

# Finance Forum

*Welcome*

**Mike Clune**

Associate Vice Chancellor, Budget & Resource Management  
Interim Chief Financial Officer

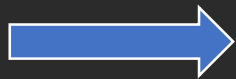
August 22, 2019

**UCSF** Finance



# Today's Agenda

- **Welcome**
- **Getting to Know: Dr. Nilika Shah Singhal**
- **Live-Poll**
- **CFO Updates**
- **Best of Finance Presentations & FAS Value Improvement:**



TOPIC	PRESENTER	DEPARTMENT
LivingGreen in the Controller's Office	Lisa Duca	Controller's Office
FAS Finance Service Center: Who We Are	Linda Moran	FAS Finance Service Center
Value Improvement Program	Stephanie Mackler	Finance & Administrative Services



Get Ready For Live-Polling!

# Getting to Know: Dr. Nilika Shah Singhal

- Neurologist and epilepsy specialist
- Associate Professor, Department of Neurology & Pediatrics
- Earned medical degree from the University of Texas Health Science Center at Houston
- Double board-certified in neurology with special qualifications in child neurology and epilepsy
- Enjoys hiking, yoga and traveling
- Presenting: *“Pediatric Epilepsy Learning Healthcare System.”*







*Questions & Answers*

**With Dr. Nilika Singhal**



Get Ready For Live-Polling!

# UCSF Finance New Staff

Controller's Office

Supply Chain  
Management

Budget & Resource  
Management

TRAN LU

DERRICK CHUN

MARIANNE  
LEJANO

SIKOTI MANUMUA

YVETTE VILLA-  
CARLOS

SARAH  
RITTERSKAMP

HILDA ANDERSON

COURTNEY  
CROSSON

TIANNA  
CHAPMAN

JUSTIN SALVAN

JEREMIAH YOO

SUSAN O'HARA

SAIQA QURESHI

CHERNO JALLOW

JENNY  
SANGPOLSIT

JENSINE LOW

NANCY TRUONG





Angela Lucien!



# UCSF FINANCE CUSTOMER SATISFACTION SURVEY



**YOUR FEEDBACK MATTERS**



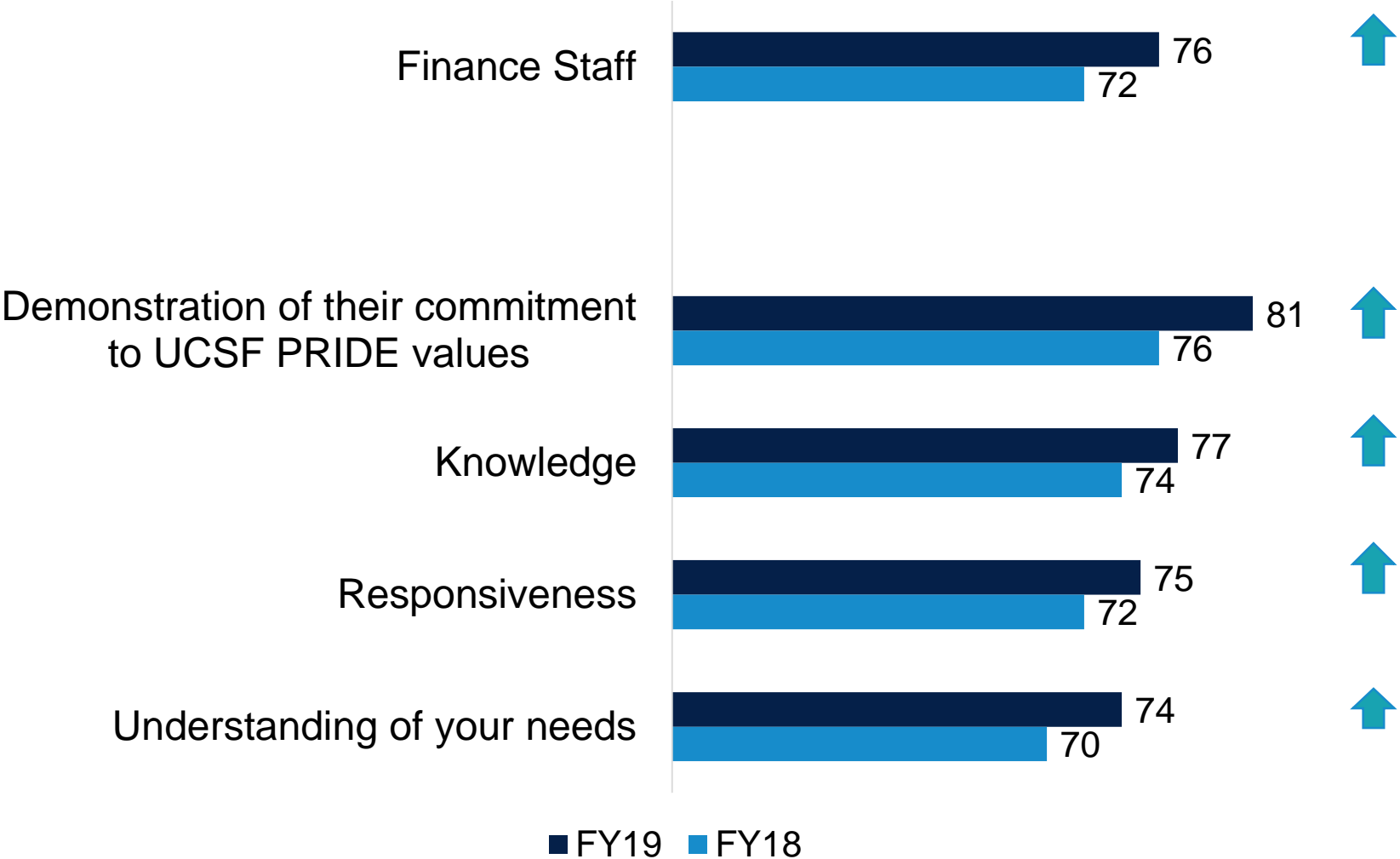
# Year-Over-Year Score Comparisons

Closing the final wave of FY2018-19, UCSF Finance received an overall score of 65, a four-point increase from last year's score of 61.

