

FINANCE & ADMINISTRATION

**Monthly Snapshot
November 2023**



Stony Brook University

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FINANCE & ADMINISTRATION

MISSION

Finance & Administration serves to support, fulfill and advance the mission of Stony Brook University by innovatively, prudently and collaboratively delivering financial and administrative services to the University community and constituents.

By leveraging our operational expertise and fostering a supportive yet practical framework, Finance & Administration will deliver dynamic high-quality services, timely and responsive solutions and judicious guidance in order to enable reliable outcomes that are rooted in transparency, accountability and stewardship.



GUIDING PRINCIPLES



CONTINUOUS IMPROVEMENT

Understand needs, develop forward-thinking solutions, and embody a culture that strives to continuously be better in each and everything we do.



COLLABORATION

Maintain an ethos that supports collaborative work to build better experiences, solve problems and deliver improvements.



DIVERSITY & INCLUSIVITY

Create a positive and productive environment where everyone brings themselves, as they are, to do their best work. Embrace new ideas, creative solutions and unique viewpoints for inclusive problem solving and decision making.



INTEGRITY

Be honest, dedicated and accountable for our wins and also for our losses. Establish trust by delivering guidance, instruction and decisions with transparency and clarity.



VISIONARY

Embody innovation and pursue ongoing growth as visionary leaders in order to implement smart solutions and best practices.

FINANCE & ADMINISTRATION

GOALS

- 1.** Listen, understand and balance the University's dynamic needs. Match resources with priorities through a supportive operational model.
- 2.** Operate in ways that promote transparency, sustainability, professionalism, stewardship and leadership.
- 3.** Provide an economic, operating and technological framework where each unit can achieve its goals.
- 4.** Ensure processes and systems provide meaningful data to units in order to empower informed, localized decision-making.
- 5.** Treat all constituents with respect, civility and professionalism. Demonstrate ethical and financial integrity driven by a desire to improve customer satisfaction.



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FINANCE & ADMINISTRATION

STRATEGIC DIRECTIONS

IT IS OUR HOPE that the 1,100+ employees within F&A will earnestly endeavor to utilize these strategic directions as navigational beacons to guide, direct and depend upon when making individual decisions in their work.

This overarching plan is supplemented with individual plans developed by each unit within F&A that incorporates their own unique strategies, tactics, measurable goals and operational metrics in support of their own area, as well as the University's mission and strategic endeavors both now and in the future.

STRATEGIC DIRECTIONS

1

Protect and enhance the **University's assets**, including financial, administrative, technological, and human capital.

Goals Addressed: 1, 2, 3

2

Achieve financial value for the **University** by collaborating and providing actionable data that allows partners to make sound financial decisions.

Goals Addressed: 2, 4, 5

3

Create operational frameworks that **support individual unit decision making**. Remain nimble and adaptive as priorities and resources change.

Goals Addressed: 1, 2, 3, 4

4

Use technology to **improve services, systems and processes** that are used by units to support strategies and objectives.

Goals Addressed: 3, 4, 5

5

Establish and maintain an environment with fluid processes that lead to efficient management and request fulfillment. **Deliver excellent service, provide value and lend operational support.**

Goals Addressed: 1, 2, 3, 4, 5

6

Acknowledge the skills and experiences that each of us bring to the workplace and **promote a learning-oriented culture that supports and elevates our talented F&A teammates** through opportunities for career development.

Goals Addressed: 2, 5

7

Keep sustainability **at the forefront of decision making** by increasing awareness and adoption of sustainable practices in daily business operations and technological infrastructures.

Goals Addressed: 2, 3

FINANCE & ADMINISTRATION

PROJECT LIST

Key projects and strategic initiatives from each of the areas which serve Finance & Administration.



Enterprise Resource Planning (ERP) Implementation

Project Manager: Heather McLaughlin

Estimated Completion: Multi-Year

IMPACTED F&A AREAS: Budget, Financial Planning & Analysis, DoIT, Enterprise Risk Management, Finance, Human Resource Services

STATUS: ● Pre-Implementation Work

SCOPE:

Implement a new cloud-based Enterprise Resource Planning (ERP) system to support BFP&A, Finance and HR areas.

