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

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

- Advance Strategic Procurement initiatives with the implementation of Buy to Pay system solutions and related process enhancements
- Advance all additional ITCRB initiatives and University-wide technology and systems projects and programs, including Position Tracking and Reporting, I-9/eVerify, Ad Hoc Reporting, Research Compliance, HUBS Next Generation, etc.
- Continue to develop and implement University-wide contract management strategy including contract management repository, contract review advisory services, and training to mitigate risks, drive efficiencies, and contain costs
- Complete the reviews and negotiate the University area Facilities and Administrative (F&A) proposal
- Propose and implement a University Policy Infrastructure for policy management, communication, and compliance
- Assess opportunities and implement strategies to increase payment revenues (early payment discounts, Citibank card programs) and efficiencies (digital disbursements for individuals)
- Focus on opportunities for transparency across the Schools and Units, to encourage sharing of best practices and identify opportunities and challenges

**Financial Stewardship:** Leadership in a Resource Constrained Environment

- Improve Financial Literacy across Harvard School’s and stakeholders, including materials supporting Donor Education efforts and leading CWD courses on Harvard finances
- Support School and Unit-based planning in response to the current financial environment; integrate Recession Playbook learnings and develop ongoing and long-term sustainability and financial plans where needed
- Enhance sponsored monitoring of key internal controls; establish formal mechanism for collecting, summarizing, and tracking results
- Identify best practices for acquiring and managing professional services for architects and engineers (could be cost savings implications)
- Continue build-out of financial framework for Allston development funding needs
- Advance the analysis of tax reform implications and develop operational outcomes; position the Tax team as leader on tax matters University-wide
- Strengthen FAD and University-wide measurement capacities and focus, including enhanced data analytics
- Select (FY19) and implement (CY20) the investment managers for the new $1B fixed income portfolio
- Examine the relationship between current planning processes (i.e., MYFP and budget) to clarify goals and rationalize effort

**Culture and Community:** Care and Stewardship of FAD Culture and Values

- Continue to provide leadership and actions designed to enhance diversity and build a greater sense of inclusion and belonging, including broad FAD and local business unit activities
- Broaden visibility, usage, usability, and documentation for flexible work arrangements; support enhanced manager capabilities
- Recruit, develop and retain top talent throughout the organization; facilitate talent review and planning

**Client Partnership and Engagement:**
Foster an Environment of Trust and Collaboration

- Active participation in faculty disclosure and compliance activities; monitor federal changes, address clarifications and requirements, council School leadership, and report to agencies
- Direct support to Grad Student Union contract
- Advance the Institutional Risk Management Program
- Provide leadership and accountability for FAD and CADM toward the efficient, activity-based use of staff and office space, including 1033 3rd floor renovation, support for FAD/CADM master floor plan, and improved 1033 HVAC
- Whatever Katie Lapp wants

---

**Top 11 Goals**

- Advance Strategic Procurement initiatives with the implementation of Buy to Pay system solutions and related process enhancements
- Advance all additional ITCRB initiatives and University-wide technology and systems projects and programs, including Position Tracking and Reporting, I-9/eVerify, Ad Hoc reporting, Research Compliance, HUBS Next Generation, etc.
- Propose and implement a University Policy Infrastructure for policy management, communication, and compliance
- Assess opportunities and implement strategies to increase payment revenues (early payment discounts, Citibank card programs) and efficiencies (digital disbursements for individuals)
- Focus on opportunities for transparency across the Schools and Units, to encourage sharing of best practices and identify opportunities and challenges
- Improve Financial Literacy across Harvard School’s and stakeholders, including materials supporting Donor Education efforts and leading CWD courses on Harvard finances
- Support School and Unit-based planning in response to the current financial environment; integrate Recession Playbook learnings and develop ongoing and long-term sustainability and financial plans where needed
- Continue build-out of financial framework for Allston development funding needs
- Strengthen FAD and University-wide measurement capacities and focus, including enhanced data analytics
- Continue to provide leadership and actions designed to enhance diversity and build a greater sense of inclusion and belonging, including broad FAD and local business unit activities
- Recruit, develop and retain top talent throughout the organization; facilitate talent review and planning
- Active participation in faculty disclosure and compliance activities; monitor federal changes, address clarifications and requirements, council School leadership, and report to agencies
- Whatever Katie Lapp wants

---

*Indicates a top goal*