SUMMARY OF RECOMMENDATIONS

Note: The OE Finance Team is developing two business cases: one for the financial model (which is still in development—a business case proposal will be forthcoming at a later time to outline our specific plans) and the second business case, presented here, for the Cal Budget & Planning project. The Cal Budget & Planning business case is coming forward now because unique circumstances within the UC system make it desirable to move more quickly, as explained later.

Relationship of the budget tool to the overall finance initiative:
Leaders—including Deans, Chairs and administrators—and finance staff across the campus must be engaged
in developing and transitioning to a new, sustainable financial model because of:

1. **The changing fiscal environment for the University of California**: State funds will soon comprise less than 15% of the campus’s financial resources. In 2012, it is likely that operating resources from the state will only cover salaries for tenured faculty; *everything else* at UC Berkeley will need to be paid for from a diverse pool of funding sources.

2. **The changing fiscal environment within UC**: The UC system will be transitioning to a model where funds generated on campus stay on campus with a percentage returned to UC Office of the President (UCOP).

3. **Our centralized and incremental budgeting system does not meet current needs or support a future where all sources of revenue need to be viewed, managed and maximized.**

Over the past fifteen years, financial conditions have prompted many major research universities in the United States and Europe to change their financial model. Many of them are adopting models that place greater authority and accountability at the level of individual academic units. What is valuable to note here is that no matter which financial model UC Berkeley chooses to adopt, the choice must support UC Berkeley’s needs, culture, and pre-eminence.

Brief overview—financial sustainability is central to the Operational Excellence mission, and the Finance Initiative Team has identified a three phased conceptual framework for UC Berkeley:

**Phase 1—Clarification and rationalization**

The first phase focuses on clarifying and rationalizing our complex budgeting environment. Our current system is, more complex and time-consuming than it needs to be. It actually prevents the campus from making changes that are necessary for UC Berkeley to transition to a new funding model. For example, currently:

- UC Berkeley budgets over 14,000 funds compared to approximately 2,000 at UCLA.
- Processes for distributing funds for Temporary Academic Staff, for example, are complex, laborious and not tied directly to strategic initiatives in teaching.
- The system contains a large number of unnecessary historical artifacts, and is poorly suited to the evolving new structure of revenue flows to the campus.
- It is extremely difficult to “roll up” summary information because the supporting data is often not consistent, reliable and/or accessible.

**Phase 2—Modernization**

In the second phase, we need to start building tools and processes to support our desired future.

The campus’s currently available budget tools were built for an outdated “permbudg” model that does not look at all sources of funding and cannot carry us into a future where leaders regularly access financial reviews and forecasting scenarios to inform their decisions. Although financial staff across the campus have been proactive and created unit-specific systems to provide their leaders with financial information for decision making, this represents an enormous duplication of effort and makes data consistency and security an ever-increasing problem.
**Phase 3—Transformation**

In the third phase we move from preparation for a new reality to living and managing in the new financial reality.

In terms of the Cal Budget and Planning project the campus will be able to produce an all funds budget every year. Each Dean will be able to easily view all available resources for analysis of programmatic resources and needs. Since there will be an approval of a complete budget for units, the need for the current transaction heavy budget journal allocation will be eliminated. The campus and deans will be able to move to multi-year forecasting, and be able to smooth budgetary shocks. These efforts will help us lay the groundwork for more in-depth discussions about the fundamental structural changes to the campus financial model, including the possible adoption of elements of resource centered management.

In an effort to further prepare UC Berkeley for the changing financial environment Finance Initiative Team recommends that the campus implement an enterprise-wide budget and financial planning and analysis framework by deploying the already purchased Hyperion Planning. This tool will provide support for enhanced analysis, planning and decision making capabilities, which are particularly important in our changing fiscal environment. In particular, this system will:

1. Provide leaders with improved information and analysis, allowing them to examine trends and forecasts to inform their decisions.
2. Shift the much of the effort of finance professionals *from* heavily manual transactions (rekeying data from multiple reports into Excel, processing budget journal entries, etc.) *to* analysis and decision-support for leaders. Enable them to customize how data is displayed to meet their local business needs.
3. Standardize and streamline the annual budget process.
4. Provide all campus leaders and financial professionals 24x7 access to their real-time financial data
5. Facilitate and motivate financial clarification, rationalization and modernization—helping to pave the way for a new, sustainable financial model.

