

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

Financial Stewardship:

Leadership in a Resource Constrained Environment

- Strategically assess and plan Harvard's financial future in the context of higher education trends
- Align School and University leadership's response to the constrained and uncertain revenue environment
- Strengthen procurement policies, procedures and risk management activities to support key system redesign (i.e., B2P)
- Enhance sourcing strategies with category management; increase spend under management
- Complete the FIRST project (migrate FRAP to GMAS) by March 2018
- Provide targeted financial stewardship and support to constrained academic activities
- Complete Facility Condition Assessments (FCA) and develop a financial framework for the stewardship of assets
- Align University-wide multi-year capital and financial planning
- Advance the Institutional Risk Management Program
- Deliver high value audit and consulting services
- Analyze adequacy of insurance limits and coverage terms and propose alternative strategies as appropriate (museum collections, exhibitions, and cyber risk)
- Assess viability of different student loan models
- Assess and monitor central/institutional capacity to fund strategic priorities given scarce resources e.g. debt capacity
- Develop and commence a quarterly compliance and regulatory monitoring process

Culture and Community:

Care and Stewardship of FAD Culture and Values

- Leverage more opportunities to further enhance our relationships among the FAD teams and enrich and develop our sense of culture and community
- Support the awareness and promotion of an environment of belonging and inclusion in FAD
- Drive activities to monitor, develop, and retain our staff; develop actions to improve onboarding of new FAD staff

Client Partnership and Engagement:

Foster an Environment of Trust and Collaboration

- Coordinate with the research schools on the F&A base year preparations
- Develop focused training program and materials for contracting and new procurement processes for SP staff as well as Harvard community
- Build new financial models and tools to evaluate School business lines, advance financial discipline, and strengthen partnerships
- Partner with the Office of General Counsel on a risk assessment of the EU General Data Protection Regulation and on the development of an institutional response
- Whatever Katie Lapp wants

Business Processes

and Technology: Develop Business and Systems Strategies, Plans and Processes

- Define roadmap for new B2P process and system solution; commence implementation
- Develop a plan for redundancy in research reporting and data management
- As Business Sponsor, work toward the successful finalization of the conversion of financial reports from CREW to OBI; help lead efforts to train the University community and decommission CREW
- Lead efforts in the Planning Phase of Position Management to determine the needs and recommended solution for the University
- Advance the Tax Leadership Committee's top priorities

The Top 10 Goals

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2. Leverage more opportunities to further enhance our relationships among the FAD teams and enrich and develop our sense of culture and community
3. Build new financial models and tools to evaluate School business lines, advance financial discipline, and strengthen partnerships
4. Align School and University leadership's response to the constrained and uncertain revenue environment
5. Drive activities to monitor, develop, and retain our staff; develop actions to improve onboarding of new FAD staff
6. Define roadmap for new B2P process and system solution; commence implementation
7. Lead efforts in the Planning Phase of Position Management to determine the needs and recommended solution for the University
8. Enhance sourcing strategies with category management; increase spend under management
9. Complete the FIRST project (migrate FRAP to GMAS) by March 2018
10. Whatever Katie Lapp wants