

Division of Finance & Administration Strategic Plan

2024

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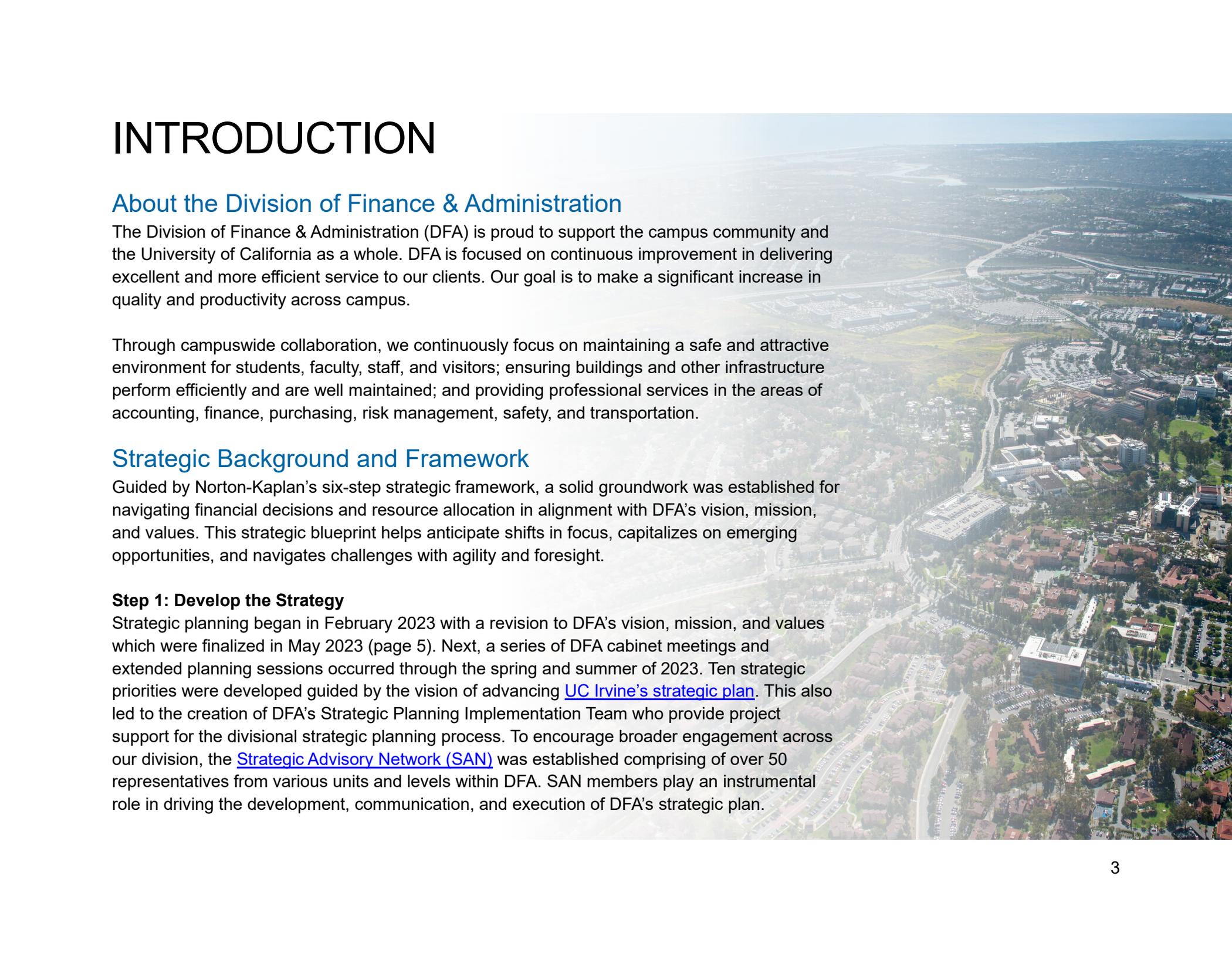
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"Our commitment to a divisional strategic plan positions us to not only enhance organizational performance but also foster a culture of innovation and process improvement, adaptability, and resilience."

Mary Lou D. Ortiz
Chief Financial Officer & Vice Chancellor

INTRODUCTION



About the Division of Finance & Administration

The Division of Finance & Administration (DFA) is proud to support the campus community and the University of California as a whole. DFA is focused on continuous improvement in delivering excellent and more efficient service to our clients. Our goal is to make a significant increase in quality and productivity across campus.

Through campuswide collaboration, we continuously focus on maintaining a safe and attractive environment for students, faculty, staff, and visitors; ensuring buildings and other infrastructure perform efficiently and are well maintained; and providing professional services in the areas of accounting, finance, purchasing, risk management, safety, and transportation.

Strategic Background and Framework

Guided by Norton-Kaplan's six-step strategic framework, a solid groundwork was established for navigating financial decisions and resource allocation in alignment with DFA's vision, mission, and values. This strategic blueprint helps anticipate shifts in focus, capitalizes on emerging opportunities, and navigates challenges with agility and foresight.

Step 1: Develop the Strategy

Strategic planning began in February 2023 with a revision to DFA's vision, mission, and values which were finalized in May 2023 (page 5). Next, a series of DFA cabinet meetings and extended planning sessions occurred through the spring and summer of 2023. Ten strategic priorities were developed guided by the vision of advancing [UC Irvine's strategic plan](#). This also led to the creation of DFA's Strategic Planning Implementation Team who provide project support for the divisional strategic planning process. To encourage broader engagement across our division, the [Strategic Advisory Network \(SAN\)](#) was established comprising of over 50 representatives from various units and levels within DFA. SAN members play an instrumental role in driving the development, communication, and execution of DFA's strategic plan.

Step 2: Translate the Strategy

From September to December 2023, departments developed and refined their strategic unit goals, tactics, and KPIs in alignment with the divisional priorities and UC Irvine's strategic pillars.

Step 3: Align the Organization

Several virtual and in-person SAN meetings and DFA town halls were held to gain understanding and alignment.

Step 4: Plan Operations

The first year of strategic planning focuses on the business process improvements that are most critical for executing the strategy, in addition to linking strategy with operating plans and budgets.

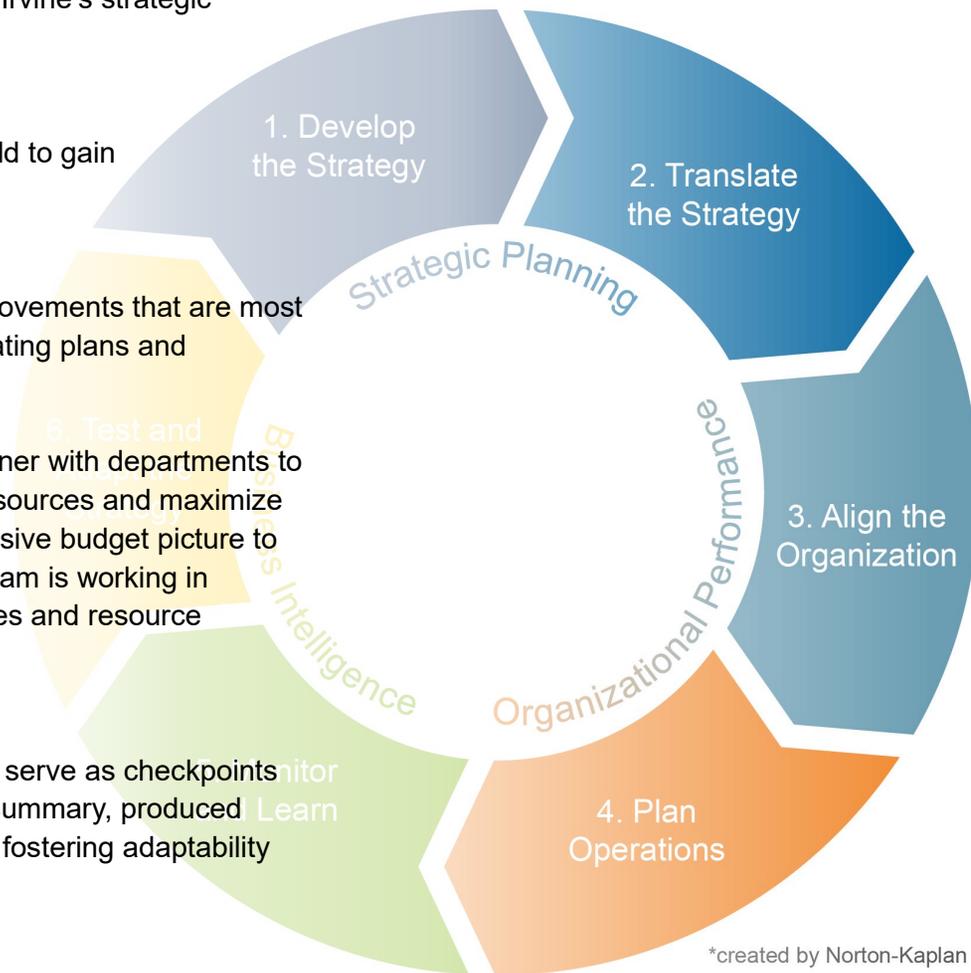
DFA Program Development & Execution department is positioned to partner with departments to drive operational improvements and streamline processes to optimize resources and maximize outcomes. The Budget & Finance team are working toward a comprehensive budget picture to effectively manage financial resources across the division. The DFA IT team is working in parallel to optimize the IT roadmap in alignment with our strategic priorities and resource availability.

Step 5: Monitor and Learn

Scheduled strategic report-outs, slated to occur three times annually, will serve as checkpoints for assessing progress and refining strategies. An annual strategic plan summary, produced each June, facilitates the formulation of a dynamic, rolling five-year plan, fostering adaptability and resilience.

Step 6: Test and Adapt the Strategy

In this final step, DFA reaffirms commitment to a culture of innovation and continuous improvement by rigorously testing and adapting strategic initiatives to navigate the evolving landscape of higher education with confidence and efficacy.



*created by Norton-Kaplan

VISION, MISSION, AND VALUES

We are With U • For U. We are proud to support the UCI community.

Vision

Advance UC Irvine's strategic goals and priorities through leadership in resource management, sustainability, and innovation while fostering a commitment to inclusive excellence.

