

Strategic Treasury: Two Cohesive Goals

- Impacting the Enterprise
 - Personal Growth

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Impact the Enterprise

- Academic Plan (Understand the Goals).
- Three legs of power (Faculty, Alumni, Governing Board).
- If you are a Research University.
- If you have a Medical Center.
- Be the “Go To” Person.
- Seat at the Table.

What are the Pathways

- Breakfast or lunch with Deans, VP's and other key people.
- Offer to help and then follow through.
- Volunteer for committees.
- Volunteer for special assignments.
- Volunteer for special positions.
- Teaching Courses, Seminars, Etc.

What are the Pathways (Continued)

- Pay attention to diversity issues.
- Attend faculty events.
- Be thoughtful with your relationships.
- Strive for atypical achievements.

Provost and Academic Affairs

- Our Friend.
- Powerful?
- Very complex organizational structure.
- Budget responsibility?
- Computing?

Research

- Complex facilities.
- Grants (NSF and NIH).
- Research Parks.
- Technology transfer and licensing.
- Royalties from patents.
- Private stock gifts from new seed companies.

Medicine and Medical Centers

- March of the White Coats.
- Very complex facilities and equipment.
- Risk Management and Self Insurance issues.
- Practice Plans.

Agriculture

- Land Grant Institution?
- Co-op extension.
- Agricultural research.
- Largest industry in many States.
- Ubiquitous.

Student Affairs

- Students the Customer?
- Help with residence halls.
- Help with athletics.
- Parents.
- Special Venues (Arenas, hotels, etc).
- Student Health Center.

Development

- Alumni.
- Donors.
- Help Development Officers.
- Publications.
- Speak at events.
- Help with Gift Processing.
- Help with Campaign Planning.
- Help with Foundation.

Communications and Public Relations

- Your treasury publications (Be strategic).
- Help communication people with treasury facts.
- Push to get your message across.
- Push to get your kudos.
- Speaking engagements.
- Help the speech writers.

Legislative

- Help with factual treasury information.
- Testify before legislative committees.
- Write white papers.
- Circulation of draft documents for comment.

Legal and General Counsel

- Help on technical issues.
- Issues often involve donors and alumni.
- Senior people appreciate help in this area.

Finance and Administrative Services

- Facilities.
- Financing.
- Investments.
- Leasing.
- Internal Banks.
- Quasi endowment.
- Risk Assessment.

Summary

- Understand the Enterprise Goals.
- Network and Communicate.
- Volunteer Outside your Comfort Zone.
- Be thoughtful with your Relationships.
- Strive for Atypical Achievements.
- Be the “Go To” Person.