

PROJECT ASSESSMENT PLAN

METRIC CATEGORY	SPECIFIC METRIC	DATA COLLECTION METHOD	DATA COLLECTION FREQUENCY	FUNCTIONAL OWNER OF DATA COLLECTION	PERSON RESPONSIBLE FOR DELIVERY OUTCOME	LARGER GOAL TO WHICH METRIC RELATES
FINANCIAL PERFORMANCE						
	Number of hours required to prepare quarterly forecast	Survey	Quarterly	Central Budget Office	Laurent Heller	Reduce amount of time financial staff spend generating and manipulating data; redirect time to creating actionable analysis Reduce complexity of budget process and time required for budgeting
	Number of hours required for central budget office to compile key "all sources" reports	Survey	Quarterly	Central Budget Office	Laurent Heller	Reduce complexity of budget process and time required for budgeting
	Reduction in year-end "surprise" deficits; increase in in-year opportunities to redeploy resources	Count of deficit waiver requests	Annual	Campus divisions	Laurent Heller	Leverage every dollar most effectively in the realization of our mission; identify opportunities for investment in new sources of revenue.
OPERATIONAL PERFORMANCE						
	Reduce the complexity of the budget process by focusing on key fund groupings in lieu of individual funds	Data from CalPlanning system	Quarterly	Central Budget Office	Laurent Heller	Enable the creation of an "all funds" budget, and plan for strategic use of all sources to meet strategic objectives
	Number of units who run reports in CalPlanning as part of their regular financial processes	Survey / Data from CalPlanning system	Monthly	Central Budget Office	Laurent Heller	Full engagement from managers across the campus in ensuring best use of all funds, avoiding waste and fraud
	Number and \$\$ amount of journals processed	Data from BFS system	Quarterly	Central Budget Office	Laurent Heller	Automate and reduce transactional work
PRODUCT/SERVICE QUALITY						

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	Amount of central resources for major commitments transferred to units by the end of each quarter	Data from BFS / CalPlanning systems	Quarterly	Central Budget Office	Laurent Heller	Improved financial management and reporting
	Number of data / metadata errors detected and corrected with each monthly load process	Data from CalPlanning system / IST	Monthly	Cathy Lloyd	Andrea Zirman	Highly reliable data
EMPLOYEE SATISFACTION						
	User satisfaction with how the system helps them perform financial management (scale 1-5)	OE Pre- and Post-Implementation Survey	2x/year	OE PO	Mindy McDaniels	High level of user satisfaction with how the system assists in financial management/analysis, removing them from transactional work
CUSTOMER SATISFACTION						
	Improvement in Deans and Chairs understanding of their financial position	Survey	Annual	Outreach Project (on-going: Budget Office)	Jon Bain-Chekal/ Laurent Heller	High level of leader satisfaction with how the system assists in realizing strategic goals
PUBLIC RESPONSIBILITY						
	Number of hits on the Berkeley budget book; reduction in public records requests	Website tracking	Annual	Planning & Analysis	Pamela Brown	Provides insight to our public stakeholders, as well as our donors, parents, and students on how Berkeley employs all our funding sources to meet our obligations