

First Balanced Scorecard Report



November 2005

Dear FAS Managers,

I am pleased to share with you the First Report of our efforts in strategic planning using the Balanced Scorecard (BSC) as a management tool.

This report outlines the key strategic objectives and measures FAS will implement in order to improve services to our customers and stakeholders and to contain operation costs and improve internal controls. The report also identifies the 2005-06 performance targets, some of which are tied to the FAS Incentive Plan, and the major initiatives.

As a management tool, the BSC has proven success with many organizations striving for excellence. It provides a framework for the development of an integrated strategy for improving organizational performance and helps organizations chart the course for managing and monitoring performance. At a time with major campus plans for growth and continued challenges in resources, the BSC will be an important tool in FAS' efforts to become an organization that provides superior services to UCSF.

I encourage you to review this document for relevance and alignment to your department's goals and efforts. Subsequent reports will include results on how we are doing in meeting our targets for each area.

Thank you.

A handwritten signature in black ink, appearing to read "Steve Barclay". The signature is fluid and cursive, written over a white rectangular area.

Steve Barclay
Senior Vice Chancellor
Finance and Administration

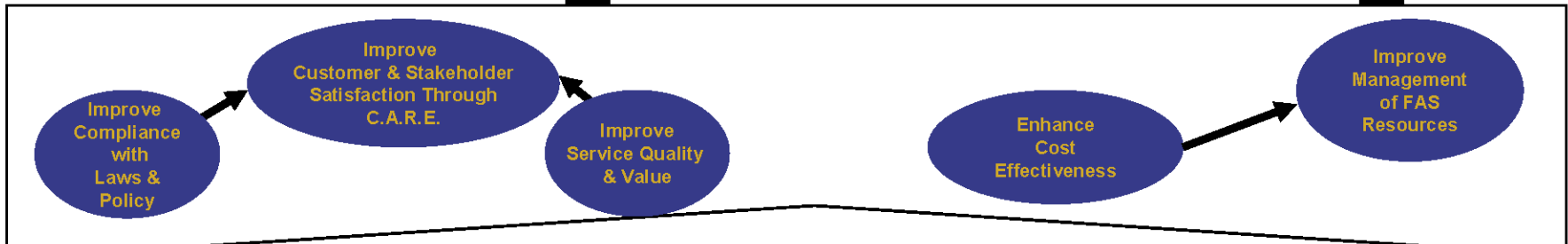
Financial & Administrative Services (FAS) Strategy Map

FAS MISSION
Provide strategic and operational support services that advance UCSF's mission, safeguard University assets and assure public trust.

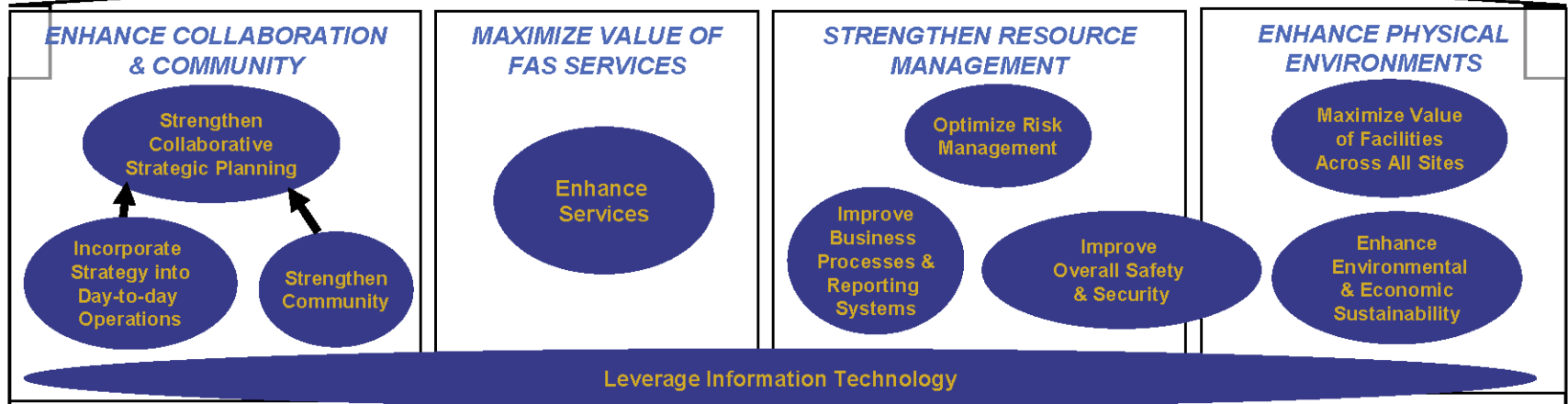
FAS VISION
We strive to be a high-performing team providing superior services helping to make UCSF the institution of choice for discovery, working and learning.

