

Our Role: Financial stewards, trusted partners, agents for positive change

Financial Stewardship:

Leadership in a Resource Constrained Environment

- Provide targeted financial stewardship and support to constrained academic activities
- Refinance University debt
- Adapt the University's long-term financial plans to meet evolving economic conditions
- Complete compliance monitoring plan and implement any additional monitoring activities
- Whatever Katie Lapp wants
- Strengthen procurement policies, procedures and risk management activities in advance of key system redesigns (e.g., B2P)
- Enhance sourcing strategies with category management
- Develop Allston SEC operating cost model
- Benchmark University financial performance to its peers
- Develop Facility Conditions Assessment (FCA) and financial framework
- Align University-wide capital and financial planning
- Benchmark the University's Institutional Risk Management (IRM) program
- Conduct an assessment of the FAD administrative support model

Culture and Community:

Care and Stewardship of FAD Culture and Values

- Advance talent development and retention initiatives
- Build a culture of greater trust in senior management
- Advance our focus and understanding of diversity and inclusion
- Onboarding of new FAD leaders and teams

Client Partnership and Engagement:

Foster an Environment of Trust and Collaboration

- Advance the Supplier Diversity Program
- Enhance IT partnership and use of technologies

Business Processes and Technology:

Develop Business and Systems Strategies, Plans and Processes

- Partner with HUIT to support the transition of finance reports from CREW to OBI
- Complete the discovery phase for a Position Management system and submit a proposal for ITCRB funding
- Implement a vendor spend analytics tool
- Define and develop a Buy-2-Pay (B2P) roadmap
- Replace the third-party student loan system (ECSI)
- Establish a governance model and strategic roadmap for the PeopleSoft Payroll system
- Enhance research reporting and data management
- Develop strategies and tools to improve Nonresident Alien related business processes at the Schools
- Advance the Internal Controls initiative and ongoing monitoring of existing controls
- Develop an ITCRB funding proposal for the Financial Application Reporting Portal (FRAP) to GMAS planning phase
- Standardize key sponsored research business practices
- Support and enhance enterprise automated systems for capital projects

The Top 11 Goals

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5. Advance our talent development and retention initiatives
6. Build a culture of greater trust in senior management
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9. Implement a vendor spend analytics tool
10. Define and develop a Buy-2-Pay (B2P) roadmap
11. Whatever Katie Lapp wants