



**SAN FRANCISCO
STATE UNIVERSITY**

ABOUT

San Francisco State University (SFSU) is a public university located in San Francisco, California. They are a part of the California State University (CSU) system, which is the largest higher education system in the United States. One of SFSU's missions is to provide broadly accessible higher education for residents of the region and state, as well as the nation and world. SFSU offers 118 different bachelor's degrees, 94 master's degrees, and 5 doctoral degrees along with 26 teaching credentials among six academic colleges.

LOCATION

San Francisco, CA
<https://www.sfsu.edu>

INDUSTRY

Higher Education

TECHNOLOGY

- Oracle Planning Cloud
- Oracle Scenario Modeling

USER QUOTE

Bernice Yeh, a Senior Budget Analyst at SFSU says, "[The solution] is eye-opening because you're not just creating a spreadsheet for a report, you're actually analyzing what's on the spreadsheet."

ABOUT PERFORMANCE ARCHITECTS

Performance Architects partners with clients to design and build solutions that enable significant improvements in their performance. Whether you are considering Oracle's Analytics or EPM solutions or have an existing implementation, our team of experienced functional and technical consultants can help you leverage the full power of these solutions.

BACKGROUND

San Francisco State University was looking for a system that was going to assist them with their planning and budgeting processes. Armed in hand with Oracle Planning Cloud and Performance Architects as their implementation partner, SFSU decided to take a phased approach to slowly grow the system within the budget office and prevent user culture shock.

These four phases allowed for completion of the solution:

- Phase 1: Financial reporting and analytics within Oracle's Planning Cloud
- Phase 2: All funds annual budget (including positions) within Oracle's Planning Cloud
- Phase 3: All funds forecast within (including positions) within Oracle's Planning Cloud
- Phase 4: 10-year Strategic Model within Oracle's Scenario Modeling

SOLUTION

Performance Architects setup SFSU's Budget Office with reporting and analytics within Oracle's Planning Cloud in the first phase of the project. With every completed phase of the project, SFSU has been able to officially remove another manual offline process until all major processes were put into the system. As the system has continued to grow, the centralized system has continued to grow as a system of record. The timing of the final phase has also allowed for quick, agile turnarounds within the budget office as major economic conditions change including the changes put forth as the severe impact of COVID-19.

CHALLENGES

It was first important to understand what every department wanted out of the tool to make the implementation successful. Once that was done, it was important to get users to adopt the tool, which turned out to be a challenge. Most users needed training to understand the tool and erase any bias they might have previously had. This was done by having a workforce discovery session between all departments to get everyone on the same page.

KEY PRODUCT HIGHLIGHTS

- Detailed transparency allowed through position-level detail available for budget-to-actuals variances
- Continued system usage and growth through the removal of painful offline processes
- Increased responsibility and transparency through audition functionality and a position request approval process
- Flexibility with data modeling as assumptions and decisions change throughout the COVID-19 crisis