An enterprise-wide budget tool, such as those used by many of our peer institutions, could both address these needs and advance financial clarification, rationalization and modernization—helping to pave the way for a new, sustainable financial model.

Hyperion Planning can be used to support a range of financial models and will also build a robust foundation for implementing more advanced financial functionality that is beyond the scope of this design phase, including:

- Modeling with non-financial metrics
- Capital projects budgeting
- Detailed sponsored award budgets.
FINANCIAL ANALYSIS

• Year by year breakdown of savings and costs
• Key assumptions

<table>
<thead>
<tr>
<th>Hyperion Planning Implementation Budget Estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Start Date: 12/1/2010  Project End Date: 6/30/2013</td>
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<table>
<thead>
<tr>
<th>COST DRIVER</th>
<th>PROJECT COST</th>
<th>DESCRIPTION</th>
<th>FY10-11</th>
<th>FY11-12</th>
<th>FY12-13</th>
<th>Operating Costs 2013-14</th>
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<tbody>
<tr>
<td>IST, Software &amp; Technology Infrastructure</td>
<td>$1,906,282</td>
<td>Licenses and/or support fees for application software (Hyperion Planning/Endbase) and associated data integration/management tools. IST staff to configure software, perform installations, &amp; support servers.</td>
<td>$1,003,200</td>
<td>$879,104</td>
<td>$403,800</td>
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<td>Budget &amp; Resource Planning</td>
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<td>Resources required to manage the design, build, test and deployment of webframes, calculations, reports; specify requirements for data load/interfaces, and other aspects of product “come and feeding.”</td>
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<td>Change and Project Management</td>
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<td>$700,320</td>
<td>$875,862</td>
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<td>Consulting (NP Dynamics)</td>
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<td>External consultants with implementation experience and deep product knowledge. Primary project allocation during initial design &amp; build (FY10-11). Includes Public Sector consulting equal to ~$100K.</td>
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<td>$204,330</td>
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<td>Training</td>
<td>$477,740</td>
<td>Project team training. Build user guides, work instructions, and online training modules. Deliver classroom training for local trainers and users. Includes training-related non-salaried expenses.</td>
<td>$128,852</td>
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<td>Non-Salaried Expenses</td>
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<td>General (not training-related) non-salaried expenses (computers, office supplies, publications, etc.)</td>
<td>$48,620</td>
<td>$26,820</td>
<td>$14,870</td>
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</table>

GRAND TOTAL $6,157,105

Total for FY $2,189,274 $2,100,707 $1,887,304 $935,979

PROBLEM STATEMENT/NEEDS ASSESSMENT

• Objectives
• Situation
• Opportunity

SITUATION

The ability of UC Berkeley leaders and staff to view real-time financial data and make informed choices and financial decisions to address our economic reality is severely limited.

Our campus’s current budgeting system and practices were developed at a time when the State of California provided the majority of funds for the University of California. Over the past decade, UC’s financial model has changed dramatically and all campuses increasingly rely on non-permanently budgeted fund sources. Now that the state provides less than 15% of UC’s total resources, all campuses down to the department level need to have a complete view of their all-funds budget in order to make informed planning choices and financial decisions. However:

Financial management at UC Berkeley is more difficult than it should be

• Too frequently campus leaders must make decisions based on inadequate, incomplete or outdated financial data.
• Campus finance professionals spend too much time generating, manipulating and presenting data rather than analyzing data and supporting decision making.
Comparing financial scenarios—a cornerstone of sound financial management—is challenging and problematic, particularly across units or multiple years, when the inconsistent inputting of financial data is combined with our reporting system, which focuses on past transactions.\(^1\)

All of the academic deans, the Chief Administrative Officers (CAOs), and many other campus finance professionals are being interviewed by members of the Finance Initiative Team December 2010-March 2011. Their\(^1\) responses about budget templates and practices add dimension to how difficult financial management is on campus:

- Nearly all interviewees **manually maintain off-line Excel spreadsheets** to monitor spending during the year and to prepare their annual budget.
- **Position budgeting** (maintaining and adjusting staffing lists) is requiring a higher degree of effort as departments seek to identify salary savings from permanently budgeted positions to fund operations. There is a strong desire to have this function automated by the new budget tool.
- Most budget directors centrally prepare budgets for each of their units and **update the templates themselves** based on planning conversations with the unit (note: not all budget directors have templates).
- Budget directors would prefer to push **accountability, preparation and monitoring** of budgets to the subsidiary units, but are **hampered by underdeveloped financial and technical competencies** in many of them, coupled with workload increases due to budget cuts.
- **Contracts and grants budgeting and reporting for faculty** was also noted as a key pain point, with significant effort devoted to providing up-to-date projections.
- Preliminary discussions indicate a fairly consistent format and approach to the design of budget templates and associated processes.

