

# **FINANCE & ADMINISTRATION**

**Snapshot Report  
January 2025**



Stony Brook University

# TABLE OF CONTENTS

**FINANCE &  
ADMINISTRATION  
DIVISION**

## **Pages 3 through 7**

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F&A Mission, Guiding Principles,  
Goals and Strategic Directions

**CURRENT  
PROJECT LIST**

## **Pages 8 through 33**

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Major projects Finance &  
Administration is currently  
engaged in

## FINANCE & ADMINISTRATION

# MISSION

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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.



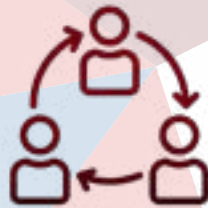
# **GUIDING PRINCIPLES**

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## **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

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- 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.



# 6

## FINANCE & ADMINISTRATION

# STRATEGIC DIRECTIONS

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**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

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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:** ● Design and Build Phases

## 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](http://stonybrook.edu/WolfieONE)

## STATUS:

- Several workstreams in the project have entered the Build phase.
- The first cycle of data conversion was completed in January: Human Resources data (20 business objects), ERP suppliers and General Ledger information (from the SB Foundation) were loaded from legacy systems into Oracle Cloud.
- Design (requirements gathering and conceptual planning) is being finalized for budgeting, forecasting, and financial planning in EPM, instead of the Campus Budget Module and spreadsheets. The Build phase sprints for EPM processes have begun.

## RISKS:

- 80/20 rule for configuration vs out of the box functionality
- Available resources
- Other special/internal competing projects assigned to project staff

## PLANNED ACTIVITIES:

- ERP and HCM have completed the 4th sprint of the Build phase, and are embarking on the 5th sprint. A sprint is a 4-week cycle of working sessions in which the project leads perform a walkthrough of activities and tasks in the Oracle environment, and tweak the configurations as needed.

# Digital Governance

Project Manager: Heather McLaughlin

Estimated Completion: XXXX

**IMPACTED F&A AREAS:** DoIT

**STATUS:** ● Active

**SCOPE:**

- Insert

**STATUS:**

- Insert

**RISKS:**

- Insert

**PLANNED ACTIVITIES:**

- Insert

# 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:**

- Working with e-builder on the User Acceptance Testing phase of the process.

**RISKS:**

- n/a

**PLANNED ACTIVITIES:**

- Schedule a planning/intro session.
- Begin implementation with DoIT.



# Irrigation Controller Upgrade

Project Manager: Christian Guzman

Estimated Completion: TBA

**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
- 45 controllers fully installed and added to management platform
- 13 controllers installed and awaiting network connection
- 14 controllers awaiting installation

**RISKS:**

- n/a

**PLANNED ACTIVITIES:**

- Programming of watering schedules continues
- Schedule installation of 14 irrigation controllers (underway)
- Schedule network installations for 13 locations (underway)

# Humanities & Nobel Halls Lighting Upgrade Project

Project Manager: Christian Guzman

Estimated Completion: Completed

**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:**

- Completed the fixture upgrades at Humanities. Replaced 170 fluorescent fixtures in Humanities with 107 LED 2x2 fixtures with advanced controls. The university received a \$5,174 incentive from PSEG.
- Completed the fixture upgrades outside Nobel Hall. Replaced 57 metal halide fixtures with LED fixtures. The university received a \$7,505 incentive from PSEG.
- Energy savings TBD

**RISKS:**

- n/a

**PLANNED ACTIVITIES:**

- n/a

# Sports Complex Lighting Upgrade Project

Project Manager: Christian Guzman

Estimated Completion: Completed

**IMPACTED F&A AREAS:** Facilities & Services

**STATUS:** ● Active

**SCOPE:**

Replace existing fluorescent 2' x 4', 1' x 4', and high-hat fixtures with LED fixtures to enhance lighting in Sports Complex.

