FY 2014 - 2017 OBJECTIVE:

What is Winning ...

The office of the CFO will provide innovative, collaborative, client-focused financial, analytical and administrative management to our campus partners while providing our team clarity, focus and the space for creativity.

GOALS:

	FY14-15 Target	FY15-16 Target	FY16-17 Target
Financial Strength			
Financial Reform	50%	75%	100%
Budget cycle satisfaction	50%	75%	80%
Financial model	70%	80%	100%
ICR Proposal	40%	80%	100%
High $ Supply	$5M	$7.5M	$10M
Simplify processes			
BPI-T&E	70%	80%	90%
BPI-P2P	70%	80%	90%
BPI-Payroll	80%	90%	95%
BPI-Property	65%	75%	80%
BPI-Business Contracts	80%	85%	90%
Risk/IA Alignment	70%	80%	90%
EDM pilot	100%	-	-
3 Year Tech Roadmap	100%	-	-
Campus engagement			
BIBS retirement	90%	100%	-
BAIRS retirement	75%	100%	-
Cal Plan hosting	100%	-	-
Cal Plan user satisfaction	65%	75%	80%
Cal Answers user satisfaction	70%	80%	90%
Comm/Training satisfaction	70%	80%	90%
Cal Time user satisfaction	70%	80%	90%
Leverage data			
TAS/Curriculum model	65%	80%	90%
Survey mgmt program	50%	75%	100%
Campus space planning	75%	100%	-
Cal Answers dashboards	65%	80%	95%
SIS implementation	40%	70%	80%
Sallie Mae implementation	80%	100%	-
UC Path	30%	60%	100%
Engagement			
Staff satisfaction	75%	80%	85%
Perform evals comp	90%	95%	97%
Campus financial COP	75%	80%	97%
OGSP adoption	75%	100%	-
Appreciation work group	80%	100%	-
Prof Dev work group	80%	100%	-

STRATEGIES:

How we will Win ...

1. Achieve financial strength - Align financial resources to campus strategies.

2. Simplify processes - Standardize and simplify policies, business processes and internal controls for campus partner satisfaction, greater efficiency and compliance.

3. Build a service oriented model of campus engagement - Engage campus partners through adoption, acceptance and satisfaction of applications, processes and tools.

4. Leverage data for strategic decision making - Leverage and institutionalize financial, academic and human resource data sets for strategic decision making.

5. Promote collaboration and professional development — Build and maintain a culture of collaboration and continuous professional development that supports accountability, engagement and opportunity.

CALENDAR 2014-15 PLANS: (Owner, Date)

1a Lead planning on financial reform to align incentives, simplify the budgeting process, and improve campus understanding of financial resources (Heller, 6/30)
1b Revise the campus financial model to improve long range financial planning (Wezelman, 3/31)
1c Plan and gather data (inc space survey) for ICR proposal to be submitted in 2015 (Milano, 6/30)
1d Strengthen high $ supply chain management (Hine, 3/31)
1e Build financial case methodology for Berkeley in UC system decisions (Heller, 6/30)

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
2b Align risk and internal audit to support external audit programs (Vanderfin, 6/30)
2c Pilot electronic document management program (Anglim, 3/31)
2d Reconcile, standardize and simplify T&E (Regalia), contracting (Rubinshteyn) and procurement policies
2e Prepare 3 year enterprise application technology roadmap (Rae, 6/30)

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)
3f Create a unified communications, change management and training function (Bednarz)
3g Implement Cal Time system for campus non-exempt staff (Rae, 6/30)
3h Implement quarterly reviews with units (Bain-Chekal,12/31)

4a Develop temporary academic support (TAS) and core curriculum modeling (Machamer, 6/30)
4b Implement survey management program (Machamer, 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)
5b Establish and measure team objectives, goals, strategies and plans (Cronin, 12/31)
5c Establish Appreciation (Hummel) and Professional Development (Cronin) work groups (12/31)
5d Develop and maintain plan timelines and scorecards (Cronin, 12/31)