Mission

Serve as planning partners, problem solvers, and solution providers to manage UC Irvine's financial and physical resources effectively and efficiently in support of its academic, research, service, and health missions. **We are With U • For U.**

Values

- **Integrity**
Strive to be responsible and reliable partners that prioritize ethical decision-making, transparency, and accountability in all our actions.
- **Efficiency & Effectiveness**
Optimize work structures, methods, and tools to deliver more value to our campus community.
- **Health & Safety**
Establish and maintain a safe and healthy workplace that nurtures employee well-being and operational excellence to foster sustainable growth.
- **Diversity, Equity, & Inclusion**
Promote and embody a culture where everyone feels they are a valued and respected member of our campus community.
- **Teamwork**
Collaborate and create synergies within the division and across various partners.
- **Change & Innovation**
Embrace change in the spirit of continuous process improvement and encourage each employee to invest in learning and development opportunities.



STRATEGIC PRIORITIES

Background

DFA's strategic priorities build onto UC Irvine's strategic pillars.

Pillar 1: Growth That Makes a Difference

Expanding Our Capacity to Improve Lives

DFA has three strategic priorities supporting this pillar:

- A. Oversee the development and deployment of the physical infrastructure to support campus growth and accessibility.
- B. Provide physical infrastructure support to meet campus enrollment goals as outlined in the compact with the state of California.
- C. Focus on opportunities to expand research and lab space.

There are 15 department goals that encompass various aspects of development, efficiency, and inclusivity at UC Irvine. These include integrated planning for capital projects, developing a new Long Range Development Plan, exploring growth scenarios, pursuing affordable housing solutions, reducing leased office space, improving space data accuracy, establishing consistent permitting processes, enhancing accessibility standards, managing chemical inventory reconciliation, conducting a decarbonization study, and enhancing transportation systems.



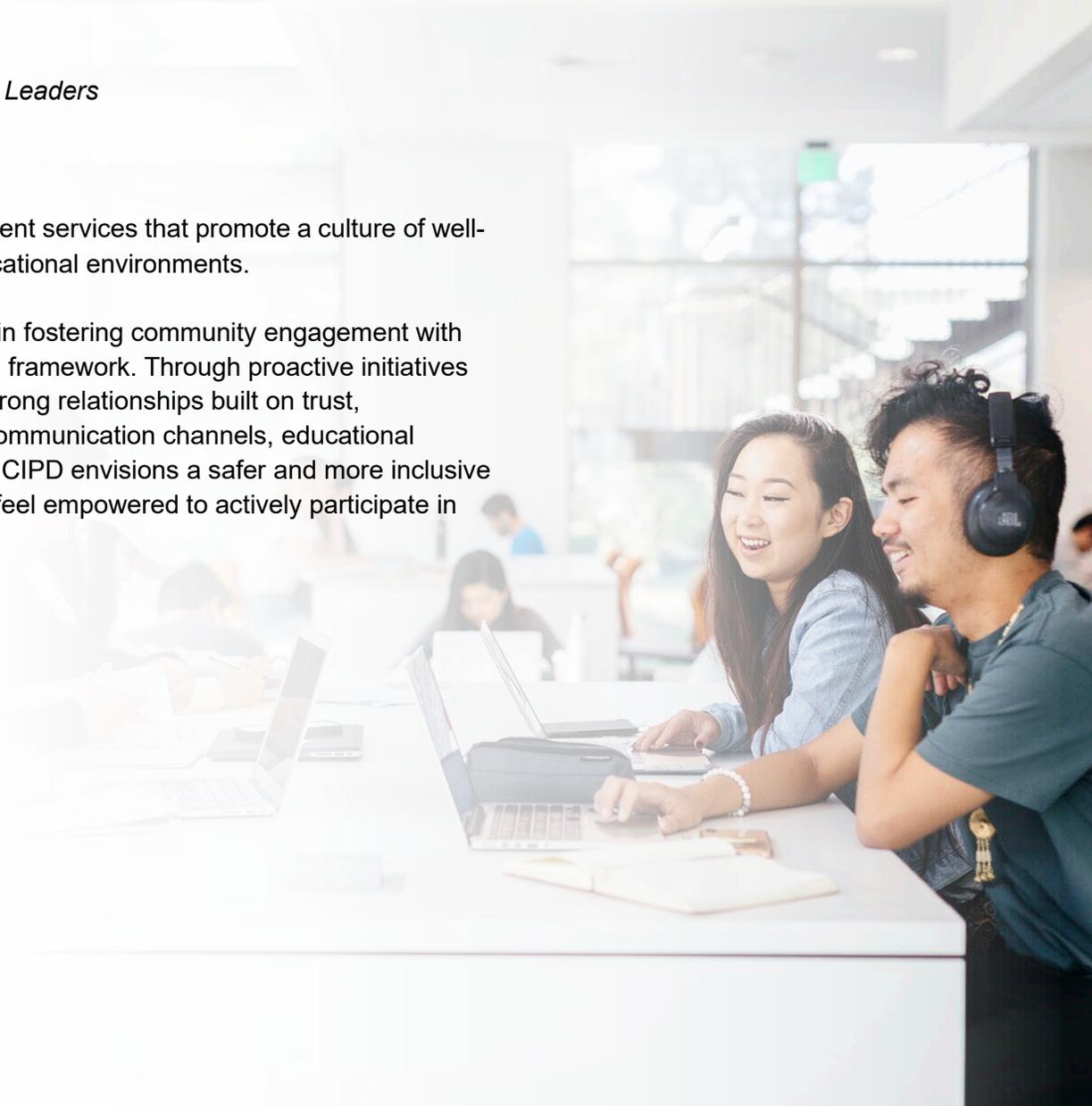
Pillar 2: First in Class

Elevating the Student Experiences to Prepare Future Leaders

DFA has one strategic priority supporting this pillar:

- A. Elevate the student experiences through efficient services that promote a culture of well-being and safety in their living, work, and educational environments.

UC Irvine's Police Department (UCIPD) aims to lead in fostering community engagement with residents and campus communities within the UCIPD framework. Through proactive initiatives and meaningful interactions, the goal is to cultivate strong relationships built on trust, transparency, and mutual respect. Prioritizing open communication channels, educational outreach programs, and collaborative partnerships, UCIPD envisions a safer and more inclusive environment where residents and campus members feel empowered to actively participate in shaping their community's safety and well-being.



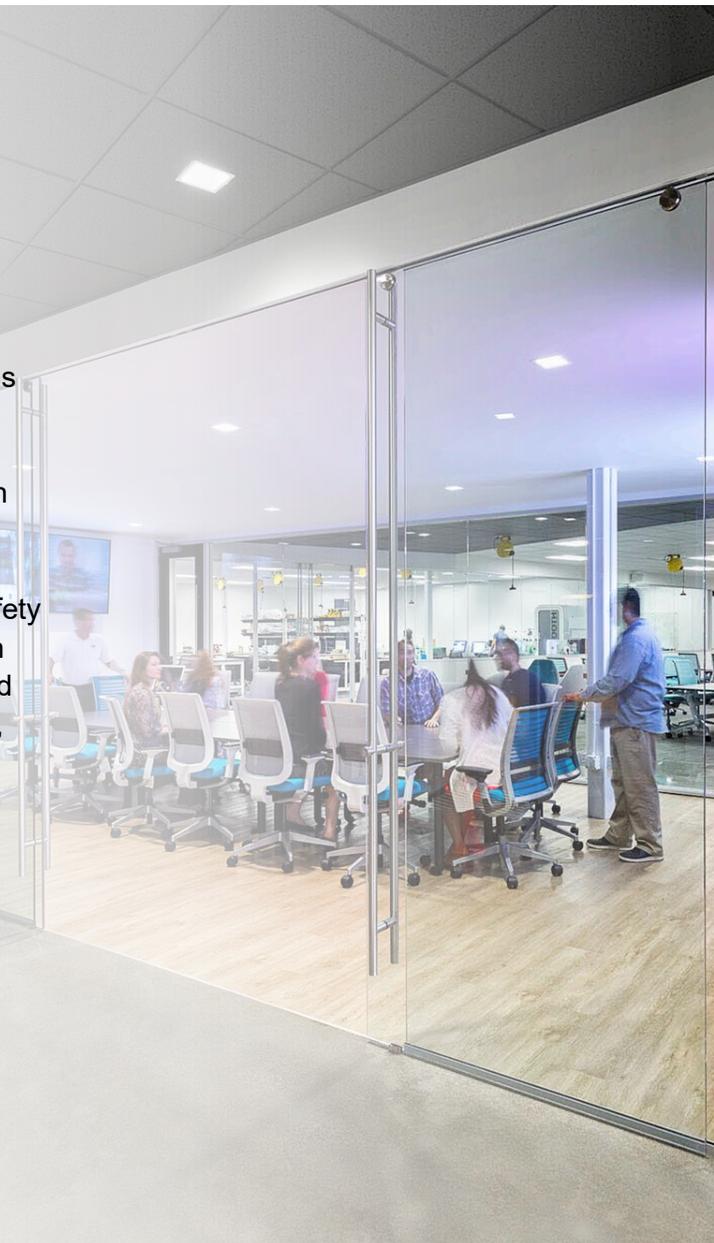
Pillar 3: Great Leaders

Making Regional and Global Connections That Enhance Our Mission and Serve the People

DFA has two strategic priorities supporting this pillar:

- A. Strengthen and promote environmentally sustainable operations and practices.
- B. Foster and promote external partnerships.

The strategic priorities of strengthening and promoting environmentally sustainable operations and fostering external partnerships are intertwined with several DFA goals. Initiatives include updating the Climate Action and Adaptation Plan to align with sustainability objectives, deepening awareness of sustainability measures in capital projects, collaborating to transition campus switchgears away from sulfur hexafluoride, reducing energy consumption through efficient technologies, and expanding sustainable transportation partnerships and programs. Additionally, efforts to rebuild connections with law enforcement agencies aim to enhance safety and security on main and health campuses, while improvements to the student transportation program seek to reduce costs and enhance the overall experience for users. These combined endeavors reflect DFA's commitment to environmental stewardship, community engagement, and operational excellence.



