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.

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 2015-16 PLANS:

1a. Implement financial reform to align incentives, simplify the budgeting process, and improve campus understanding of financial resources (Heller, 6/2018)
1b. Implement Quarterly Management Review with pilot units (Bain-Chekaj, 4/2016)
1c. Conduct unit deep dives (Bain-Chekaj, 4/2016)
1d. Support Campus Strategic Planning Effort (Heller, 6/2016)

2a. CalPlanning/Budget Process Enhancements:
   • CalPlanning Upgrade (Zirman, 6/2017)
   • Phase 1 UI and HCP Improvements (Zirman, 3/2016)
   • HCP FTE Reporting (Distributed FTE, Actual FTE) (Zirman, 12/2015)
   • Blended forecast plus actuals development (Zirman, 10/2015)
   • Developed decision package/automated budget consolidation business process (Bain-Chekaj, 4/2016)
   • Tricore Transition (Zirman, 8/31/15)

3a. Retire Berkeley Integrated Budget & Staffing System (BIBS/PRT) (Spurr, 6/30/17)
3b. Implement Cal Answers Enhancements e.g. Faculty Dashboard, time to degree, etc. (Zirman, 6/2016)
3c. Integrate recharge operations within FP&IA unit (Remick, 6/2016)
3d. Adopt maintenance of administrative personnel tool (Zirman, 12/2015)

4a. Partner with UCB Foundation to improve fundraising related reporting (Zirman, 6/30/16)
4b. Implement Enrollment Model enhancements to improve enrollment predictions (Machamer, 12/2016)
4c. Implement comprehensive institutional research agenda (Phase 1) (Machamer, 6/2016)
4d. Implement Program Review Reporting Improvements (Machamer, 12/2016)
4e. Implement campus financial model enhancements (Quennarouch, 6/30/16)
4f. Implement PI Portfolio Projections (Sexton, 6/2016)
4g. Cal Answers Data Clean up and Adhoc Training (Zirman, 6/2017)
4h. SIS Project Integration (Zirman, 6/2016)

5a. Support Finance Competency Framework Development (Bain, 6/30/16)
5b. Participate in development of CFO financial and institutional research community (Bain, Hallett, 6/30/16)