



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

Business Processes and Technology:

Develop Business and Systems Strategies, Plans, and Processes

Financial Stewardship: Leadership in a Resource Constrained Environment

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

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

Continue to advance our digital presence throughout the organization by improving/increasing our adoption and use of modern technology; continue migration toward SharePoint sites and away from network drives

*** Complete implementation of all components of B2P platform; promote adoption of B2P functionality including sourcing and contracting tools**

Continue to develop and implement University-wide contract management strategy to mitigate risks, drive efficiencies, and contain costs

Enhance reporting capabilities and forecasting of Monthly Reporting

- Cash flow—OTM
- Reforecasting—OFSP
- Financial Reporting and PTR—OC

Paying Out of State Employees—Develop an analysis of the costs and benefits of registering for payroll in other states

*** Ad-Hoc Reporting—Take a leadership role in the implementation of Oracle as the University-wide ad hoc reporting tool**

Collaborate with OTM, SP, HUIT to implement and gain wide adoption of a variety of payment strategies such as a Paymode Premium to generate revenue on payments made by Harvard to vendors

Automate OTM processes and reduce manual input

- Further digitize receipts and disbursements—allow for schools/units to make mobile deposits, convert more schools to TouchNet to expand check acceptance and enhance processes for remote environment
- Expand use of Central A/R
- Explore automation of cash receipts

*** Partner with HUIT to design and implement the enhanced reporting capabilities of Oracle Analytics Server**

- Creation of data models
- Ability to access data across financial, sponsored, and HR
- Additional data in HDW
- Provide training

Propose and implement a University Policy Infrastructure in partnership with HHR to develop and implement a framework through which University Policies (UP) can be managed and communicated

* Indicates a top goal

*** Plan, guide, and implement organizational and process changes through FAD Forward, VERIP impacts, new investments, and cost-constrained budgets to achieve better business outcomes, increased efficiency, and fulfilled workforce**

Leverage Category Management strategies to grow spend under management, drive cost savings, and mitigate risk. Work with stakeholders to refine plans based on potential shift in priorities due to COVID related budget constraints

*** Assist with planning, implementation, and monitoring of Outside Activities and Interest Reporting (OAIR) and improvements in Faculty Disclosures**

- Partner with OVPR creating University-wide guidance & training on disclosures
- Be a resource for sponsored community on disclosures

*** Provide thought leadership to the University around financial planning and strategy challenges due to COVID-19, including examining historic timelines and providing support around key revenue and expense assumptions**

Advance risk management practices through the identification of alternate risk financing solutions and integration of the insurance and institutional risk management program

Working closely with Schools, Units, and Central Administration, every effort will be made to increase capital project efficiencies and lower costs for construction projects

- CAPS and SP to review procurement practices for construction services, materials, and supplies to identify opportunities to leverage the University's buying power
- Identify best practices to reduce soft costs including the acquiring and managing of professional services from architects and engineers
- Gather and organize information by various space attributes to leverage remote work practices learned during the pandemic

*** Effectively manage Central Bank resources in the context of potential University deficits, capital funding needs, and Bank-funded support during the COVID-19 pandemic**

*** Drive an ongoing focus and continued culture of equity, inclusion, true self, and belonging**

- Create a welcoming and supportive environment that fosters growth and professional fulfillment for all
- Initiate additional actions for diversity sourcing, pipelining, and promotions
- Advance constructive discussions on differences, race, social inequities and injustice in order to improve the work environment

Design and create a refreshed FAD brand identity for communications collateral in support of an enhanced digital presence

Strengthen development and retention activities to support a high quality, diverse workforce

- Focus upon manager capabilities in a virtual/remote/FWA environment
- Conduct, analyze, and implement actions from pulse survey
- Enhance visibility and participation in CWD programs
- Broaden visibility, usage, usability, and documentation for flexible work arrangements for remote work and return to campus
- Continue to build solid program for onboarding new hires remotely

Top 11 Goals

- Complete implementation of all components of B2P platform; promote adoption of B2P functionality including sourcing and contracting tools
- Ad-hoc Reporting—Take a leadership role in the implementation of Oracle as the University-wide ad hoc reporting tool
- Partner with HUIT to design and implement the enhanced reporting capabilities of Oracle Analytics Server
- Plan, guide, and implement organizational and process changes through FAD forward, VERIP impacts, new investments, and cost-constrained budgets to achieve better business outcomes, increased efficiency, and fulfilled workforce
- Assist with planning, implementation, and monitoring of Outside Activities and Interest Reporting (OAIR) and improvements in Faculty Disclosures
- Provide thought leadership to the University around financial planning and strategy challenges due to COVID-19, including examining historic timelines and providing support around key revenue and expense assumptions
- Effectively manage Central Bank resources in the context of potential University deficits, capital funding needs, and Bank-funded support during the COVID-19 pandemic
- Drive an ongoing focus and continued culture of equity, inclusion, true self, and belonging
- Collaboration between SP, CAPS, Campus Services, and Schools to increase M/WBE participation on capital projects, including contractors, suppliers, and professional consultants. Promote and advance the Supplier Diversity Program
- Support and lead Schools and senior leadership with guidance due to COVID pandemic policies, procedures, processes, and regulations. Support University-wide COVID/remote efforts to collaborate on opportunities for expense management, efficiencies, and investment
- Whatever Katie Lapp wants