Adam Mills: Financial Services and Budget Manager, L&S Division of Social Sciences

- Number of years at Berkeley: <1
- Number of years working in Finance: 10
- Favorite Excel Short Cut: Ctrl~, displays the formulas within cells
- Finance Areas of Expertise: Budget Management, Forecasting, Mergers and Acquisitions, Variance Analysis, Benchmarking, Debt Management
- Opportunities/Challenges of Unit Budgeting: Not having a dedicated financial representative staffed within each department. Not knowing the amount of revenue due to the fluctuation in revenue sources.
- Favorite thing about working for UC Berkeley: The opportunity to be located in the middle of campus and being surrounded by all the energy of the students

Andrea Zirman: Interim Executive Director OSPM

- Number of years at Berkeley: 4
- Number of years working in Finance: 29
- Favorite Excel Short Cut:
- Finance Areas of Expertise: My team and I support CalPlanning, BAIRS and Cal Answers - glad to help in any way we can with tools and/or data!
- Opportunities/Challenges of Unit Budgeting: We have reduced staff by 2 FTE since last year but have a lot we are excited to accomplish in CalPlanning and Cal Answers.
- Favorite thing about working for UC Berkeley: Working with so many bright, dedicated people!

Barbara Lane: Assistant Dean, College of Natural Resources

- Number of years at Berkeley: 30
- Number of years working in Finance: 28
- Favorite Excel Short Cut: Never play favorites with your Excel shortcuts
- Finance Areas of Expertise: Campus Funds, Contract and Grant Accounting, Gift Accounting, Strategic Funds utilization, Purchasing, Human Resources/Staffing/Organization Strategy, Risk
- Favorite thing about working for UC Berkeley: In spite of all obstacles the miracle continues - we keep producing new knowledge, educated students and solutions to our worlds most pressing challenges.

David DeClercq, CFO, Assistant Dean for Financial Affairs, School of Public Health

- Number of years at Berkeley: 4
- Number of years working in Finance: 8
- Favorite Excel Short Cut: Alt-O-E, displays the Formatting dialog box
- Finance Areas of Expertise: Financial planning and analysis
- Opportunities/Challenges of Unit Budgeting: Decentralized structure of fund management; budgeting central commitments (known inflow, but uncertain outflow) - how to ‘book’ revenue with appropriate cost to show that the funds are committed even though there is no known expense
- Favorite thing about working for UC Berkeley: Huge opportunity for financial leadership
### Elena Wen Jiang: Portfolio Budget Officer, Campus Budget Office
- **Number of years at Berkeley:** 14
- **Number of years working in Finance:** 21
- **Favorite Excel Short Cut:** Ctrl+, displays the formulas within cells
- **Finance Areas of Expertise:** Financial Planning & Analysis, Long Range Financial model, Student Fees, Financial Operations, Portfolio Management
- **Favorite thing about working for UC Berkeley:** UC Berkeley’s mission, the culture of higher education and the people who dedicate to this community resonate with my values and passion for life.

### Grace Crvarich: Chief Operating Officer, VC-Real Estate
- **Number of years at Berkeley:** 5
- **Number of years working in Finance:** 19
- **Favorite Excel Short Cut:**
- **Finance Areas of Expertise:** Documenting how reports are run so others can recreate them. Tying budgets to unit’s strategy & goals. Involving responsible parties in the unit in the budgeting process. Knowledge of plant accounting.
- **Opportunities/Challenges of Unit Budgeting:**
- **Favorite thing about working for UC Berkeley:**

### Eric Ugalde: Finance Director, Student Affairs Immediate Office
- **Number of years at Berkeley:** 1
- **Number of years working in Finance:** 15
- **Favorite Excel Short Cut:** Alt-Tab
- **Finance Areas of Expertise:** Budget development/management, financial modeling and analysis.
- **Opportunities/Challenges of Unit Budgeting:** Opportunities: potential for change and growth. Challenges: aggregating fund accounting with cost accounting
- **Favorite thing about working for UC Berkeley:** Giving back to my alma mater...Go Bears!

