



## CalPlanning

Financial sustainability is central to the Operational Excellence mission, yet the campus's centralized and incremental budgeting system neither meets current needs nor supports a future where financial scenarios can be compared and evaluated. Deploying Oracle Hyperion Planning software will enhance analysis, shift emphasis to decision-support, and streamline the budget and planning processes.

### Summary

Finance professionals at UC Berkeley spend too much time generating, manipulating, and presenting data rather than analyzing data to support decision-making. Inconsistent recording of financial information and a reporting system that is focused on historical transactions makes comparison of financial scenarios—particularly across units or multiple years—challenging and problematic. The campus lacks a commonly understood framework that describes its financial performance and that makes both opportunities and risks to operations transparent at all levels.

This proposal calls for implementation of an enterprise-wide budget and financial planning and analysis framework by deploying already-purchased Oracle Hyperion Planning software. Hyperion Planning is a centralized, Excel- and web-based planning, budgeting, and forecasting solution that will provide support for enhanced analysis, planning, and decision-making capabilities. It will provide campus leaders with improved information and analysis, shift financial professionals' efforts from transactions to analysis and decision-support, and standardize and streamline the annual budget process. It will provide real-time navigation to financial data and facilitate and motivate financial clarification, rationalization and modernization—helping to pave the way for a new, sustainable financial model.

### Delivering the Vision

Deploying CalPlanning will help achieve the vision of Operational Excellence by reducing costs, automating transactional work, advancing an effective and efficient operating environment, more-effectively utilizing resources, and instilling a culture of continuous improvement. CalPlanning will require \$6.2 million in OE investment.

### Timeline

The OE Executive Committee approved this proposal in March 2011. Implementation will be a 30-month process, beginning with refining projects requirements and design, with various components of the system being built, tested, and rolled out in phases. Full roll-out and training would be complete by spring 2013.

### Leadership

Sponsor: Paul Gray, Professor Emeritus, EECS

Sponsor: Erin Gore, Associate Vice Chancellor – Chief Financial Officer

Design Phase Initiative Manager: Jon Bain-Cekal, Finance Program Manager

### For More Information

Complete copies of the Finance Business Case as well as the Request for Resources and the proposed budget for Deploying Oracle Hyperion Planning Software can be viewed online at the OE web site at <http://oe.berkeley.edu>

Questions and comments about this proposal for the initiative team: [oefinance@berkeley.edu](mailto:oefinance@berkeley.edu)

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