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\(^1\) For example: Temporary Academic Staff (TAS) funding is budgeted incrementally and not viewed relative to the comprehensive campus budget or current needs. Although this disconnect was improved with the augmentation of targeted common good course funding, the budget and needs are not viewed together in terms of delivering instruction or explicitly tied to enrollment relative to faculty lines. The overarching goal of delivering more courses with smaller class size is being achieved, but with a high degree of complexity and uncertainty, particularly for multi year planning.

\(^2\) Discussions about budget templates and practices were held with financial managers in: College of Chemistry, College of Letters & Sciences (Divisions of Arts & Humanities, Biological Sciences, Physical Sciences, Social Sciences, UGIS), School of Education, School of Law, School of Public Health, VC for Equity & Inclusion, University Relations, VC-RESS, UC Extension. All academic Deans were interviewed separately.
We could continue to conduct business as usual, making incremental changes, but this would become increasingly costly—both financially and in terms of opportunity costs—in the face of our changing revenue environment. If this situation continues, we risk eroding our competitive edge and the trust of our stakeholders because:

- UC Berkeley will not be prepared to respond to the on-going decline in state funding, particularly the need to have a multi-fund strategy to support continued excellence in teaching and research.
- UC Berkeley will not be prepared to navigate strategically the UC-wide change where funds generated on campus will stay on campus and a percentage will be returned to UCOP.
- Leaders making decisions based on inadequate, incomplete or old financial data could put the campus at risk.
- Across the campus financial professionals’ time will be squandered by continuing to relegate them to transactional work.

Although the campus has done a remarkable job ensuring that available funding supports our teaching and research mission, as the funding environment changes, not having multi-fund budgets and the ability to forecast and complete analysis is inconsistent with maintaining Berkeley’s excellence. Clearly the status quo is not a plausible option.

**OPPORTUNITY**

Most of our public and private peers use institution-wide budget tools to:

- track actual expenditures and revenues to a budget
- view, synthesize and analyze multiple funding commitments
- forecast future needs
- explore a range of scenarios

Several of UC Berkeley’s peer institutions—including Harvard, UCLA and Stanford—have purchased Hyperion’s planning and budgeting tool, providing them with greater data visibility, forecasting ability, and consistent financial information across their institutions.
OBJECTIVES
The overall objectives for implementing Hyperion Planning as a budget tool are to:

- Provide all campus leaders and financial professionals 24x7 access to their real-time financial data.
- Provide leaders with improved financial information, allowing them to examine trends and forecasts to inform their decisions.
- Shift the effort of finance professionals from heavily manual transactions to analysis and decision-support for leaders. Enable them to customize how data is displayed to meet their local business needs.
- Support the Campus Budget Office in standardizing and streamlining the annual budget process.
- Provide all levels of the campus with a consistent language/framework and real-time data for understanding and discussing the financial resources available to support our academic and public service mission.

RECOMMENDATIONS (Extended; summary above.)

- Deliverables
- Rationale
- Costs/Benefits/Risks
- Key assumptions

DELEIVERABLE FOR IMPLEMENTATION PHASE
*Install and deploy Hyperion Planning.*

RATIONALE

A typical Design Phase approach would have been to develop specifications for a budget tool and use this document to recommend issuing a Request for Proposals. The urgency, however, of preparing campus leaders and finance staff for the impending funding changes in time for FY 2012-13 prompted the Finance Initiative Sponsors and Initiative Manager to “act with dispatch.” Recently identified as an OE principle, acting with dispatch acknowledges that “departures from the natural inclination toward thoroughness will help to move ideas toward proposals, and proposals toward projects.”

We started with the commitment to leverage a best-in-class system already in use in the UC system so that we could evaluate implementation, adoption and functionality issues in a comparable environment and ask for advice/support when needed.

