

GOALS:

	FY20-21 Target Complete (in %)			
	Q1	Q2	Q3	Q4
Strategy 1:				
1a. Acad.Funding Model	25%	25%	25%	25%
1b. Fin Sustainability Str.	25%	25%	25%	25%
1c. Student Fee Model	25%	25%	25%	25%
Strategy 2:				
2a.	%	%	%	%
2b.	%	%	%	%
2c.	%	%	%	%
2d.	%	%	%	%
2e.	%	%	%	%
Strategy 3:				
3a. SA & Fin Aid	25%	25%	25%	25%
3b.	%	%	%	%
3c.	%	%	%	%
3d.	%	%	%	%
3e.	%	%	%	%
Strategy 4:				
4a. Fin Rptg Dashboard	25%	25%	25%	25%
4b. Enrollment Dashboard	25%	25%	25%	25%
	%	%	%	%
	%	%	%	%
Strategy 5:				
5a. Campus Engagement & Support	%	%	%	%
	%	%	%	%
	%	%	%	%
	%	%	%	%

STRATEGIES:

<p>Implement financial reform that incentivizes revenue generation, equitably distributes central resources, and fairly taxes units for common goods.</p>
<p>Support philanthropic and revenue generation efforts that support core operations.</p>
<p>Simplify processes, policies, and internal controls for campus partner satisfaction, greater efficiency, and compliance.</p>
<p>Leverage data for strategic decision making and institutionalize financial, academic, and human resource data sets for strategic decision making.</p>
<p>Build a service oriented model of campus engagement - Engage campus partners through adoption, acceptance and satisfaction of applications, processes, and tools.</p>

CALENDAR 2020-21 PLANS: (NET ANNUAL REVENUE, Owner, Date)

<p>1a. Academic Funding Model: Implement a new academic funding model designed to make resource allocations to schools and colleges systematic, predictable and transparent (Stanich, Woodson Turman, Alexander; 6/2021)</p> <ul style="list-style-type: none"> • Conduct division deep dives in Arts & Humanities, Chemistry and Grad Div • Execute implementation workstreams, such as, the Sources and Uses Redesign, Projections Refinements, Metrics collection, PermBudg Changes, etc. • Development of visualization and modelling tools as well as other analytical support • Design and execute Change Management and Communication related activities
<p>1b. Financial Sustainability Strategy: Develop a financial sustainability strategy which, among other things, includes a plan for replenishing central ending balances and for funding long term financial commitments e.g. capital projects, deferred maintenance, etc. (Stanich, Quennarouch, 6/2021)</p>
<p>1c. Student Fee allocation Model for carryforward balances: Design and develop a multi-year model and process to ensure usage of student fee carry forward balances (D’Escoto, 6/2021)</p>
<p>3a. Student Affairs & Fin Aid Budget: Work with Student Affairs to carve out -via the organizational tree hierarchy - the divisional budget vs. financial aid (TBD, TBD)</p>
<p>4a. Financial Reporting Dashboard: Design and develop a financial reporting dashboard for the Executive Leadership Team (Quennarouch, 6/2021)</p>
<p>4b. Undergrad Executive Enrollment Dashboard: Design and develop a new Undergrad focused dashboard for campus leadership (Alexander, 6/2021).</p>
<p>5a. Campus Engagement & Support: Work with the DFL Advisory group to identify strategies to better engage and support divisional finance leaders across campus, and expand training to the campus finance community in various areas e.g. CalPlanning, Cal Answers, Smart View, etc. (Mack, Efron; 6/2021)</p>