



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

<p><b>Financial Stewardship:</b> Leadership in a Resource Constrained Environment</p>	<p><b>Business Processes and Technology:</b> Develop Business and Systems Strategies, Plans, and Processes</p>	<p><b>Client Partnership and Engagement:</b> Foster an Environment of Trust and Collaboration</p>	<p><b>Culture and Community:</b> Care and Stewardship of FAD Culture and Values</p>		
<ul style="list-style-type: none"> <li>• Support Phase II of the Strategic Financial Review Project; assist in the implementation of ideas/projects identified in the report and subsequent leadership discussions</li> <li>• Develop preliminary, high-level understanding of Allston funding needs and support ongoing planning for Allston development, including the SEC</li> <li>• Identify best practices for acquiring and managing professional services for architects and engineers (could be cost savings implications)</li> <li>• In partnership with colleagues in the Center and Schools, complete, submit &amp; negotiate the University area Facilities and Administrative (F&amp;A) Proposal</li> <li>• Advance the Institutional Risk Management Program</li> <li>• Advance the analysis of tax reform implications and develop operational plans for implementation; position the Tax team as leader on tax matters University-wide</li> <li>• Prepare for the new technical accounting standards related to leases, revenue disclosures, not-for-profit reporting and pension expense</li> <li>• Update Liquidity and Central Bank risk assessment</li> <li>• Assess opportunities and implement strategies to increase payment revenue (e.g., early payment discounts, Citibank card programs)</li> <li>• Enhance sponsored monitoring of key internal controls</li> <li>• Focus on opportunities for transparency across the Schools and Units, to encourage sharing of best practices and identify opportunities and challenges</li> </ul>	<ul style="list-style-type: none"> <li>• Advance Strategic Procurement Initiatives, including implementing new systems and business processes related to Buy to Pay; category management strategies; developing and implementing a University-wide contract management strategy</li> <li>• Implement electronic I-9/E-Verify pilot</li> <li>• Strengthen FAD and University-wide measurement capacities and focus, including enhanced data analytics</li> <li>• Examine the relationship between current planning processes (i.e., MYFP and budget) to clarify goals and rationalize effort</li> <li>• In collaboration with the Schools, advance University-wide initiatives including Position Tracking and Reporting, Research Compliance, Revenue Management Systems and Ad Hoc Reporting</li> </ul>	<ul style="list-style-type: none"> <li>• Assess viability of different student loan models for Schools; help establish a plan for FY19 cycle that reduces graduate student loan burden</li> <li>• Procure external expertise to educate university leadership (e.g., rating agency or investment bank to a Fin Deans meeting)</li> <li>• Assess Harvard's policy environment and present options for rationalization</li> <li>• Develop a master space plan for FAD units in 1033; enhance environment through Activity-Based Workplace Design</li> <li>• Whatever Katie Lapp wants</li> </ul>	<ul style="list-style-type: none"> <li>• Recruit, develop and retain top talent throughout the organization; facilitate talent review and planning</li> <li>• Support FAD-wide and unit goals for Diversity, Inclusion and Belonging; build greater trust in senior leadership</li> </ul>		
<p>● INDICATES A TOP GOAL</p>					
<table border="1"> <thead> <tr> <th data-bbox="456 1276 1534 1318"> <p><b>The Top Goals</b></p> </th> </tr> </thead> <tbody> <tr> <td data-bbox="456 1318 1534 1978"> <ul style="list-style-type: none"> <li>• Support Phase II of the Strategic Financial Review Project; assist in the implementation of ideas/projects identified in the report and subsequent leadership discussions</li> <li>• Develop preliminary, high-level understanding of Allston funding needs and support ongoing planning for Allston development, including the SEC</li> <li>• Advance Strategic Procurement Initiatives, including implementing new systems and business processes related to Buy to Pay; enhancing category management strategies; developing and implementing a University-wide contract management strategy</li> <li>• In partnership with colleagues in the Center and Schools, complete, submit &amp; negotiate the University area Facilities and Administrative (F&amp;A) Proposal</li> <li>• Retain, develop and recruit top talent throughout the organization; facilitate talent review, development and planning</li> <li>• Support FAD-wide and unit goals for Diversity, Belonging and Inclusion; build greater trust in senior leadership</li> <li>• In collaboration with the Schools, advance University-wide initiatives including Position Tracking and Reporting, Research Compliance, Revenue Management Systems and Ad Hoc Reporting</li> <li>• Advance the analysis of tax reform implications and develop operational plans for implementation; position the Tax team as leader on tax matters University-wide</li> <li>• Update Liquidity and Central Bank risk assessment</li> <li>• Assess Harvard's policy environment and present options for rationalization</li> <li>• Strengthen FAD and University-wide measurement capacities and focus, including enhanced data analytics</li> <li>• Whatever Katie Lapp wants</li> </ul> </td> </tr> </tbody> </table>				<p><b>The Top Goals</b></p>	<ul style="list-style-type: none"> <li>• Support Phase II of the Strategic Financial Review Project; assist in the implementation of ideas/projects identified in the report and subsequent leadership discussions</li> <li>• Develop preliminary, high-level understanding of Allston funding needs and support ongoing planning for Allston development, including the SEC</li> <li>• Advance Strategic Procurement Initiatives, including implementing new systems and business processes related to Buy to Pay; enhancing category management strategies; developing and implementing a University-wide contract management strategy</li> <li>• In partnership with colleagues in the Center and Schools, complete, submit &amp; negotiate the University area Facilities and Administrative (F&amp;A) Proposal</li> <li>• Retain, develop and recruit top talent throughout the organization; facilitate talent review, development and planning</li> <li>• Support FAD-wide and unit goals for Diversity, Belonging and Inclusion; build greater trust in senior leadership</li> <li>• In collaboration with the Schools, advance University-wide initiatives including Position Tracking and Reporting, Research Compliance, Revenue Management Systems and Ad Hoc Reporting</li> <li>• Advance the analysis of tax reform implications and develop operational plans for implementation; position the Tax team as leader on tax matters University-wide</li> <li>• Update Liquidity and Central Bank risk assessment</li> <li>• Assess Harvard's policy environment and present options for rationalization</li> <li>• Strengthen FAD and University-wide measurement capacities and focus, including enhanced data analytics</li> <li>• Whatever Katie Lapp wants</li> </ul>
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