Emergency Operations Center (EOC)** with five positions, escalating into Recovery Operations Center, managing multiple emergency events.
- Exhibited **transparency, empathetic compassion, and tireless dedication** to our UCSF community during a period of national civil unrest as a result of George Floyd's death and other national incidents.
- **Increased security coverage** in some areas despite budget cuts and shortage of Security Officers.
- Canceled, reduced, or rescheduled professional development training sessions.
- **Halted construction** designed to bring Patrol and Investigations units to 654 Minnesota with the goal of having all units of the Police Department altogether in one building.
- To address complaints of bias, PD will be **deploying ID/badge scanners at all security stations** (approximately 17 campus-wide) so that every single entrant swipes in.

UCSF Real Estate

Real Estate construction progress slowed due to COVID safety procedures.
- The progress of construction projects managed by UCSF Real Estate has been slowed due to COVID safety protocols implemented on all job sites. Before any work was allowed to resume following the Shelter-in-Place order, each project had to submit a **site-specific safety plan** for review and approval by UCSF. Changes to construction site access and work practices include health screening of anyone who enters a job site, physical distancing, additional use of PPE, and other measures; access to and around the jobsite is being carefully detailed.
- UCSF is **regularly inspecting all active construction for compliance with the safety plans** and any project not in compliance will be immediately shut down. These new work practices, in addition to the initial shutdown of UCSF construction, have impacted schedules and slowed progress. Updates and revised timelines are being shared with project teams and campus customers on a regular basis.

ADMIN OUTLOOK
Be on the lookout for these change efforts.

What and Why?	What's Next?	Who is Impacted?
Transportation Services **pay-as-you-go parking option**	Convenient pay-as-you-go online-based payment process (PayByPhone) with monthly and daily options	All UCSF employees and students
Email mobile access is changing	Beginning winter 2020/21 Microsoft Intune Company Portal will need to be installed for mobile security	Anyone currently accessing UCSF email on their mobile device
Applicant Tracking System Brass Ring enhances functionality and improves the hiring manager and internal job seeker experience	Launches Oct. 7, with an internal applicant gateway, new manager dashboard, automated offer letters, and improved communication-more Manager Orientation Sessions coming soon	Campus and Health Hiring Leaders; Internal job seekers
UCSF Finance, UCSF Real Estate and academic representatives are making recommendations to incentivize the **return of underutilized research space**	Further data analysis and consultation, discussion with the campus and Academic Senate space committees, and recommendations to the Chancellor's Executive Team	Schools, departments, organized research units, faculty, and other principal investigators
Financial Management Dashboard updates	UC PATH data is now included and additional metrics are being evaluated	Campus financial managers/users
Supply Chain Management (SCM) check payment frequency transitioned from daily to three times a week on Mondays, Wednesdays and Fridays	Other electronic forms of payment such as ACH, Payment Plus, EFT and wire, will not be impacted. There is an emergency check request process	Anyone receiving or distributing paper checks
Supply Chain Management support now managed by **SCM Response Team**	As of Sept. 1 requests for support are generated through new online intake forms	Faculty/staff and students and suppliers and external customers seeking assistance
UCPath support services transitions from the Bridge Center	UCSF's temporary support model transitions back to operational support structures on Oct. 5	Entire UCSF community

UCSF LEAN IMPROVEMENT STORY: FAS Value Improvement

The **FAS Value Improvement** portfolio launched in January 2020. Value Improvement (VI) is one of our four FAS Strategic Priorities and supports the Chancellor's priority of financial resilience for UCSF, as described in his 2019 State of the University address. We are investing in these projects to deliver more value to our customers and the growing enterprise, and advance a culture of continuous improvement.

70 applications

22 projects launched

8 coaches

36% showing measurable value, despite COVID delays
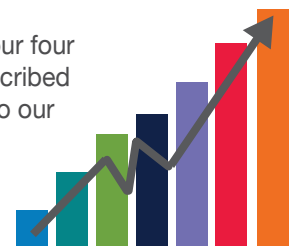
$14m estimated cost savings over 3 years - avoided costs, revenue increases, expense reductions, process efficiencies

6 FAS Departments
Campus Life Services
Finance
Human Resources
IT
Police Department
Real Estate

List of 22 Awarded FAS Value Improvement Proposals

1. *CLS*-Day Shift Cleaning Model
2. *Finance*-Ultra low temperature Freezer optimization
3. *Finance*-Chemical Supply Chain Management
4. *Finance*-Easy Money: Annual Fund Request Process
5. *Police*-New Contract Services BCHO
6. *CLS*-Work Plans for High Frequency Repairs
7. *CLS*-Reducing Credit Card Fees
8. *HR*-Optimizing the Talent Acquisition Function
9. *HR*-HR Roadmap–Staff Compensation Streamlined Processes
10. *CLS*-Facilities Services Onboarding Smartsheet
11. *HR*-HR Roadmap–Labor & Employee Relations (LER) streamlined process & support levels
12. *HR*-Contingent Labor Managed Services Provider
13. *CLS*-Adopting New Technologies for Floor Care
14. *CLS*-Tool check out program (MAXIMO)
15. *Finance*-Comprehensive Campus Managed Print Services
16. *CLS*-Lab Freezer Monitoring
17. *Real Estate*-Leased Campus Building Maintenance (MAXIMO)
18. *CLS*-Replacing old floor care equipment with updated technology
19. *CLS*-Enhanced Carpet Cleaning
20. *CLS*-Reduce Time to Perform Scheduled Maintenance Work (MAXIMO)
21. *IT*-IT Portal
22. *Real Estate*-Using GIS Mapping to Lower Lab Renovation Cost