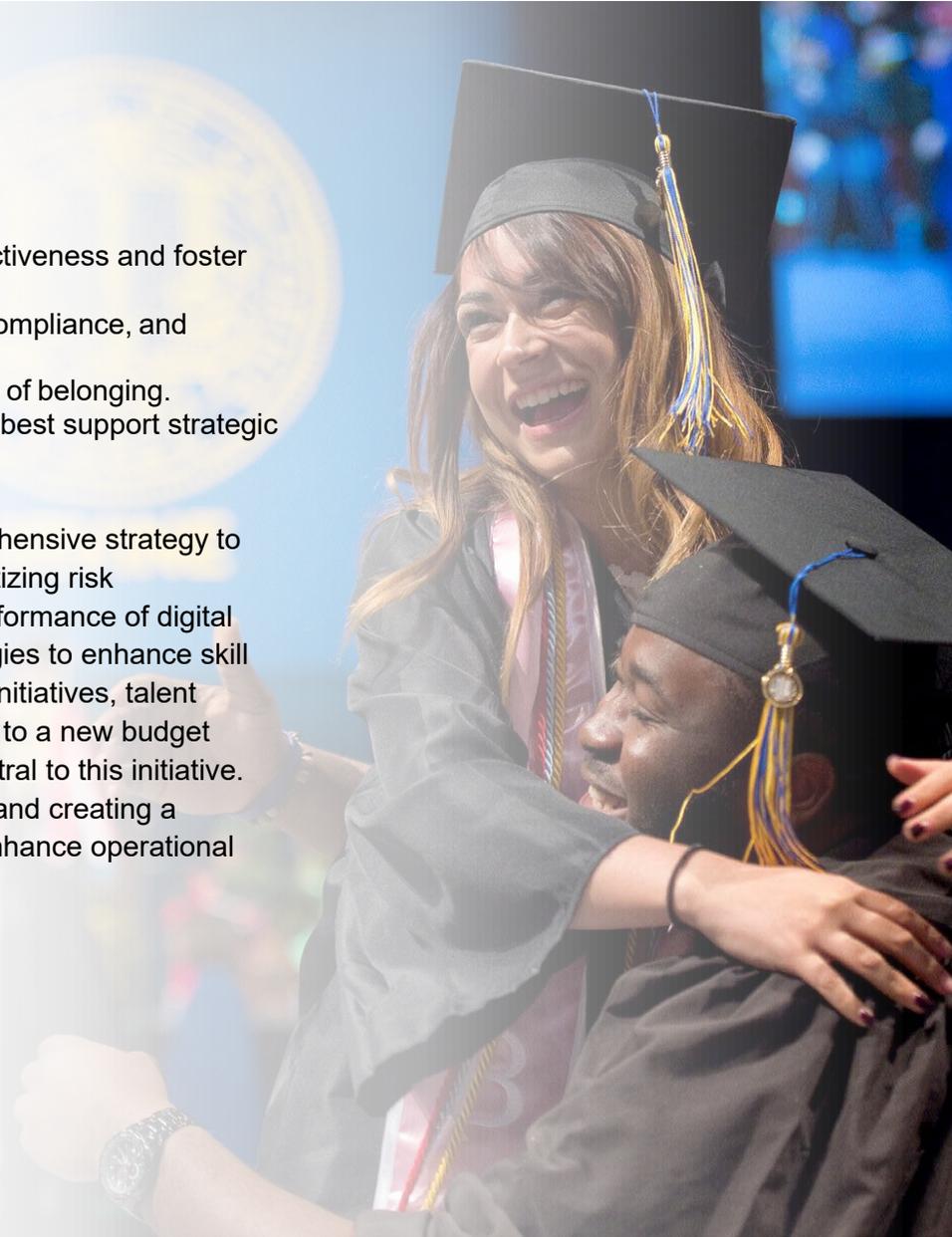
Pillar 4: New Paths for Our Brilliant Future

Forging Best Practices to Power the Coming Century

DFA has four strategic priorities supporting this pillar:

- A. Reimagine business processes with a focus on efficiency and effectiveness and foster an environment of continuous process improvement.
- B. Effectively address the university's liability, financial, operational, compliance, and reputational risks.
- C. Develop and maintain an engaged workforce and cultivate a sense of belonging.
- D. Lead the transition to a new budget model that allocates funding to best support strategic priorities.

With over 70 goals supporting those priorities, DFA has outlined a comprehensive strategy to reimagine business processes for efficiency and effectiveness while prioritizing risk management and workforce engagement. Goals include elevating the performance of digital content management systems and implementing divisional training strategies to enhance skill development. Additionally, efforts focus on diversity, equity, and inclusion initiatives, talent development, and customer service management platforms. Transitioning to a new budget model and fostering a culture of continuous process improvement are central to this initiative. These goals underscore DFA's commitment to innovation, accountability, and creating a supportive environment for its workforce while leveraging technology to enhance operational efficiency and customer satisfaction.



DIVISIONAL GOALS

Background

After careful review of department goals, several common themes emerged, leading to the formalization of seven divisional goals.

DFA is dedicated to enhancing its digital presence by elevating the performance of its websites, aiming to provide users with accessible, high-quality digital experiences. Simultaneously, recognizing the significance of continuous learning, the division is implementing a robust training strategy to equip its workforce with essential skills and knowledge.

DFA places a strong emphasis on diversity, equity, and inclusion (DEI), bolstering existing initiatives and fostering an inclusive workplace culture through collaboration and engagement efforts. Additionally, the division is committed to nurturing talent and fostering internal growth opportunities, enabling staff members to reach their full potential.

DFA prioritizes efficient customer service, implementing systems to streamline processes and enhance service quality across all departments. Alongside, the division is strategically allocating resources to optimize budget utilization during its transition to a new model. Lastly, DFA is cultivating a culture of continuous improvement and innovation, driving efficiencies and enhancements across various operational processes to ensure ongoing organizational success.

DFA is tracking progress on divisional goals in three strategic report outs a year.

Legend for Status Column:

Far left (red) = Work on goal has not started yet.

Middle (yellow) = Work on goal has started and progress is being made.

Far right (green) = Work on goal is well underway, on track with all key milestones.



Divisional Goals

Goal	Key Metrics/Milestones	Drivers	Progress
<p>Goal 1: Digital Content Management Significantly elevate the performance of DFA websites (22) by establishing a robust web management strategy with the goal to maintain a minimum accessibility score of 85% across all websites, while streamlining content management processes. (FY24 – FY28) P4 – DFA-A</p>	<ul style="list-style-type: none"> Website analytics. Website accessibility scores. Website quality assurance scores. 	<ul style="list-style-type: none"> Improve user experience. Compliance with accessibility standards. Streamline content management process. Brand consistency. Maximize resources. 	<p>Implementation Phase</p>
<p>Goal 2: Divisional Training Strategy Develop and implement a divisional strategy for training design and delivery of DFA functional area trainings for internal and external audiences. (FY24 – FY29) P4 – DFA-A</p>	<ul style="list-style-type: none"> Completion of dept. trainings inventory. Number of needs assessments conducted. Number of trainings developed. Training attendance. Training effectiveness. 	<ul style="list-style-type: none"> Improve user experience. Alignment within DFA. Brand consistency. Maximize resources. 	<p>Planning Phase</p>
<p>Goal 3: Diversity, Equity, and Inclusion Initiatives Continue building on the existing divisional DEI initiatives and leverage the DEI Power Team to establish additional DEI goals and metrics, finalizing a 5-year framework by the end of FY 2023-24. (FY24 – FY29) P4 – DFA-C</p>	<ul style="list-style-type: none"> Number of conversation engagements. Annual survey results. Gallup engagement survey results. 	<ul style="list-style-type: none"> Support UCI strategies. 	<p>Expanding Base</p>
<p>Goal 4: Talent Development Assess, develop, and propose implementation of a DFA internal development model to enhance staff growth opportunities and assist in addressing internal talent gaps for phased implementation beginning in 2025. (FY24 – FY26) P4 – DFA-A</p>	<ul style="list-style-type: none"> Number of developmental activities in repository. Number of activities assigned. Number of completed assignments. Increase in number of qualified internal staff for positions. 	<ul style="list-style-type: none"> Address skill growth. Employee engagement and retention. Succession planning. 	<p>Planning Phase</p>