UCLA began its relationship with the Hyperion Planning tool and the consulting team in 2004. It seemed reasonable to discuss the benefits of having the two largest UC campuses using the same budget tool system. When we began to explore other possible solutions, we discovered that the following peer institutions have also implemented or are implementing the Hyperion Planning tool:

Public
- University of Michigan

Private
- Stanford
In February 2011 conversations with higher education institutions about their financial management and budget analysis capabilities, the benefits of Hyperion Planning for UC Berkeley were again made evident. For over five years UCLA and Santa Cruz (through a different tool) have been able to have quarterly budget-to-actual reviews with their EVCP to review the funding of the academic enterprise. Their budget discussions focus on the comprehensive resource picture rather than only on incremental additional resources. During the recent budget reductions, their visibility into their multiple funding sources enabled them to modulate replacing declining state revenues—a strategic and fiscally sound option that UC Berkeley does not have.

We also identified “lessons learned” from recent system rollouts to inform our analysis and planning:

- Establish quantifiable definitions of success
- Define realistic scope given stated go-live dates
- Multiple levels of governance
- Phased implementation: start small (for roll-out), include many in analysis, incorporate lessons learned into later phases
- Clearly define and document local scope/project plan and local staffing requirements up front with stakeholders and hold them accountable
- Utilize prototyping and feedback from constituents to assess usability of system
- Recruit “A-team” project resources and empower them to collaborate on the best solutions for the University as a whole
- Ensure on-going UC Berkeley support team in place during project
- Deliver a set of basic reports for initial release, build capacity for additional analytical reporting once users have stabilized on system

Hyperion Planning, as a best-in-class system, meets our identified campus needs and addresses several “lessons learned” from recent system rollouts. In particular, Hyperion Planning will:

- Use a familiar, Excel-like interface, thereby reducing regular and occasional users’ learning curve and improve adoption rates
- Offer 24x7 access to real-time data and tools for analyzing and understanding the budget, including comparisons of prior, current and future year budgets
- Automate building web-enabled templates by the 300 and finance positions across campus to collect budget data for their school, college, division, and control unit
- Allow department users to calculate, enter, annotate and submit their current year forecast and next fiscal year budget, as well as record multi-year commitments and forecasts
- Provide unit-level financial offices with interactive and dynamic tools to work with their departments to collect, roll-up and submit consolidated annual budgets to the Campus Budget Office
IMPLEMENTATION APPROACH

Iterative, Interactive Design

- Full-featured prototype developed during Phase 0 and “Interactive Design” sessions with “hands on keyboards” allows for faster turn-around to see local configuration in action.
- Consistent with the model employed in other deployments of this tool.

Phased Implementation

- Phase 0 build of prototype allows for hands-on business process execution by department users prior to expending resources on full build
- Phase 1 builds finance office familiarity with system and ad hoc reporting functionality for FY11-12 in advance of on-boarding local department end-users for data entry of the FY12-13 budget in Phase 2
- Phase 3 builds on prior phases with release of employee/position detail budgets

Collaborative Methodology

- All college, school, division, and control units are expected to participate in monthly status meetings and general design discussions, select business process analysis sessions, and special hands-on “lab” sessions.
- Identify good-to-best practices; continuous assessment of change management challenges.
- Align external expertise with internal staff who will “own” the system.
PROJECT RISK/OPPORTUNITY ASSESSMENT
A full risk assessment was conducted in early December 2010; over 25 major risks/mitigations identified to date including:

- Project team not assembled in time to complete design/build in time for FY12-13 budget cycle; key project resources diverted to other campus priorities
- Sizing of hardware can’t accommodate scale of implementation

Our high level plan for risk mitigation and opportunity realization is:

- Designate a specific “owner” for each risk and opportunity.
- Update risk / opportunity assessment continually.
- Communicate movement for individual risks through governance structure
- Many of the potential risks and opportunities will undergo a more thorough review at major milestones through the project:
  - Phase 0 Review / Analysis (April 2011)
  - Phase 1 Review / Analysis (Sept 2011)
  - Phase 2 Review / Analysis (April 2012)

ALTERNATIVES CONSIDERED (including status quo)

- Costs/Benefits/Risks
- Key assumptions

The status quo is not a plausible option. Most of our public and private peers can produce budget documents at both the campus and department level. They are able to track actuals to a budget, and synthesize multiple funding commitments, forecast future needs, and display a range of scenarios.

