



OneFinance Strategic Initiative

EXECUTIVE SUMMARY

OneFinance North Star

To enable Yale’s mission, simplify and standardize financial services in order to make life easier where everyone has a role in building a strong culture of financial integrity, insight and stewardship of Yale resources.

PROGRAM GOALS

- ❑ **Connecting:** Build a more unified finance function campus-wide
- ❑ **Simplifying:** Simplify and standardize financial processes, supported by better reporting and analytics
- ❑ **Monitoring:** Implement central monitoring (data, site visits) for quality and controls
- ❑ **Training:** Train and develop financial professionals campus-wide
- ❑ **Culture:** Strengthen a culture of integrity and accountability among faculty and staff

KEY DELIVERABLES

- Risk Assessment**
of processes to inform priorities
- Standard Operating Procedures (SOPs)**
Streamlined, more effective, efficient
- Reporting & Analytics**
Improved access to data, insights
- Compliance Monitoring**
Fraud detection, quality assurance
- Financial Training Program**
Why, How, What – Hard and Soft
- Operating Model**
Connected, clear, aligned roles, structure
- Stronger Culture**
Service, Integrity, Insight, Compliance

BENEFITS

- ❑ Enhances institutional reputation
- ❑ Strengthen ability to attract and recruit high quality talent
- ❑ Improves financial stewardship and compliance
- ❑ Establishes expectations to hold people accountable
- ❑ Facilitates your work; reduces barriers to achieve your expectations; informs your decisions
- ❑ Positively impacts your ability to do research, educate and provide service and confidence in financial management
- ❑ Protects and supports you in how you get your job done and in doing the right thing; a positive work environment

PROGRAM TEAM

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