CUSTOMER SERVICE

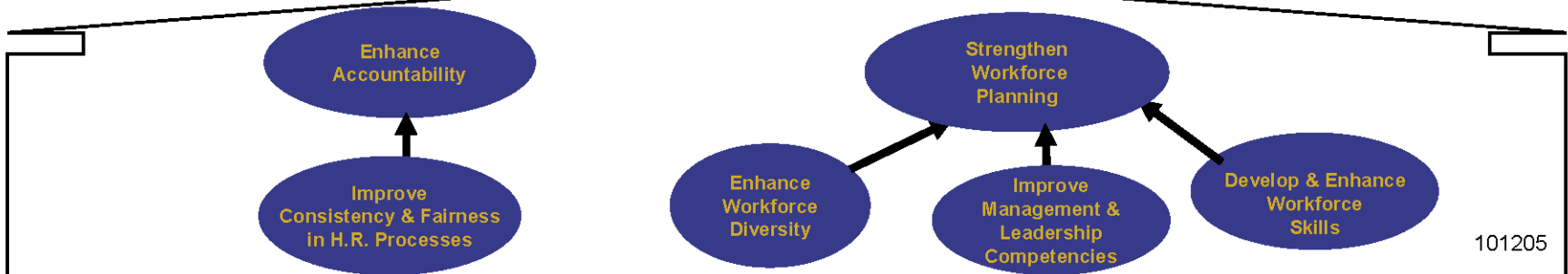
FINANCIAL PERFORMANCE



INTERNAL PROCESSES



LEARNING & GROWTH



2005 - 2006 FAS Balanced Scorecard

☐ = not being measured this fiscal year

Perspective	Strategic Objectives	Performance Measures	Baseline	2005 - 06 Target
Customer Service	C1 Improve Customer and Stakeholder Satisfaction through C.A.R.E.	Overall Customer Satisfaction Rating (#)	3.71	3.76
	C2 Improve Compliance with Laws & Policies	Risk Mitigation (%)	N/A	25%
	C4 Improve Service Quality & Value	FAS C.A.R.E. Rating (#)	3.65	3.65
Financial Performance	F1 Improve Management of Resources	Budget to Actual Variance Analysis \$ or %	N/A	≥ 0%
	F2 Enhance Cost Effectiveness	Key Product/Service Line Cost (%)	N/A	50%
Internal Processes	I1 Strengthen collaborative strategic planning	Effective Collaborations (%)	N/A	N/A
	I2 Incorporate Strategy into Day-to-Day Operations	Operationalizing Strategy (%)	N/A	75%
	I3 Strengthen Community	Career staff employees in FAS attend Communication Site Visit or receive information through alternative delivery by June 30, 2006 (%)	N/A	85%
	I4 Enhance Services	Service Improvements (#)	N/A	24
	I5 Optimize Risk Management	Mitigation of Top Risks (#)	N/A	0 > 3 months
	I6 Improve Business Processes & Reporting Systems	Process and Reporting Systems Milestones Achieved (%)	N/A	100%
	I7 Improve Overall Safety & Security	UCSF Public Safety and Security Index (#)	N/A	≥ 7
	I8 Leverage Information Technology	Enabling Technology Milestones Achieved (%)	N/A	75%
	I9 Maximize Value of Facilities Across All Sites	UCSF Satisfaction with Capital Projects (%)	N/A	50%
	I10 Enhance Environmental & Economic Sustainability	Energy Usage per MGSF (#)	N/A	N/A
Learning & Growth	L1 Enhance Accountability	BSC Targets (%)	0%	50%
	L2 Enhance Workforce Diversity	Good Faith and Lawful Parity within FAS (%)	N/A	100%
		Affirmative action parity goals achieved by FAS units (%)	N/A	N/A
	L3 Improve Consistency & Fairness in H.R. Processes	% of Performance Evaluations Completed within FAS (%)	N/A	100% of Management Group
		Satisfaction with Performance Appraisal System (#)	3.29	3.35
	L4 Improve Management & Leadership Competencies	% of FAS Managers who have completed the Leadership Development program (%)	0%	N/A
		Average of the FAS Roll-up EOS Scores on Items 12 & 31 (#)	3.98	4.00
	L5 Strengthen Workforce Planning	Workforce Plans in Place (%)	N/A	N/A
		Time to Fill Open Positions (#)	71 Days	67 Days
	L6 Develop & Enhance Workforce Skills	% of FAS Staff Completing Customer Service Training (%)	0%	85%
% of C.A.R.E. performance evaluation ratings for staff (%)		N/A	80%	

