



UC Berkeley – Financial Planning & Analysis - One Page Strategic Plan

FY2014 to 2017

| FY 2014 - 2017 OBJECTIVE: What is Winning ... | | | | | STRATEGIES: How we will Win ... | | | | | CALENDAR 2015-16 PLANS:(Owner, Date) | | | | |
|---|-----------------------|-----|----|-----|--|--|--|--|--|--|--|--|--|--|
| 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. | | | | | 1. Achieve financial strength - Align financial resources to campus strategies. | | | | | 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-Chekal, 4/2016) 1c. Conduct unit deep dives (Bain-Chekal, 4/2016) 1d. Support Campus Strategic Planning Effort (Heller, 6/2016) | | | | |
| GOALS: | FY15-16 Target (in %) | | | | 2. Simplify processes - Standardize and simplify policies, business processes and internal controls for campus partner satisfaction, greater efficiency and compliance. | | | | | 2a. CalPlanning/Budget Process Enhancements: | | | | |
| | Q1 | Q2 | Q3 | Q4 | | | | | | <ul style="list-style-type: none"> 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-Chekal, 4/2016) Tricore Transition (Zirman, 8/31/15) | | | | |
| Financial Strength | | | | | 3. Build a service oriented model of campus engagement - Engage campus partners through adoption, acceptance and satisfaction of applications, processes and tools. | | | | | 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&A unit (Remick, 6/2016) 3d. Adopt maintenance of administrative personnel tool (Zirman, 12/2015) | | | | |
| Financial Reform | 15 | 25 | 40 | 50 | | | | | | | | | | |
| OMR | 20 | 50 | 75 | 100 | | | | | | | | | | |
| Deep Dives | 25 | 50 | 75 | 100 | | | | | | | | | | |
| Campus Strategic Planning | 25 | 50 | 75 | 100 | | | | | | | | | | |
| Simplify processes | | | | | 4. Leverage data for strategic decision making - Leverage and institutionalize financial, academic and human resource data sets for strategic decision making. | | | | | 4a. Partner with UCB Foundation to improve fundraising related reporting (Zirman, 6/30/16) 4b. Implement Enrollment Model enhancements to improve enrollment predictions (Machamer, 12/2015) 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) | | | | |
| CalPlanning Upgrade | 5 | 10 | 10 | 30 | | | | | | | | | | |
| HCP/UI Improvements | 30 | 30 | 40 | - | | | | | | | | | | |
| HCP FTE Reporting | 50 | 100 | - | - | | | | | | | | | | |
| Blended Forecast plus actuals | 50 | 100 | - | - | | | | | | | | | | |
| Budget Consolidation Process | 25 | 50 | 75 | 100 | | | | | | | | | | |
| Tricore Transition | 100 | - | - | - | | | | | | | | | | |
| Campus engagement | | | | | 5. Promote collaboration and professional development – Build and maintain a culture of collaboration and continuous professional development that supports accountability, engagement and opportunity. | | | | | 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) | | | | |
| BIBS/PRT Retirement | 20 | 30 | 40 | 50 | | | | | | | | | | |
| CalAnswers Enhancements | 25 | 50 | 75 | 100 | | | | | | | | | | |
| Recharge Integration | 25 | 50 | 75 | 100 | | | | | | | | | | |
| Administrative Personnel Tool | 50 | 100 | - | - | | | | | | | | | | |
| Leverage data | | | | | | | | | | | | | | |
| Reporting for UCB Foundation | 25 | 50 | 75 | 100 | | | | | | | | | | |
| Enrollment Model | 80 | 100 | - | - | | | | | | | | | | |
| UCB Research Agenda | 25 | 50 | 75 | 100 | | | | | | | | | | |
| Program Review Reporting | 5 | 25 | 50 | 75 | | | | | | | | | | |
| Campus financial model | 25 | 50 | 75 | 100 | | | | | | | | | | |
| PI Portfolio | 25 | 50 | 75 | 100 | | | | | | | | | | |
| CalAnswers Data Clean up/Adhoc | 10 | 20 | 30 | 50 | | | | | | | | | | |
| SIS Integration | - | 20 | | | | | | | | | | | | |
| Collaboration/Prof Development | | | | | | | | | | | | | | |
| Finance Competency Framework | 25 | 50 | 75 | 100 | | | | | | | | | | |
| Financial and Institutional Research Community | 25 | 50 | 75 | 100 | | | | | | | | | | |