**STATUS:**

- Completed the fixture upgrades at Sports Complex. Replaced 102 fluorescent 2x4 fixtures with 89 LED 2x2 fixtures. Replaced 48 fluorescent 1x4 fixtures with LED fixtures. Replaced 20 high-hat fixtures with LED fixtures. The university received a \$12,498 incentive from PSEG.
- Energy savings TBD

**RISKS:**

- n/a

**PLANNED ACTIVITIES:**

- n/a



# Calverton Incubator Lighting Upgrade Project

Project Manager: Energy Management

Estimated Completion: TBA

**IMPACTED F&A AREAS:** Facilities & Services

**STATUS:** ● On Hold

**SCOPE:**

Replace existing fluorescent fixtures with LED fixtures to enhance lighting in Calverton Incubator.

**STATUS:**

- Confirming list of existing fluorescent fixtures
- Working on getting pricing for material
- Working with Eldor to get pricing for labor

**RISKS:**

- n/a

**PLANNED ACTIVITIES:**

- Replace 98, 1' x 4' fluorescent fixtures with LED fixtures
- Replace 164, 2' x 4' fluorescent fixtures with LED fixtures
- Replace 34, 2' x 2' fluorescent fixtures with LED fixtures
- Replace 13, 1' x 8' fluorescent fixtures with LED fixtures
- Replace 4 fluorescent high-hat fixtures with LED fixtures

## 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:

- Working to get training in the PI system to incorporate additional data points. Training should begin in May 2025.
- The Schneider Electric energy management system is 40% 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:

- PI System Training
- 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

# BMS Setback During the Holidays and Student Breaks

Project Manager: Tom Lanzilotta

Estimated Completion: Ongoing

**IMPACTED F&A AREAS:** Facilities & Services

**STATUS:** ● Active

**SCOPE:**

The energy management team works with building managers to adjust building occupancy schedules to conserve energy during holidays and student breaks.

**STATUS:**

- Working on new schedules for the summer of 24 – schedules for about 10 buildings have been modified for optimal energy savings
- Thanksgiving break – saved over \$10k in energy due to adjusting schedules
- Christmas/New Year – schedules have been modified and savings need to be calculated

**RISKS:**

- n/a

**PLANNED ACTIVITIES:**

- Continue to analyze data from the metering system, class schedules, and Wi-Fi to modify schedules during times that students are not on campus.



# Campus Wide Fleet Electrification Study

Project Manager: Tom Lanzilotta

Estimated Completion: October 2025

**IMPACTED F&A AREAS:** Facilities & Services

**STATUS:** ● Active

**SCOPE:**

Part of the recently implemented NYS EO 22 requires 100% of light-duty non-emergency vehicles be zero emissions by 2035 and 100% of medium and heavy-duty vehicles by 2040. To prepare for this goal, SBU has partnered with the New York Power Authority (NYPA) to produce a fleet electrification study and to recommend a path to meet EO22 goals.

The campus wide study will analyze the state of the current fleet using software, evaluate SBU's building and electrical infrastructure to determine electrical capacity, assess resiliency and critical vehicles, and make recommendations based on the collected data.

**STATUS:**

- CPC signed and the study is moving forward. Currently in the data collection stage

**RISKS:**

- n/a

**PLANNED ACTIVITIES:**

- Energy Management to provide energy and transformer data
- CPC to help with single line diagrams

## Solar PV Phase 1

Project Manager: Tom Lanzilotta

Estimated Completion: Closed

**IMPACTED F&A AREAS:** Facilities & Services

**STATUS:** ● Closed

### SCOPE:

SBU partnered with NYPA to bid out the assessment of non-cogen sites for solar PV. The RFP was awarded to Ameresco due to having the most detailed and organized assessment and most reasonable pricing. After reviewing 10 sites, it was determined that a ground mounted system near building 17 would be the best option. The system is sized to be approximately 2,500 kWdc and expected to reduce energy consumption at building 17 by half. The remaining energy generated will reduce SBU's total spend for PSEG connected sites.

