Discussion Topics

• **Introducing Operational Excellence:** Michael Hindery, Vice Dean Administration, Finance and Clinical Programs, School of Medicine

• **Making OE a Success:** Beth Kane, Director of Organizational Development, SOM

• **The Challenges of OE:** Richard Secunda, Director of Administrative Services, SOM

• **In Conclusion**
Introducing Operational Excellence ‘OE’

The Chancellor Susan Desmond-Hellmann, MD, MPH

“OE is about making sure that every dollar we spend is in service of our mission (patients and health, discovery, and education) through excellence.”

The end-points OE is striving for:

- **Money**: reduce administrative costs by $48M.
- **Faculty**: minimize administrative burdens to be able to focus on real job
- **Staff**: ensure equitable salary/roles & responsibilities, defined career path, training
- **Systems**: invest in systems to support new way to work
- **Process**: eliminate unnecessary steps, replace with clarity
- **Policies & Procedures**: simplify, align procedures, reduce risk
- **Departments**: ensure excellent service consistently available regardless of size & resources
OE began in January 2010 with design, drill down and implementation

Functional Owners now rolling out teams in phases
  • August 2011 through August 2012

Pre-award and Human Resources
  • Consolidated services into newly formed teams
  • Teams serve programmatically grouped departments
  • Teams/Service Centers located on multiple campuses
  • Individuals applied for new positions on teams
  • Intense training
The Governance Structure for the Design & Development Phases of OE

Chancellor’s Leadership Operating Cabinet
Jeff Bluestone, John Plotts, Deans of Dentistry, Nursing, Medicine, Pharmacy

OE Coordinating Committee

- Execute program to achieve operational excellence
- Resolve resource and design conflicts
- Monitor and report on cost & savings
- Identify and validate communications requirements
- Identify funding model to support new service delivery that is transparent, direct and equitable

Faculty Oversight Committee

OE Senior Work Group

- Provide guidance to work groups
- Ensure effective service delivery for integrated model
- Validate and integrate OE recommendations
- Resolve issues
- Endorse solutions and deliver to OECC

Work Groups

- Communications
- HR & Academic Affairs
- IT Infrastructure
- Finance
- Research Administration

- Provides vigorous review & feedback
- Ensures faculty representation
- Provides advisors for each work group
- Vets & validates recommendations

#1
Focus for IT efforts

• **Single password**: doesn’t expire
• **Email**: migrated over 23,000 accts. Medical Center on board in March 2012
• **Network**: upgrade of wireless infrastructure throughout UCSF, multi-year project
• **Help desk**: single unified operation School of Medicine, IT and Medical Center
• **IT procurement**: ‘Bear Buy’ single point of entry for faculty, staff from UCSF, Berkeley & the Medical Center to purchase and manage payment data

**Desktop Support & Data Centers**: consolidation
Finance

• Different Approach
• Chart of Accounts Redesign
• Enterprise-wide Financial & Managerial Reporting
  • Consistent and robust reporting
  • Set of tools to produce reports
• Budgeting and Financial Planning Analysis
  • Simplification of budget workflow and approval process
  • Implementation of integrated budgeting and forecasting software
• Resource Allocation Model
  • Designing financially sustainable enterprise-wide model to support tripartite mission of UCSF
  • Realigning the UCSF funds flow in response to UCOP model
The Governance Structure for the Current Implementation of OE

Chancellor’s Executive Cabinet
Jeff Bluestone, John Plotts, Deans of Dentistry, Nursing, Medicine, Pharmacy

OE Coordinating Committee

- Execute program to achieve all initiative operational excellence
- Facilitate resolution of resource and programmatic issues
- Monitor cost & savings

OE Communications Committee

Faculty Oversight Committee

- Meets as needed
  - Provides vigorous review & feedback
  - Ensures faculty voice

AP/HR Advisory Group
- Ensure effective service delivery for integrated model
- Oversee budget
- Monitor Metrics/overall performance
- Resolve issues
- Endorse solutions and deliver to OECC