FAS Initiatives

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CUSTOMER SERVICE



FINANCIAL PERFORMANCE



Internal Controls

ENHANCE COLLABORATION
& COMMUNITY

Communication Plan

MAXIMIZE VALUE OF
FAS SERVICES

STRENGTHEN RESOURCE
MANAGEMENT

ENHANCE PHYSICAL
ENVIRONMENTS

LINK Projects: Process Improvements

INTERNAL
PROCESSES

LEARNING
& GROWTH

C.A.R.E. Training

Balanced Scorecard Implementation Plan

The above are the initiatives key to improving performance in the targeted areas. Initiatives are defined as action programs developed to achieve objectives or to close a gap between current status of a measure and its targeted performance. Initiatives are projects, actions, or activities that are specific, have stated boundaries (beginning and end), have a person/team assigned to accomplish them, and have a budget.

BSC Implementation Roles & Responsibilities



Balanced Scorecard

A Planning Model

CUSTOMER SERVICE

FINANCIAL PERFORMANCE



Commitment to Service Excellence

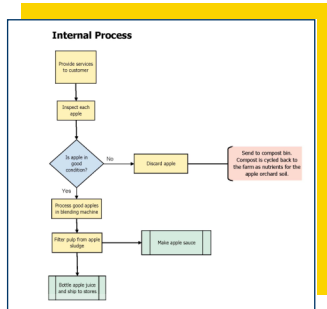
Leads to Satisfied Customers



Improved Financial Performance

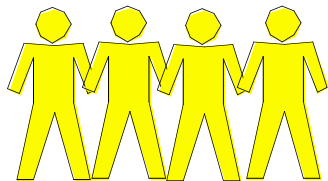
Strengthened Processes

INTERNAL PROCESSES



Strong Operating & Business Processes
Created by Skilled, Motivated Workforce

LEARNING & GROWTH



Skilled, Motivated and Aligned Workforce

Drive Success

What is the Balanced Scorecard?

The **Balanced Scorecard (BSC)** is a measurement-based way of managing strategy. It helps organizations identify strategic goals and measure performance in the areas of Customer Service, Financial Performance, Internal Processes, and Learning & Growth.

There are two parts to a BSC: a strategy map and a scorecard.

The **strategy map** is a visual representation of an organization's strategy and shows at a glance the organization's strategic priorities in the form of strategic objectives. These are the "bubbles" on the map.

The **scorecard** is developed from the strategy map and is a way of translating the strategic objectives into a comprehensive set of performance measures and targets. This then provides the framework for the organization's strategic measurement and management system.

Resources

- FAS Balanced Scorecard Coordinator – Kathleen Brown,
415.502.4125, kathleen.brown@ucsf.edu
- Financial & Administrative Services website:
<http://www.ucsf.edu/fas/bsc/bscintro.html>
- Campus Life Services website:
<http://cas.ucsf.edu/balancedscorecard/scorecard1.html>
- Human Resources Strategic Plan Materials:
<http://ucsfhr.ucsf.edu/info.html?x=1490>
- Balanced Scorecard Collaborative Website -
<http://www.bscol.com/>
- The Balanced Scorecard Institute -
<http://www.balancedscorecard.org/>
- myBalancedScorecard.com:
<http://www.mybalancedscorecard.com/index.html>