UCSF Human Resources

Update to the Academic Senate Update
October 2015
Today’s Agenda

• 2016 Retirement Options Taskforce
  – Goal(s)
  – Guiding Principals
  – Parameters for Options

• Update on HR organization
  – Transformation efforts update
  – FY15 Performance Metrics (Customer Survey, SPA)
  – Chazey Partners Recommendation progress update
Overview

- Background: why the Task Force was formed
- Task Force composition
- Task Force’s charge and guiding principles
- Parameters for new retirement benefits options
- Timeline
- Meeting Summaries
- Keeping you abreast of what’s happening
- Questions
Why the Task Force was formed

- State budget agreement included $436 million to help pay down UCRP’s unfunded pension liability
- These monies would be the first UCRP funding from the state in 25 years
- In exchange for state’s pension funding, UC must implement a new retirement benefits program that aligns pension-eligible pay for future employees with that of state employees
- President Napolitano formed Task Force to help develop retirement benefits options for the president and regents to consider
Task Force composition

- Faculty, staff and administrators from around the UC system
- 13 members
- Membership list available at http://ucal.us/2016retbens
Charge of Task Force

- Develop retirement benefits options for future employees (i.e., hired / re-hired on or after July 1, 2016) for President Napolitano’s consideration
- Consider widest possible range of options
- Consult with the entire UC community
UC Retirement Options Task Force

Guiding principles for options

- UC retirement benefits remain competitive in the context of total remuneration so that UC will be able to continue to recruit quality faculty and staff
- Total cost of 2016 retirement options does not exceed current costs, and that any alternative arrangement includes an assessment to pay down the unfunded UCRP liability
- Simplicity of design for implementation and communication
- State partners perceive that benefit options appropriately align with the State budget compact
Parameters for options

- Will apply to future employees hired / re-hired on or after July 1, 2016
- Current employees and retirees are **not** affected
- Must align pension-eligible pay for future employees with that of state employees under PEPRA
  - Otherwise, the 2016 Tier will have the same design as the 2013 Tier
- Will be informed and guided by input from UC community, including UC regents, faculty, both non-represented and represented staff, and stakeholders
- Pension changes for future represented employees will be subject to collective bargaining
Previously Held Meetings

- August 7: Initial Task Force meeting and charge from President Napolitano
- August 20: Discussion of guiding principles and introduction of defined contribution options
- September 15: Continued discussion of supplemental benefit and presentation of proposed financial parameters by Chief Financial Officer (CFO) Nathan Brostrom
- September 30: Continued discussion of supplemental benefit design and eligibility, and the initial discussion of defined contribution plan choice
UC Retirement Options Task Force

Timeline

- Currently: Task Force is meeting regularly, and consulting and gathering input from faculty, staff, administrators and retirees at their respective campuses.
- December 2015: Task Force delivers recommendations to President Napolitano
- Spring 2016: President Napolitano presents her recommendation to Board of Regents for approval
- July 2016: New retirement benefits options implemented for employees hired / re-hired on or after July 1, 2016
UC Retirement Options Task Force

How to stay informed

Dedicated website: [http://ucal.us/2016retbens](http://ucal.us/2016retbens)

- Background information on budget agreement and Task Force
- FAQs
- Task Force meeting summaries
- Timeline
- Update stories
Questions?
HR Initiatives

*Academic Senate Update*

October 2015
Human Resources opportunities for transformation (campus)

Organization
- Optimize organizational structures to streamline delivery – *single service center, dedicated postdoc service line, optimal LER structure*
- Assess and actualize recommendations from Chazey Partners independent study

Processes
- Identify “quick wins” for customers and partner to address key challenges with simple fixes
- Apply LEAN to improve processes/workflow that directly impact customer interactions
- Priority areas are improved post doc processes, LER processes, and onboarding

Technology
- Deploy Customer Relationship Management (CRM) technology to transform the customer experience
- Digitalize personnel files to enable direct, effortless and intelligent access to HR information and records
- Optimize Enterprise Data Warehouse to support planning and decision-making in staff and academic personnel
Organization

We are aligning the organizational structure to support workflow improvements and specialization. Decisions informed by customer feedback, Chazey Partners recommendations, and operating experience.

- Initial areas of focus
  - Service Center Consolidation (Implemented)
  - Postdoc Services Team (Implemented)
  - Labor and Employee Relations (Implemented)
  - “Business Partner” Strategic Support Services (On Hold)

- Next steps include further evaluation of strategies to develop
  - Employee Service Desk (Continued Planning – CRM Dependent)
  - Tiered Workflow (Continued Planning – CRM Dependent)
Process

HR is working both within the organization and with key collaborators to improve processes. Goals include “quick wins” and long-term changes.

