



UC San Diego
Health Sciences



RINA DAVISON

ASSISTANT VICE CHANCELLOR
HEALTH SCIENCES ADMINISTRATION |
UC SAN DIEGO HEALTH SCIENCES



PARAM NARAYANAN

DIRECTOR OF HEALTH SCIENCES BUSINESS
INTELLIGENCE | UNIVERSITY OF
CALIFORNIA SAN DIEGO HEALTH SCIENCES

How UC San Diego Health Sciences Modernized Financial Planning with Tru Consulting and Anaplan

Situation

UC San Diego Health Sciences (UCSD), a multibillion-dollar enterprise, includes UC San Diego Health, three professional schools, and various institutes. It plays a key role in patient care, research, and medical education. Operating in a complex, matrixed environment, the institution's financial processes, like budgeting and forecasting, have long been handled through siloed, manual systems such as Excel and Access across hundreds of units.

Rina Davison, Assistant Vice Chancellor for Health Sciences Administration, has been with UCSD for 28 years. *"We've grown rapidly, but without the tools to support that growth,"* she said. *"We couldn't afford to keep expanding personnel, so we needed a modern solution to empower our existing team."*

Enter Param Narayanan, MBA, Director of Business Analytics, who brought a fresh perspective from outside academia. *"When I arrived, I quickly realized there was no centralized system. Each department was using their own version of the truth,"* said Param.

"There was a massive opportunity to align planning, automate routine work, and deliver data-driven insights across the institution."

The team began evaluating enterprise platforms. Anaplan stood out for its web-native, user-friendly interface and scalability. But UCSD needed more than a tool, they needed a partner who understood higher education's unique governance, structure, and challenges. That partner was Tru.



Solution

UCSD partnered with Tru to implement Anaplan, starting with a faculty financial portfolio planning solution.



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“What began as a health sciences tool evolved into a campus-wide initiative,” said Param. “We received immediate interest from Academic Affairs and departments across the university who had the same planning problems.”

Results

- Rina emphasized the cultural shift: “We had a campus-wide habit of passing spreadsheets from one person to the next for 30 years. Tru helped us reimagine that entirely. They pushed us to innovate.”

Over time, the system's usage expanded beyond Health Sciences. *"What began as a health sciences tool evolved into a campus-wide initiative," said Param. "We received immediate interest from Academic Affairs and departments across the university who had the same planning problems."*

[illegible]

Month	Revenue	Expenses	Ending Bal.
Jun 25	\$76,769	\$76,027	\$339,753
Jul 25	\$76,769	\$62,521	\$277,231
Aug 25	\$76,769	\$40,531	\$214,700
Sep 25	\$76,769	\$62,521	\$152,189
Oct 25	\$76,769	\$76,769	\$75,420
Nov 25	\$76,769	\$1,353	\$74,067
Dec 25	\$76,769	\$76,769	\$75,110
Jan 26	\$76,769	\$76,769	(\$154,887)
Feb 26	\$76,769	\$76,769	(\$231,650)
Mar 26	\$76,769	\$76,769	(\$308,424)
Apr 26	\$76,769	\$76,769	(\$381,185)
May 26	\$76,769	\$76,769	(\$362,431)



Efficiency Through Automation:

Faculty financial forecasting, once done manually in 500+ Excel files, is now standardized and automated in Anaplan.



Scalable Across Campus:

The system grew from supporting 1,200 users to over 3,000 across multiple units.



Strategic Reallocation:

Fund managers now spend less time maintaining spreadsheets and more time supporting faculty and research missions.



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Faster Onboarding:

New employees now ramp up quickly using pre-built, standardized tools embedded in the platform.

500+

Years of combined
industry experience

50+

Certified Anaplan
experts



Proactive Insights:

With TruEd's foresight, UCSD implemented stress testing, governance controls, and collaborative prototypes before issues emerged.

"I've worked with many consultants in the past," said Param. "Tru stands out. They're not just technical experts—they bring business process insight, higher ed fluency, and a truly collaborative spirit."

Conclusion

UCSD Health Sciences is not just upgrading tools—it's transforming how the institution plans, collaborates, and scales. Thanks to the strategic partnership between UCSD, Anaplan, and Tru, the university is reimagining data, planning, and people management for the modern era.

One phrase to describe Tru?

"They get us." — Rina Davison

One word?

"Successful." — Param Narayanan, MBA

The Tru Difference

60+

Clients served across
higher education and
public sector

100%

Projects delivered—on
time, on target, and on
mission

100+

Client satisfaction



6 years at the University of California, Riverside, School of
Medicine
Founding Staff of the School of Medicine & UCR Health
Mela Fezzey, Executive Director, Finance



10 years at the University of California, Riverside School of
Medicine and the University of California, Irvine College of
Health Sciences
Founding Staff of the School of Medicine & UCR Health
**Sheila Morris, Executive Director, Academic Affairs and
Faculty Compensation**



10 years at the University of Rochester Medical Center
Libby Deibler, Anaplan Implementation Lead



8 years at Oregon Health & Science University
2 years at Baylor University School of Medicine
Greg Smith, Finance and Clinical Data Warehouse Consultant