Modules to be implemented include Enterprise Data Management (EDM), Enterprise Performance Management (EPM), Finance and Human Capital Management (HCM).

Read more at stonybrook.edu/WolfieONE

STATUS:

- Sponsors and Steering Committee Workshops completed
- Current state documentation in-progress
- Project team allocations planned and shared with Implementation partner
- Other SBU Project timelines shared with Implementation partner, highlighting potential staffing impacts to WolfieONE

RISKS:

- 80/20 rule for configuration vs out of the box functionality
- Available resources
- Other special/internal competing projects assigned to project staff
- Agreement on Milestones and payment deliverables needed

PLANNED ACTIVITIES:

- Chart of Accounts workshops continue
- Current state documentation completed
- Plan to outline desired state requirements
- Initial timeline created and distributed to project team

Upgrade of the DoIT Website

Project Manager: Heather McLaughlin

Estimated Completion: 2024

IMPACTED F&A AREAS: DoIT

STATUS: ● Active

SCOPE:

Current platform will stop being supported in November 2023. This means no more community-based updates like bug fixes, new features, or security updates. This project will focus on upgrading to the next supported version of the platform.

This is not a content redesign.

STATUS:

- Drupal training for Content creators took place
- Team building out content in new Platform

RISKS:

- Project resources are assigned to multiple projects; should another project get extended, the completion of this project could surpass the planned implementation

PLANNED ACTIVITIES:

- Website build continues
- Project plan revisions agreed upon and published

myTIME: Time and Attendance System

Project Manager: John Passaro

Estimated Completion: April 2024

IMPACTED F&A AREAS: Human Resource Services, DoIT

STATUS: ● Active

SCOPE:

The new Time and Attendance Reporting System offers State and RF employees a modern, paperless approach to time reporting, benefiting all employees. Other enhancements include:

- Modern interface for time reporting activities
- Real-time visibility to accruals and time off balances
- Ability and empowerment for faculty and staff to report their own time
- Built-in compliance to rules, regulations and accrual policies

STATUS:

- Third campus-wide communication was sent
- Working with Labor Relations to communicate timekeeping changes for union employees
- Working with the Change Management team on strategy and process for change management throughout the project
- Liaising with CPDC on setting up new timeclocks

RISKS:

- If any resources (functional or technical) are out for an extended period, it could impact the project timeline
- If the vendor does not secure an Integration Specialist in a timely manner, it may push the remaining project tasks out past their current due dates
- If more timeclocks are required over the current amount procured (25), the project team will have to put in a change request for more funding to purchase additional clocks

PLANNED ACTIVITIES:

- Prepare next campus-wide communication
- Continue discussing timeclock placements and maintenance
- Begin communicating timeclock usage to union representatives
- Continue scheduling and conducting solution development workshops
- Continue system development discussions

HR Now Modernization Initiative

Project Manager: TBA

Estimated Completion: TBA

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IMPACTED F&A AREAS: Human Resource Services

STATUS: ● Active

SCOPE:

Collaborative campus initiative aimed at enhancing the employee experience and positioning the University for future success through expanded HR services, enhanced systems, and delivery of HR services across the campus.

STATUS:

- A search is underway for a new AVP of HR Business Partnerships and Services to oversee the network of business partners, which are under the new service delivery model. We've also hired new staff within our training unit, engagement and HR information systems. Welcome Patrick, Anthony and Reshma! The Biz Library soft launch has started with HR piloting the virtual learning offerings.

RISKS:

- Need for additional resources to support training and engagement programming

PLANNED ACTIVITIES:

- For more information on new and ongoing HR Now enhancements and to keep up-to-date on their progress, visit the HR Now Implementation Dashboard.