### STATUS:

- Project could not move forward due to the time it was active and also the increase in cost. We are looking at alternatives.
- The current Power Purchase Agreement (PPA) is with SBU's legal department

### RISKS:

- n/a

### PLANNED ACTIVITIES:

- After legal approval to move forward:
  - Sign the PPA
  - Schedule the installation

# South P-Soccer Fields Lighting Upgrade Project

Project Manager: Christian Guzman

Estimated Completion: Completed

**IMPACTED F&A AREAS:** Facilities & Services

**STATUS:** ● Completed

**SCOPE:**

Replace existing metal halide exterior fixtures with LED fixtures to enhance outdoor lighting around the concession stand for the South P Soccer Fields.

**STATUS:**

- Completed the fixture upgrades at the South P Soccer Fields. Replaced 12-1500W metal halide fixtures with 450W LED fixtures. The University received a \$2,475 incentive from PSEG.
- Energy savings TBD

**RISKS:**

- n/a

**PLANNED ACTIVITIES:**

- n/a

# Fleet and Public EV Charger Expansion and Phase I Fleet Chargers

Project Manager: Energy Management/Sustainability

Estimated Completion: Fall 2025

**IMPACTED F&A AREAS:** Facilities & Services

**STATUS:** ● Active

**SCOPE:**

This project will expand our current level 2 public charger infrastructure and install chargers for our fleet vehicles.

**STATUS:**

- Walkthrough of potential locations has taken place

**RISKS:**

- n/a

**PLANNED ACTIVITIES:**

- Await quote from Eldor (vendor)

## EcoLeader Program

Project Manager: Erin Kluge

Estimated Completion: Ongoing

**IMPACTED F&A AREAS:** Facilities & Services

**STATUS:** ● Active

### SCOPE:

Since fall 2012, the EcoLeader program has been a student leadership initiative that focused on raising positive awareness of environmental issues and encourages sustainable practices at SBU. In the fall 2024 semester, the Office of Sustainability worked with SoMAS to create a for-credit semester-long internship program. Students met with the sustainability coordinator biweekly and worked on various campus sustainability projects for 3 hours/week. Students collected data for the STARS Report as well as hosted tabling outreach events such as campus sustainability trivia. The program has expanded from 4 students to 7 for the upcoming semester cohort.

### STATUS:

- 7 for-credit semesterly student interns
  - 3 Research & Data
  - 3 Event Planning & Outreach
  - 1 Social Media & Marketing
- Introduce year long positions as SUNY Empire Service Corps site location in Fall 2025

### RISKS:

- n/a

### PLANNED ACTIVITIES:

- With the introduction of the SUNY Empire Service Corps, the Office of Sustainability is working with Career Services to create year long paid internship positions (approx. 6hrs/week)
- Assisting with calculating Scope 3 emissions
- Creating EarthStock event
- Collaborating with campus sustainability/environmental clubs on events
- End of semester freecycle event
- Weekly social media content via Instagram and improving sustainability website

# STARS Report

Project Manager: Erin Kluge

Estimated Completion: Spring 2025

**IMPACTED F&A AREAS:** Facilities & Services

**STATUS:** ● Active

**SCOPE:**

The Sustainability Tracking, Assessment, and Rating System (STARS) Report is a comprehensive self-reporting assessment for institutions to share their environmental achievements and areas for improvement. In 2014, SBU earned the prestigious gold ranking which has since expired. Given the sustainability initiatives that SBU has embarked on since then, the Office of Sustainability has set the goal to earn a gold rating once again. The Office of Sustainability is working with various administrative departments on campus to collect data needed to complete the report.

**STATUS:**

- 65% completed as of January 2025

**RISKS:**

- n/a

**PLANNED ACTIVITIES:**

- Submit application to AASHE to receive ranking and feedback for improvement
- Create action plan to earn platinum ranking for 2028 submission



# 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:**

- VEOCI has been field tested during multiple emergency operations over the Spring Semester and into the Summer with success in enhancing communications and providing a common operating picture to operational and leadership personnel.
- Business Continuity Analyst has been hired and trained on VEOCI in order to best leverage the technology for continuity planning across the enterprise.