- **Areas of increase:**

- Payroll
- Receiving and Delivery
- Contracts and Grants Financial Management
- Capital Asset Management
- Annual Budget Process
- MyReports
- Recharges
- Storage
- Controller's Office Solution Center

# Finance Staff Year-Over-Year Comparison



Indicates statistically significant change for current wave from prior wave at an 80%  or 90%  level of confidence



A group of people in business attire are performing a high-five gesture in a meeting room. The background is dark with several colorful sticky notes (yellow, blue, red) pinned to a wall. The text "Employee Engagement" is overlaid in a white, elegant script font.

*Employee Engagement*

# UCSF Finance Engagement Scores

	2019	2018	Change
<i>Q00: How satisfied are you with your organization as a place to work?</i>	4.05	3.93	0.12
<i>Q01: I know what is expected of me at work.</i>	4.49	4.28	0.21
<i>Q02: I have the materials and equipment I need to do my work right.</i>	4.33	4.22	0.11
<i>Q03: At work, I have the opportunity to do what I do best every day.</i>	4.15	4.05	0.10
<i>Q04: In the last seven days, I have received recognition or praise for doing good work.</i>	4.03	3.62	0.41
<i>Q05: My supervisor, or someone at work, seems to care about me as a person.</i>	4.21	4.11	0.10
<i>Q06: There is someone at work who encourages my development.</i>	4.04	3.95	0.09
<i>Q07: At work, my opinions seem to count.</i>	4.02	3.82	0.20
<i>Q08: The mission or purpose of my organization makes me feel my job is important.</i>	4.38	4.33	0.05
<i>Q09: My associates are committed to doing quality work.</i>	4.30	4.22	0.08
<i>Q10: I have a best friend at work.</i>	4.05	4.00	0.05
<i>Q11: In the last six months, someone at work has talked to me about my progress.</i>	4.25	4.07	0.18
<i>Q12: This last year, I have had opportunities at work to learn and grow.</i>	4.24	4.12	0.12
<b>GRAND MEAN</b>	<b>4.21</b>	<b>4.06</b>	<b>0.15</b>



From Michael Huang to Carol Luong

04/26/2019 05:09 AM

Hi Carol, Thank you so much for taking the time today to teach me everything you know about UPlan and SmartView. It was great to be able to learn from your expertise and it feels good knowing I can always reach out to you for support on these programs. Thanks for all you do and I really appreciate your help!!!



From Todd Vizenor to Mohammed Alkubati

04/23/2019 02:56 PM

Mohammed, Thank you for being a soldier through this period of being short staffed and busy. You have always stepped up in times of need and have figured out how to maneuver through difficult times. I greatly appreciate all your hard work and diligence to work that you do. Thanks, Todd



From Shireen Huda to Miko Thomas

06/21/2019 01:55 PM

Thank you

Thank you for taking on the ledger verification tasks while Jenny is out. You have done a thorough job and have been a great help to identify some charges that have hit the ledger incorrectly. Keep up the great work!

[Recognize.ucsf.edu](https://recognize.ucsf.edu)



# UCSF Finance Recognize Cards

*Special thanks to UCSF Real Estate for creating  
the Recognize Card program & PRIDE design.*



# FINANCE



Preliminary Fiscal Close





- UCSF campus and UCSF Health core activities are ahead of plan, by a combined total of \$228 million
- Total revenue reached nearly \$7.5 billion
- Salaries and benefits grew faster than revenues



# Welcome to eta.ucsf.edu

Campus Life Services is here to let you know what's happening so you can **rock your commute** or know what to expect if visiting UCSF.

We'll help you gear up for the opening of the Chase Center, the arrival of the Warriors, and then some!

[GET ALERTS](#)



# ETA Calendar

August

SUN	MON	TUES	WEDS	THURS	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31



**Red**

Expect major delays



**Yellow**

Expect delays

# There's an app for that!

## Get the latest On the go

Download the UCSF Mobile app.

Get alerts, access Live Shuttle, a trip planner, maps and more – all in the Go tab.



Available on the  
APP STORE



Get it on  
GOOGLE PLAY





# Best of UCSF Finance

TOPIC	PRESENTER	DEPARTMENT
LivingGreen in the Controller's Office	Lisa Duca	Controller's Office
FAS Finance Service Center: Who We Are	Linda Moran	FAS Finance Service Center

# LivingGreen in the Controller's Office

**Lisa Duca**, Office Services Analyst  
Controller's Office

# Carbon Neutrality Initiative

UC, a national leader in sustainability, has pledged to become carbon neutral by 2025, becoming the first major university to accomplish this achievement.





We are the University of California, and there is no reason that UC can't lead the world in this quest, as it has in so many others.