Construction Project Management System

Project Manager: Jim Gonzalez

Estimated Completion: TBA

IMPACTED F&A AREAS: Facilities & Services, DoIT

STATUS: ● Active

SCOPE:

Purchase and implement a construction project management software that will be used by Campus Planning, Design & Construction. Currently, six separate systems are used to track CPDC projects; all historical data will be merged and aggregated into one new software platform.

STATUS:

- Vendor has been selected
- All reference documents have been submitted to procurement

RISKS:

- n/a

PLANNED ACTIVITIES:

- Vendor kickoff

Irrigation Controller Upgrade

Project Manager: Christian Guzman

Estimated Completion: December 2023

IMPACTED F&A AREAS: Facilities & Services

STATUS: ● Active

SCOPE:

Upgrade all campus irrigation controllers to smart-enabled controllers with remote programming access. The use of smart-enabled controllers will allow for greater control over watering schedules. For example, new units will monitor the weather for rain and not activate when rain is expected. This will lead to an overall reduction of water use on campus.

STATUS:

- Irrigation Controller installations began in Fall 2022
- 21 controllers fully installed and added to management platform
- 36 controllers installed and awaiting network connection
- 16 controllers awaiting installation

RISKS:

- n/a

PLANNED ACTIVITIES:

- Programming of watering schedules continues
- Schedule installation of 16 irrigation controllers (underway)
- Schedule network installations for 36 locations (underway)

Lighting Upgrade (Phase 2)

Project Manager: Christian Guzman

Estimated Completion: TBA

IMPACTED F&A AREAS: Facilities & Services

STATUS: ● Active

SCOPE:

Replace existing fluorescent 2' x 2' fixtures with LED fixtures to enhance lighting in Humanities. Replace existing metal halide exterior fixtures with LED fixtures to enhance outdoor lighting around Nobel Hall.

RISKS:

- n/a

STATUS:

- Currently replacing fixtures in Humanities
- Currently scheduling fixture replacement timeline for Nobel Hall

PLANNED ACTIVITIES:

- Replace 170 fixtures in Humanities
- Replace 57 exterior fixtures around Nobel Hall

OSI PI Data Server

Project Manager: Tom Lanzilotta

Estimated Completion: TBA

IMPACTED F&A AREAS: Facilities & Services, DoIT

STATUS: ● Active

SCOPE:

Energy Management and the Division of Information Technology, Enterprise Applications, and Integrations departments are working on implementing a data collection server that will serve as a "warehouse" for data from multiple BMS/EMS systems campus-wide. This will enable the team to make more informed decisions on where to focus resources to improve efficiency.

STATUS:

- The Schneider Electric energy management system is 20% integrated
- Building management systems at West Side Dining and the Campus Rec Center are currently being integrated
- Next step is to integrate the remainder of the Schneider energy management system

RISKS:

- Lack of human capital to implement on time
- Funding for continued annual cost of approximately \$30K

PLANNED ACTIVITIES:

- Pull datapoints in from WSD Carrier system (completed)
- Pull datapoints in from Rec Center Trane system
- Pull datapoints in from Siemens BMS once upgraded to Desigo
- Pull datapoints in from JCI BMS once upgraded
- Pull datapoints in from West and East Plants
- Pull datapoints from Class schedule system 25Live
- Pull datapoints from WiFi
- Upgrade all Modbus maps in the ION system then pull datapoints (work in progress)
- Create informative dashboards for both the HVAC and EM teams

Kitchen Hood Controllers at West Side Dining

Project Manager: Tom Lanzilotta

Estimated Completion: August 2023

IMPACTED F&A AREAS: Facilities & Services, Faculty Student Association

STATUS: ● Active

SCOPE:

The kitchen exhaust hoods at WSD were fitted with new sensors and controllers to enable ramping up and down the exhaust fans to match the intensity of the cooking below them. When cooking is active, heat and smoke are detected which in turn, ramps up the exhaust. When no cooking is detected, the fans are set to a minimum. This conserves a large amount of electrical and thermal energy.