**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:**

- With the operations module and the new Business Continuity staff member in place, focus on the implementation of the Business Continuity aspect of the software.
- Business Continuity Analyst will compile previous plans and materials to be incorporated into VEOCI.
- The OEM team has begun the testing/implementation of the Sports/Event Management module and the Building Emergency Plan module.
- Project is on track for August 2024 implementation.

# Safety Management System

Project Manager: Gary Kaczmarczyk and Steven Wong

Estimated Completion: 2025

**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.

## 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.

## STATUS:

- SMS System: The system is operational.
- Laboratory Registration: This module is operational. There are currently 518 laboratory registrations.
- Learning Management System (LMS): This module is operational. There are currently 73 training programs available through the system (52 - Online/21 - In person). Since January, over 11,700 classes have been completed.
- Chemical Inventory Management: 23,487 chemicals are uploaded. Chemical Abstract System ("CAS") numbers have been uploaded from the existing SDS Pro system and quality assurance checks are in progress.
- Radiation Safety: Currently tracking 23 licenses and 163 internal issued permits.
- Hazardous Waste: Documenting weekly inspections in Main Accumulation Areas (MAA). Started inspections in Satellite Accumulation Areas (SAA) in labs with 49 completed.
- Equipment: There are 8,000 pieces of equipment, including fuel storage tanks, fume hoods, lasers, x-ray equipment, and radiation detection equipment. This facilitates tracking for required inspections.
- Assessments: The assessment module is being used for conducting inspections in laboratories, hazardous waste accumulation areas, shops and maintenance areas, and on equipment such as, lead garments, radiation survey meters, portal monitors and radiation counting equipment. More than 4,250 assessments have been performed to date.

## PLANNED ACTIVITIES:

- SMS System: Pending Salute entering Building Manager and Director of Labs user group access levels based on building location or department.
- Safety Training: Complete integration of historical data from Blackboard/PeopleSoft into the Learning Management System (LMS). 80% of data is with Salute, pending the import of three additional courses. Q3 2024
- Fire Safety Assessments: Preparing assessments for AEDs and Fire Extinguishers. Q1 2025
- Environmental Compliance: All Underground storage tanks, aboveground storage tanks and cooling towers have been included in the equipment list. The Oil Water Separator Assessment is developed and operational. The Daily ECPP Secondary Containment Assessment is being conducted in Salute (164 inspections). Salute is working to upload the Annual Environmental Assessment.
- Accident Reporting: In Process / Investigate the use of the Accident Reporting module for reporting critical accident details for regulatory reports and workers comp such as injury type, OSHA case classification, treatment, and more. Q1 2025
- Incident reporting: This component of the system is currently being used by all Program Areas to capture notable incidents. There are currently 27 incidents in the system.

## Parking Management System (AIMS)

Project Manager: Kendra Violet and Donna Skidmore

Estimated Completion: 2025

**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:

- Phased I rolled out on January 15, 2025. Phases II and III are forthcoming.

### RISKS:

- Changes in policies and procedures related to the new management system will need to be communicated clearly. This can be more difficult with live implementations over the winter break.
- Delayed gate implementation gives less time for testing before go-live.
- Budget

### PLANNED ACTIVITIES:

- Continue implementation.

# Wolfmart Enhancements and Upgrades

Project Manager: Sean Dermody

Estimated Completion: Ongoing

**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 was completed. 17 Projects (57%) were completed/nearly completed.
- Notable recent project updates include:
  - Virtual Stockroom completed and ready for October 2024 launch.
  - Proof of Concept for AC-340 Project.
  - Integration of non-contract Utility Payments into WolfMart in July 2024.

