



UC Berkeley – **VC Finance-** Financial Planning and Analysis

One Page Strategic Plan

**FY2018-19**

	<b>FY18-19 Target (in %)</b>					
	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>		
<b>GOALS:</b>					<b>STRATEGIES:</b>	<b>FISCAL YEAR 2018 -19 PLANS:</b>
1a. New Resource	25	50	75	100	<b>Implement financial reform</b> that incentivizes revenue generation, equitably distributes central resources, and fairly taxes units for common goods.	1a. Work with the EVCP and Finance Reform Leadership Committee to develop a new model and strategies for allocating resources on campus (Stanich/Bain-Chekal/Woodson Turman, 6/19) 1b. Implement improvements to the TAS allocation process (Bain-Chekal/Woodson Turman/Blaisdell-Sloan, 12/18)
1b. TAS Improvements	50	100	-	-		
3a. BAIRS Retirement & Cal Answers Upgrade	80	100	-	-		
3b. UCPath Retrofit	20	40	60	75	<b>Support philanthropic and revenue generation efforts</b> that support core operations.	
3c. CalPlanning Upgrade			25	50		
3d. Financial Knowledge Base, Operating Efficiencies	10	25	75	100	<b>Simplify processes,</b> policies, and internal controls for campus partner satisfaction, greater efficiency, and compliance.	3a. Complete the CalAnswers Financials/BAIRS Retirement and Cal Answers Upgrade (Sexton, 12/18) 3b. Implement the UCPath Retrofit Project (Jocson/Sexton, 2/20) 3c. Upgrade CalPlanning (Bain-Chekal/Sexton, 10/19) 3d. Improve financial knowledge base and operational efficiencies (Hallet/CRM Director, 6/19)
4a. Tableau Enterprise Server Implementation	20	40	60	80		
4b. Faculty Workload & Financial Model	50	100				
5a. DFL Onboarding & Mentoring Program	25	50	75	100	<b>Leverage data for strategic decision making</b> and institutionalize financial, academic, and human resource data sets for strategic decision making.	4a. Implement Tableau Enterprise Server consortium on EDW infrastructure in partnership with OPA, UDAR and other campus units. (Sexton, 9/19) 4b. Develop a faculty workload and financial model to support the EVCP and Academic Senate Budget Committee in the faculty slot allocation process (Stanich, 12/18)
5b. DFL Concierge Review	50	100	-	-		
5c. Finance Literacy Program Operationalization	100	-	-	-	<b>Build a service oriented model of campus engagement</b> - Engage campus partners through adoption, acceptance and satisfaction of applications, processes, and tools.	5a. Implement a DFL Onboarding and Mentorship Program (Stanich/Mack, 12/18) 5b. Review the DFL Concierge Process (Stanich/Bain-Chekal, 12/18) 5c. Operationalize the Finance Literacy Program (Stanich/Mack, 10/18) 5d. Review and make changes to the FP&A operating model in order to increase impact and collaborations across campus (FP&A team, 12/18)
5d. FP&A Operating Model Review & Changes	100					