STATUS:

- The equipment has been installed and is operational

RISKS:

- n/a

PLANNED ACTIVITIES:

- Networking to install data drops (complete)
- Carrier to link the hood controller into the Building Management System (BMS) (on hold)
- Enable schedule setbacks to conserve energy in conjunction with SBU Energy Management (pending)

EOC Operations and Business Continuity Software

Project Manager: Zachary Lee and Steven Wong

Estimated Completion: August 2024

IMPACTED F&A AREAS: Enterprise Risk Management

STATUS: ● Active

SCOPE:

The SBU-OEM Emergency Operations Center is a central location for managing all campus emergencies. With an increase in the campus population, and the complexity of our operations, there is a need for an updated integrated software system to streamline the monitoring of day-to-day campus operations the coordination of emergency operations.

A web-based platform used to manage planning, response, and recovery will assist in the development and execution of master Emergency Operations Plan and Continuity of Operations Plans, while also improving communications and workflow during activations.

STATUS:

- SB Common Data Integration: People (via Peoplesoft) data setup and testing completed. SFTP integration in progress
- Hazard Vulnerability Assessment (HVA)/Business Continuity (BC)/Continuity of Operations (COOP): Div. of Enterprise Risk Management alpha test in progress
- Incident Management: First round of configuration complete and testing in progress
- Project Management Module: Demonstration completed by vendor, currently evaluating for configuration changes

RISKS:

- Lack of common virtual collaborative meeting place inhibits critical communication related to campus emergencies
- Current business continuity plan building tool is antiquated and lacking elements that are important for a comprehensive emergency and continuity plan

PLANNED ACTIVITIES:

- 25 Live and EH&S Safety Management System (SMS) scope integration tabled pending hiring of new EM staff, Expected Q4 2023
- HVA and BC/COOP module beta test and full rollout planned to start October/November 2023
- Building Emergency Plan demonstration and planning to begin October 2023

Safety Management System

Project Manager: Gary Kaczmarczyk and Steven Wong

Estimated Completion: Fall 2023

IMPACTED F&A AREAS: Enterprise Risk Management

STATUS: ● Active

SCOPE:

The SMS is a new software database solution that is designed to manage risk, ensure safety and compliance, and improve efficiency for laboratory and research safety, hazardous materials management, worker safety programs, fire safety and emergency response, and will facilitate regulatory required training, inspections and compliance activities.

STATUS:

- Integration of SBU IT Systems: Completed integration and verification of SBU people and building data and IT systems. People data from SB affiliate hospitals added into data import.
- Laboratory Registration: Beta testing completed. Currently updating door-signage and changing several questions. Rollout imminent.
- Learning Management System (LMS): System brought into production and campus announcement sent on 9/26/23. Working to import historical data.
- Radiation Safety Module: Working with SMS provider to determine how the program can be updated to accommodate department needs.

RISKS:

- Funding for Annual Fees: The initial SMS contract will be paid out of Research funds that were rolled over from previous years. A source of additional funding in the amount of \$100K is needed for annual fees.
- Staffing: EH&S will require an additional Lab Safety Specialist (requested in FY 22/23) to support implementation of Chemical Inventories
- Departments will likely request support for chemical inventory management

PLANNED ACTIVITIES:

- Learning Management System (LMS): Complete integration of historical data from Blackboard/PeopleSoft by 10/30/23.
- Laboratory Registration: Complete hazard assessment questions based on new door sign requirements and launch by 10/30/23.
- Chemical Inventory Management: Develop and implementation plan for Chemical Inventory Management module.
- Incident Reporting: Plan framework for incident reporting module
- Equipment Inventory & Inspections: Begin planning and testing equipment inventory and inspections for each EH&S program.
- Internship Support: Develop plan which will incorporate student interns to provide lab registration and inventory assistance.