### Terence Phuong: CFO, Office of The CIO
- **Number of years at Berkeley:** 10
- **Number of years working in Finance:** 13
- **Favorite Excel Short Cut:** Custom macro to round figures to thousands.
- **Opportunities/Challenges of Unit Budgeting:** Continued budget constraints, specifically the mandatory increases in salaries and benefits that are not funded by the campus.
- **Favorite thing about working for UC Berkeley:** As a Cal grad, I have a tremendous amount of pride to be fortunate enough to work at Cal and have an opportunity to ensure Cal continues to be an institution of excellence.
<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Number of years at Berkeley</th>
<th>Number of years working in Finance</th>
<th>Favorite Excel Short Cut</th>
<th>Finance Areas of Expertise</th>
<th>Opportunities/Challenges of Unit Budgeting</th>
<th>Favorite thing about working for UC Berkeley:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delphine Regalia</td>
<td>Assistant Vice Chancellor, CFO Controller</td>
<td>5</td>
<td>35</td>
<td></td>
<td>Accounting, Budgeting, Operations, Financial Analysis, Internal Controls, Project Management, SEC Reporting, Financial Reporting</td>
<td>Budgetary constraints, Insufficient staff numbers, Staff skills across campus, External hot market for accountants, Budget for new T&amp;E system</td>
<td>People, Opportunity to make a difference, Challenges</td>
</tr>
<tr>
<td>Eric Leal</td>
<td>Assistant Dean, School of Optometry</td>
<td>1</td>
<td>11</td>
<td></td>
<td>Financial Planning &amp; Analysis, Budget &amp; Forecasting, Strategic Planning, Financial Policies &amp; Procedures, Financial Reporting, Fund Accounting, General Accounting, Audit</td>
<td></td>
<td>People, Opportunity to make a difference, Challenges</td>
</tr>
<tr>
<td>Georgia Giatras</td>
<td>Senior Assistant Dean &amp; Chief Operating Officer</td>
<td>1</td>
<td>17</td>
<td></td>
<td>Forecasting, modeling, budget development, etc.</td>
<td>Standardized reporting, use of CalPlan in budgeting and throughout the year…</td>
<td>People, Opportunity to make a difference, Challenges</td>
</tr>
</tbody>
</table>
Heidi Hallett: Portfolio Budget Officer, CFO - CBO
Number of years at Berkeley: 3
Number of years working in Finance: 25
Favorite Excel Short Cut: F4 (mainly for repeat, but also for absolute references)
Opportunities/Challenges of Unit Budgeting: Creating value in a resource-restrained environment. Helping others react and plan in this new environment - making planning, budgeting and monitoring easier!
Favorite thing about working for UC Berkeley: Never a dull day - the variety and scope of what I do is invigorating! I love interacting with the folks in my portfolio!

Laurent Heller: Executive Director, Budget - CFO Immediate
Number of years at Berkeley: 9
Number of years working in Finance: 20
Favorite Excel Short Cut: VLOOKUP!!
Finance Areas of Expertise: Financial planning & analysis (FP&A), Budget processes, Strategic planning, Institutional research, Financial modeling, Database design & reporting, Hyperion Planning, SmartView
Opportunities/Challenges of Unit Budgeting: I believe in the transformative power of higher education and Berkeley's unique responsibility to share that opportunity with the people of California. In service to this amazing mission, I get to work with brilliant, caring people every day. We love puzzles and finance at Berkeley is an amazingly large, challenging, and interesting puzzle.

Moon Jang-Shinn: CAO, Summer Sessions Study Abroad & Interim CAO Undergraduate Education
Number of years at Berkeley: 12
Number of years working in Finance: 2
Favorite Excel Short Cut: Ctrl+F
Finance Areas of Expertise: Budget, Financial/Business Processes, Summer Sessions Revenue Share, Revenue/Budget Modeling (Programs), Student Finances
Opportunities/Challenges of Unit Budgeting: How to best utilize the combined resources, macro budgeting. How to best leverage existing resources to maximize the return/benefit on the investment. How to create opportunity to increase revenue/resources either by creating new programs/initiatives/revenue sources or by managing the existing resources and reducing expenses, reorganization, etc.
Favorite thing about working for UC Berkeley: The organizational mission and the dedicated people working for the organization towards its mission

Roia Ferrazares: Assistant Dean, School of Journalism
Number of years at Berkeley: 6.5
Number of years working in Finance: 6.5
Favorite Excel Short Cut: Pivots!
Finance Areas of Expertise: I'm a campus-trained budget person. I am very comfortable in BAIRS pivots, but lack real-world finance experience.
Opportunities/Challenges of Unit Budgeting: Our gifts and revenue targets will be very difficult reach. Any unexpected staffing change with the staff responsible for those targets could mean not reaching them. Also, with close to 27% of our budget needing to be raised through philanthropy and revenue generation, we're not able to match fund sources to expenditures, and anticipate spending a great deal of time moving expenditures after-the-fact once a fund source is raised.
Favorite thing about working for UC Berkeley: The brightness and enthusiasm of our students - and the sense that they're the reason we do what we do.
Scott Shireman: Chief Operating Officer, University Extension