**Janet Napolitano**  
UC President

# How can Finance units get involved?

# Get LivingGreen Certified!

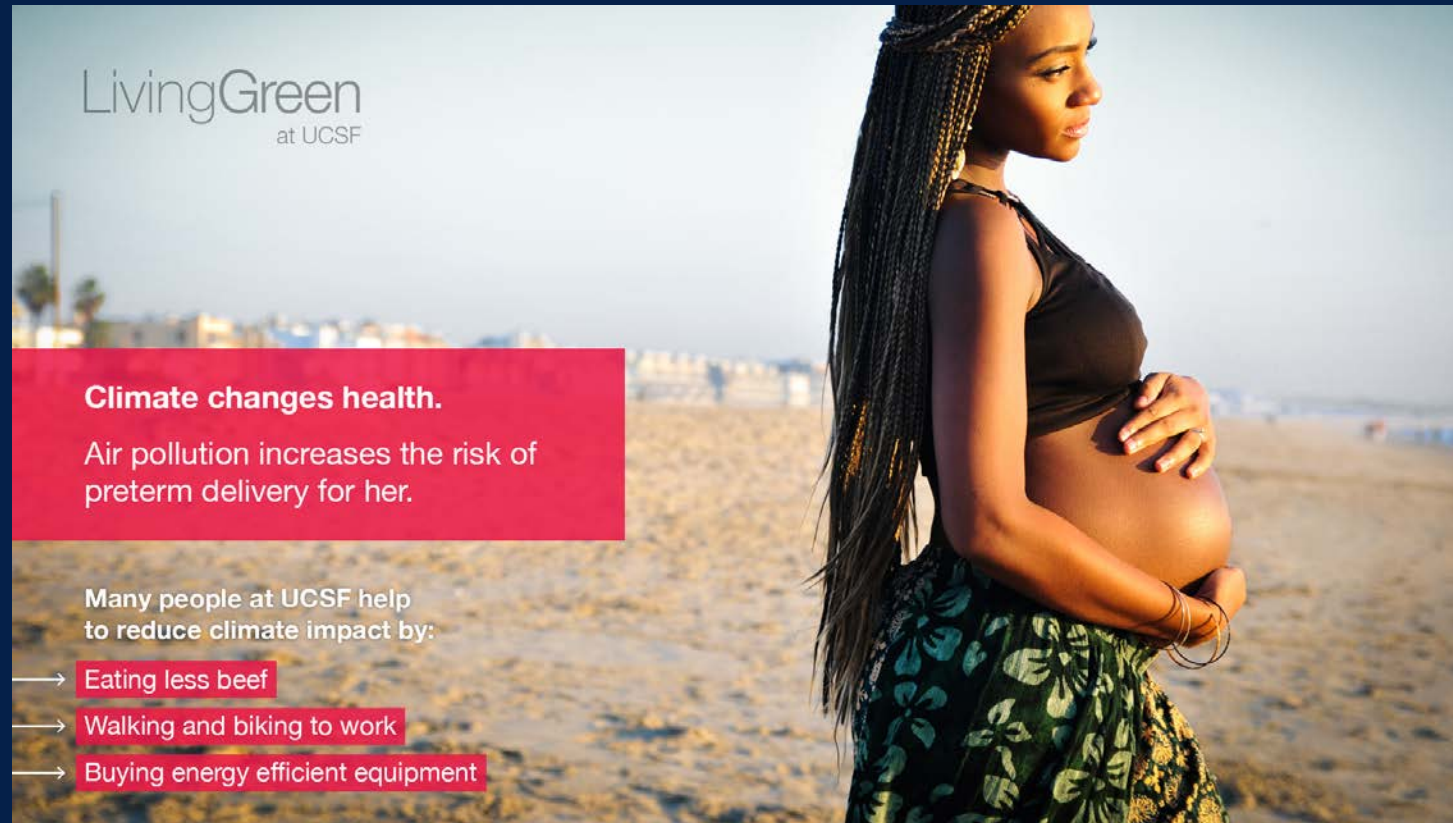
<p>Step 1 Show your Interest</p>  <p>Reach out to the LivingGreen Team to start your certification.</p> <p>Become the informal, volunteer green champion to oversee the certification process.</p> <p>Email us at <a href="mailto:livinggreen@ucsf.edu">livinggreen@ucsf.edu</a> to get started.</p>	<p>Step 2 Meet with our LivingGreen Team</p>  <p>A member of our team will help you determine actions to get certified.</p> <p>A team member will meet you on-site to jointly evaluate ways reduce your impact and get co-workers engaged. Afterwards, you will receive a preliminary score along with options to earn more points.</p>			
<p>Step 3 Take Action on Recommendations</p>  <p>Implement changes from the checklist and start making a difference.</p> <p>Depending on your area, the LivingGreen team will provide you with recommendations for a range of specific actions to implement.</p> <p>Click below for Checklists:</p> <p><a href="#">Lab</a> <a href="#">Office</a> <a href="#">Clinic/Unit</a> <a href="#">Events</a></p>	<p>Step 4 Schedule a Follow-up Visit</p>  <p>The LivingGreen team will return during the following quarter to see what improvements have been made and award points.</p> <p>Your certification level is awarded based on the total number of points your group earns.</p> <table border="1"><tr><td> 70 points Bronze</td><td> 80 points Silver</td><td> 90 points Gold</td></tr></table>	 70 points Bronze	 80 points Silver	 90 points Gold
 70 points Bronze	 80 points Silver	 90 points Gold		



# Controller's Office LivingGreen Actions

# Raise Awareness

*Climate Changes Health* posters added in each suite's kitchenette



# Raise Awareness

## Communicated LivingGreen Resources

 **Controller's Office**

**Be a Sustainability Steward!**

In 2015, the Controller's Office achieved a LivingGreen Office Silver Level Certification. This was a great accomplishment, attained through the efforts of climate change champions in our office.