Parking Management Software

Project Manager: Kendra Violet and Donna Skidmore

Estimated Completion: January 2023

IMPACTED F&A AREAS: Enterprise Risk Management

STATUS: ● Active

SCOPE:

Implement a new parking and enforcement system to replace end-of-life systems and support new initiatives. Components include:

- Permit Software: Allows permits to be allocated in a variety of options by classification of customers. Current software has limitations regarding the types of permits that can be allocated.
- Enforcement Software/Hardware- Seamlessly integrates a customer's information for online payments. Allows for online appeals. Provides enforcement the opportunity to issue one-time warning citations for individuals that have never had a citation.
- Mobile/Fixed License Plate Recognition (LPR) - Uses license plates to verify payment for parking through permit, meter, reservation or mobile payments (eliminates physical hangtags). Increases compliance with parking regulations; thereby ensuring adequate parking for all customers.

STATUS:

- Vendor selected and contract reviewed by SBU General Counsel
- Contract at vendor for signature

RISKS:

- Implementation dependent on other areas that may have large projects occurring at the same time
- Delayed implementation can impact any changes to current parking operations
- Budget

PLANNED ACTIVITIES:

- On-going meetings with various campus partners to understand current platform structure to prepare for implementation
- Review of current policies and creation of new policies based on system changes
- Update to website based on changes

Walmart Enhancements and Upgrades

Project Manager: Sean Dermody

Estimated Completion: June 2024

IMPACTED F&A AREAS: Finance

STATUS: ● Active

SCOPE:

Enhance existing functionality within the Walmart System to improve operational efficiencies and support cost savings. Leverage new functionality from Jaggaer regular release upgrades as they become available.

STATUS:

- The 2023-24 Enhancement Plan has been finalized and identifies 25 projects aligned with Procurement's Strategic Priorities
- Projects recently finished or currently underway include:
 - New Hosted Catalog for General Welding Supply Company, a supplier for Tank Gas (Completed)
 - A new Help Center for submitting new supplier requests and helpdesk cases (In Progress)
 - A new process for integrating Information Security and Electronic Information Accessibility reviews into the requisition process (In Progress)

RISKS:

- System integration issues to Oracle / SUNY diverting resources from enhancement plan efforts
- SBU staff resource constraints to test and implement enhancements (same resources manage daily help desk issues and testing)
- SUNY staff resource constraints to support enhancement plans
- Staff support requirements for the new ERP system implementation

PLANNED ACTIVITIES:

- Jaggaer will be updated to version 23.3 on Monday, 11/6
 - The System will be unavailable from Friday, 11/3 at 9:00 PM to Sunday, 11/5 at 12:00 PM for the promotion of the upgrade
 - The upgrade includes minor changes to improve system performance and enhance the shopping experience
- Upcoming identified in the 2023-24 Enhancement Plan:
 - Contract (AC-340) Integration in Walmart
 - Digital Capture (new electronic invoicing scanning solution)
 - New forms for supporting RF Funded Tuition Payments and Critic Teacher Stipends

Procurement Website Refresh

Project Manager: Carmen Gonzalez

Estimated Completion: March 2024

IMPACTED F&A AREAS: Finance

STATUS: ● Active

SCOPE:

Launched in summer 2022 to consolidate and refresh the multiple Procurement websites to improve customer experience. Websites in scope include Procurement, Central Receiving, Property Control, Mail Services, WolfMart, Travel & Card Programs.

STATUS:

- New Procurement website launched September 18, 2023
- Progress to date:
 - The Central Services website is completed (consolidated Mail Services, Property Control and Central Receiving)
 - Completed the redesigned Procurement website map (moved WolfMart website into this new site)
 - The students made a major update to the 'forms' no longer needed as many are out-of-date and moved to electronic formats

RISKS:

- Student schedules cause project delays
- Properly 'decommissioning' all of the old website links

PLANNED ACTIVITIES:

- 2 student assistants will begin working on the Travel & Card Programs website to update the 'look and feel' to be the same as the Procurement and Central Services sites

Concur Travel and Expense Implementation

Project Manager: Gerardina Paduano

Estimated Completion: TBA

IMPACTED F&A AREAS: Finance

STATUS: ● Active

SCOPE:

Integrate Concur at Stony Brook University, Stony Brook Hospital and LISVH for all employee travel-related expense transactions and reservations.