AP/HR Service Centers Specialty Center

OSR Advisory Group RMS and C&G

IT Advisory Group

RMS Teams C&G Office

IT Organization

#2
UCSF Workforce Issues

The Money

• Target
  • Responding to internal and external reductions

• Investing to save money and increase performance

• Transition
  • Central provides reimbursement for severance
  • Transition staffing in departments

• Perception that for some departments OE costs more
UCSF Workforce Issues

• Funding Models
  • Keep it simple, minimize burden to administer
  • Pre-award utilizes indirect cost dollars based on volume
  • HR identified cost per faculty, staff & students, direct charge
  • IT Model cost per person, details being refined

• OE Cost-Savings Tracking Tool
  • Tracks all OE cost saving activities within departments
Making OE a Success

The Leadership

• Clear strong messages
• Consistent presence throughout the evolution of OE
• At every level of the institution

The Faculty and Staff - creating the new OE way to work

• Broad-base; individuals who do the work, manage the work and influence the work
• ‘Who is at the table?’ Builds trust and credibility
• Faculty, faculty and more faculty from day one

The Staff - now doing the new work

• Competitive process to get a job in the new teams
• Training for technical skills, policy, team, customer service, problem solving
• Accountable – rigorous measures
Making OE a Success

Communication – The Principles

• Get timely, accurate OE information to UCSF community
• Provide opportunities for all individuals to provide input
• Address tough issues openly
• Have access to all information directly, eliminate filters
• Deliver information in a voice that speaks to the real work experience of the individuals
• Overall support so individuals can succeed
Making OE a Success

• Communication – The Tools
  • OE Communication Committee
  • OE website ‘Go To’ place to find out anything
  • Rumor Mill & FAQs
  • Brown Bags, Town Halls, monthly email updates, department meetings
  • Talks with Leadership
  • ‘Managing the Change’ Work Shops
  • ‘Come and Be Heard’ sessions
  • Functional Owners
Outstanding Endeavor

For Dr. Neal Cohen, OE means a streamlined process of academic achievement that will clearly define career paths for all faculty at every school.

OE: What does it mean to you?

New Information

2/28/12
OECC February Status Update
See materials

Edit

1/27/12
Approval Policy Changes effective February 1, 2012
See materials

Edit

12/22/11
OECC Status Update
See materials

Edit

Events

6/6/12
Come and Be Heard - on hold until 2012

More Events

Scorecard

UCSF IT Service Desk
Announcement: ISU Request Mailbox will be retired on 2/26/12. As of March 1, 2012, all support must be requested via the Employee Self-Service Portal or via email.

BearBuy Help Desk is open for business. The BearBuy Help Desk can be reached by sending an email or by calling 1-855-4100, option 2.

OE in the Works

Susan Sall, Director of Service Center A

Edit

Jenny Scherer, Director of Service Center B

Edit

OECC

OECC February Status Update

IT

Have you ever been traveling overseas to a conference and your email disappeared? The IT Help Desk is now staffed 24/7. You can talk to a live person wherever you are in the world, whatever time of day it is. Call 415-514-4100 or email.

Pre-Award

"How's My Driving?" results: Faculty provide 'at the time' feedback regarding the quality of the service they are receiving from the new pre-award RMS teams and the RSCs.

RMS Six-Month Progress Report Plan. Provides the measures and evaluates the implementation, operations and performance of the first RMS team.

Two RMS Teams launched on January 17, 2012! Team D is located on the Parnassus Campus. Team E is temporarily located at Laurel Heights until their space is ready at SFGH.

The OE Faculty Pre-Award Baseline Satisfaction Questionnaire Executive Summary & Detailed Summary of the Key Findings is available here.

Human Resources

UCSF Human Resources: Serving the Academic and Staff Community. is well on its way to full implementation. Significant steps are being taken to ensure a successful rollout. Please click here for complete details.

UCSF Human Resources Service Level Agreement is now available.

Service Center B E Go-Live Orientation Materials are now available.