### Be Inspired



[Watch this quick video](#) to learn more about UCSF's LivingGreen initiative and goals!

### Get Involved

#### Recycling & Waste Reduction

PAPER	PLASTIC	GLASS
FOOD	METAL	OTHER

**Save the Date!**  
Plan to attend a **June 5 Lunch & Learn** on recycling and waste reduction (invitation to follow).

### Stay Informed



[Sign up](#) for the Office of Sustainability LivingGreen newsletter for stories, events, tips, and discounts.

### Take Action

What can you do today to reduce your carbon footprint?



Turning off your monitor when not in use can save up to \$50 a year and translates to a CO2 savings of 261 lbs. a year—the equivalent of 13 gallons of gas. Please contact the Admin Services team if you would like a sticker to remind you.

Would you like to shine a spotlight on staff who deserve recognition for their sustainability efforts in the



# Support Zero Waste

Bins and updated signage in each suite

The image shows four signs for waste sorting, each with a list of items and a 'Learn more' link to [zerowaste.ucsf.edu](http://zerowaste.ucsf.edu).

- RECYCLE** (Blue background):
  - empty beverage containers
  - soup cups, aluminum, plastic containers
  - mixed paper, hard plastics
- COMPOST** (Green background):
  - food, soiled paper, paper towels
  - coffee filters, tea bags
  - "compostable" labeled foodware
- GARBAGE** (Black background):
  - shiny food wrappers
  - styrofoam
  - plastic film, gloves, bubble mailers
- Special Materials** (Purple background):
  - cell phones, small electronic waste
  - batteries
  - small scrap metal, eye glasses

## Bins Are Better Together

Sort Your Waste



Keep sorting simple.

Leave bins:

- ✓ next to each other
- ✓ with the correct sign

**WHY?**

Proper waste sorting is now mandated under San Francisco's Refuse Separation Ordinance #180646 as of 7/1/19.

UCSF Office of Sustainability  
Sustainable UCSF Decisions

[tinyurl.com/UCSFHwaste](http://tinyurl.com/UCSFHwaste)

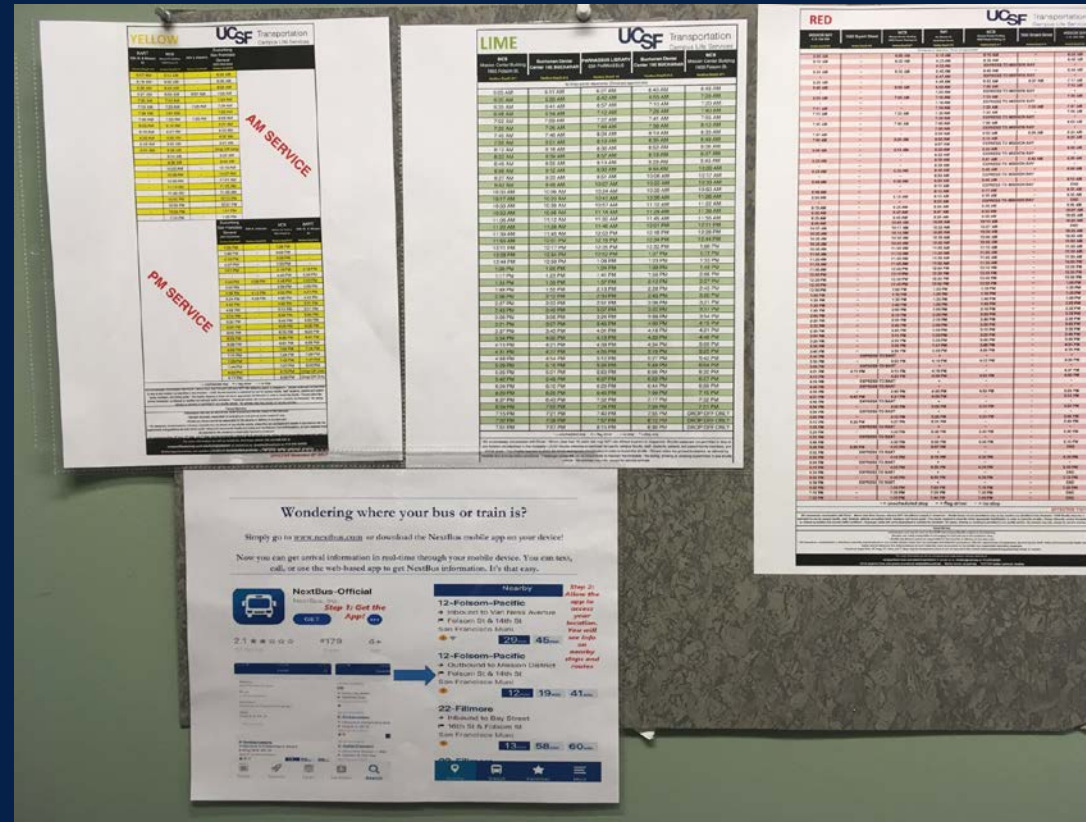
# Implement Print Management Best Practices

