

BerkeleyHaas

Haas School of Business
University of California Berkeley

Deloitte/Berkeley-Haas Partnership Update

October 26, 2015

Agenda

- Introductions (Jack Russi/Jim Davis)
- Strategic Update on Haas (Rich Lyons)
- Campaign for Haas Outcomes (Michelle McClellan)
- Center for Financial Reporting and Mgmt (Jose Plehn-Dujowich)
- Ways to Engage (Rich Lyons)

Introductions

Deloitte Hosts

- Jack Russi, National Managing Partner, Deloitte
Chair, Haas Board & University Advisory Partner
- Jim Davis, Principal, Deloitte Consulting, Lead University Principal

Berkeley-Haas Team Presenters

- Rich Lyons, Dean
- Michelle McClellan, Assistant Dean, Development & Alumni Relations
- Jose Plehn-Dujowich, Executive Director, Center for Financial Reporting and Management

Cal Leadership Team



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& Consulting Lead Principal**

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University of California, Berkeley

420+

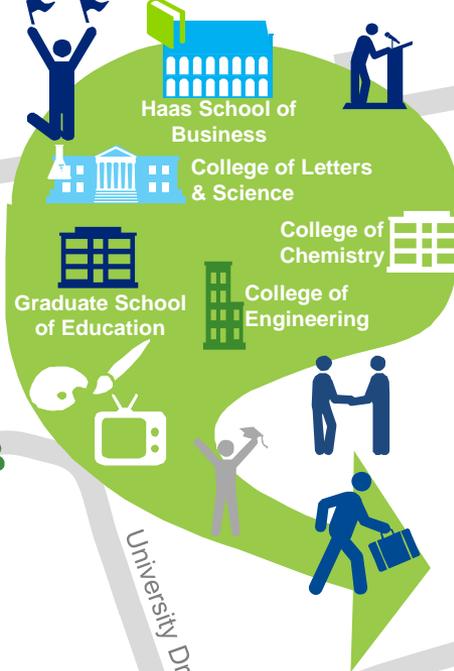
Hiring Oski

Deloitte employs over 420 UC Berkeley alumni, including 50+ PPD, across 33 of our U.S. offices and hires approximately 105 undergraduate and graduate students each year

Serving on Advisory Boards

Several Partners proudly sit on UC Berkeley boards and councils:

- Executive Board for the Center for Financial Reporting and Management – Brad Poole
- Jack Russi, Chair, Haas Board



Bringing Eminence

Many of our Deloitte leaders have come to UC Berkeley to speak and teach on various topics

Notably:

- Punit Renjen
- Mumtaz Ahmed
- Suzanne Kounkel
- Barbara Gniewek
- John Kutz
- Chet Wood
- Morgan

Engaging Students

Deloitte and Deloitte Foundation sponsor many student and talent acquisition programs:

- National MBA Case Competition
- National Undergraduate Case Competition
- National Leadership Conference
- NextGen Leaders Conference
- Envision
- Discovery

Client Service

Deloitte has supported the Student Affairs department at Berkeley with an IT Roadmap assessment.

Faculty Development

The Deloitte Foundation has offered faculty development programs to UC Berkeley academics

- True blood seminar
- Tax Case Study Competition
- Doctoral Consortium
- Deloitte doctoral fellows

\$3.13M+

Academic Investments

Deloitte Partners, employees and the Deloitte Foundation have sponsored over \$3.13M+ over the past 8 years in donations and matching gifts in support of many academic purposes across the University.

UR Featured Programs

UC Berkeley has been invited to take part in many university relations featured programs such as our transition labs, academic visits to Deloitte University and our Deans Summit.

Oxford St

Hearst Ave

Wickson Rd

University Dr

Gayley Rd

Bancroft Way



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Strategic Update

How Strong is Berkeley-Haas? By The Numbers

Undergraduate Program: #2 in *U.S. News* ranking of the country's best undergrad business programs, tied with MIT.

Full-Time Berkeley MBA Program: #7 in *U.S News*. Internal head-to-head admissions data say #6 (best single measure). Among US schools, in *The Economist*, the *FT*, *Forbes* and *BusinessWeek* the latest numbers are #5, #7, #8 and #9, respectively.

Evening/Weekend MBA: #1 in *U.S. News* among part-time programs for the third year in a row.

Our Culture & Defining Principles

In 2010, after an extensive process involving input from alumni, students, faculty, and staff, we codified the culture of Berkeley-Haas—which has been latent in the school for generations.