The following alternative systems were evaluated:

Oracle Hyperion Strategic Finance
Oracle’s Hyperion Strategic Finance software is a financial modeling application that lets executives identify and understand the full financial impact of alternative strategies. This software focuses on the central operations and financial statement development activities and cannot be distributed out to departments. We determined early on, however, that standardizing and distributing functionality down to the department level was essential. Yale implemented both Hyperion Strategic Finance and Hyperion Planning, which informed our thinking. In this budget climate and with the currently identified organizational needs, it is clear that Hyperion Planning better meets UC Berkeley’s current operational needs.

Kuali Finance: Budget Construction
Currently Indiana University and San Joaquin Delta College run Budget Construction with Kuali Financials. UC Berkeley is on PeopleSoft Financials and we assessed the interface development with Kuali Budget Construction would not be cost effective. There is a smaller adoption rate of Kuali Budget Construction and the software has not been tested in our natural peer group. This is not the same as Kuali Student, and would require replacing the financial system, or being the first institution attempting a hybrid approach. Given the significant change management needed at Berkeley to have a new budget process, marrying that with a new hybrid technology felt like significant additional project risk.

The team also leaned heavily on Gartner Research, a leading national provider of IT research and analysis, and the extensive evaluations conducted as part of the UCLA and Harvard vendor selection processes to eliminate...
Oracle leads the field in the scalability necessary for enterprise-wide deployment in higher education.

Gartner rates Oracle—the developer of Hyperion Planning—at the top of enterprise planning systems.

**IMPLEMENTATION PLAN**

- Implementation activities
- Functional ownership
- Timeline

**Proposed Team Structure**
### 1 – Reporting Release

**Schedule Dates:** April – August 2011

**High-level Project Activities:**

1. **Data loads (historic budget & actuals at line item detail) build, testing & validation**
2. **Reporting-only release** (SmartView for ad hoc with Sources & Uses Financial Studio Report to LIMs and central BRP)
3. **Sign-off on final design of summary budget functionality**
4. **Assess performance on Phase 1 deliverables and revise plan for Phases 2-3**

### 2 – Summary Budgeting

**Schedule Dates:** Aug 2011 – April 2012

**High-level Project Activities:**

1. **Production build, configuration, testing, migration of data loads, artifacts for summary budgeting only (no employee/position)**
2. **Development, review, and delivery of training content**
3. **December 2011 Go-Live**
4. **User training & on-boarding**
5. **Summary budget preparation and submission (FY12-13 Budget Call) in CBPS**
6. **User focus groups to give feedback on solution and recommend improvements**
7. **Enhancements to functionality coming out of initial budget cycle**
8. **Assess performance on Phase 1 deliverables and revise plan for Phases 2-3**

### 3 – Employee/Position

**Schedule Dates:** May 2012 – June 2013

**High-level Project Activities:**

1. **Production build, configuration, testing, migration of data loads & artifacts for employee/position budgeting**
2. **Enhancements to summary budgeting functionality from Phase 2 assessment**
3. **Development, review, and delivery of training content**
4. **December 2012 Go-Live**
5. **Finalization and documentation of on-going operational support model, including planning and prioritization for future tool initiatives**
6. **Project-wide after-action review to capture lessons learned and “best practices” for future IT projects at UCB**
Major Unit Integration and decision making:

1. There are three levels of decision-makers on the project:
   a. Project Sponsors
   b. OE Financial Management Initiative Team
   c. CBPS LIM Steering Committee
   d. A fourth group, the Local Implementation Managers, will represent their units, providing feedback and supporting details for decision-makers

2. Specific responsibilities, types of decisions, and current representatives are noted on the following slide
The Role of the Local Implementation Manager

The role of the Local Implementation Manager (LIM) is vital to the success of the project. The project team depends on them to help translate the existing processes of their unit into the functionality of the application.

1. 37 LIMs serve as each college, school, division or control unit’s primary connection to the budget tool implementation. A LIM’s fundamental responsibilities are:
   a. Serve as primary contact for college, school, division, or control unit, ensuring bi-directional communications between the project team and the local user community are effective and timely, and engaging local unit subject matter experts as needed to provide design and implementation feedback to the project team and LIM Steering Committee.
   b. Provide business and process expertise; coordinate any necessary chart of accounts adjustments, user training and security data collections
   c. Manage the college, school, division, or control unit’s implementation project plan in conjunction with the CBPS project team; track local issues & assist with coordination of troubleshooting efforts and business process redesign
   d. Oversee the effort of all local representatives working on the project, ensuring all deliverables are provided with a high degree of quality and timeliness

The Role of the LIM Steering Committee

2. 8 comprise the LIM Steering Committee including HAAS, Law, OE Program Office, VC Research, IS&T, Student Affairs, L&S, UHS, Budget Office, Engineering, Library, and Controller.
3. Because of their role in shaping the enterprise solution, candidates were selected based upon their ability to consider design and implementation decisions in terms of their benefit versus implementation cost to the institution as a whole, even if it means challenging the interests of their
own local constituency.
4. They are collaborative partners with their peers as well as the project team and leadership, and will be able to constructively weigh options and efficiently drive to decisions, staying within project scope and timeline.
5. They will also devote more time than a typical LIM to review materials, respond to issues, and attend meetings.