Finance

February Finance Update
Making OE a Success

Wide variety of tools: Focus groups, expanded surveys, SurveyMonkey, email, personal interviews, systems data, activity reports, ‘How’s My Driving’, Service Level Agreements, group meetings, satisfaction surveys on email signatures, OE website

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<thead>
<tr>
<th>IT METRICS</th>
<th>EXAMPLES</th>
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<tbody>
<tr>
<td>Client Awareness and Satisfaction</td>
<td>Survey ratings average 4.8 out of 5 on 95% of all tickets</td>
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<td></td>
<td>Meeting established SLA’s 98% of the time</td>
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<tr>
<td>Productivity</td>
<td>Achieve device to tech FTE ratio</td>
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<td></td>
<td>Achieve client per tech FTE</td>
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<tr>
<td>Incident Management</td>
<td>Time to respond</td>
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<td></td>
<td>Time to resolution by tier</td>
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<tr>
<td></td>
<td>Ticket escalation percentage is less than 5%</td>
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<tr>
<td>Resource Management</td>
<td>Achieve targeted device to FTE ratio</td>
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<td></td>
<td>Job satisfaction</td>
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## Making OE a Success

<table>
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<tr>
<th>RMS (Pre-Award) METRICS</th>
<th>EXAMPLES</th>
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<tr>
<td>Client Satisfaction</td>
<td>Department satisfaction with RMS Faculty satisfaction with RMS</td>
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<tr>
<td>Quality of Work Measures</td>
<td>Quality of proposals Quality of RMS work</td>
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<tr>
<td>Internal Processes – Staff Satisfaction</td>
<td>Job satisfaction level for: Associate RSC, RSC, Team Manager, Director Staff attrition</td>
</tr>
<tr>
<td>Internal Processes-Performance</td>
<td>Efficiency performance targets Cycle times Accountability</td>
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<tr>
<td>Training Program</td>
<td>Participant response Increased knowledge Application of information</td>
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<tr>
<td>Cost Measures</td>
<td>Cost per proposal Cost of RMS operation</td>
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<tr>
<td>Implementation Progress</td>
<td>Implementation Schedule Implementation environment Model Integrity</td>
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Making OE a Success

How Will We Know OE is a Success?

• Faculty & staff will come to their own conclusions
• The ‘word on the street’
• The OE Cost-Savings Tracking Tool records savings
• The OE Metrics extract and track valid and valuable information to identify OE strengths and weaknesses
• Assessment by UCSF Leadership
The Challenges of OE

Organizational

- Diversity of UCSF community (functional & geographic)
- History of decentralized, independent departments
- Institutional memory of less than successful change
- Economic pressures have been ongoing and departments are already doing more with less
The Challenges of OE

Operational

- Impact on Managers’ jobs including uncertainty about their future
- Staff come to new OE organizations with varying skill levels
- Achieving consistency in program and policy interpretation
- Functional staff are leaving departments but not all functional duties
- Investment in technology infrastructure had been neglected and is now critical to success of OE
- Transitional staff issues resulting from multiple go-lives
The Challenges of OE

Financial

• Challenge in getting to the numbers/data
• Funding the investment in technology
• Identifying the real costs of functional duties left in the Departments
• Making OE a success for departments who were under resourced and won’t achieve savings
• Can we achieve the savings targets?
The Challenges of OE

Political
• Senior leadership at every level (campus, school, department) must be out front every step of the way
• Committees with broad representation add credibility but ‘leadership by committee’ does not work
• Ensuring department voices/needs are well represented
• Clarity of decision making transparency, accountability and communication are critical
• Engaging faculty as leaders and change agents
The Challenges of OE

Cultural

- How much change can the organization absorb at one time?
- Historic tension between departments and central offices
- Broad-based denial that change will actually happen
- Recognize & appreciate past accomplishments so staff can embrace the future
- Great idea that should apply to everybody else
Thank you!

Comments, Questions?
PreAward Materials
http://operationalexcellence.ucsf.edu/resources/pre-award-implementation
http://operationalexcellence.ucsf.edu/resources/pre-award-phase-ia-and-ib-departments
http://operationalexcellence.ucsf.edu/work-groups/pre-award-implementation

AP/HR
http://operationalexcellence.ucsf.edu/resources/aphr-service-centers
http://hr.ucsf.edu/

IT Materials
http://operationalexcellence.ucsf.edu/work-groups/it

Finance Materials

Purchasing ‘BearBuy’
http://bearbuy.ucsf.edu/

3/7/2012