- Question the Status Quo
- Confidence Without Attitude
- Students Always
- Beyond Yourself

The Ripple Effect of Culture

Our Defining Principles **are a source of competitive advantage** as well as pride and engagement.

Our culture is **part of our strategic plan**, admissions and hiring decisions, and how we attract and compete for the best talent and students.

Our greater goal—that the Defining Principles **influence leaders** in addressing society's big opportunities and challenges.

Leaders Set Culture

~75% of graduates from the past decade are aware of the defining principles

>90% of graduating full-time MBAs feel their classmates display Confidence Without Attitude

Strategic Business Plan 2016-2021

Build financial, reputational, and operational strength by leveraging:

- **Berkeley Strength:** deliver education and research that integrates UC Berkeley strengths
- **Bay Area Location:** capitalize on our Bay Area location and corporate relationships to differentiate Berkeley-Haas
- **Alumni Network:** employ organization-wide approach to activating our network to improve visibility, access to expertise, and giving
- **Haas Operations:** embody our defining principles to achieve organizational excellence (includes sharpening leadership brand)

New Initiatives

Expanding Our Reach

- Berkeley Haas Entrepreneurship Program
- Center for Executive Education
- Flex MBA
- Center for Financial Reporting and Management
- Growth University: non-degree initiative

New Initiatives

Growth University

- Part of our Center for Executive Education
- Launches formally later this fall
- Proposition: Use our assets to help large enterprises grow faster
 - Lean practice: better performance of innovation-project teams
 - Culture practice: norms and values that support growth (enterprise wide)
 - Open innovation practice: rethinking where valuable ideas come from and go
 - Science practice: state-of-the-art science advice where useful (from Berkeley)

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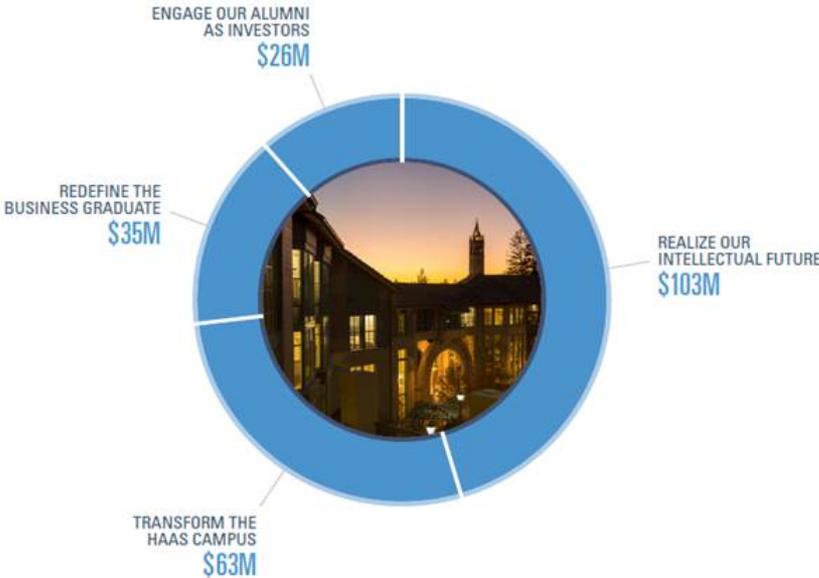
Report on the Campaign for Haas

Campaign for Haas & The Deloitte Partnership

Multi-year partnership that began as a journey and resulted in **extraordinary** generosity and commitment.

Over **\$3.1 million received** from Deloitte in matching funds and Deloitte/Berkeley-Haas alumni from 1,290 gifts.

Campaign for Haas – Overall Results



\$227 MILLION RAISED

JULY 1, 2005 – DECEMBER 31, 2013

Campaign for Haas: Impacts

You and our other Berkeley-Haas donors made so much possible!

- 83% real growth in this campaign over our last one
- 10 Faculty Chairs
- 25 Scholarships & Fellowships
- \$60M for Centers & Institutes