- Default to double sided printing
- Order 100% recycled paper



# Identify Alternative Transit Options

Posted UCSF Shuttle timetables & NextBus mobile app for live Muni updates





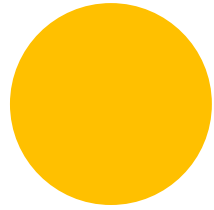
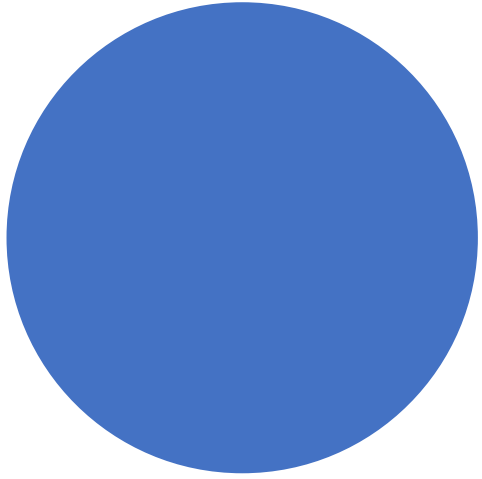
# LivingGreen Certification Results



Chancellor Sam Hawgood awarded the Controller's Office the LivingGreen Gold Level Certificate in June 2019.

# Web Resources

- UCSF Office of Sustainability:  
<https://sustainability.ucsf.edu/>
- UC Cool Climate Challenge:  
<https://www.coolcampuschallenge.org>
- UC Carbon Neutrality Initiative Climate Lab:  
<https://www.universityofcalifornia.edu/climate-lab>



Presenter: Linda Moran, Director  
Department: FAS Finance Service  
Center

**FAS Finance Service  
Center: Who We Are**



# Who We Are:

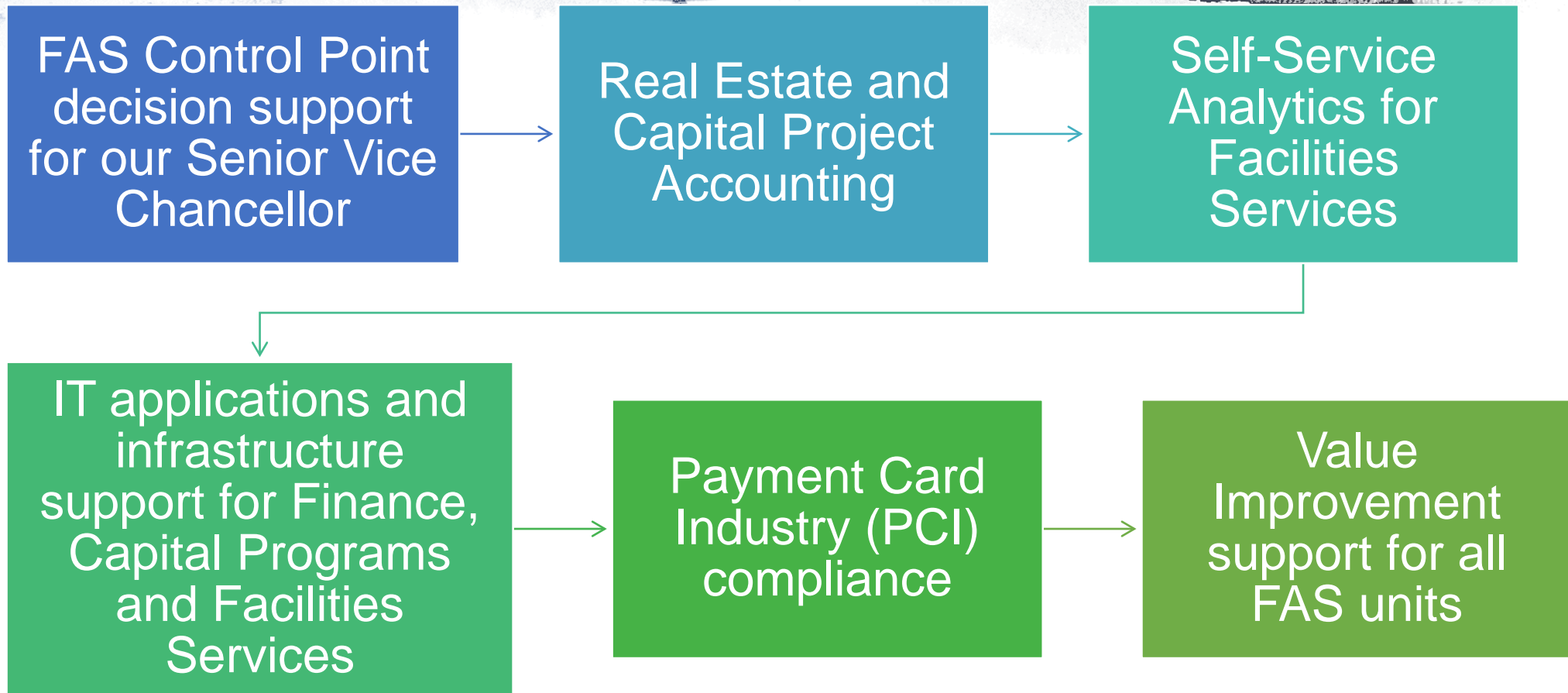
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The Finance Service Center (FSC) is a shared service organization that support all FAS and some Chancellor's units in effective stewardship and conservation of financial and operational resources.

