



UC Berkeley Finance Policy and Institutional Research – OCFO

One Page Strategic Plan

FY2018

FY 2018 OBJECTIVE:		STRATEGIES:	Calendar 2017-18 PLANS:
<p>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.</p>		<p>1. Achieve financial strengths. Align financial resources to campus strategies</p>	<p>1a Direct development and implementation of CFO's Quarterly Financial and Operational Dashboard to advance senior leadership decision support and external advocacy. 1b Set direction for enrollment management by directing efforts to develop accurate and updated enrollment data throughout admissions cycle. 1c Develop consistent data gathering and reporting methods from student fee committees to the Office of the CFO to allow proper decision support for allocation and management of student fee revenues. 1d Support and refine TAS process and Finance Reform.</p>
GOALS:	FY17-18 Target	<p>2. Simplify Processes - Standardize and simplify policies, business processes and internal controls for campus partner satisfaction, greater efficiency and compliance.</p>	<p>2a Direct campus effort to review and revise all student fee policies to ensure consistency between policies and effective alignment of processes for review and approval, with particular attention on budget perspective. 2b Building on approach introduced in 2016-17, continue to rationalize process for review and timely certification of recharge rate proposals, including implementation of an effective governance structure and creation of standard reporting and controls for recharge certification to monitor and course correct when necessary.</p>
<p>Financial Strength *Quarterly Dashboard *Enrollment Management *Consistent Data from Student Fee Committees *Support and Refine TAS</p>	<p>100/100 100/100 100/100 100/100</p>	<p>3. Build a service oriented model of campus engagement - Engage campus partners through adoption, acceptance and satisfaction of applications, processes and tools</p>	<p>3a Refine processes for facilitating all campus student fee requests, including analysis for committees, briefings for leadership, and communication with UCOP. 3b Provide high-quality budget analysis to student fee committees to ensure effective decision-making. 3c Continue to develop a collaborative relationship with UCOP to ensure approval of campus requests for student fee increases, including PDSTs and SSGDPDs. 3d Work with EDW as functional lead on data quality, enhancements, security model, system functionality, and addition of BCS data. 3e Institutionalization of survey priorities and coordination to reduce survey fatigue.</p>
<p>Simplify Processes *Revise Student Fee Policies *Revise Policy and Improve Recharge Rate Certification Process</p>	<p>100/100 100/100</p>	<p>4. Leverage data for strategic decision making - Leverage and institutionalize financial, academic and human resource data sets for strategic decision making.</p>	<p>4a Develop overall design, technical infrastructure and accurate data for a single comprehensive dashboard site in Cal Answers that serves as principal interface for public facing Berkeley data. 4b Work with Student Services to ensure coordinated process for tracking admissions data from onset of admissions cycle to ensure data accuracy and effective process for validating enrollment modeling so that targets are met and effective decision-making is possible throughout annual cycle. 4c Provide analysis of campus support expenditures to support Chancellor's effort to establish possible common goods assessment for campus as follow-up to the recommendations of the Public and Common Goods Task Force.</p>
<p>Campus Engagement *Refine processes to facilitate Fee Requests *Provide Strong Analysis Support to Fee Committees *Continue to build UCOP relationship regarding fees *Work with EDW *Setting survey priorities</p>	<p>100/100 100/100 100/100 100/100 100/100</p>	<p>5. Promote collaboration and professional development – Build and maintain a culture of collaboration and continuous professional development that supports accountability, engagement and opportunity.</p>	<p>5a Increase professional development through cross training of staff (shadow other analyst, train a co-team member, partner with co-team members on long range analytical projects) and building technical skill sets. 5b Increase staff engagement through building community of practice for analysts (Cal Answers COP, FASO-OPA) and attend existing opportunities (CAN, BPAWG, etc.) and team building exercises. 5c Prepare training material and provide training to recharge professionals across the campus to advance standardization of recharge process and build collaborative working relationship with campus recharge units.</p>
<p>Leverage Data *New Cal Answers Dashboard *Coordinate with Student Services on Tracking Admissions Data *Common Goods Task Force Follow-up Analysis</p>	<p>100/100 100/100 100/100</p>		
<p>Collaboration & Professional Dev *Professional Development by Cross Training *Increase Staff Engagement Through Community of Practice *Implement Recharge Training Program for Campus</p>	<p>100/100 100/100 100/100</p>		