Divisional Goals

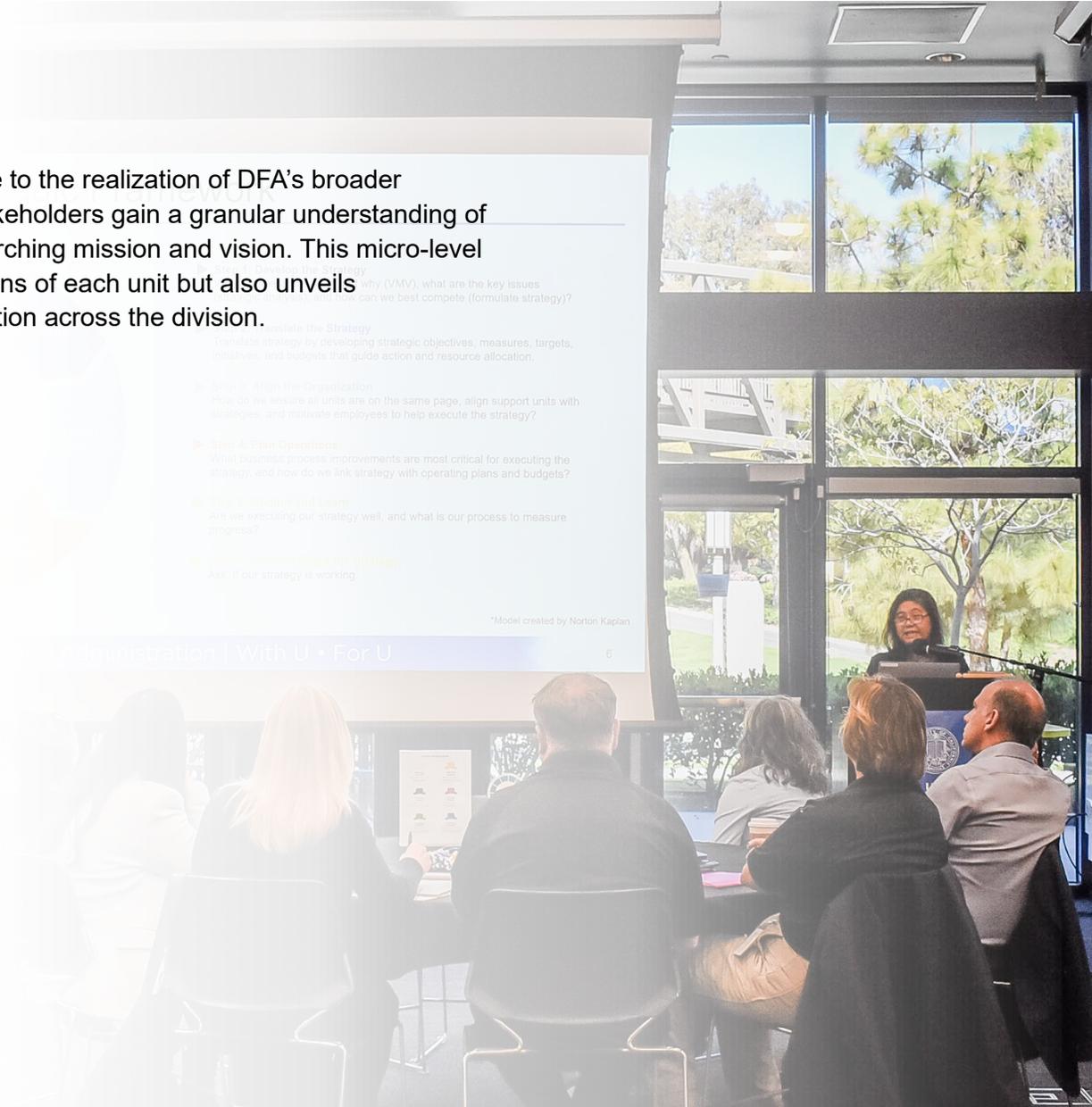
Goal	Key Metrics/Milestones	Drivers	Progress
<p>Goal 5: Customer Service Management Platform Implement Customer Service Management system (ServiceNow) to improve customer service across DFA via automated work order tracking and standardized knowledge management. (FY24 – FY29) P4 – DFA-A</p>	<ul style="list-style-type: none"> • Number of DFA depts. setup in SN. • Number of incoming requests and inquiries. • Number of knowledge management articles. 	<ul style="list-style-type: none"> • Improve service efficiency. • Improve user experience. • Standardized service quality. • Data-driven decision making. 	<p>Planning Phase</p> 
<p>Goal 6: Divisional Budget Strategy Develop and implement a divisional methodology for effective allocation of resources in DFA as we move to a new campus budget model. (FY24-FY29) P4 – DFA-D</p>	<ul style="list-style-type: none"> • Determine the current total salary for 99's in DFA and calculate 4.2% increase, 2% funding estimate, the delta by department, and by fund source to determine shortfall in core funds. • Development and use of monthly report. • Number of completed “start/stop/continue” reviews and status change of activities. 	<ul style="list-style-type: none"> • Effective data-driven decision making. • Alignment within DFA. 	<p>Implementation Phase</p> 
<p>Goal 7: Divisional Continuous Process Improvement Strategy Develop and implement a divisional strategy for a Continuous Process Improvement culture. (FY24 – FY29) P4 – DFA-A</p>	<ul style="list-style-type: none"> • Number of CPI projects per year in progress, completed, and proposed statuses. • Number of hours saved, dollars saved, revenue generated. 	<ul style="list-style-type: none"> • Alignment within DFA M,V,V, strategy, and departmental goals. 	<p>Implementation Phase</p> 

UNIT GOALS

Summary

Unit goals serve as the building blocks that contribute to the realization of DFA's broader divisional objectives. By delving into these goals, stakeholders gain a granular understanding of how each department aligns its efforts with the overarching mission and vision. This micro-level examination not only highlights the unique contributions of each unit but also unveils opportunities for synergy, collaboration, and optimization across the division.

- Accounting & Fiscal Services
- Budget Office
- Campus Planning & Sustainability
- Capital Planning & Space Management
- Design & Construction Services
- DFA Human Resources
- DFA Program Development & Execution
- Emergency Management
- Environmental Health & Safety
- Facilities Management
- Internal Audit Services
- Police Department
- Procurement Services
- Real Estate Services
- Risk Services
- Transportation & Distribution Services



Unit Goals: Accounting & Fiscal Services

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 1: Replace KFS Advance Deposit (AD) manual documents for UCI non-student Invoicing. (FY24 – FY26)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Reduction in departmental deposits by 80%. (using KFS A/R in combination with Goal 6) 90% reduction in KFS AD documents for ACH/WIRE processed by GA. (manual process when ACH is unknown for who) Timely revenue recognition within the same fiscal year. Reduction in year-end revenue accrual entries (YEDA) processed by departments by 80%. 	<ul style="list-style-type: none"> Accurate and timely recording of non-student invoices in KFS AR. Ability to match payments received to invoices. Reduction in unpaid non-student invoices. A lack of consistency in invoicing practices for non-student billable activities and systems for tracking outstanding receivables. 	<ul style="list-style-type: none"> On track: FS has contacted some departments to use KFS AR for invoicing and increased % use Currently working on making the use of KFS AR a requirement across the institution – presenting at next Maabo mtg 
<p>Goal 2: Achieve enhanced knowledge of facilities & administrative rates process and minimal supervision from external consultant. (FY24 – FY27)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Improve efficiency for F&A data collection & analysis by reducing the time from 18 to 12 months. Understand how to use the CRIS model (F&A tool) to perform "what-if" scenarios. Submit F&A rate proposal to Cost Allocation Services (CAS) 5 years after the previous approved proposal. New F&A rate approved prior to expiration of the current rates or extend no longer than a year. 	<ul style="list-style-type: none"> To capture as best as possible the actual costs of facilities and administration supporting sponsored projects. Strong impact to the University's ability to grow research capacity infrastructure and services. Recoup as much as allowed for indirect costs 	<ul style="list-style-type: none"> Focused on specialized trainings to gain foundational knowledge. Identifying process improvements based on challenges in the on-going F&A process. Anticipating regulatory changes that may impact future F&A rates. 
<p>Goal 3: Develop a more robust model (e.g. revenue-based or modified expense based) General & Administrative Assessment. (FY26 model)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> Development of revenue-based G&A assessment by Dec. 2023. Update for FY26 model using revenue based or modified expense based. Selection of G&A assessment model to increase recovery of costs within the campus by ~15%-25% compared to previous model using more accurate and robust recovery models. (since campus is likely underassessing). Update the AFS Cost accounting webpage to show the G&A assessment methodology. Discuss methodology with affected units. 	<ul style="list-style-type: none"> Allocate shared costs using a rational and sustainable model across self-supporting revenue generating units. 	<ul style="list-style-type: none"> Completed review of two proposed models. Minor tweaks on the existing model for FY25 assessment. Exploring opportunity to find a more suitable model for FY26 

Unit Goals: Accounting & Fiscal Services (cont.)

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 4: Centralize check deposit process for the campus only. (FY24 – FY26)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Reduction in lost checks by 80%.- no lost checks & increased # of checks going directly to the cashier's office Centralized deposits for UCI increase by 75% - certain groups unable to centralize deposits (e.g. childcare, C&G, financial aid, advancement). All checks received should have a KFS invoice # Unclaimed checks will be listed on a Decision Support report so campus partners can view it 	<ul style="list-style-type: none"> To assure revenue is accounted for accurately, and invoices are paid fully and recorded timely. To help eliminate checks being routed to the wrong area, lost checks, and unpaid invoices. 	<ul style="list-style-type: none"> On track: "remit to" address is programmed in KFS AR. Contacting mail room and other departments to forward all mailed payments to Aldrich Office. 
<p>Goal 5: Develop and implement streamlined end-to-end imputed income reporting & overpayment recovery process. (FY24 – FY24)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> Publicly accessible process documents. 75% satisfaction rate on department and employee user survey. Increased efficiencies: Reduce parties/touchpoints in process; reduce turn-around timeframe. 	<ul style="list-style-type: none"> Increase understanding of process w/ user community. Increase processing efficiency for imputed income & overpayment recovery. Create control metrics for imputed income process w/ Central Payroll. 	<ul style="list-style-type: none"> Start Q1 '24. Payroll and General accounting are reviewing and documenting the existing process to use for future process mapping. 
<p>Goal 6: UCPATH centralized transaction processing for campus departments, excluding SOM and MC (FY24 – FY28)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> 10% - 35% increase in transaction accuracy level to baseline (depending on transaction). Will measure based on reduced error rate and/or reported user issues. UCPATH transaction accuracy measurements. UCPATH transaction processing rates. Business process analytics and development of metrics. Customer satisfaction feedback for UCPATH and Payroll. Define UCPATH terminology and document clear procedures. 	<ul style="list-style-type: none"> Change campus UCPATH transaction processes from decentralized to centralized to better meet UCI & UCPATH business needs. Develop standardized business processes to better support divisions. Establish a transaction support unit to process UCPATH transactions to improve end-to-end accuracy, resource efficiency, & oversight. 	<ul style="list-style-type: none"> Active workgroup. Socialize plans w/ DFA & HR leaders. Drafting the project charter and in review with core team for input. Risk – competing priorities has stalled this goal – Project Dragon has consumed both Central HR and UCI UCPATH teams for transition activities. 

Unit Goals: Budget Office

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 1: Achieve financial stability by resolving the campus structural deficit. (FY24 – FY27)</p> <p>P4 – DFA-D</p>	<ul style="list-style-type: none"> Financials in the black, central reserves within target range and not in jeopardy of decreasing below healthy levels (3 months of operating). Specific targets defined and approved by campus leadership. Additional space/lease savings by FY25-\$3M. Development of new rates and implementation plan. 	<ul style="list-style-type: none"> Core revenue growth is less than expense growth. 	
<p>Goal 2: Develop a new budget model for the campus to improve alignment of resources with strategic goals, and improve clarity, predictability, and transparency. (FY24 – FY27)</p> <p>P4 – DFA-D</p>	<ul style="list-style-type: none"> Outreach to other higher education institutions. Model funding stream alternatives based on various metrics. Budget model and phase-in plan for academic units. Budget model and phase-in plan for support units. 	<ul style="list-style-type: none"> Need for improved planning. 	
<p>Goal 3: Develop a new central budget office commitment tracking tool to improve accuracy for reporting, tracking of available funding, and forecasting models of central obligations. (FY24 – FY24)</p> <p>P4 – DFA-D</p>	<ul style="list-style-type: none"> Reduce time to request, approve, and document a supplemental commitment. Improve communication, transparency and customer service experience. Improve access and accuracy of current data and reports. Improve accuracy and time required copying over to the next year's budget plan. 	<ul style="list-style-type: none"> Set the stage for improved reserve management. High reserves are a risk to the campus. 	
<p>Goal 4: Create a common fund to make the budget allocation and financial management processes less cumbersome and reduce the number of funds and accounts being used. (FY24 – FY25)</p> <p>P4 – DFA-D</p>	<ul style="list-style-type: none"> Reduce number of funds used for core budget allocations. Reduce processing time, increased accuracy and accessibility. 	<ul style="list-style-type: none"> Operational efficiency for campus financial managers. 	
<p>Goal 5: Improve budget office processes related to communications, documentation, and training. (FY24 – FY24)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> One new communication enhancement implemented by mid-winter in FY24. Functional areas and glossary by 1/31/24; best practice updates (e.g., budget process, final budget) by 3/31/24. Conduct a customer satisfaction survey after roll-out of the budget model. 	<ul style="list-style-type: none"> Increase transparency. 	