The FSC leverages campus-wide financial planning and transaction support acumen while working closely with partners in Budget and Resource Management (BRM), Controller's Office and Supply Chain to provide our clients the best of both worlds:

***shared services attuned to our unique clients' needs.***

# What Is Unique?



# What Is Our Shared Work For Clients?

- Annual Budget Cycle Support
- Financial Planning & Analysis
- Recharge Rate Development
- Monthly, Quarterly and Ad hoc Financial Reporting
- High-Volume Transaction Processing

## UCSF Real Estate

## Information Technology

Office of Legal Affairs  
UR Communications  
UR Community and  
Government Relations  
  
Office of the Senior Vice  
Chancellor  
UC Police Department  
Human Resources  
Program Management  
Office

Campus Life Services  
Arts & Events, Business &  
Technology Svcs,  
CLS AVC Administration,  
CLS Executive Director  
Documents and Media,  
Family Services, Fitness &  
Recreation, Housing,  
Milberry Union Events &  
Meeting Center, Retail  
Services, Transportation,  
Wellness

Campus Life Services  
Facilities Services &  
Utilities

Finance  
Audit and Advisory  
Services, Budget and  
Resource Management,  
Controller's Office, Office  
of Sustainability, Office of  
the Vice Chancellor and  
CFO, Risk Management &  
Insurance Services, Supply  
Chain Management  
Finance Service Center

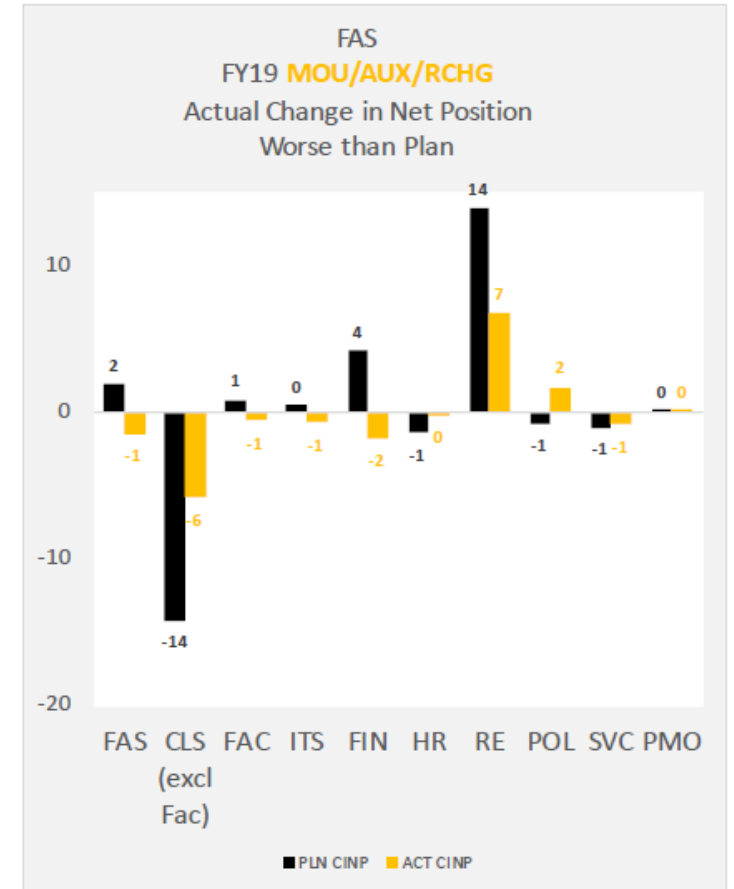
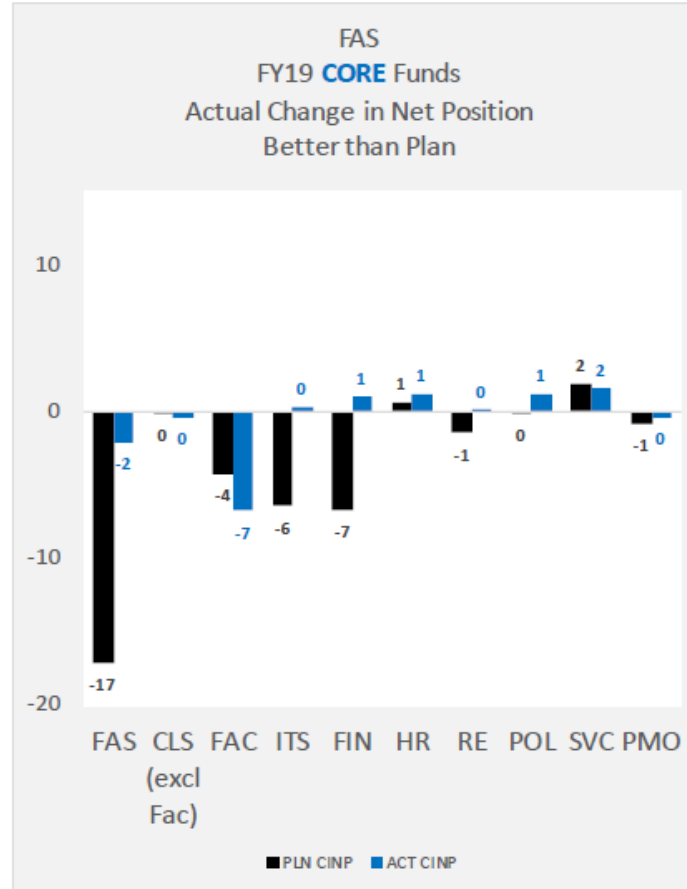
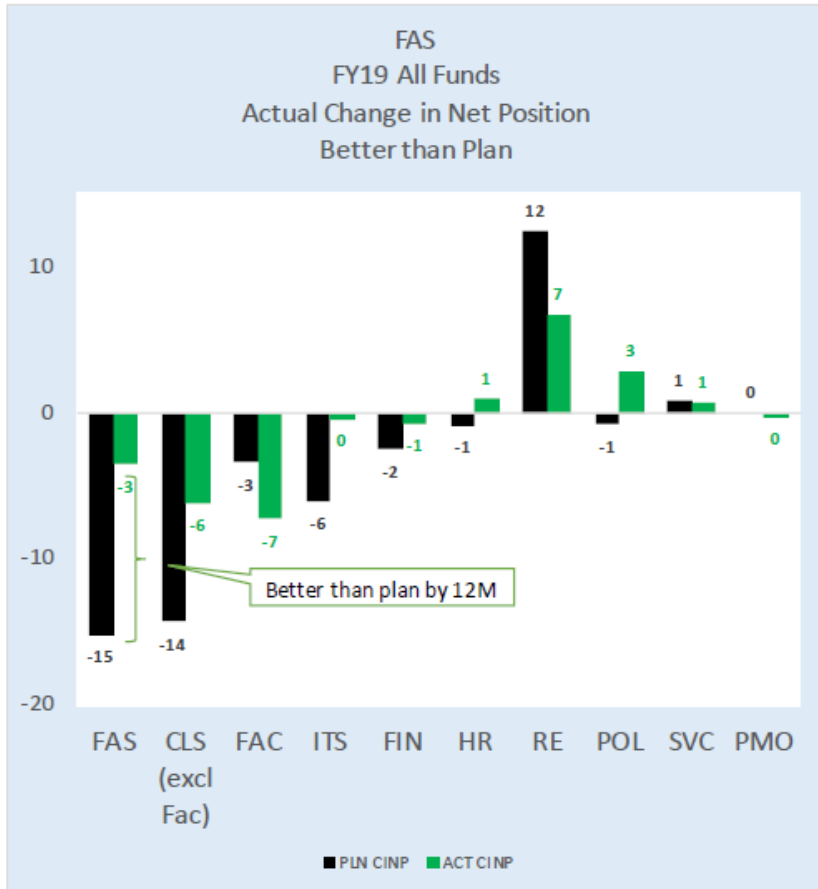
Who We Are:  
**PRIDE** values,  
strengths and  
qualities

