# UC Berkeley Finance Literacy Training

2017-2018 Curriculum

Overview

The Finance Literacy project launched a series of courses to help advance financial literacy across campus by building upon the knowledge, skills, and abilities of our finance professionals. These sessions created an environment for learning and collaboration and acted as a conduit for leaders and subject matter experts to disseminate current thinking and topics that were unavailable in traditional learning and development outlets.

Finance Literacy Courses

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| Course Title | Date | Course Details |
| GAAP and GASB  | Tuesday, October 31, 2017 | This course provides an overview of key accounting rules and standards and includes an interactive exercise (Jeopardy questions and answers) to reinforce relevant definitions, concepts, and principles.  |
| Financial Statements  | Thursday, November 30, 2017 | An overview of financial statements such as the balance sheet, income statement and cash flows; and applying them to UC Berkeley's unique reporting.  |
| Berkeley Financial Overview | Tuesday, December 12, 2017 | This course will provide campus with an overview of key strategic, financial topics. Because this course is being held halfway through the fiscal year, it's an opportune time for a mid-year financial check-in to review performance and set guidance for the upcoming budget process. |
| Revenue Generation Opportunities | Tuesday, January 30, 2018 | This course will provide campus with an overview of modeling revenue generation ideas. In particular, this training will cover factors to consider when thinking about revenue generation opportunities and guidance on how to frame your project or idea. |
| Revenue Generation Opportunities Labs | Wednesday, February 7, 2018 | Labs are meant to complement the Finance Literacy courses, providing a deeper, more technical level of training and discussion. In this case, we are offering 30 minute one-on-one’s with our presenter Scott Shireman. |
| TAS and Our Mission | Friday, March 16, 2018 | This course will provide an overview of TAS, its key concepts, values, and allocation methodology. |
| Raising Awareness on Fundraising | Wednesday, March 21, 2018 | The learning objectives for this course include (1) an overview of Berkeley's fundraising organization including the hybrid centralized/decentralized model (2) discussion around Regents vs Foundation gifts and it's unique accounting (3) guidance around policies, payouts, restrictions and new minima standards (4) best practices on reporting (CalAnswers) and working with Donor and Gift Services. |
| TAS and Our Mission Labs | Friday, March 23, 2018 | Labs are meant to complement the Finance Literacy courses, providing a deeper, more technical level of training and discussion. In this case, we are offering an hour Q&A with our presenters Jon Bain-Chekal, Kira Blaisdell-Sloan, and Maya Woodson Turman. |
| Raising Awareness on Fundraising Lab | Wednesday, March 28, 2018 | We are offering 30 minute, one-on-one’s with our presenters Director of Fund Management Ali De Gros and Director of Gift Services Matthew Weaver. |
| Building Blocks of Capital Projects | Tuesday, April 24, 2018 | The class will provide an overview of Capital Projects concepts and methodology, including how the capital projects process currently works and examples of successful case studies. At the session you’ll learn from experts in the field, including Director of Capital Planning Judy Chess, Director of Finance and Capital Asset Strategies Adile Quennarouch, and Director of Financial Accounting and Controls Lisa Vanderfin. |
| Navigating SSGPDPs and PDSTs | Thursday, June 14, 2018 | The course will provide an overview of Self-Supporting Graduate Professional Degree Programs (SSGPDPs) and Professional Degree Supplemental Tuition (PDST) programs. Topics include the proposal development process and timeline of key milestones and deadlines; why market research is important during the discovery phase; an overview of the SSGPDP campus financial pro forma template; and the annual fee approval process. The course will be taught by Campus Finance Lead for Student Fees Hugh Graham, Institutional Research Analyst Noam Manor, Chief Operating Officer of University Extension Scott Shireman, and Assistant Dean for Academic Affairs Linda Song. |