Unit Goals: Budget Office (cont.)

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 6: Develop improved financial reports using reporting tools to automate existing download and manual update processes. (FY24 – FY24)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Reduce time to run reports (data) and roll forward (formatting) the new FY. Replace internal report by 12/31/23. Publish report for campus use by 3/31/24. Publish year-end forecast reports to org/units. 	<ul style="list-style-type: none"> Better reports, more informed recommendations and decisions. 	
<p>Goal 7: Coordinate with Academic Planning, Graduate Division, and Academic Senate to improve processes related to new program review. (FY24 – FY25)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Improve contribution of academic enterprise. Track programs that don't make it to approval in addition to ones that do. Measure error rates in forecast. 	<ul style="list-style-type: none"> Improve guidance and consistency of information. 	
<p>Goal 8: Improve Budget Office transactional processes. (FY24 – FY28)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Increased automation for processes related to budget upload via LLCP document, staffing, intercampus transfer of funds. 	<ul style="list-style-type: none"> Reduce time on transactions so we can spend on value added analysis. 	
<p>Goal 9: Ensure that all student fee processes are completed on time, appropriate review and consultation is completed on rate proposals, and guidance and materials are consistent with UC policies. (FY24 – FY28)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> Included in scope are Professional Degree Supplemental Tuition (PDST), Self-Supporting Graduate Professional Degree Program (SSGPDP), Course Material & Services Fees (CMSF), Student Service Fee (SSF), referenda, student intent to register (SIR), and miscellaneous fees as well as oversight of student fee advisory committee. 	<ul style="list-style-type: none"> Ensuring smooth transition after turnover. 	
<p>Goal 10: Pursue a long-term budget solution that will support campus and unit planning. (FY24 – FY28)</p> <p>P4 – DFA-D</p>	<ul style="list-style-type: none"> Complete research and identify a recommended tool by 6/30/2027. Develop implementation plan consistent with resource availability. 	<ul style="list-style-type: none"> A new budget system would be best practice. 	<ul style="list-style-type: none"> Not yet started. Dependent on other campus enterprise system priorities.

Unit Goals: Campus Planning & Sustainability

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 1: Emphasize integrated planning from inception through execution on all capital projects. (FY24 – FY25)</p> <p>P1 – DFA-A</p>	<ul style="list-style-type: none"> • Design review process on a project-by-project basis. • Annual meeting with D&CS to coordinate campus standard updates. 	<ul style="list-style-type: none"> • An outdated Physical Design Framework. • Benefits of peer review of proposed changes to campus character and its public realm. • Compatibility of character of elements of the campus' public realm. 	
<p>Goal 2: Develop a new Long Range Development Plan (LRDP). (FY23 – FY26)</p> <p>P1 – DFA-B</p>	<ul style="list-style-type: none"> • Determine schedule for completing LRDP and EIR. • Physical planning for LRDP completed Summer 2025. • CEQA analysis for LRDP completed late 2026. 	<ul style="list-style-type: none"> • Ensuring the capacity of growth for the next 10-15 years. • Offer an aspirational vision for campus growth. • Updating CEQA compliance to align with changes in the regulatory framework. 	
<p>Goal 3: Update Climate Action and Adaptation Plan. (FY24 – FY25)</p> <p>P3 – DFA-A</p>	<ul style="list-style-type: none"> • CAAP Development: <ul style="list-style-type: none"> • Finalize decarbonization study in summer 2024. • Interim climate targets and decarbonization date set by January 1, 2025. • Updated charter and membership for the Sustainability Steering Committee. 	<ul style="list-style-type: none"> • Offer a path for alignment with State regulations. • Reflect current values and goals in campus sustainability priorities. • Lead in the transition away from carbon-based technologies. 	

Unit Goals: Capital Planning & Space Management

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 1: Develop space and financial models for alternative growth scenarios for the LRDP update. (FY24 – FY26)</p> <p>P1 – DFA-A</p>	<ul style="list-style-type: none"> Completion of a report summarizing space needs and capital costs for two or three growth scenarios and an evaluation of potential issues and challenges. 	<ul style="list-style-type: none"> Campus intends to update the LRDP and requires information to help determine what enrollment level to target. 	
<p>Goal 2: Develop strategy, feasibility analysis, and implementation recommendations for UCI P3 Development (Public-Private Real Estate Partnerships), pursuing affordable housing solutions. (FY24 – FY28)</p> <p>P1 – DFA-A</p>	<ul style="list-style-type: none"> Completion of accurate analysis and sound planning recommendations for P3 development solutions that serve key strategic needs and financial feasibility factors. Initiation of projects that achieve UCI strategic goals and financial metrics. 	<ul style="list-style-type: none"> Support campus leadership’s interest in developing P3 housing for students, faculty, and staff. Plan affordable student housing to make progress towards achieving the LRDP goal of accommodating 60% of students on campus. 	
<p>Goal 3: Improve the programming process and basis-of-design documents (DPPs) for the development of new facilities to increase efficiency, effectiveness, and inclusion of campus population. (FY24 – FY26)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Identification of improvements to the DPP process or documents. Completion of DEI plans. 	<ul style="list-style-type: none"> Improve the usefulness of DPPs as the basis of design for design-build projects. Ensure that DPPs accurately represent requirements of various campus stakeholders. 	
<p>Goal 4: Develop recommendations to further reduce the amount of administrative office space leased by the campus over the next five years. (FY24 – FY28)</p> <p>P1 – DFA-A</p>	<ul style="list-style-type: none"> Square footage of space no longer leased. Amount of budgetary savings. 	<ul style="list-style-type: none"> Reduce lease costs to help address structural budget problem. Optimize space assignments to reflect hybrid and remote work patterns. 	

Unit Goals: Capital Planning & Space Management

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 5: Improve the accuracy and completeness of space data in the facilities inventory system (FDX) and expand available space information to better support reporting, planning, space and emergency management. (FY24 – FY28)</p> <p>P1 – DFA-A</p>	<ul style="list-style-type: none"> Decreasing number of inaccuracies or omissions in annual review within audits. Accuracy and availability of floorplans and new data fields in FDX database. 	<ul style="list-style-type: none"> Ensure that the FDX contains accurate space and building data that can reliably be used for planning and reporting purposes. 	

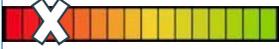
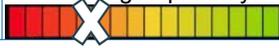
Unit Goals: Design & Construction Services

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 1: Establish a consistent and applicable permitting process for all campus improvement projects, including leased and ICHA projects. (FY24 – FY27)</p> <p>P1 – DFA-A</p>	<ul style="list-style-type: none"> • Verify that all projects being built have been permitted. • Improve timing for permit issuance. • Establish quarterly meeting to ensure process is being followed by campus partners. 	<ul style="list-style-type: none"> • Jurisdictional authority over Regents land and developments. • ICHA projects being plan reviewed by City of Irvine, shifting to outside consultant. 	
<p>Goal 2: Efficiently manage project documents and communications and automate the process of maintaining/updating financial aspects of billing and project cost reporting to ensure projects meet program, budget and schedule parameters. (FY24 – FY28)</p> <p>P1 – DFA-A</p>	<ul style="list-style-type: none"> • Common file structures across projects. • Standardized workflow processes across projects. • Improved process for producing financial and cost reports by automating pulls of data from existing financial systems that house the data. • Share out to FM and Procurement process improvements and positive outcomes. 	<ul style="list-style-type: none"> • Inconsistent tools and processes among projects and PM's. • Financial system antiquated and producing errors. • Process improvements necessary for consistency, training, tracking and reporting. 	
<p>Goal 3: Enhance the campus' equal access to facilities and sites through developed campus standards, advocacy, and representation in an effort to be fully inclusive to those with permanent and temporary disabilities. (FY24 – FY24)</p> <p>P1 – DFA-A</p>	<ul style="list-style-type: none"> • Refer to the Campus Standards. • Confirm participation from Disability Services on each new project procurement during design. • Participate in improving campus websites for clarity surrounding accessibility, even during construction. 	<ul style="list-style-type: none"> • Embrace the campus aspirations for Universal Design and expand the stakeholder input in support of various disabilities. 	
<p>Goal 4: Deepen and enhance UCI's sophistication and awareness on sustainability measures on capital projects. (FY24 – FY27)</p> <p>P3 – DFA-A</p>	<ul style="list-style-type: none"> • Track Request for Proposals, and frequency of project updates and announcements. • Verify that a list of recommended sustainable measures and practices are developed within one year. • Verify that template for project update newsletter has been created within one year. 	<ul style="list-style-type: none"> • Continue to lead the nation in sustainability practices, including decarbonization and carbon neutrality. 	

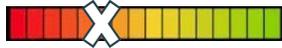
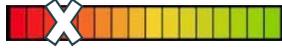
Unit Goals: Design & Construction Services (cont.)

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 5: Reduce the current average time to process requests to contract with design professionals from 2.5 weeks to 1.5 weeks after all required documentation is received. (FY24 – FY25)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> • Frequency of communications with UCI Project Managers (PM) and consultants if documentation is deficient prior to tracking processing time. • Distribute fully executed Work Authorization no more than 1.5 weeks of initiating required signatures. 	<ul style="list-style-type: none"> • Accelerate project progress for award through process improvement. 	
<p>Goal 6: Update Campus Standards and Master Specifications for use on all campus projects consistent among all departments delivering construction projects. (FY24 – FY26)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> • Campus stakeholders buy-in, including FM, EH&S and Housing. • Completed draft of updated Campus Standards and Master Specifications. • Finalized product standardized within a living document balancing first cost and lifecycle costs. 	<ul style="list-style-type: none"> • Consistency among campus stakeholder groups and communicating expectations for quality and project processes. 	