STATUS:

- AI auditing tool has been implemented
- Registry" policy regarding non-SBU funded travel, in partnership with Enterprise Risk Management, has been implemented

RISKS:

- Compliance, adoption and enforceability of program with SB travelers

PLANNED ACTIVITIES:

- RF Non-Travel reimbursements coming to Concur; date TBD
- SBF/Concur: Policy "design sessions" scheduled for early September

Procurement University Savings

Project Manager: Frank Bowden

Estimated Completion: June 2024

IMPACTED F&A AREAS: Finance

STATUS: ● Active

SCOPE:

Increase cost savings realized during purchasing process (e.g. costs reduction, costs avoidance and rebates).

This includes savings achieved through sourcing events (RFP, RFQ, IFB, etc.), re-negotiation of contract pricing as well as terms and conditions, administrative and operational process improvements, and technology enhancements such as automation.

STATUS:

- Cost savings activity for FY-2023/24 kicked off on July 1, 2023
- Projected FY2023/24 Quarterly Costs Savings run rate:
 - July 1, 2023, to September 30, 2023 - \$2.5MM
 - October 1, 2023, to December 31, 2023 - \$5.0 MM
 - January 1, 2024 , to March 30, 2024 - \$7.5 MM
 - April 1, 2024, to June 30, 2024 - \$10.0 MM
- Achieved Quarterly Costs Savings run rate (actual):
 - July 1, 2023, to September 30, 2023 - \$2,528,049.21

RISKS:

- Ineffective collaboration with internal and external stakeholders resulting in missed costs savings targets
- Stakeholders not procuring off of the WolfMart catalogs for best pricing

PLANNED ACTIVITIES:

- Created and rolled out new streamlined version of the Savings Tracker in June 2023
- Met with entire Sourcing team and provided an overview of the importance of costs savings, the different types of costs savings and the announcement of the new savings tracker in June 2023
- Review and validate costs savings on a monthly basis
- Report on Quarterly Costs Savings run rate

FY23/24 Annual Budget Planning Cycle

Project Manager: Budget, Financial Planning & Analysis

Estimated Completion: September 1, 2023

IMPACTED F&A AREAS: BFP&A, DoIT, Enterprise Risk Management, Facilities & Services, Finance, Human Resource Services

STATUS: ● Active

SCOPE:

- The FY 23/24 Budget Cycle is underway. Dedicated BFP&A Analysts collaborated with the 15 VP Areas and VPCs to review the Quarter 1 reports and Multi-Year Templates during October. A few carry over meetings are slated for November. The next Mid-Year Template review is scheduled for the end of February.
- The annual Budget to Actuals workstream is now in progress. BFP&A and Accounting are collaborating to accurately report FY 22/23 Actuals vs. FY 23/24 Budget to be published on the University BFP&A website.
- The ERP implementation project is underway and the BFP&A team is currently evaluating the scope of work and engaging with Deloitte partners.

RISKS:

- n/a

STATUS:

- FY 23/24 Budget Updates: Form 1/FMS was posted on October 18, 2023 and VP Areas have been notified.
- Prioritized Funding for Unbudgeted Initiatives (PFUI): The Prioritized Funding for Unbudgeted Initiatives (PFUI) is designated one-time fiscal funding that will be used for emergency, time-sensitive requests only. The next scheduled Quarterly PFUI meeting is scheduled in January 2024. Please have all PFUI requests submitted by January 19, 2024. Learn about eligibility and guidelines for FY 2023/24 on the Policies and Forms page.

PLANNED ACTIVITIES:

- FY 24/25 Budget planning in development; CBM is scheduled to open on January 15, 2024 and will close on March 15, 2023.
- Monthly VPC meetings have been scheduled through 2024 to increase cross-communication between BFP&A and the VP Areas.

Additional Project-Related Resources

- **Budget Financial Planning & Analysis:** PFUI Information
- **Division of Information Technology:** Enterprise Project Management website
- **Facilities & Services:** Active Construction Projects
- **Human Resource Services:** HR Now website
- **Procurement:** Concur website