



UC Berkeley – **Office of VC Finance** - One Page Strategic Plan
FY2020 -21

GOALS:	FY2020-21 Target Complete (in %)				STRATEGIES:	CALENDAR 2019-20 PLANS: (NET ANNUAL REVENUE, Owner, Date)
	Q1	Q2	Q3	Q4		
Financial Reform: 1a. Acad.Funding Model 1b. Fin Sustainability Str. 1c. Student Fee Model 1d. Lease accounting 1e. Common COA 1f. UCPath stabilization	25%	25%	25%	25%	Implement financial reform that incentivizes revenue generation, equitably distributes central resources, and fairly taxes units for common goods.	1a. Academic Funding Model: Implement a new academic funding model (Stanich, Woodson Turman, Alexander; 6/2021) 1b. Financial Sustainability Strategy: Develop a financial sustainability (Stanich, Quennarouch, 6/2021) 1c. Student Fee allocation Model for carryforward balances: Design and develop a multi-year model and process (D’Escoto, 6/2021) 1d. Implement Lease Accounting (Garkusha/Okamura 06/2021) 1e. UCOP Common Chart of Accounts Design (Okamura/Garkusha/Chavez 06/2022) 1f. UCPath stabilization and cleanup: of CGA funds, overpayments, billing and payroll accounts (Parkinson, Garkusha, Chavez, Okamura 6/2021)
Philanthropy/Rev Gen: 2a. Insurance partnership 2b. Campus beverage agreement 2c. Departmental support 2d. Credit card program	50%	75%	100%	100%		
Simplify Processes: 3a. Student Affairs/fin aid budget 3b. Contract review process 3c. Advertising policy 3d. Contracts & Grants 3e. Payroll improvements 3f. Cohort based tuition 3g. Student financials 3h. Vendor and travel processes 3i. Membership & innovative service contracts	25%	25%	25%	25%	Simplify processes, policies, and internal controls for campus partner satisfaction, greater efficiency, and compliance.	3a. Student Affairs & Fin Aid Budget: Carve out the divisional budget vs. financial aid (TBD, TBD) 3b. Collaborate with BCBP on a standard process for sponsorship contract (Brandon, 12/2020) 3c. Begin to manage the Commercial Advertising Policy: working closely with the Advisory Committee, BCBP and Supply Chain Management (Brandon, 1/2020) 3d. Contracts & Grants: improve award closeout process and implement workload tracking system (Chavez 6/2021) 3e. Payroll: Improve payroll processes and system (Parkinson 12/2020) 3f. Cohort Based Tuition (Wechling 06/2021) 3g. Student financials: SIS enhancements and International Funds Transfer payment options for students (Wechling 6/2021) 3h. Stabilize operations and streamline processes: Process and systems related to vendoring and travel (Parnas 6/2021) 3i. Implement improved process: Membership and Innovative Service contracts (Okamura/Chavez 06/2021)
Decision Making: 4a. Fin Report dash 4b. Enrollment dash 4c. Payment terms program 4d. BFS improvements	25%	25%	25%	25%		
Service Model: 5a. Engagement and support 5b. Campus partnership programs 5c. Multi-campus opp and procurement 5d. Websites 5e. AR service model	25%	25%	25%	25%	Build a service oriented model of campus engagement - Engage campus partners through adoption, acceptance and satisfaction of applications, processes, and tools.	5a. Campus Engagement and Support: Engage and support DFLs and expand training (Mack, Efron; 6/2021) 5b. Increase the number of campuses actively pursuing partnership programs: Support them throughout their program establishment (Deborah, 6/2021) 5c. Serve as the system wide lead for the UC Partnership Programs: Identify multi-campus opportunities and lead business development on at least two categories, identify procurement RFPs (Amy, 6/2021) 5d. Update websites: Update with current, user friendly information (Chavez, Okamura, Parkinson 6/2021) 5e. Issues escalation: Create new service model for managing campus inquiries (Wechling 06/21)