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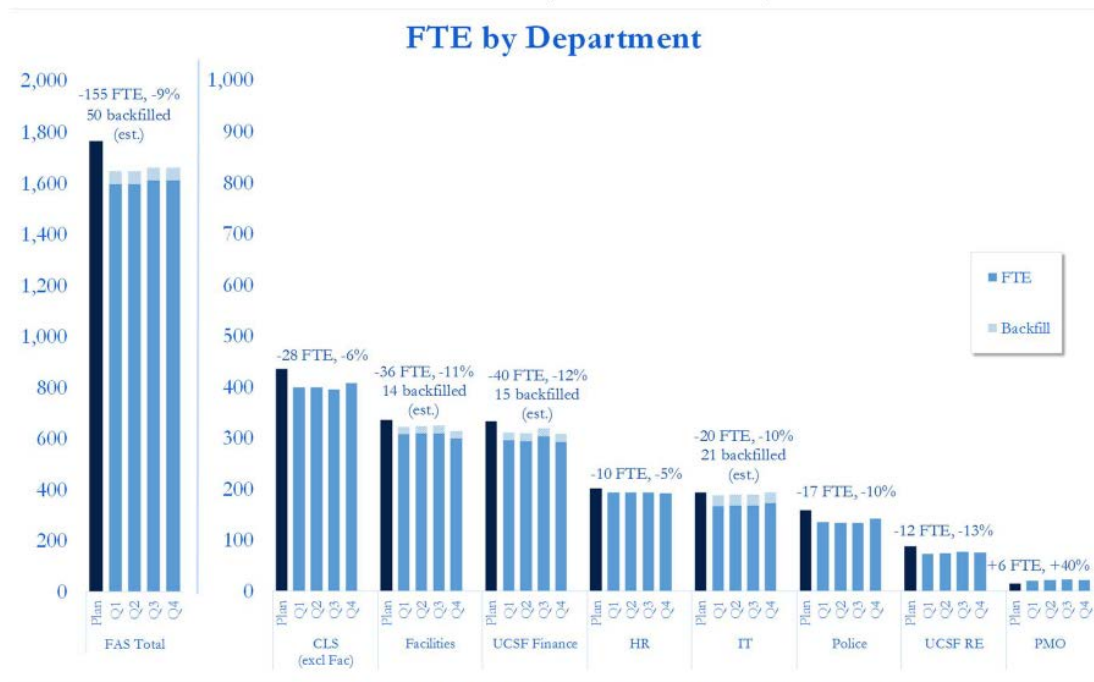