LIMs and the Project Team
6. LIMs will primarily be working in partnership with one of two Unit Portfolio Managers (UPMs) assigned to them from the CBPS project team, who will be their single point of contact for all things CBPS:
   a. Issues, questions, functionality requests, business process documentation & redesign, data loads, reporting, user access, change management and training
7. UPMs will be able to draw upon the knowledge and skills of the larger CBPS project team as demonstrated in the illustration below.

Change Management Plan
Deans, Chairs, administrators, and financial staff across the campus must be aware of and engaged in the transition to a new financial model because of:

8. The changing fiscal environment for the University of California: State funds will soon comprise less than 15% of the campus’s financial resources. In 2012, it is likely that operating resources from the state will only cover salaries for tenured faculty; everything else at UC Berkeley will need to be paid for from a diverse pool of funding sources.
9. The changing fiscal environment within UC: As the UC system transitions to a model where funds generated on campus stay on campus with a percentage returned to UC Office of the President (UCOP), leaders will need to look at all funding sources to determine how best to pay for UCOP services.
10. Our centralized and incremental budgeting system does not meet current needs or support a future where all sources of revenue need to be viewed, managed and maximized.

Campus Leader engagement: As a first step, Initiative Sponsor Paul Gray is meeting with each of the deans to identify their current budget management approaches and to discuss how Hyperion Planning could support financial viewing, analysis and planning in their school or college as early as the 2012-13 budget cycle. These discussions are creating awareness and a high level of interest among these academic change leaders for a transition to a campus-wide budget tool, thereby laying a strong foundation for the overall Finance Initiative.
Campus financial manager engagement:
The team of 37 Local Implementation Managers who serve as each college, school, division or control unit’s primary connection to the implementation of Hyperion Planning, is an unprecedented level of engagement among high-level change implementers.

Proposed resources to create an effective change management plan for Hyperion Planning:
Because the transformation from our current way of viewing, analyzing, and planning using a real-time, customizable budget tool, the change management demands of the this project will be extraordinarily high. A full-time change management lead, a trainer, and two Unit Portfolio managers have been proposed. Together they will be responsible for activities including:

1. Communications that are clear, timely, and focused to audience (with major communications reviewed by LIM Steering prior to distribution)
2. Delivering LIMS pre-reads for design sessions in advance to facilitate internal unit discussions prior to formal project feedback
3. Documenting, comparing, and reviewing “as-is” and “to-be” budgeting business process with the LIMs, who must signed off on before build
4. Training strategy and implementation that represents the units’ needs (through collaborative requirements sessions with the Local Implementation Managers during the design and build phases), a
5. The right mix of classroom training, on-line simulations, and other documentation to fully support the transition

Initial Communication Plan

<table>
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<tr>
<th>Communication Tool</th>
<th>Primary Audience</th>
<th>Type of Information Delivered</th>
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<tbody>
<tr>
<td>Budget &amp; Resource Planning website</td>
<td>Campus</td>
<td>Project charter, timeline, info about the tool, links to project team contacts, lists of LIMs by unit, general FAQs</td>
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<tr>
<td>bSpace</td>
<td>Governance bodies, LIMs</td>
<td>Pages configured by audience (governance level), shared calendars, doc collaboration, training registration, LIM communications</td>
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<tr>
<td>JIRA</td>
<td>Project team</td>
<td>Issues management (in lieu of e-mail), change control, bug/enhancement mgmt</td>
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<tr>
<td>CalShare</td>
<td>Project team</td>
<td>Detailed project plan for review, design docs, funct/tech specs, test plans</td>
</tr>
<tr>
<td>Status Reports</td>
<td>Project Leads LIMs/UPMs OE/Sponsors</td>
<td>Project team individual weekly status reports  Unit readiness/engagement status Bi-weekly project status dashboard (PMO)</td>
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