**EXECUTIVE SUMMARY**

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.

<table>
<thead>
<tr>
<th>PROGRAM GOALS</th>
<th>FOCUS AREAS</th>
<th>BENEFITS</th>
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</thead>
<tbody>
<tr>
<td>Connecting: Build a more unified finance function campus-wide</td>
<td>Source to Pay (S2P)</td>
<td>Enhances institutional reputation</td>
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<tr>
<td>Simplifying: Simplify and standardize financial processes, supported by better reporting and analytics</td>
<td>Standard Operating Procedures (SOPs)</td>
<td>Strengthens ability to attract and recruit high quality talent</td>
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<tr>
<td>Monitoring: Implement central monitoring (data, site visits) for quality and controls</td>
<td>Finance Training</td>
<td>Improves financial stewardship and compliance</td>
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<tr>
<td>Training: Train and develop financial professionals campus-wide</td>
<td>Central Monitoring (Dashboards, Central Reviews)</td>
<td>Establishes expectations to hold people accountable</td>
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<td>Culture: Strengthen a culture of integrity and accountability among faculty and staff</td>
<td>Payroll</td>
<td>Facilitates your work; reduces barriers to achieve your expectations; informs your decisions</td>
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<td></td>
<td>Other Financial Processes Based on an Assessment of Risk, User Impact, Cost-Benefit</td>
<td>Positively impacts your ability to do research, educate and provide service and confidence in financial management</td>
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</tbody>
</table>

**BENEFITS**

- Enhances institutional reputation
- Strengthens ability to attract and recruit high quality talent
- Improves financial stewardship and compliance
- Establishes expectations to hold people accountable
- 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**

**Program Sponsors**
- Stephen Murphy
- Arnim Donites
- Shannon Smith

**Steering Committee**
- Jess Caponigro
- Pamela Caudill
- Joseph Crosby
- Arnim Donites
- Jill Ely
- Steve Gaudreau
- Rosa Genovesi
- Laura Gianni
- Susannah Gobbi
- Jessica Kunstman
- Dana Lipnickas
- Frank Mathew
- Lisa Merola-Grimm
- Stephen Murphy
- Ruth Philo
- Brian Rebeschi
- Shannon Smith
- Lisa Vami

**Program Leads**
- Brian Rebeschi
- Lisa Vami

**Program Manager**
- Dana Lipnickas

**Project Managers**
- Stephanie Avalone
- Chuck Benjamin
- Liz Burrell
- Paul Harkins
- Chris Watkins

**Change Management**
- Rosa Genovesi
- John Sudenfield

**Process Improvement & Enablement**
- James Hurling
- Tom Maddalena

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