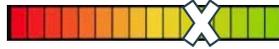
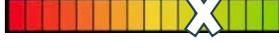
Unit Goals: DFA Human Resources

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 1: Update and implement a comprehensive talent planning model for leadership and critical positions. (FY24 – FY28)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> • % of leader/critical positions assessed for potential successors and readiness for next levels. • % of leader/critical positions with identified potential successors with targeted development plans. • Average time-to-fill vacant leader/critical positions. 	<ul style="list-style-type: none"> • Identified talent and skill gaps. • Targeted development plans. • Succession planning. 	<ul style="list-style-type: none"> • Developing criteria and assessment process for VC review. 
<p>Goal 2: Provide enhanced strategic recruitment support for hiring managers and hiring committee members. (FY24 – FY26)</p> <p>P4 – DFA-C</p>	<ul style="list-style-type: none"> • Average time-to-fill posted vacancies. • Qualitative feedback from hiring managers and committee members. • Results of “inclusivity” rating in 2025 engagement survey. 	<ul style="list-style-type: none"> • Inconsistencies in recruitment process. • DEI recruitment efforts. • Timing to fill vacancies. 	<ul style="list-style-type: none"> • Updating process map and hiring guide to incorporate new ATS workflow. 
<p>Goal 3: Provide support for the implementation of central HR’s new applicant tracking system (ATS) launch to provide meaningful recruitment analytics and reduce the time-to-fill vacancies by 10%. (FY24 – FY26)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> • Average time to post recruitments once submitted to ATS. • Average time-to-fill posted vacancies. • Customer satisfaction rating on use of tool. 	<ul style="list-style-type: none"> • Change management needs for new ATS. • Leveraging tool for increased analytics. 	<ul style="list-style-type: none"> • HR training March/April with eta of pilot launch in May. 
<p>Goal 4: Provide DFA senior leaders with people-centric analytics for greater visibility in linking staff activity to their strategic plans/goals. (FY24 – FY28)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> • Annualized attrition rate. • Time-to-fill recruitments. • Vacancy rate. • Training compliance. • Staffing-to-budget report. • Strategic support rating. 	<ul style="list-style-type: none"> • Lack of regular quantitative feedback on people actions. • Enabling strategic goals through people actions. 	<ul style="list-style-type: none"> • Creating library of current system reports available. • Will schedule intake meetings April/May. 

Unit Goals: DFA Program Development & Execution

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 1: Develop a recommendation for the creation of a DFA Business Office to include the current DFA Budget and Finance unit, the DFA Business Services unit, and any additional identified functional activities for appropriate centralization. (FY24 – FY26)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Tracking improved time and resources saved through standardized business processes. 	<ul style="list-style-type: none"> Need for organization of administrative activities after re-org of functions. Opportunity for reviewing functions for efficiency and improvements. Provide support for smaller units/depts that do not have dedicated admin/business support. 	<ul style="list-style-type: none"> With 3 employees in Bus Svcs unit and one just resigned, figuring out what activities to stop / start / continue. 
<p>Goal 2: Develop financial/budget reporting tool (transition from Adaptive). (FY24 – FY24)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Department heads sign off on monthly reports. 	<ul style="list-style-type: none"> Transitioning away from Adaptive aligns with the Budget Office's vision for future budgeting tools. Development of a revised BVA report to include reconciliation improves controls and reduces risk. Using excel for reports, data pulled from KFS Decision Support and ensuring data ties to Anteater Financials. 	<ul style="list-style-type: none"> Still much work to do to adjust budgets in KFS and align with the excel reports. Development will continue into FY25. 
<p>Goal 3: Develop/define annual budget process for DFA departments, including timelines/deadlines and budget planning assumptions for both revenue and expense updated quarterly. (FY24 – FY24)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Submit to Budget Office by deadline of 5/17/24. 	<ul style="list-style-type: none"> Develop a process to build an all-funds, consolidated budget for DFA to budget for sources and uses. Improve communication and expectations for planning, reporting, and managing. Identify opportunities and vulnerabilities in operations to make better resource decisions and service level adjustments at department level, so that expenses align with available resources. 	<ul style="list-style-type: none"> Still much work to do to properly allocate resources, such as BENF, to core funded units. KFS budgets need to be adjusted for current expectations. Multiple supporting schedules need to be developed. 
<p>Goal 4: Review and document the recharge process for all of DFA. (FY24 – FY25)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Recharge account surplus/deficit is within 60 days +/- operating expenses. Recharge rate packages are approved by Recharge Rate Committee. 	<ul style="list-style-type: none"> Came out of conversation with Organizational Consultant – DFA Budget / Finance to work with Controller's Office. 	

Unit Goals: DFA Program Development & Execution (cont.)

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 5: Assess and refine a minimum of one key operational process within each team annually to drive ongoing improvements. (FY24 – FY28)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Number of processes documented and improved: One process per team per year. Inventory of process flow maps: One process per team per year should have a process map. Use of process improvement tools to reduce waste: One process improvement tool per process. 	<ul style="list-style-type: none"> Step one in process improvement is documenting current state business processes. Identify top process(es) in each PDE unit and document at least one per year going forward. 	<ul style="list-style-type: none"> In progress 
<p>Goal 6: Expand DFA IT function scope and authority, transitioning from a consulting role to providing assurance that proposed IT investments are aligned to highest DFA priorities.). (FY24 – FY28)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Number of IT projects started without approval. % of projects on the roadmap that with committed funding and resources. Number of DFA units not attended quarterly review meeting. 	<ul style="list-style-type: none"> Inconsistent behavior by DFA departments based on funding. Less than ideal communication between departments on technology projects bypassing opportunities for collaboration. Implement better controls for both cost and for DFA IT Strategy. 	
<p>Goal 7: Improve Procurement End-to-End Processes. (FY24 – FY25)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Number of purchasing escalations per month. % survey responses with highly satisfied with purchasing. % POs aging > 30 days. Number of POs processed per buyer. 	<ul style="list-style-type: none"> Numerous customer complaints. Common misunderstanding throughout campus of multi-step processes. 	
<p>Goal 8: Develop infrastructure to support continuous process improvement activities for DFA. (FY24 – FY25)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Number of CPI tools and workshops. Use of Intake Form. Completion and use of PM toolkit. Completion of Intake and PM flowcharts. 	<ul style="list-style-type: none"> Consider effort invested in improvements as compared to actual savings realized – try to quantify improvements. 	

Unit Goals: Environmental Health & Safety

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 1: Eight Reviews of critical programs and implementation of Corrective Action Plans. (FY24 – FY26)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> Project schedule and budget (if 3rd party review). Generation of annual report for each program based on applicable program KPIs. Development of corrective action plans and full closure rate (100%) of agreed corrective action plans (CAP step closure rate). 	<ul style="list-style-type: none"> EHS manages over 80 Campus-wide compliance programs. We audit critical programs to ensure compliance with applicable requirements. 	<ul style="list-style-type: none"> Three FY 2023-24 reviews have been completed.
<p>Goal 2: Implement UCOP risk and safety solution technology-driven EHS software. (FY24 – FY26)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> Measure the time it takes to implement campus-wide software applications based on annual RSS Roadmap. 	<ul style="list-style-type: none"> EHS manages several database applications to ensure compliance and policy obligations are in order. 	<ul style="list-style-type: none"> Three FY 2023-24 applications are in progress.
<p>Goal 3: Coordinate campuswide chemical inventory reconciliation project & update process for all labs. (FY24 – FY28)</p> <p>P1 – DFA-C</p>	<ul style="list-style-type: none"> Number of labs completing required annual chemical inventory reconciliation. Number of labs (as part of the annual Laboratory Safety Inspections Program) with current reconciliation inventories. Number of labs/units by school/division with current chemical inventory by quarter. 	<ul style="list-style-type: none"> EHS manages various programs to ensure hazardous chemicals are used, stored, and disposed of properly. 	<ul style="list-style-type: none"> One tactic has been completed, and three are in progress.
<p>Goal 4: Manage the National BSL-3 Training Center partnership and support the growth of facility and program. (FY24 – FY28)</p> <p>P1 – DFA-C</p>	<ul style="list-style-type: none"> Update MOU as required (every 5 years). Track funding/cost sharing. Track student completion, program offerings, funding, and annual work plan for the center. 	<ul style="list-style-type: none"> UCI is the home of the UCOP National BSL-3 training center. EHS works with UCOP/SOM leadership to ensure the facility is operational. 	<ul style="list-style-type: none"> All tactics are in progress.
<p>Goal 5: Create a UCI-specific Maximum Allowable Quantities (MAQ) plan to address MAQ chemical overages in all labs. (FY24 – FY30)</p> <p>P1 – DFA-C</p>	<ul style="list-style-type: none"> Number of labs with MAQ overages (annual). Number of buildings with MAQ overages (annual). % labs, buildings and schools over required MAQ storage quantities (quarterly and bi-annual). Number of school specific MAQ plans (annual). 	<ul style="list-style-type: none"> Significant system-wide property insurance and fire code compliance risk. 	<ul style="list-style-type: none"> All FY 2023-24 tactics are in progress.

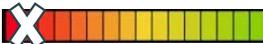
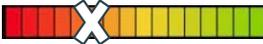
Unit Goals: Environmental Health & Safety (cont.)

