**UC Berkeley – Office of the CFO - One Page Strategic Plan**

**FY2014 to 2017**

**GOALS:**

<table>
<thead>
<tr>
<th>Financial Strength</th>
<th>1. Achieve financial strength - Align financial resources to campus strategies.</th>
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<tbody>
<tr>
<td>Budget cycle satisfaction</td>
<td>2. Simplify processes - Standardize and simplify policies, business processes and internal controls for campus partner satisfaction, greater efficiency and compliance.</td>
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<tr>
<td>Financial model</td>
<td>3. Build a service oriented model of campus engagement - Engage campus partners through adoption, acceptance and satisfaction of applications, processes and tools.</td>
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<td>ICR Proposal</td>
<td>4. Leverage data for strategic decision making - Leverage and institutionalize financial, academic and human resource data sets for strategic decision making.</td>
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<tr>
<td>High $ Supply</td>
<td>5. Promote collaboration and professional development – Build and maintain a culture of collaboration and continuous professional development that supports accountability, engagement and opportunity.</td>
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</tbody>
</table>

**STRAATEGIES:**

**How we will Win …**

1. **Achieve financial strength - Align financial resources to campus strategies.**
   - Leverage and institutionalize financial, academic and human resource data sets for strategic decision making.
   - Simplify processes - Standardize and simplify policies, business processes and internal controls for campus partner satisfaction, greater efficiency and compliance.

2. **Build a service oriented model of campus engagement - Engage campus partners through adoption, acceptance and satisfaction of applications, processes and tools.**
   - Leverage and institutionalize financial, academic and human resource data sets for strategic decision making.
   - Simplify processes - Standardize and simplify policies, business processes and internal controls for campus partner satisfaction, greater efficiency and compliance.

3. **Develop temporary academic support (TAS) and core curriculum modeling (Machamer, 6/30)**
   - Implement survey application and embed usage into divisional decision making (Machamer/Davidson, 6/30)
   - Build a financial case methodology for Berkeley in UC system decisions (Heller, 6/30)
   - Create a unified communications, change management and training function (Bednarz)
   - Implement Cal Time system for campus non-exempt staff (Rae, 6/30)

**CALENDAR 2014-15 PLANS:**

2a Define end-to-end improvement for T&E (Regalia), P2P (Hine), Payroll (Parkinson), Property Management (Anglim), Fleet Service (Anglim) and Business Contracts (Rubinshteyn) processes

3a Retire Berkeley Integrated Budget & Staffing System - BIBS (Spurr, 6/30)

3b Prepare project plan for the retirement of the Berkeley Administrative Initiative Reporting System – BAIRS (Lloyd, 3/31)

3c Transition CalPlanning to a hosted environment (Lloyd, 6/30)

3d Improve CalPlanning user experience through budget templates. Smartview and query capability (Bain-Chekal, 6/30)

3e Leverage Cal Answers and Strategy, Planning & Monitoring (SPM) data sets through an intuitive front end and embed usage into divisional decision making (Machamer/Davidson, 6/30)

4a Develop temporary academic support (TAS) and core curriculum modeling (Machamer, 6/30)

4b Implement survey application and embed usage into divisional decision making (Machamer/Davidson, 6/30)

4c Implement a campus space planning system (Milano, 6/30)

4d Design and implement a Cal Answers academic dashboard (Machamer, 3/31)

4e Participate as a functional owner in SIS Replacement Project (Strum, 6/30)

4f Plan for Sallie Mae/Higher One implementation (Strum, 6/30)

4g Implementation of UC single payroll system - UCPath (Lloyd, 6/30)

5a Build a campus financial and analytical management community of practice (Bain-Chekal, 6/30)

5b Strengthen campus partnership through the Academic Senate, Student Affairs, VC's, COD and affinity groups (CFO's/CAO's) (Rae, 6/30)

5c Strengthen performance management and performance development (Cronin, 12/31)

5d Improve internal processes and systems (Cronin, 12/31)

5e Expand and develop campus timelines and scorecards (Cronin, 12/31)

5f Improve process collaboration and professional development – Build and maintain a culture of collaboration and continuous professional development that supports accountability, engagement and opportunity.

5g Strengthen campus partnership through the Academic Senate, Student Affairs, VC's, COD and affinity groups (CFO's/CAO's) (Rae, 6/30)

5h Establish and measure team objectives, goals, strategies and plans (Cronin, 12/31)

5i Establish Appreciation (Hummel) and Professional Development (Cronin) (Rae, 6/30)

5j Develop and maintain campus timelines and scorecards (Cronin, 12/31)