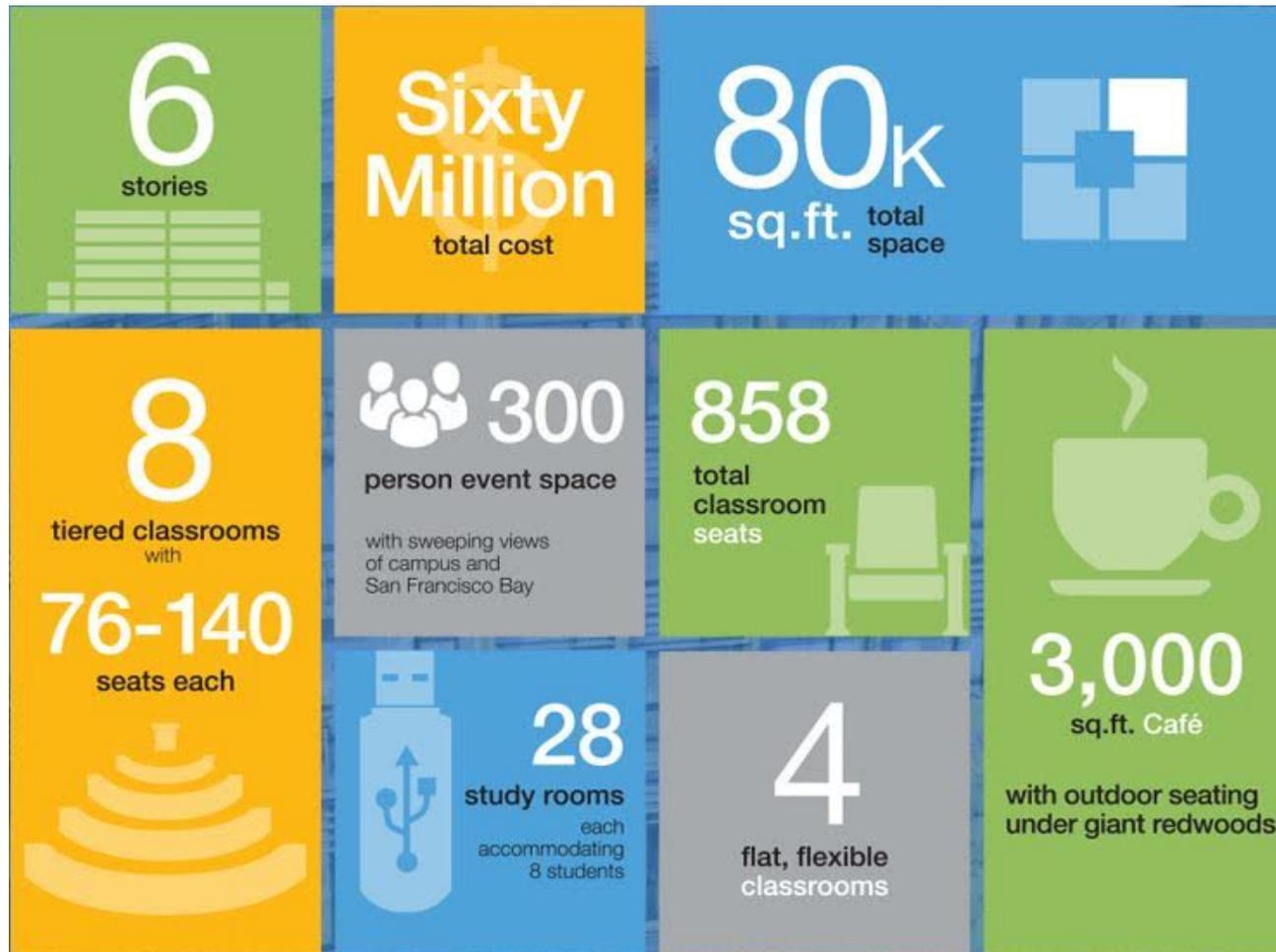
and **ONE NEW BUILDING**

North Academic Building

