FINANCE & ADMINISTRATION

Monthly Snapshot
August 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.

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: Tom Ballis
Estimated Completion: TBA

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).

STATUS:
- Vendor contract has been executed
- Implementation Partner has been selected
- Legal teams have reviewed contract
- Agreement is with the OSC

RISKS:
- Budgeting this initiative
- Functional support and availability
- Staffing

PLANNED ACTIVITIES:
- Continue pre-implementation training
- Continue socializing initiative with campus leadership
- Establish governance structure for project
- Initial review of existing Chart of Accounts and reports being generated

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 support has been extended past the Fall of 2023
- Website build continues
- Team was redirected to the ITSM project, currently assessing the impact to the timeline

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:
- Team training and content creation
- Website build continues

myTIME: Time and Attendance System
Project Manager: John Passaro
Estimated Completion: December 2023

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:
- 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 various departments on their timeclock needs
- Working with the vendor on development activities
- Sent second campus-wide communication

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:
- Begin to prepare third campus-wide communication
- Continue discussing the need for additional timeclocks and possibly purchase more
- Begin communicating timeclock usage to union representatives
- Continue scheduling and conducting integration meetings
- Continue system development discussions

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:
- Started implementation phase which involves socializing recommended projects/programs to impacted stakeholders
- Met with HR Business Partners (HRBP) to discuss new distributed services/HRBP model and review anticipated duties and responsibilities
- Actualizing projects in order of practicability, creating various working groups to begin socializing and implementing recommendations.
- Presented project updates to the Cabinet, the Deans and the Senior Academic Administration

RISKS:
- Need for additional resources to support training and engagement programming

PLANNED ACTIVITIES:
- Finalize the hiring of a Director, Culture & Organizational Development
- Finalize the hiring of a Trainer
- Procurement for Biz Library, the e-learning platform has been finalized. Implementation talks will begin in the coming weeks.

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:
- Rating sheets have been submitted to Procurement

RISKS:
- n/a

PLANNED ACTIVITIES:
- Announce vendor selection

Project Manager: Christian Guzman
Estimated Completion: September 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
- 16 controllers fully installed and added to management platform
- 39 controllers installed and awaiting network connection
- 18 controllers awaiting installation

RISKS:
- n/a

PLANNED ACTIVITIES:
- Programming of watering schedules continues
- Schedule installation of 18 irrigation controllers (underway)
- Schedule network installations for 39 locations (underway)

Lighting Upgrade (Phase 1)

Project Manager: Christian Guzman

Estimated Completion: August 2023

IMPACTED F&A AREAS: Facilities & Services
STATUS: ● Active

SCOPE:
Replace existing fluorescent 2' x 2' fixtures with LED fixtures to enhance lighting in Frey Hall, Harriman Hall, Melville Library, Physics, Scan Center, Sports Complex, Staller Center and Sullivan Hall.

STATUS:
- Project completed as of August 2023
- All 227 fixtures have been replaced throughout Frey Hall, Harriman Hall, Melville Library, Physics, Scan Center, Sports Complex and Staller Center

RISKS:
- n/a

PLANNED ACTIVITIES:
- n/a

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.

STATUS:
- Currently scheduling fixture replacement timeline

RISKS:
- n/a

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

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) (work in progress)
- Enable schedule setbacks to conserve energy in conjunction with SBU Energy Management (pending)

EOC Operations and Business Continuity Software
Project Manager: Colby Rowe and Steven Wong
Estimated Completion: June 2023

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: Completed integration of buildings and have uploaded sample data sets for organizational structure and people to be processed by Veoci. Formal people (via Peoplesoft) integration to follow. Defining scope of work with integration to 25 Live and EH&S Safety Management System (SMS).
- Training: Fundamentals training completed by all administrators
- Hazard Vulnerability Assessment (HVA)/Business Continuity (BC)/Continuity of Operations (COOP): Completed HVA data import and review of BC/COOP forms, workflow, and reporting
- Incident Management: Completed demonstration of Incident Management module and received implementation guide from Veoci

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:
- Peoplesoft people data integration to be completed by end of August 2023
- Scope of work and plan for 25 Live and SMS integrations completed by end of August 2023
- HVA and BC/COOP module pre-alpha testing followed by division-wide alpha test starting with Div. of Enterprise Risk Management. Expected completion late September 2023.
- Review documentation and begin planning for Incident Management module implementation to determine timeline and milestones