Number of years at Berkeley:
Number of years working in Finance:
Favorite Excel Short Cut:
Finance Areas of Expertise:
Opportunities/Challenges of Unit Budgeting:
Favorite thing about working for UC Berkeley:
<table>
<thead>
<tr>
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<th>Favorite Excel Short Cut</th>
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<th>Opportunities/Challenges of Unit Budgeting</th>
<th>Favorite thing about working for UC Berkeley</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heidi Wagner</td>
<td>Assistant Dean for Administration, School of Social Welfare</td>
<td>2</td>
<td>8</td>
<td>Format Painter</td>
<td>Re-evaluating processes and reporting while building a culture that is team-oriented, customer focused, and committed to professional excellence and accountability.</td>
<td>There has been considerable change over the past five years. As a campus, we've invested in new systems, new processes, and new talent. Many of these changes have emphasized reviewing and managing our funds through new lenses. This provides the opportunity to review each unit’s needs, goals, and relation to the continued success of the unit. While these are valuable conversations, they are difficult and take time truly consider the impact of our actions moving forward.</td>
<td>The weather :)</td>
</tr>
<tr>
<td>Jean Bednarz</td>
<td>Director of Communications, Change Management &amp; Training</td>
<td>3</td>
<td>12</td>
<td>Alt + Down</td>
<td>Change Management, Communications, Training</td>
<td>Providing the right tools to support financial leaders and their staff leverage strategy to drive budget</td>
<td>Working in service of an institution dedicated to education and innovation</td>
</tr>
<tr>
<td>Joyce Sturm</td>
<td>Director, Financial Operations, CFO - Controller</td>
<td>26</td>
<td>32</td>
<td></td>
<td>Accounts receivable, accounts payable, cash-handling</td>
<td>Favorite thing about working for UC Berkeley: The variety of activities and challenges encountered on a daily basis.</td>
<td></td>
</tr>
<tr>
<td>Kevin Mack</td>
<td>Divisional Finance Leader - Administration &amp; Finance, Portfolio Budget Officer</td>
<td>1</td>
<td>10</td>
<td>Alt + Down</td>
<td>Financial planning and analysis, financial monitoring, budget process planning and implementation, budget model development, benchmarking and training</td>
<td>Working with the largest Division on campus brings many challenges to aggregating the various budgets into a single view that is meaningful. Opportunities for high impact when implementing new initiatives like quarterly reviews</td>
<td>Working with others who share the same values and passion for higher education.</td>
</tr>
</tbody>
</table>
Linda Moran: Director, Financial Planning & Analysis, University Relations

Number of years at Berkeley: 6
Number of years working in Finance: 23
Favorite Excel Short Cut: Currently, various displays of Format-Numbers-Custom. I like making numbers look clean for the audience.
Finance Areas of Expertise: Financial Planning and Analysis: financial modeling, multi-year forecasts, budget process planning and implementation. Creating an environment of collaboration and accountability, as well as forms, reports and materials that inform decision-making.
Opportunities/Challenges of Unit Budgeting: This year, my challenge and opportunity is to create an improved system to track multi-year commitments that assist senior leadership to be up-to-date on the status of investments and projects that are planned or underway.
Favorite thing about working for UC Berkeley: Mission is important to me. I'm working in a place dedicated to revealing new knowledge and discovery that benefits mankind and the world.

Louise Davidson: Director of Strategic Planning, CFO - CBO

Number of years at Berkeley: 4
Number of years working in Finance: 
Favorite Excel Short Cut: 
Finance Areas of Expertise: 
Opportunities/Challenges of Unit Budgeting: 
Favorite thing about working for UC Berkeley:

Rebecca Hoag: Business Officer, Art Museum & Pacific Film Archive

Number of years at Berkeley: 28
Number of years working in Finance: 36
Favorite Excel Short Cut: 
Finance Areas of Expertise: Budget formation
Opportunities/Challenges of Unit Budgeting: 
Favorite thing about working for UC Berkeley:

Suzanne Sutton: Assistant Dean, Finance and Administration, College of Chemistry

Number of years at Berkeley: 2
Number of years working in Finance: 17
Favorite Excel Short Cut: Keystrokes
Finance Areas of Expertise: Public finance
Opportunities/Challenges of Unit Budgeting: Inherited personnel whose skills are not commensurate with the needs and expectations of the current financial management model. They were not hired with the required skills in mind. Training them to see the big picture along with the detail is required but some lack the inherit skills to learn and apply these skills to their work.
Favorite thing about working for UC Berkeley: Many opportunities to improve the organization in its culture, efficiency, and stewardship of public funds.
<table>
<thead>
<tr>
<th>Terrence Ireland: Chief Financial Officer, L&amp;S Core</th>
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</thead>
<tbody>
<tr>
<td><strong>Number of years at Berkeley:</strong> 1</td>
</tr>
<tr>
<td><strong>Number of years working in Finance:</strong> 25</td>
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<tr>
<td><strong>Favorite Excel Short Cut:</strong> Customize ribbon and Quick Access toolbar to facilitate access to most frequently used tools.</td>
</tr>
<tr>
<td><strong>Finance Areas of Expertise:</strong> Variance analysis, budgeting, multi-year forecasting</td>
</tr>
<tr>
<td><strong>Opportunities/Challenges of Unit Budgeting:</strong> Developing a long-term, sustainable funding model.</td>
</tr>
<tr>
<td><strong>Favorite thing about working for UC Berkeley:</strong> I love the dynamic environment that comes from the diversity of academic programs, the energy of students and faculty, and the relationship to the surrounding community.</td>
</tr>
</tbody>
</table>
Anna Weidman: Budget Officer, L&S Arts & Humanities

Number of years at Berkeley: 1
Number of years working in Finance: 24
Favorite Excel Short Cut: Customizing my tool bar to have all my favorite function keys at my fingertips
Finance Areas of Expertise: Fundraising, project cost accounting, non-profit management, publishing (my professional former sphere before coming to campus)
Opportunities/Challenges of Unit Budgeting: Additional training is needed for Academic department staff to participate more fully in the budgeting process. In my Division have 19 departments (35 L4s and 135 L7) Dept IDs and I need to get them information, access, and skills to be involved. This will start with Cal Reporting and the ability to run College-designed SmartView reports.
Favorite thing about working for UC Berkeley: My colleagues in the College of Letters & Science. It is a great and dedicated group to work with. I also love being located in the center of campus at Durant Hall.

Carolyn Capps: Chief of Staff, Office for the Faculty

Number of years at Berkeley: 21
Number of years working in Finance: 31
Favorite Excel Short Cut: Command+shift+end
Finance Areas of Expertise: Accounting, finance and procurement.
Opportunities/Challenges of Unit Budgeting: Challenges include the ever-present specter of unplanned, immediate workloads which federal compliance audits or unforeseen UCOP requests present. Opportunities include providing assistance to campus deans and department chairs in ever-evolving training workshops.
Favorite thing about working for UC Berkeley: The privilege of working with inspiring colleagues.

Jeannine Miles: Learning & Engagement Architect, Office of the CFO

Number of years at Berkeley: 2
Number of years working in Finance: 17
Favorite Excel Short Cut: Double click on the bottom right corner of a cell to copy the calculation down the column
Finance Areas of Expertise: Adult learning theory and engagement strategies, Designing engaging learning experiences, Group facilitation and leader led training, Systems training development and facilitation, Knitting
Opportunities/Challenges of Unit Budgeting: Limited resources to support the many great initiatives happening within the Office of the CFO.
Favorite thing about working for UC Berkeley: All of the cultural and educational opportunities and the trees!

Lee Borrowman: Faculty Budget Coordinator, CFO - CBO

Number of years at Berkeley: 22
Number of years working in Finance: 27
Favorite Excel Short Cut: Finance Areas of Expertise: Faculty FTE; financial planning and analysis.
Opportunities/Challenges of Unit Budgeting: Favorites things about working for UC Berkeley: Oski sightings; tripping over happy graduates and proud parents in May; the Botanical Garden; the a capella student groups by Sather Gate at lunch time; the legacy of the Free Speech Movement; furthering the mission of public education for the greater good.
Sandra Rollins Ketchpel: Assistant Dean, Administration & Operations, Goldman School of Public Policy
Number of years at Berkeley: 25
Number of years working in Finance: 15
Favorite Excel Short Cut: 
Finance Areas of Expertise: Strategic planning, faculty funds
Opportunities/Challenges of Unit Budgeting: Fiscal challenges: Increasing operating expenses; rented space costs. Fiscal opportunities: executive education programs; self-supporting degree programs.
Favorite thing about working for UC Berkeley: The smart people here.