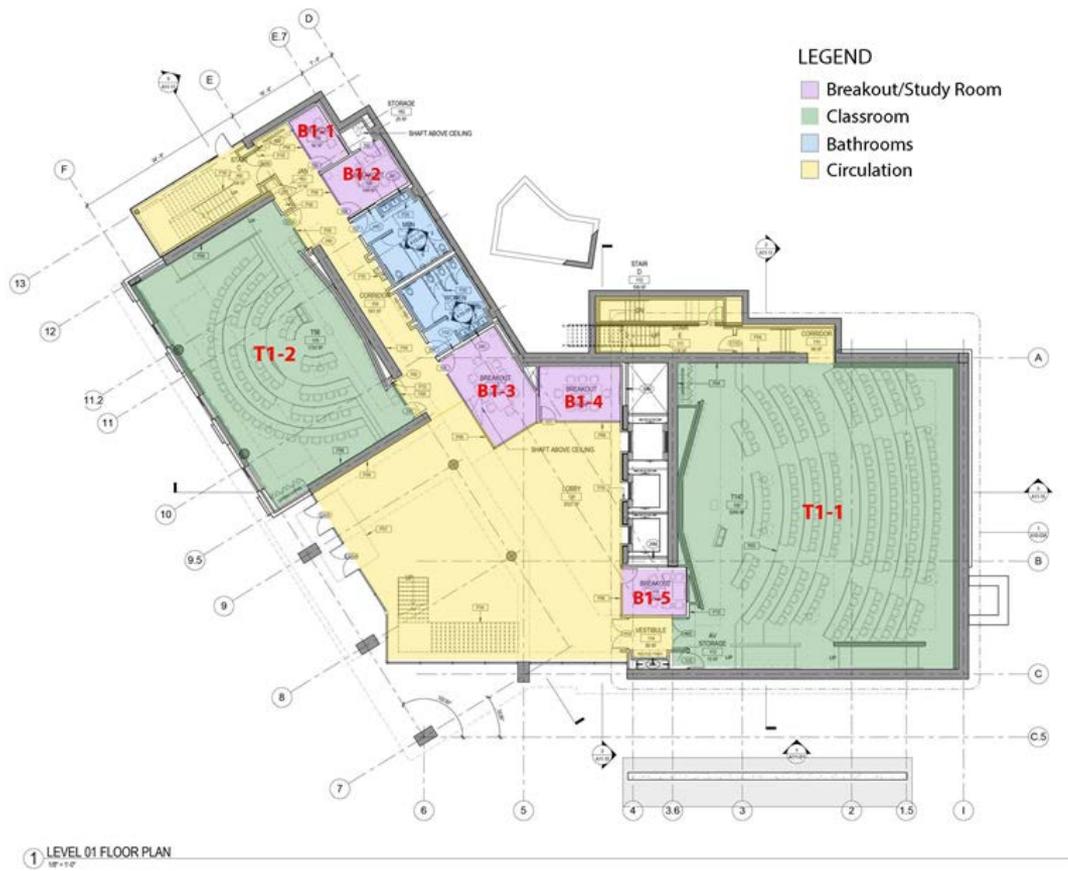
A state-of-the-art learning lab for Berkeley-Haas students



