



UC Berkeley – **Controllers OGSP**  
**FY2017-18**

<b>GOALS:</b>	<b>FY17-18 Target (in %)</b>				<b>STRATEGIES:</b>	<b>CALENDAR 2017-18 PLANS:</b>
	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>		
<b>Financial Reform:</b> 1a. CGA Fund Inactivation 1b. CGA Fund Cleanup 1c. BIBS/PRT Retirement 1d. Agency Accounting 1e. UC Path 1f. Retrofit CalTime	25%	50%	75%	100%	<b>Implement financial reform</b> that incentivizes revenue generation, equitably distributes central resources, and fairly taxes units for common goods.	<b>CALENDAR 2017-18 PLANS:</b> 1a. Fund Inactivation: implement process (Page, Chavez 3/18) 1b. CGA Fund Cleanup and workload tracking system (Page, Chavez 12/17) 1c. Assist with retirement of BIBS/PRT (Okamura, Vanderfin, Chavez 6/18) 1d. Improve agency accounting (Vanderfin, Garkusha 6/18) 1e. Implement UCPATH (Regalia, Parkinson, Vanderfin, Lightner, Chavez, Page, Okamura 12/18) 1f. Retrofit CalTime (Parkinson 6/18)
<b>Philanthropy/Rev Gen:</b> 2a. P-Card Administration 2b. Payment Matrix 2c. 2d.	%	25%	50%	100%		
<b>Simplify Processes:</b> 3a. ITGC Access Controls 3b. Travel Reimbursement 3c. Entertainment Reimbursement 3d. Intercampus 3e. Reconciliations 3f. Membership processing 3g. Stabilize Student Financials	100%	%	%	%	<b>Simplify processes</b> , policies, and internal controls for campus partner satisfaction, greater efficiency, and compliance.	3a. Implement enhancements to provisioning/de-provisioning/quarterly review (Okamura, 9/17) 3b. Rollout streamlined travel reimb process to support direct entry (Sturm/Parnas, 12/18) 3c. Streamline processing of reimbursement requests for entertainment (Sturm/Parnas, 12/18) 3d. Support system-wide financial control/intercampus project. (Vanderfin 6/18) 3e. Improve reconciliations/analyses (Garkusha, Del Prado 6/18) 3f. Implement improved process to handle Membership contracts (Okamura/Chavez/Page, 6/18) 3g. Stabilize Student Financials business processes collections/write-offs (Sturm/Wechling, 6/18)
<b>Decision Making:</b> 4a. Expand SIS 4b. Central Dept ID CleanUp 4c. BFS Upgrade 4d. BFS Interfaces 4e. BFS Ledgers	10%	50%	75%	100%		
<b>Service Model:</b> 5a. CGA website 5b. Transition Student Loans 5c. Sunset BAI 5d. Update Controllers Websites 5e. Video Training	33%	66%	100%	%	<b>Build a service oriented model of campus engagement</b> – Engage campus partner through adoption, acceptance and satisfaction of applications, processes, and tools.	5a. Revise CGA Website (Page, Chavez, Cannon 3/18) 5b. Transition student institutional loan administration to new 3rd-party servicer (Wechling/Del Prado, 12/17) 5c. Sunset the www.bai.berkeley website and transition relevant content into controller.berkeley.edu website. (Cannon, 3/18) 5d. Update the Controller's Office websites with user-friendly and up-to-date information (Cannon, 6/18) 5e. Collaborate with campus partners to provide video training and subject-matter expertise upon request. (Cannon, 6/18)