# FAS Results : Better than Plan by \$12M



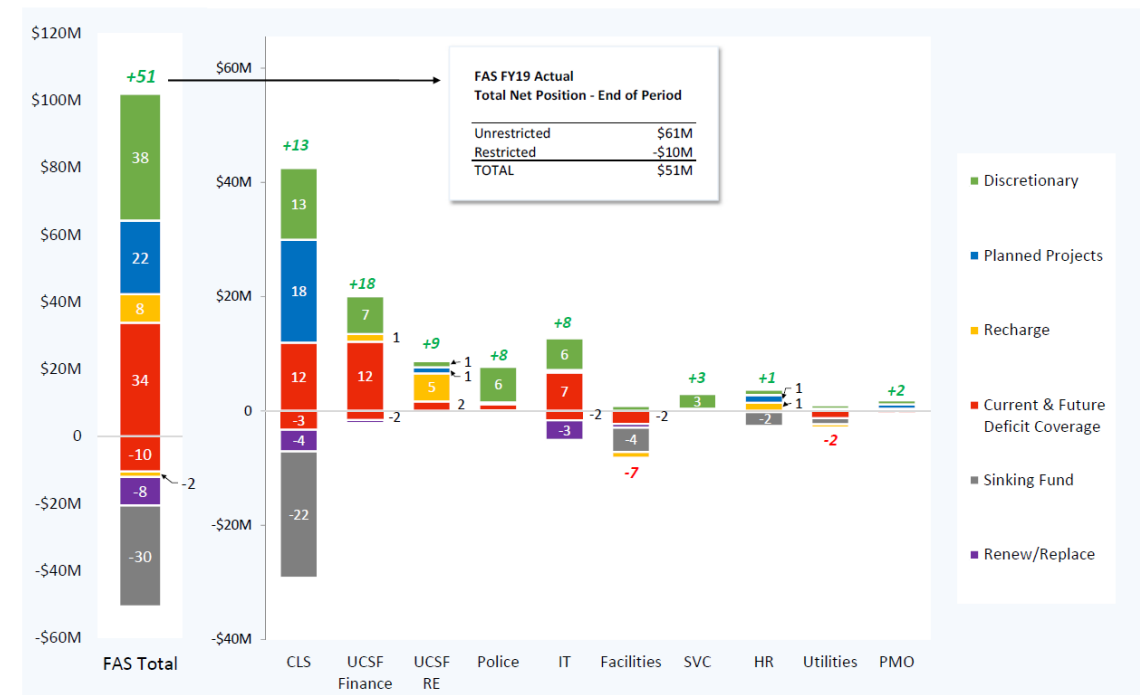
# Goals: Improve our FAS Budget Planning, Client Partnerships and support Value Improvement

2018-19 FTE  
June 2019 Actual: -9.0% (-155 FTE) Below Plan



FTE includes Regular, Contract, Temp pool, Limited, Per Diem and other appointment types.

FAS FY19 Actual Reserves by Category



# FAS Value Improvement

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**Stephanie  
Mackler**

**Finance &  
Administrative  
Services**

# What is Value Improvement?

- Program designed to empower our people to measurably reduce waste, improve processes, and create capacity to serve our growing enterprise
- One of the four FAS Strategic Priorities supporting [FAS True North](#) goals





# Why Does Value Improvement Matter?



UCSF continues its rapid growth, resulting in increasing needs for FAS services



FAS wants to continue providing excellent service



Value improvement efforts can simplify our work and provide greater value to our customers



Funding is available to make your ideas come to life

# What Can I Do?



Bring your ideas for improving value to our customers!

**Reduce**



wait times

**Reduce**



waste in processes

**Improve**



utilization of assets

**Decrease**



expenses

**Increase**



revenue

# Where Should I Start?



Brainstorm ideas with colleagues



Prepare to submit a project proposal



Get help developing your proposal



Coaching available from the Program Management Office (PMO) and the Finance Service Center (FSC)



Visit [fas.ucsf.edu/value-improvement](https://fas.ucsf.edu/value-improvement) for additional resources (i.e., templates, webinars, examples, etc.)

# Key Dates

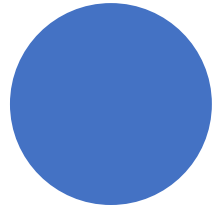
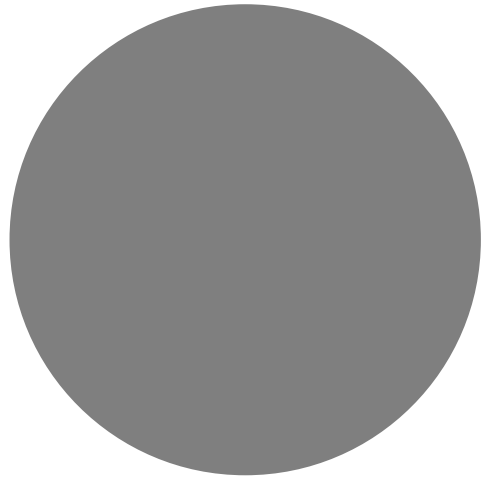






# Where?

- [open-proposals.ucsf.edu/](https://open-proposals.ucsf.edu/)
  - Submit proposals
  - View and submit comments and “likes”
  - Check proposal status
- [fas.ucsf.edu/value-improvement](https://fas.ucsf.edu/value-improvement)
  - View program details: timeline, FAQs, elements of a good proposal
  - Download one-pager to spread the word



Questions or Ideas?

# Key Takeaways



- To receive your water bottle (online attendees) please email [Finance@ucsf.edu](mailto:Finance@ucsf.edu) with your name and campus mailbox number.
- Recognize cards will be available at your department's front desk or breakroom.
- Submit your Value Improvement proposal, visit [Fas.ucsf.edu/value-improvement](https://fas.ucsf.edu/value-improvement) for more information.
- Suggestions on how to make our forum better? Contact us at [Finance@ucsf.edu](mailto:Finance@ucsf.edu)