UC Berkeley – **Controller's OGSP** - One Page Strategic Plan
FY2018-19

GOALS:	FY18-19 Target (in %)				STRATEGIES:	CALENDAR 2018-19 PLANS: (NET ANNUAL REVENUE, Owner, Date)
	Q1	Q2	Q3	Q4		
Financial Reform:					**Implement financial reform** that incentivizes revenue generation, equitably distributes central resources, and fairly taxes units for common goods.	1a. Implement UCPath (Regalia, Parkinson, Lightner, Chavez, Okamura 03/19)
1a. UCPath	20%	50%	85%	100%		1b. UCOP Common Chart of Accounts Design (Okamura, Garkushka, Chavez 06/21)
1b. UCOP Common COA	0%	5%	15%	25%		1c. CGA Fund Cleanup and workload tracking system (Chavez 03/19)
1c. CGA Fund Cleanup	33%	66%	100%	%		1d. Retrofit CalTime (Parkinson 3/19)
1d. Retrofit CalTime	50%	75%	100%	%		1e. Restructure Payroll Dept for post-UCPath functions (Regalia, Parkinson 6/19)
1e. Restructure Payroll Dept	%	50%	75%	100%		
Philanthropy/Rev/Gen:					**Support philanthropic and revenue generation efforts** that support core operations.	2a. Establish P-Card program (bluCard, Event card) structure and administrative strategy (Parnas, 12/18)
2a. P-Card administration	50%	100%	%	%		2b. Expand P-Card program to campus units (Parnas, 6/19)
2b. P-Card expansion	25%	50%	75%	100%		2c.
2c.	%	%	%	%		2d.
2d.	%	%	%	%		
Simplified Processes:					**Simplify processes**, policies, and internal controls for campus partner satisfaction, greater efficiency, and compliance.	3a. Implement PeopleSoft Test Framework (Okamura, Margam 10/18)
3a. Test Framework	90%	100%	%	%		3b. Implement improved process to handle Membership contracts (Okamura/Chavez, 6/19)
3b. Membership processing	%	33%	66%	100%		3c. Revise C&G award closeout process (Chavez/Jones 6/19)
3c. Closeout process	%	33%	66%	100%		3d. Streamline processing of reimbursement requests for entertainment (Sturm/Parnas, 6/19)
3d. Entertainment reimbursements	25%	50%	75%	100%		3e. Stabilize support and operations of direct entry travel reimbursement process (Sturm/Parnas, 6/19)
3e. Stabilize travel direct entry	25%	50%	75%	100%		3f. Transition production of IRS Form 1098-T to the new systemwide service provider (Wechling, 6/19)
3f. Transition 1098-T to new provider	25%	50%	75%	100%		3g. Convert and support campus department RegOnline event management users to new systemwide service provider, eTouches (Wechling, 6/19)
3g. Transition to eTouches	30%	60%	75%	100%		3h. Transition to improved Western Union payment platform for international student payments to Campus Solutions (Wechling, 6/19)
3h. Transition to Western Union platform	%	20%	50%	100%		3i. Implement new payment terms criteria to incentivize supplier participation in electronic invoicing and payment methods (Parnas , 6/19)
3i. Implement payment terms criteria	50%	75%	90%	100%		
Decision Making:					**Leverage data for strategic decision making** and institutionalize financial, academic, and human resource data sets for strategic decision making.	4a. Upgrade the BFS system to PeopleTools 8.56 (Okamura 12/18)
4a. BFS Upgrade	50%	100%	%	%		4b. Implement BFS Disaster Recovery System (Okamura 06/19)
4b. Disaster Recovery	25%	50%	75%	100%		4c.
4c.	%	%	%	%		4d.
4d.	%	%	%	%		4e.
4e.	%	%	%	%		
Service Model:					**Build a service oriented model of campus engagement** – Engage campus partner through adoption, acceptance and satisfaction of applications, processes, and tools.	5a. Revise CGA Website (Chavez, Cannon 12/18)
5a. CGA Website	50%	100%	%	%		5b. Update the Entertainment section of Controller's website with new text, job aids, videos, and promotional content (Cannon 12/18)
5b. Entertainment Website	50%	100%	%	%		5c. Update all other website content with user-friendly and up-to-date information (Cannon, 6/19)
5c. Update Controllers Website	25%	50%	75%	100%		5d. Collaborate with campus partners to provide video training and subject-matter expertise upon request. (Cannon, 6/19)
5d. Video Training	25%	50%	75%	100%		5e.
5e.	%	%	%	%		