Michael Ferencz: Interim CAO, Graduate Division
Number of years at Berkeley: 15
Number of years working in Finance: 22
Favorite Excel Short Cut: 
Finance Areas of Expertise: Budget modeling, Multi-year planning, Variance analysis
Opportunities/Challenges of Unit Budgeting: CalPlanning/Reporting balances are incorrect/do not match BAIRS, Addressing multi-year funding commitments with decreased resources
Favorite thing about working for UC Berkeley:

Youssef Kubis: Director of Contracts And Grants Accounting, CFO Controller
Number of years at Berkeley: 2
Number of years working in Finance: 32
Favorite Excel Short Cut: Ctrl+c
Finance Areas of Expertise: Accounting, auditing, Internal Controls, Taxation, Nonprofits, Higher Education
Opportunities/Challenges of Unit Budgeting: 1- Complete the implementation of the Uniform Guidance. 2- Timely setup, process and close of contracts and grants. 3- Manage the workload considering the budget constrain. 4- Partner with CSS, SPO and other units to adhere to established business processes, and make improvements when needed.
Favorite thing about working for UC Berkeley: Diversity, constant challenges, expansiveness, and opportunities.
**Finance Leadership Forum Profiles**

<table>
<thead>
<tr>
<th>Name</th>
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<th>Opportunities/Challenges of Unit Budgeting:</th>
<th>Favorite thing about working for UC Berkeley:</th>
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</thead>
<tbody>
<tr>
<td>Dat Le</td>
<td>College of Engineering</td>
<td>25</td>
<td>24</td>
<td>Ctrl-shift-page up/down to move between tabs.</td>
<td>Framework, business process and systems, make data meaningful</td>
<td>Learning, limited resources, non-agile resource allocation methods, central business processes and decisions that don't make sense or align to unit needs</td>
<td>Balance, relationships</td>
</tr>
<tr>
<td>David Castellanos</td>
<td>Budget Director, Research, Policy, Planning and Administration</td>
<td></td>
<td></td>
<td>Save button</td>
<td>Financial Reporting and Analysis, Multi-Year Financial and Business Planning, Business Process Improvement, Responsibility Based Budgeting (RBB/RCM).</td>
<td>Managing unfunded mandates and budget cuts orienting and updating new University Librarian on campus policies, procedures and terminology finding time to develop expertise in SmartView, CalPlanning and CalReporting to provide useful reports to division leaders on key budgetary issues</td>
<td>People &amp; Mission</td>
</tr>
<tr>
<td>Drew Knab</td>
<td>Chief Financial Officer, Berkeley Law</td>
<td>1</td>
<td>8</td>
<td>Ctrl-shift-page up/down to move between tabs.</td>
<td>Financial Reporting and Analysis, Multi-Year Financial and Business Planning, Business Process Improvement, Responsibility Based Budgeting (RBB/RCM).</td>
<td>Learning, limited resources, non-agile resource allocation methods, central business processes and decisions that don't make sense or align to unit needs</td>
<td>Evaluating all career staff vacancies and opportunities to reduce select cost categories; (3) Growing Summer PLLM Revenue; (4) Expanding fundraising activities and results; (5) Comprehensive fund plan to maximize use of restricted funds, particularly financial aid.</td>
</tr>
<tr>
<td>Elise Woods</td>
<td>Chief Administrative Officer, UC Library</td>
<td>20 (33 years of UC service)</td>
<td>33</td>
<td>Need one!</td>
<td>Chart of accounts, fund accounting, multi-year budgeting</td>
<td>Managing unfunded mandates and budget cuts orienting and updating new University Librarian on campus policies, procedures and terminology finding time to develop expertise in SmartView, CalPlanning and CalReporting to provide useful reports to division leaders on key budgetary issues</td>
<td>Engaging with colleagues, students, faculty and some of the most brilliant minds worldwide. A sense of pride that my contributions can make a difference. My job is never boring!</td>
</tr>
</tbody>
</table>
Maya Woodson Turman: Portfolio Budget Officer, CFO - CBO

Number of years at Berkeley: 3
Number of years working in Finance: 22
Favorite Excel Short Cut: Alt + E + S + F + Enter (Paste Formula)
Opportunities/Challenges of Unit Budgeting: Revenue generation and cost cutting measures are key to the success of my unit
Favorite thing about working for UC Berkeley: It is close to home and very familiar to me. I graduated from Cal and I love being back on campus and contributing to its success.