FY 15 Key Outcomes

- Lean – Onboarding Project
  - A new paperless onboarding process is being piloted by Financial and Administrative Services (FAS)
  - New hires are reporting significantly improved overall experience
    - Average experience score for our first five weeks is 4.87 out of a possible 5.0

FY16 Process Improvement Focus

- Academic Personnel Training
- Recruitment and Selection
- Labor and Employee Relations
- Ergonomics

*Priorities developed in consultation with SPA subcommittees and HR Advisory Board*
Technology strategy

- HR is developing a roadmap to deploy **CRM technology** to transform the customer experience and optimize the **Enterprise Data Warehouse** to support planning and decision-making in Staff and Academic Personnel.

- UC Path timing will be determined after the UCOP go-live this fall. Estimated UCSF go-live is late 2017.
- Personnel files for active employees approximately 50% converted to electronic filing system.
- HR, PMO, ITS, and Customers have worked together to narrow possible CRM solution to a final 3 preferred solutions.
- Developing HR website enhancements based on customer feedback.
- HR Service Request System user experience enhancement planning.
Annual Customer Survey Results

Overall Satisfaction Responses: 2012-2015

Overall satisfaction rated on a 5-point scale:

- 5 = very satisfied
- 1 = very dissatisfied

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<th>Year</th>
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<th>Dissatisfied</th>
<th>Neutral</th>
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<td>706</td>
<td>552</td>
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(2215 responses) (4597 responses) (3746 responses) (1993 responses)

Overall satisfaction rated on a 5-point scale:

- 5 = very satisfied
- 1 = very dissatisfied

Mean: 3.39
Annual Customer Survey Results

Overall Satisfaction Responses: 2012-2015

ACADEMIC RESPONDENTS

Overall satisfaction rated on a 5-point scale:
5 = very satisfied
1 = very dissatisfied

Mean: 3.34

2012
(522 responses)

Mean: 3.10

2013
(1899 responses)

Mean: 3.21

2014
(1194 responses)

Mean: 3.28

2015
(470 responses)

47%

45%

50%

41%
Annual Customer Survey Results

Overall Satisfaction Responses: 2012-2015

STAFF RESPONDENTS

Overall satisfaction rated on a 5-point scale:
5 = very satisfied
1 = very dissatisfied

46% Very Dissatisfied
48% Dissatisfied
48% Neutral
49% Satisfied
49% Very Satisfied

Mean: 3.31
2012 (1685 responses)
223 Very Dissatisfied
545 Dissatisfied
547 Neutral
264 Satisfied
106 Very Satisfied

Mean: 3.41
2013 (3863 responses)
486 Very Dissatisfied
1406 Dissatisfied
1322 Neutral
497 Satisfied
152 Very Satisfied

Mean: 3.37
2014 (2250 responses)
309 Very Dissatisfied
918 Dissatisfied
857 Neutral
341 Satisfied
125 Very Satisfied

Mean: 3.34
2015 (1517 responses)
192 Very Dissatisfied
545 Dissatisfied
453 Neutral
244 Satisfied
83 Very Satisfied

Overall satisfaction rated on a 5-point scale:
5 = very satisfied
1 = very dissatisfied
SPA Turnaround: Results for FY15

SPA Reports include two views: Rolling 12 Month Snapshot (left) and Monthly Trends (right)

Green = SPA Target Met
Red = SPA Target Not Met
Org - Client– Tech – Process Integrated Plan

Consolidate

- Shared Services Integration (As-is workflows)

Standardize & Develop Tools

- Quick wins/key challenges
- Website/Process Documentation
- Priority process improvement within existing workflow
- Post Doc service line
- LER roles/workflow
- OFCCP Workflow
- Enhanced Client Engagement (performance reporting)

Improve through new workflow

- Lean Improvements
- Tiered workflow: design and implement
- Build portal
- “eFiles”
- HR Technology Improvements

Continuous Improvement

- Focus on process improvement.
- Engage with customers to determine needs and opportunities

Org Change Step 1
- Shared Services Consolidation

Org Change Step 2
- Postdoc service line
- LER workflow/roles

Dec. ‘14
Mar. ‘15
Jun. ‘15
Sept. ‘15
Dec. ‘15

HR Update to Academic Senate October 2015
Questions?
Summary of Chazey Partners recommendations

- Campus HR Recommendations
  - *Consolidate the four service centers* into a single HR shared services organization to further develop standard practices and improve efficiency.
  - Develop/expand *new roles to provide strategic and tactical support* to leaders at UCSF.
  - *Enhance technology* to enable HR work, focusing on workflow and document management, case management and performance metrics, and integration of existing systems.
  - Develop and *share performance measurements* that include input, operational, and output performance indicators.
  - Continue to *consider integrated solutions for campus and health system* functions as appropriate, *although this is not a recommendation to integrate campus and health system HR at this time*.

- Health System HR Recommendation
  - Conduct pre-design for Health System HR to adopt a shared services operating model
    - Scalable, standardized service to handle significant growth
    - Leverage leading practices for efficiency, quality and compliance improvements.