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 6: Secure a sustainable budget allocation to permanently fund the hazardous waste management program. (FY24 – FY27)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> Monitor the program’s compliance with regulations related to hazardous waste management. Manage program within allocated budget, budget overage, and plans to adjust for inflations/increase in disposal costs quarterly. 	<ul style="list-style-type: none"> Management and disposal of hazardous, radiological, and biological waste represent significant compliance risks for campus operations. 	<ul style="list-style-type: none"> All FY 2023-24 tactics are complete.
<p>Goal 7: Develop and implement Comprehensive Corrective Action Plan (CAP) to address Cal/OSHA Title 8 compliance deficiencies. (FY24 – FY28)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> Percentage completion of milestones by identified schedule. Completion of specific Title 8 program milestones including hazard identifications, required trainings, inspection targets, and checklists. Annual program evaluation of each compliance area. 	<ul style="list-style-type: none"> UCI is affected by over 40 CALOSHA safety standards. Managing the programs ensures we meet compliance obligations. 	<ul style="list-style-type: none"> Four of five FY 2023-26 tactics are in progress.
<p>Goal 8: Develop and implement the Cross Connection Control program to comply with regulations, maintaining and/or bringing in-house business processes. (FY24 – FY28)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> Completion of program milestones including MOU with IRWD, risk assessment of potable water systems, and established inspection frequency (unknown at this time). Percentage completion of milestones by schedule to be determined. 	<ul style="list-style-type: none"> Newly enacted State legislation requires UCI to implement new requirements. 	<ul style="list-style-type: none"> Three FY 2023-25 tactics are in progress.
<p>Goal 9: Reduce campuswide injury rate by 5%. (FY24 – FY28)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> Injury reduction measures annually (claim count, WC cost, Cal/OSHA Total Incident Rate (TIR) and Lost Workday Case Rate (LWCR). Number of injuries, injury cost, near miss reporting. Development of annual unit/division/all-up injury reports scorecards. 	<ul style="list-style-type: none"> Occupational injuries and illness affect campus morale, increase workers’ compensation and liability-related costs, and could lead to fines, lawsuits, and low employee productivity. 	<ul style="list-style-type: none"> In progress.
<p>Goal 10: Collaborate with FM and D&CS to facilitate transition of campus switchgears away from sulfur hexafluoride. (FY24 – FY26)</p> <p>P3 – DFA-A</p>	<ul style="list-style-type: none"> Measure the SF6 leak rates to comply with California Air Resources Board regulations annually. Track emissions through Facilities Management service records. Track removal/replacement of units to established plan. 	<ul style="list-style-type: none"> Newly enacted State legislation requires the phasing out of sulfur hexafluoride systems. 	<ul style="list-style-type: none"> All FY 2023-24 tactics are completed.

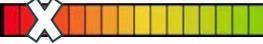
Unit Goals: Emergency Management

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 1: Conduct training on revised emergency operations plan (EOP) for stakeholders and develop a continual training process. (FY24 – FY28)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> • Creating a training development timeline. • Development of training program. • Development of continual training process. 	<ul style="list-style-type: none"> • We will be training on our Emergency Operations Plan as part of our annual EOC exercise on May 21, and will use the training template to continue stakeholder training into the future. 	
<p>Goal 2: Replace the red emergency flip charts across campus with signage displaying a single QR code. (FY24 – FY28)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> • Monthly review of adherence to project schedule. • Follow up surveys with departments and consumers. • Website analytics. 	<ul style="list-style-type: none"> • We have completed the purchase and distribution of Emergency Response Procedures signage for all campus classrooms through BSAS funding. Additional signage can be found on the em.uci.edu webpage. 	
<p>Goal 3: Develop Business Impact Analysis (BIA) to include all campus buildings and align building department hazards inventories with business continuity plans. (FY24 – FY28)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> • Number of physical plans per building. • Number of hazard inventories for the campus. 	<ul style="list-style-type: none"> • We are in the beginning phases of this projects, currently developing assessment templates and building priorities. 	

Unit Goals: Facilities Management

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 1: Implement Service Memorandum of Understanding (MoU) with UCI Health to manage exterior maintenance and operations for the Center for Advanced Care, Ambulatory Care Center, and Hospital exterior. (FY24 – FY25)</p> <p>P1 – DFA-A</p>	<ul style="list-style-type: none"> Compliance with the agreed-upon terms. Deviations from the established standards. Actual hours and cost compared to budget. Regular assessments to measure the effectiveness of the MoU. Performance reviews to track progress and identify areas for improvement. 	<ul style="list-style-type: none"> Ensuring compliance with agreed-upon terms, monitoring actual hours and costs compared to budget, conducting regular assessments to measure MoU effectiveness, and performing performance reviews to track progress and identify areas for improvement. 	
<p>Goal 2: Conduct a comprehensive evaluation of the service levels provided by each department within FM. (FY24 – FY27)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Measure the existing service levels of each department by quantifying response times, resolution rates, and customer feedback to establish a baseline for comparison. Track campus growth rate, budget changes, sponsored research expansion rate, and student enrollment increase. Estimate increase in service demand and necessary adjustments. 	<ul style="list-style-type: none"> The driver for this goal is to optimize budget allocation by aligning reductions in funding with areas of lower demand, ensuring resources are efficiently allocated to meet the evolving needs of the organization. 	
<p>Goal 3: Leverage the Tririga work order management system for identifying, documenting, and prioritizing preventative maintenance as well as assess implementing the Tririga Mobility Program to streamline the work order management process and transition away from manual paper documents. (FY24 – FY26)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Number of tasks entered, completed tasks, incomplete tasks, speed of task completion. Adoption and utilization rate of the Mobility Application by tracking the number of work orders processed electronically versus those using manual paper documents. Completion rates of preventative maintenance tasks versus tasks that remain incomplete within the Tririga system. 	<ul style="list-style-type: none"> The driver for this goal is to enhance efficiency and effectiveness in preventative maintenance and work order management processes while implementing enhanced tracking of time and materials. 	

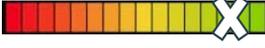
Unit Goals: Facilities Management (cont.)

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 4: Complete the decarbonization study and present the results to cabinet and other leadership, including campus fiscal and operational implications. (FY24 – FY24)</p> <p>P1 – DFA-A</p>	<ul style="list-style-type: none"> Adherence to project milestones and due date. Review of plan progress compared to baseline at every project milestone. 	<ul style="list-style-type: none"> Ensure that this high-profile report is completed on time. 	
<p>Goal 5: Enhance relationships between FM and other campus departments by scheduling regular coffee, lunch, or Zoom meetings to improve communication, boost employee engagement, and cultivate new professional relationships. (FY24 – FY26)</p> <p>P4 – DFA-C</p>	<ul style="list-style-type: none"> Number of meetings per month. Diversity of departments represented. Participant feedback. 	<ul style="list-style-type: none"> Expanding upon the efficacy of FM's monthly and quarterly meetings to foster comprehensive understanding of FM operations across campus, delineate departmental roles, and proactively address potential issues to prevent escalation. 	
<p>Goal 6: Reduce overall energy consumption by 10% by implementing energy-efficient technologies and practices across campus facilities. (FY24 – FY29)</p> <p>P3 – DFA-A</p>	<ul style="list-style-type: none"> Campuswide energy consumption (kBTU / Sqft as measured from campus utility bills). 	<ul style="list-style-type: none"> Compliance with a UCOP policy, in addition to long term financial savings to the campus. 	
<p>Goal 7: Reduce workplace incidents by 10% through enhanced safety protocols, training, and employee engagement initiatives. (FY24 – FY26)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> Workplace incidents per year. 	<ul style="list-style-type: none"> Promoting FM employee wellbeing, lower workers' compensation claims and boost morale by ensuring a safer work environment. 	

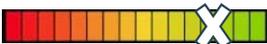
Unit Goals: Internal Audit Services

Goal	Key Metrics/Milestones	• Goal Drivers	Status
<p>Goal 1: Implement a risk assessment process to quantitatively evaluate the likelihood and impact of identified risks, develop annual audit plan with projects that address the identified risks, create management action plan(s) (MAPs) based on the observations and manage completion of MAPs within 300 days. (FY24 – FY28)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> Assess 100% of the identified risks using the risk assessment criteria. Address at least 90% of identified risks in the annual audit plan. Track 100% of MAPs related to reportable observations. Mitigate at least 90% of MAPs within 300 days of the final report. 	<ul style="list-style-type: none"> A comprehensive and thorough risk assessment is the key driver in the development of an effective audit plan. The primary purpose of an effective audit plan lies in enhancing the UCI's performance and ensuring its long-term sustainability. By reviewing and evaluating policies, procedures, control mechanisms, and governance processes an internal audit helps identify areas where improvements can be made to achieve operational excellence. 	
<p>Goal 2: Provide valuable resources through communication and education on audit best practices and compliance standards tailored to the University's specific objectives. (FY24 – FY28)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> 100% participation in meetings with stakeholders. 80% response rate in a survey of key stakeholders. 85% or higher satisfaction rate by participants on feedback surveys. Minimum of a quarterly submission of audit educational materials through DFA newsletter and minimum of two webinar presentations. 	<ul style="list-style-type: none"> Communicating best practices to stakeholders enables UCI to achieve its objectives while maintaining an environment that focuses on ethics and accountability. Establishing an ethical environment at all levels of the organization is the most important element of accountability and control. 	
<p>Goal 3: Enhance UCI's efficiency, transparency, and accountability through a strategic approach to auditing, executing 100% of the risk-based audit plan each year. (FY24 – FY28)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> 100% coverage in all major functional areas in annual audit plan. 100% completion of approved audit plan. Number of value-added recommendations, identified high/medium/low risks, and fraud observations. Client satisfaction rate in survey ratings at 85% or higher. Monthly status reports to track MAP status at 100-200-300-day intervals. 		

Unit Goals: Police

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 1: Become the leader among UCPD's in community engagement with UC residents and campus communities. (FY24 – FY25)</p> <p>P2 – DFA-A</p>	<ul style="list-style-type: none"> • Completion of at least four events with 10% employee participation by year 3 and five by year 5. • Host at minimum two Community Police Academies each calendar year. 	<ul style="list-style-type: none"> • Website. 	
<p>Goal 2: Implement the Public Safety Division Procedural Manual. (FY24 – FY24)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> • Manual approved for distribution by 2024. • Assign a Sergeant to ensure the manual is comprehensive, and systems are in place to keep it relevant and updated on an annual basis. • Evaluate employee knowledge and ability to reference the manual. • Observational study of employee performance. • Track complaints and commendations prior to and following the release of the manual. 	<ul style="list-style-type: none"> • Waiting for final leadership approval. 	
<p>Goal 3: Rebuild connections with regional law enforcement agencies to improve safety and security on main campus and UCI Health campus. (FY24 – FY24)</p> <p>P3 – DFA-B</p>	<ul style="list-style-type: none"> • Completion of updated MOUs and regular review for accuracy. • CHP, Irvine Police, and Orange Police attend one EOC training exercise per year at the respective campus. • Hosting of hospital-related critical incident training. • Regular meetings quarterly with Orange County agency partners. • Membership and participation in county-wide organizations. • Internal conversations with hospital leadership. 	<ul style="list-style-type: none"> • MOU's updated and completed. • Lieutenants are now participating in the OC Commander's Luncheon-Training & Networking March 26, 2024. 	