North Academic Building: More than a Building



The Deloitte Classroom

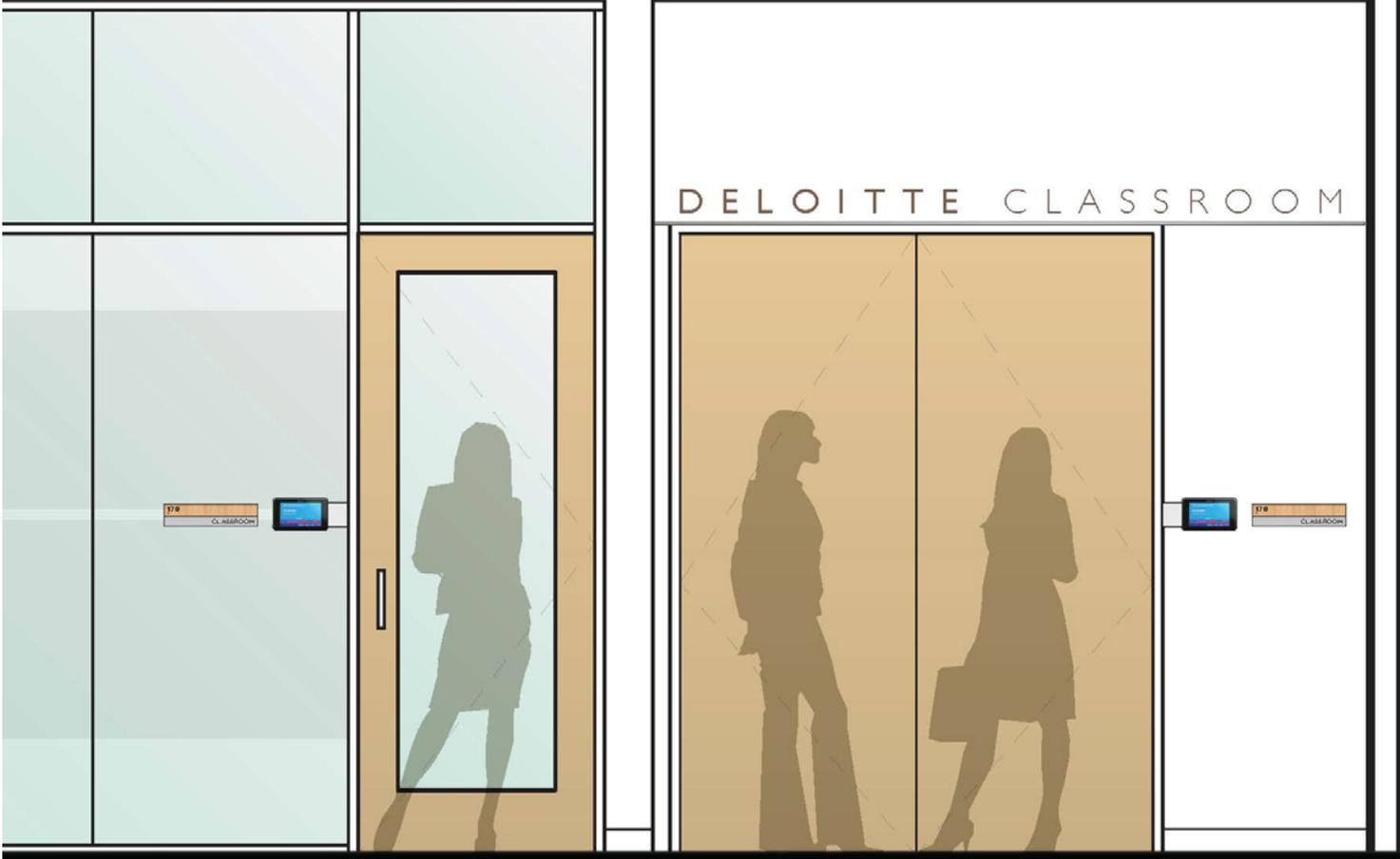


The Deloitte Classroom

Impacting the Student Educational Experience

- Largest classroom in the new building with 140 seats and second largest classroom on the Haas campus
- Located directly off of the main floor 1 entrance off of College Way
- Will serve Berkeley-Haas students from all programs

The Deloitte Classroom



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Center for Financial Reporting and Management (CFRM)

Overview of CFRM Activities

- CFRM oversees Accounting at Berkeley
 - Separate business unit within Haas
- CFRM serves as liaison between...
 - Public accounting
 - Regulators
 - Berkeley & academics
- Run new Berkeley accounting certificate
- Organize annual accounting conference
- Student activities
 - Informational events
 - Advise students on 150 credits & coursework
 - Recruiting events
 - Panel discussions & guest speakers in the classroom
- Fund faculty research & Ph.D. student stipends
- Perform research projects with accounting firms

CFRM: Recent Highlights & Initiatives

People

- **Prof. Jose Plehn-Dujowich** joins in 2015
 - Executive Director of CFRM
 - Program Director of Berkeley Certificate of Professional Accountancy (BCPA)
 - Recognized with 2015 Notable Contribution to the Accounting Literature Award, for research on cost structure and uncertainty
- **Prof. Omri Even Tov** joins Accounting faculty in 2015
- **Prof. Patricia Dechow** recognized with 2015 Distinguished Contribution to the Accounting Literature Award, for research that developed a measure to determine earnings quality
- **Prof. Panos Patatoukas** named Top 10 Business School Professor by *Fortune*

Initiatives

- 22nd Annual Conference for Financial Reporting on Nov 18, 2016
 - Theme: Technology & Accounting
- 150 Hour Rule Solution

Berkeley & CPA Requirements

California CPA Rules

- 150 academic units (total)
- 30 accounting units
- 24 business-related units
- 10 ethics units
 - New: accounting ethics (effective Jan. 2017)

Accounting Certificate

- 8 accounting courses for 30 units over 2 summers
- Evenings & weekends
- Taught by Haas faculty
- Cost: \$20k
 - Contrast: MS accounting programs cost \$40k+
- Open to all students & alumni (not just Berkeley)
 - CFRM handles admissions

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Deloitte & Berkeley-Haas Partnership

Our Partnership & Ways to Engage

Around the world, there are roughly 40,000 Berkeley-Haas alumni, all bending paths across industries and beyond business.

- Get someone to apply to Haas
- Join our LinkedIn and Twitter communities
- Engage through numerous volunteer opportunities to share your expertise
- Remain a **student always** and explore our Haas Insights learning offerings
- Participate in UC Berkeley's **Big Give** on Thursday, November 19
- **Come Back to Haas!** Mark your calendar for the November 14 tailgate

Our Partnership

Our partnership is enormously important to us. Thank you for all you do to keep Berkeley-Haas strong and help us develop the next generation of visionary leaders.

Q & A