Stephanie Metz: Director of Finance and Strategic Planning, Campus Shared Services (CSS)

Number of years at Berkeley: 9
Number of years working in Finance: 19
Favorite Excel Short Cut: Vlookup formula
Finance Areas of Expertise: Operational Budgeting, Project Budgeting, Management Reporting, Strategic Planning, Project Portfolio Reporting
Opportunities/Challenges of Unit Budgeting: Providing quality administrative services to campus while reducing expenses. Assisting department heads in understanding and managing to financial and headcount targets during the fiscal year. Creating and maintaining meaningful metrics for managing operations and for reporting to stakeholders on our operation.
Favorite thing about working for UC Berkeley: The opportunity to work with lots of amazing, smart colleagues who want to make things better for our students and the university.

Tracy Okamura: Interim Director, Berkeley Financial Systems, Campus Support Core

Number of years at Berkeley: 3
Number of years working in Finance: 31
Favorite Excel Short Cut: Copy down function
Finance Areas of Expertise: PeopleSoft Financials System including Grants, Contracts, Projects, Billing, Accounts Receivable, eBill and General Ledger, Accounting
Opportunities/Challenges of Unit Budgeting: As an internal administrative unit, we don't really have opportunities for revenue generation. Challenges in my unit continue to be finding and retaining qualified resources.
Favorite thing about working for UC Berkeley: Dynamic group of people who share a common cause of providing excellence in education.

Wanda Nieters: Financial Services & Budget Manager, L&S Division of Math & Physical Sciences