Unit Goals: Police (cont.)

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 4: Improve technology used by UCIPD to reduce capital outlay and ongoing recurring costs. (FY24 – FY24)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Negotiate and award contract to vendor and manage project to completion by FY24. Launch and use of ILJAOC time keeping program by end of fiscal year 2024. Decrease staff hours spent on data entry and capture of payroll and evidence. Connection between ILJAOC time keeping program and UC payroll system for transfer of data for payroll. Streamline BWC video downloads and transfers for evidence and court processes. 	<ul style="list-style-type: none"> NextGen911. In-Time v Kronos. BWC Implementation. 	
<p>Goal 5: Develop a staffing plan to support the opening and expansion of Irvine Medical Center. (FY24 – FY26)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Identify staffing based on necessary and/or ideal staffing models as the facility opens in 2024, along with additional openings in 2025-26. Review calls for service and staffing requests to develop staffing needs. 	<ul style="list-style-type: none"> Hiring/Training now for July start date. Phase with openings. Newly acquired hospitals. 	

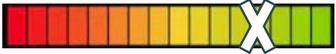
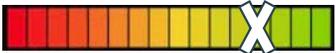
Unit Goals: Procurement Services

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 1: Implement Virtual Card (Payment Plus) payment method in KFS to provide prompt payment option to suppliers and generate additional incentive revenue of \$600,000 annually. (FY24 – FY25)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Number of suppliers enrolled. Annual incentive revenue received. 	<ul style="list-style-type: none"> Revenue generation. Prompt payment. 	<ul style="list-style-type: none"> KFS modifications complete. Pilot testing to begin in April. Supplier on-boarding to begin in May. 
<p>Goal 2: Implement a PO queue management process to reduce number of POs taking >30 days by 40%. (FY24 – FY25)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Number of aging POs (>30 days). 	<ul style="list-style-type: none"> Shorter PO approval times. Improved customer satisfaction. 	<ul style="list-style-type: none"> Weekly monitoring of aging PO in place. First focusing on POs aging >60 days. Achieved 70% reduction. 
<p>Goal 3: Redesign KFS and make necessary updates in the KFS system or implement an alternate system to streamline the procurement process by incorporating as many policy requirements in the requisition process as possible to reduce PO processing times by 30%. (FY24 – FY25)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> PO processing time. Number of helpdesk tickets submitted. 	<ul style="list-style-type: none"> Streamline end-to-end procurement process. Create efficiencies and effectiveness. Reduce PO processing time. Ease of use. Improved customer satisfaction. 	<ul style="list-style-type: none"> Future state process designs in progress. Evaluating alternate system solutions. 
<p>Goal 4: Implement Contract Lifecycle Management System to create single point of submission for contracts (eliminate manual/informal processes). (FY25 – FY26)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Processing time for executing contracts. Number of inquiries submitted. 	<ul style="list-style-type: none"> Streamline all types of contract authoring, reviewing, editing, and executing process. Create efficiencies and effectiveness. Reduce contract execution times. Robust contracts repository and database. 	<ul style="list-style-type: none"> Business case developed. 
<p>Goal 5: Implement a more modern, flexible, robust, and efficient procurement system that helps streamline the entire end-to-end procurement process. (FY25 – FY27)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Ease of ordering goods/services measured through a survey. Time to place orders through monthly reports from procurement system. 	<ul style="list-style-type: none"> Streamline end-to-end procurement process. Create efficiencies and effectiveness. Much better user experience. Improved customer satisfaction. 	<ul style="list-style-type: none"> Not started. 

Unit Goals: Real Estate Services

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 1: Design and create process guides and templates to establish consistency for loan processes reducing time spent providing repetitive responses to standard procedural tasks by 20% (FY24 – FY25)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Track time spent responding to standard procedural questions before and after the implementation of process guides. 	<ul style="list-style-type: none"> # of requests and calls from school administration seeking direction. Eliminate redundancy through unifying the process campuswide. Strengthen the collaborative efforts with dean’s and dept. chair offices. Optimize methods to deliver services provided within the Home Loan programs. 	
<p>Goal 2: Engage a “Best in Class” real estate service provider and deliver high quality brokerage services, lease administration, critical date tracking, and transaction services focusing on UCI Health (FY24 – FY24)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Annual performance review to verify the service level and cost of services meet or exceed expectations. 	<ul style="list-style-type: none"> Voice of the Customer post-transaction debrief with client (UCI Health, SOM, Deans, etc.) to confirm satisfaction level. Identify and engage a leading real estate service provider. 	
<p>Goal 3: Deliver new facility leases and lease renewals executed prior to 1/31/2025 at 95% of FMV. (FY24 – FY25)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Compare final contract terms vs. Landlord’s initial negotiating position with the goal of savings of 5% or greater. 	<ul style="list-style-type: none"> Reduction of the overall off-campus lease costs by achieving lower than fair market rental rate. 	
<p>Goal 4: Conduct annual audit of off-campus Operating Expenses and Tax Exemption for leases larger than 10,000 sf to ensure 100% compliance and collect funds due to UCI (FY24 – FY28)</p> <p>P4 – DFA-A</p>	<ul style="list-style-type: none"> Percentage of statements reviewed and confirmed accuracy of charges. Errors identified in reconciliation addressed by financial analysts and landlords contacted for explanation/resolution. 	<ul style="list-style-type: none"> County does not directly credit the exception to UCI. Not all landlords are properly applying the exemption credit due to UCI in their rent statements. 	

Unit Goals: Risk Services

Goal	Key Metrics/Milestones	Goal Drivers	Status
<p>Goal 1: Expand engagement in the planning process for campus tours and campus events to mitigate risk, provide support, and properly align insurance coverage for high-risk events. (FY24 – FY27)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> • Number of regular standing meetings with 'new' departments. • Number of campus tours and events. 	<ul style="list-style-type: none"> • Financial liability. • Reputational risk. 	<ul style="list-style-type: none"> • Risk has created a 'Goals Implementation/Process Improvement' subcommittee that meets weekly to make progress towards this goal. 
<p>Goal 2: Develop a campuswide risk approved program for handling all fine art items that will assure the highest level of accuracy in inventory, consistency in documentation, and outline proper handling requirements. (FY24 – FY27)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> • Number of ServiceNow tickets concerning fine art Certificate of Insurance (COI) requests. • Number of cross-departmental meetings to foster further collaboration. • Reduction in insurance claims regarding fine art items. 	<ul style="list-style-type: none"> • Accurate documentation of more than \$50M in Fine Arts. 	<ul style="list-style-type: none"> • Corresponded with FM & Counsel regarding their roles in moving and identifying present/future locations. 
<p>Goal 3: Develop a structure to assist in organizing both on and off campus interactions with minors, including a process to document 'registered' visitors, vetting of student and volunteer mentors/supervisors, and roper background check those with regular contact with minors. (FY24 – FY27)</p> <p>P4 – DFA-B</p>	<ul style="list-style-type: none"> • Number of ServiceNow request tickets with Certificate of Insurance and Waiver of Liabilities inquiries, event requests, and initial contact tickets. 	<ul style="list-style-type: none"> • Financial liability. • Reputational risk. 	<ul style="list-style-type: none"> • Coordinating and working with Praesidium to include group presentations with the goal of moving towards communication with all campus groups working with minors using a singular process. 

Unit Goals: Transportation & Distribution Services

Goal	Key Metrics/Milestones	Goal Drivers	Status
Goal 1: Strategic Mobility Enhancement - Work with campus partners and the medical center to enhance physical transportation systems that serve the campus. (FY24 – FY28) P1 – DFA-A	<ul style="list-style-type: none"> Engineering and traffic safety survey every 5 years Annual user satisfaction survey. 	<ul style="list-style-type: none"> UCI Long Range Development Plan (LRDP). UCI Strategic Plan (Pillar 1's focus on growth that makes a difference). Customer feedback and surveys. Opening of UCI Health Irvine Medical Complex and acquisition of Tenet's Pacific Coast Network. 	
Goal 2: Student Transportation Program & Service Enhancements - Reduce travel costs for sustainable transportation modes/rideshare program and improve their experience. (FY24 – FY28) P3 – DFA-A	<ul style="list-style-type: none"> Average Vehicle Ridership (AVR) standing for student populations. <ul style="list-style-type: none"> Mode split data (annually). Traveler surveys (annually). 	<ul style="list-style-type: none"> Senate Bill 32 – Global Warming Solutions Act, 2016. Senate Bill 375 – Sustainable Communities and Climate Protection Act, 2008. South Coast Air Quality Management District (SCAQMD) – Rule 2202. UCI Long Range Development Plan (LRDP). UCI Strategic Plan (Pillar 3's focus on developing great partnerships to serve the campus). UC Sustainable Practices Policy. 	
Goal 3: Expand Sustainable Transportation Partnerships & Programs - Work with regulatory and transportation service providers to further sustainability goals and shape service offerings and regional transportation solutions. (FY24 – FY28) P3 – DFA-A	<ul style="list-style-type: none"> Average Vehicle Ridership (AVR) and trip data requirements. <ul style="list-style-type: none"> SCAQMD commuter survey (annually). Ridership surveys (annually). Boardings and alighting data (quarterly). 	<ul style="list-style-type: none"> Senate Bill 32 – Global Warming Solutions Act, 2016. Senate Bill 375 – Sustainable Communities and Climate Protection Act, 2008. South Coast Air Quality Management District (SCAQMD) – Rule 2202. UCI Long Range Development Plan (LRDP). UCI Strategic Plan (Pillar 3's focus on making regional and global connections to foster great partnerships). OCTA Next 10 Plan (2016-2026) – Supporting OC Go initiatives. UCOP – Carbon Neutrality Initiative. UC Sustainable Practices Policy. 	
Goal 4: Business Systems & Technology Improvements - Leverage technology to streamline business processes and improve the customer experience. (FY24 – FY28) P4 – DFA-A	<ul style="list-style-type: none"> PROs analytical data (annually). Website analytical data (quarterly). WCAG 2.1 guidelines (annually). 	<ul style="list-style-type: none"> UCI Long Range Development Plan (LRDP). UCI Strategic Plan (Pillar 4's focus on forging best practices to power the coming century). 2024 UCI Strategic Communications brand refresh. Customer feedback and surveys. Opening of UCI Health Irvine Medical Complex and acquisition of Tenet's Pacific Coast Network. 	