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, with only a few exceptions. Continuing discussions on how to add people from our affiliate hospitals.
- Laboratory Registration: Completed development of hazard assessment questions for lab registration and training requirements. Alpha testing was performed; moving to Beta testing first week of August. Planned launch of system on track for beginning of semester.
- Learning Management System (LMS): Completed development and integration of training programs into the new LMS module. Planned launch of system on track for beginning of semester.
- Radiation Safety Module: The update to the Radiation Safety Module was released to the campus for review and testing. Key components include the issuing of permits, tracking of radioactive materials from purchase to disposal, inspection of lead garments and radiation training. The system is currently being tested. Planned launch of system on track for beginning of semester.

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:
- Beta testing with outside groups to be completed by Aug. 15, 2023
- Complete development of marketing materials including instructional information for use by stakeholders
- Launch Laboratory Registration, Learning Management and Radiation Safety modules in the beginning of the fall semester
- Plan and develop other SMS modules (e.g. Chemical Inventory Management, Fire Safety, Incident Reporting, Environmental Tracking, etc.)

Wolfmart Enhancements and Upgrades

Project Manager: Sean Dermody

Estimated Completion: June 2024

IMPACTED F&A AREAS: Finance
STATUS: ● Active

SCOPE:
Enhance existing functionality within the Wolfmart 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 is in the process of being finalized and will serve to guide enhancement projects aligned with Procurement's 2023-24 Strategic Priorities
- Multiple projects identified have the opportunity to benefit both Stony Brook University and other SUNY campuses
- Wolfmart was upgraded to Version 23.2 on July 16, 2023. This update included a number of new enhancements detailed on the Wolfmart Update Website.

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:
- Projects identified in the 2023-24 Enhancement Plan:
    - Contract (AC-340) Contract Integration in Wolfmart
    - Digital Capture (new electronic invoicing scanning solution)
    - New Supplier Set-up Request Process in Wolfmart
- Upcoming Jaggaer major releases are planned for November 23 (24.1) and March 24 (24.2). A list of enhancements will be posted on the Wolfmart Update Website.

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:
- As of August 2023, on track to launch new site by September 2023
- Student Assistants are trained and are working to make all of the website updates
- The Central Services website is completed (consolidated Mail Services, Property Control and Central Receiving)
- Completed the redesigned Procurement website map (moved the WolfMart website into this new site)

RISKS:
- Student schedules cause project delays
- Properly "decommissioning" all of the old website links

PLANNED ACTIVITIES:
- Student Assistant is working 20 hrs/week on completing the updates to the new Procurement website
- Starting bi-weekly meetings with leadership team to keep Student Assistant moving along

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:
-Began configuring AI auditing tool
-Kickoff meeting for SBF/Concur Project is scheduled for 8/15/23

RISKS:
- Compliance, adoption and enforceability of program with SB travelers

PLANNED ACTIVITIES:
- Finalize plan for implementing a policy regarding non-SBU funded travel in partnership with Enterprise Risk Management; expected to launch Fall 2023
- RF Non-Travel reimbursements to Concur October 2023

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 Annual Budget Planning Cycle for FY23/24 was initiated on February 1, 2023, with the release of the informational Budget Call Letter. The Campus Budget Model (CBM) opened on February 15, 2023. FY23/24 Budget Decision Letters will be posted in July.

STATUS:

- FY23/24 Budget Decision Letters were released July 18-24
- August 2nd: The BFP&A team will collaborate with VP Areas to update the campus budget module (CBM) with the increased spending authorization
- August 9th: Commitment Approval Form (CAF) and One Position Compensation Request Form that aligns with each VP Area approved spending authority are due
- Revised Targets: VP Area FY 2023/24 Targets are now available in the BFPA shared drive. Please note that the targets may be updated as we receive more information.

RISKS:

- n/a

PLANNED ACTIVITIES:

- As of January 2023, monthly VPC Meetings have been initiated to provide clarity of expectations, deliverables and increase two-way communication. These meetings are mandatory. The next meeting is scheduled for August 14, 2023 at 3pm.

Additional Project-Related Resources

- **Budget Financial Planning & Analysis**: Call Letter

- **Division of Information Technology**: Enterprise Project Management website

- **Facilities & Services:** Active Construction Projects

- **Human Resource Services**: HR Now website

- **Procurement**: Concur website