Number of years at Berkeley: 6
Number of years working in Finance: 16
Favorite Excel Short Cut: Ctrl-Shift-Arrow keys, to select large ranges of data
Finance Areas of Expertise: Financial analysis, ledger problem solving, simplifying processes, training
Opportunities/Challenges of Unit Budgeting: Getting all financial staff in Division trained on new financial systems/tools
Favorite thing about working for UC Berkeley: Working with super-smart staff across campus
<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Years at Berkeley</th>
<th>Years in Finance</th>
<th>Favorite Excel Shortcut</th>
<th>Finance Areas of Expertise</th>
<th>Opportunities/Challenges of Unit Budgeting</th>
<th>Favorite thing about working for UC Berkeley</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amy Robinson</td>
<td>Budget Officer, L&amp;S Biological Sciences</td>
<td>24</td>
<td>16</td>
<td>Large data sorting shortcuts</td>
<td>Planning and analysis, organizational development, process improvement</td>
<td>Getting to know my division (I’ve been in this role for 1 year); developing analytical tools for my dean and depts to support planning and decision making; working to increase transparency and build trust. Challenges: Implementing budget reductions while protecting instruction; managing many funds which are not fungible.</td>
<td>I love working for the best public university in the world!</td>
</tr>
<tr>
<td>Christopher Mount</td>
<td>Chief Financial Officer &amp; Chief Administrative Officer, Equity &amp; Inclusion</td>
<td>3</td>
<td>8</td>
<td>Large data sorting shortcuts</td>
<td>Process and systems analysis and creation/improvement. Teaching/facilitating for non-finance professionals.</td>
<td>Enjoy the challenge of making a somewhat overly-compex system simpler and more accessible. Budget process was challenging - streamlining was great, but appeared to be an approach which begged the question of all the detailed work and preparation put on the front-end. Smallest division, so fewer opportunities to leverage.</td>
<td></td>
</tr>
<tr>
<td>John Scroggs</td>
<td>Assistant Dean Strategic Academic &amp; Facilities Planning</td>
<td>2</td>
<td>10</td>
<td></td>
<td>Financial analysis</td>
<td>Divisional Budgets</td>
<td>Budget Reductions</td>
</tr>
<tr>
<td>Jan Miller</td>
<td>Assistant Dean, College of Environmental Design</td>
<td>13</td>
<td>25</td>
<td>Very capable Financial Analysts at CED. Finance is just one area of my portfolio, which also includes human resources, facilities and IT.</td>
<td></td>
<td>One of the biggest challenges in managing the College's budget is that the College has three academic departments, each of which has its own operating budget. Managing these disparate pieces through the annual budget process presents a significant challenge.</td>
<td>The spirit of community and social responsibility.</td>
</tr>
<tr>
<td>Name</td>
<td>Position</td>
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<td>Number of years working in Finance</td>
<td>Favorite Excel Short Cut</td>
<td>Finance Areas of Expertise</td>
<td>Opportunities/Challenges of Unit Budgeting</td>
<td>Favorite thing about working for UC Berkeley</td>
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</tr>
<tr>
<td>Jon Bain-Chekals</td>
<td>Director, UC Berkeley Operating Budget, CFO-CBO</td>
<td></td>
<td></td>
<td></td>
<td>Number of years at Berkeley: 19 Number of years working in Finance: 17 Favorite Excel Short Cut: Command-1, quick shortcut for formatting Finance Areas of Expertise: Developing full range of budgets and forecasts (e.g. instruction, sales/service, contracts and grants). Summarizing broad data sets to aid budgeting and forecasting. Campus systems: CalPlanning (including SmartView), BAIRS/HR-BAIRS, BFS, BearBuy, HCM, PPS, CalAnswers. Opportunities/Challenges of Unit Budgeting: 25 departments (L4s) to coordinate with across the 5 divisions I support. Managing timing of financial organizational moves around campus schedules (e.g. fiscal close). Favorite thing about working for UC Berkeley: Working with smart people from diverse backgrounds!</td>
<td></td>
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</tr>
<tr>
<td>Jules Freedman</td>
<td>Divisional Finance Coordinator, Academic Senate &amp; EVCP</td>
<td>19</td>
<td>17</td>
<td>Command-1, quick shortcut for formatting</td>
<td>Finance Areas of Expertise: Developing full range of budgets and forecasts (e.g. instruction, sales/service, contracts and grants). Summarizing broad data sets to aid budgeting and forecasting. Campus systems: CalPlanning (including SmartView), BAIRS/HR-BAIRS, BFS, BearBuy, HCM, PPS, CalAnswers. Opportunities/Challenges of Unit Budgeting: Streamlining campus-wide graduate professional degree programs' processes, Creating more revenue-generating opportunities for my portfolio, Ensuring portfolio is clearly making shifts and trade-offs Favorite thing about working for UC Berkeley: Collaborative environment and opportunity to work with some of the best finance people in the system</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lisa Kala</td>
<td>Assistant Dean for Administration and Special Projects, Graduate School of Education</td>
<td></td>
<td></td>
<td>VLOOKUP</td>
<td>Opinionated</td>
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<tr>
<td>Nicole Cernok</td>
<td>Portfolio Budget Officer, CFO - CBO</td>
<td>2</td>
<td>12</td>
<td>VLOOKUP</td>
<td>Finance Areas of Expertise: Variance analysis, strategic planning, modeling Opportunities/Challenges of Unit Budgeting: Streamlining campus-wide graduate professional degree programs' processes, Creating more revenue-generating opportunities for my portfolio, Ensuring portfolio is clearly making shifts and trade-offs Favorite thing about working for UC Berkeley: Collaborative environment and opportunity to work with some of the best finance people in the system</td>
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Calvin Eng: Chief Financial Officer, Cal Performances
Number of years at Berkeley: 13
Number of years working in Finance:
Favorite Excel Short Cut:
**Finance Areas of Expertise:** Strategic financial & capital planning, annual budgeting & forecasting, financial modeling & analysis, management consulting/proposal development, project management, enterprise systems implementation
Opportunities/Challenges of Unit Budgeting: Project-based labor distribution system, cloud based, self-service financial tool
Favorite thing about working for UC Berkeley: It’s Berkeley - go bears!

Crystal Parkinson: Payroll Project & Systems Supervisor, CFO-Controller
Number of years at Berkeley: 8
Number of years working in Finance: 8
Favorite Excel Short Cut: Ctrl Shift Down Arrow
**Finance Areas of Expertise:** Payroll, Payroll expense Transfers
Opportunities/Challenges of Unit Budgeting:
Favorite thing about working for UC Berkeley: The endless opportunities for staff development.

Herve Bruckert: Divisional Finance Leader - Administration and Finance, Portfolio Budget Officer
Number of years at Berkeley: 2
Number of years working in Finance: 13
Favorite Excel Short Cut:
**Finance Areas of Expertise:** FP&A, Financial reporting, Internal control, Governance, ABC, Project costing, Cost accounting
Opportunities/Challenges of Unit Budgeting:
Favorite thing about working for UC Berkeley: Knowing that I help students have access to world class teaching to transform their lives and the world.

Jean Delaney: Director, L&S Undergraduate Division
Number of years at Berkeley: 35
Number of years working in Finance: 25
Favorite Excel Short Cut: Number formatting (control shift symbol)
**Finance Areas of Expertise:** I manage finance, academic and staff HR, and student services so I am not a full time finance officer. My expertise is in planning undergraduate teaching, enrichment, and advising programs including the financial planning to support these endeavors. For 2014-15, I directly oversaw TAS planning and expenditures for 17 different programs.
**Opportunities/Challenges of Unit Budgeting:** Planning is particularly challenging given the current state of campus finances. The shifting campus strategies for responding to the budget crisis (unfunded salary and benefits increases, for example) combined with diminishing resources is making long term planning very difficult.
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<tr>
<th>Finance Leadership Forum Profiles</th>
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<tbody>
<tr>
<td><strong>Lisa Vanderfin:</strong> Director, Financial Service-General Accounting</td>
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<tr>
<td>Number of years at Berkeley: 19</td>
<td>Number of years working in Finance: 35</td>
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<tr>
<td>Favorite Excel Short Cut: Accounting (GAAP), financial analysis, auditing, internal controls, financial business processes and systems</td>
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<td><strong>Opportunities/Challenges of Unit Budgeting:</strong> Budget cut limiting what we can do so need to increase efficiency/effectives and prioritize deliverables</td>
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<td><strong>Favorite thing about working for UC Berkeley:</strong> Belief in higher education’s missions</td>
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| **Jenny Collins:** Assistant Dean for Finance and Administration, School of Information |
| Number of years at Berkeley: 2 |
| Number of years working in Finance: 15 |
| Favorite Excel Short Cut: Budget management, forecasting, process improvement |
| **Finance Areas of Expertise:** Budget management, forecasting, process improvement |
| **Opportunities/Challenges of Unit Budgeting:** I love all the new tools, processes, coaches, and systems that have been introduced in the last two years. I am still a bit overwhelmed by the number and complexity of our legacy systems, and I am excited about replacement options coming on-line. |
| **Favorite thing about working for UC Berkeley:** The community/my colleagues! |

| **Merle Hancock:** Chief Financial Officer, Goldman School of Public Policy |
| Number of years at Berkeley: 21 |
| Number of years working in Finance: 17 |
| Favorite Excel Short Cut: macros! |
| **Finance Areas of Expertise:** Budgeting, financial planning and analysis, PDST systems & setup, Campus systems: BAIRS, BFS, BearBuy, CalPlanning, HCM, PPS, CARS, PRT. |
| **Opportunities/Challenges of Unit Budgeting:** Eliminating our “shadow systems” by making CalPlanning work for us. Improving and streamlining financial reporting. Encouraging and supporting non-finance department managers’ input and participation in the budget process. Navigating the enormous amount of change to our financial systems and tools in the past four years with insufficient staffing. |
| **Favorite thing about working for UC Berkeley:** Fun, diverse, supportive environment. |

<p>| <strong>Suresh Bhat:</strong> Chief Financial Officer, Haas School of Business |
| Number of years at Berkeley: 1 |
| Number of years working in Finance: 1 |
| <strong>Finance Areas of Expertise:</strong> Financial Planning &amp; Analysis, Corporate Development, Business Strategy, Cost Leadership / Reduction, Process Improvement and Business Partnership |
| <strong>Opportunities/Challenges of Unit Budgeting:</strong> Managing expense growth and Strategic Prioritization |
| <strong>Favorite thing about working for UC Berkeley:</strong> Diversity and commitment to excellence |</p>
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<tr>
<th>Wanda Ellison Crockett: Deputy Associate Chancellor &amp; Chief Operating Officer, Campus Support Core</th>
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<tr>
<td><strong>Number of years at Berkeley:</strong> 15 months</td>
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<tr>
<td><strong>Number of years working in Finance:</strong> 27</td>
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<td><strong>Favorite Excel Short Cut:</strong></td>
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<tr>
<td><strong>Finance Areas of Expertise:</strong> Budget</td>
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<tr>
<td><strong>Opportunities/Challenges of Unit Budgeting:</strong></td>
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<td><strong>Favorite thing about working for UC Berkeley:</strong></td>
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