**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:**

- Closing out some projects that are substantially completed:
  - Jaggaer Workflow Rules Review
  - Supplier Record Merge Fix
- Moving forward with other key projects including:
  - AC-340 Proof of Concept and Phase II
  - Integration of Subawards in WolfMart
  - Integration of Stony Brook Foundation in WolfMart

# Team Dynamix - Procurement Help Center

Project Manager: Allison Parrish

Estimated Completion: December 2024

**IMPACTED F&A AREAS:** Finance

**STATUS:** ● Active

**SCOPE:**

Develop a Procurement Help Center using the Team Dynamix Software to include a structured ticketing system, designed to guide users' Procurement requests in an efficient, intuitive manner, while also increasing the efficiency with which the Systems & Operations team responds to such requests. Ticket services are divided by category: Requisitions/Purchase Orders, Supplier File, WolfMart Profile Management, Contracts, Sourcing, Systems Access, and Troubleshooting. Each category has services associated with it, from which users will choose according to their needs. The Help Center will also be expanded to provide assistance from the Travel & Cards team for users' Concur-related requests and concerns, as well as include a Knowledge Base, where users can find articles of information about Procurement, its procedures, and policies.

**STATUS:**

The first form (New Supplier Request Process) has been identified and is live. Updates include:

- Form use has been mandatory since September 16th, 2024.
- A final communication was sent via Campus Announcement, informing users of the mandatory date.
- Educational training materials have been developed and made available

The second form (WolfMart Troubleshooting) has been identified and is in the planning stages. Updates include:

- A brainstorming meeting is planned the week of November 4th, 2024.

**RISKS:**

- SBU staff resource constraints to test and implement ticketing system (same resources manage daily help desk issues and testing).
- User resistance to submitting requests using a more structured process, occurring because there is not a full understanding of how new process will streamline / add efficiencies.

**PLANNED ACTIVITIES:**

- A meeting is planned to take place the week of November 4th, 2024, to brainstorm ideas for the next TD process—WolfMart Troubleshooting.
- Articles currently unpublished in the Knowledge Base will be reviewed for accuracy and grammar, and published after approval.
- Lessons learned from users, as well as the development of the New Supplier Process, will be applied to future SysOps TD process developments.
- Project will close December 2024.

## Digital Capture

Project Manager: Sean Dermody

Estimated Completion: July 2024

**IMPACTED F&A AREAS:** Finance

**STATUS:** ● Active

### SCOPE:

- Replace existing invoice scanning system with the Jaggaer Digital Capture Solution to ensure continuity of critical accounts payable operations while implementing new opportunities for system efficiencies and cost savings.
- Digital Capture is built upon the ABBYY scanning system and is fully integrated with Jaggaer for seamless integration of scanning and importing of invoices into Jaggaer.

### STATUS:

- Digital Capture went live in the Production Environment in June 2024.
- The Punchlist of remaining project items were completed in August 2024.
- Since July 1st, 2024, over 9,000 invoices have been processed via Digital Capture.
- Over 5,300 invoices passed through ABBYY without stopping for verification/exceptions (58%)
- Project has been closed.

### RISKS:

- This is a new product for Jaggaer (Jaggaer recently acquired this solution from ABBYY) so may have learning curve for vendor that may cause delays.
- SBU Staff Resources have multiple other projects and priorities, so resources may be constrained.
- Delays in Digital Capture implementation may result in additional one-time costs for continuing current vendor solution or additional manual work for staff.

### PLANNED ACTIVITIES:

- Use of Digital Capture for daily operations



# Concur Travel and Expense Implementation

Project Manager: Gerardina Paduano

Estimated Completion: TBA

**IMPACTED F&A AREAS:** Finance, Enterprise Risk Management, Research Foundation

**STATUS:** ● Active

**SCOPE:**

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

**STATUS:**

- Verify AI auditing tool has been implemented, exploring new efficiencies
- Registry” policy regarding non-SBU funded travel, in partnership with Enterprise Risk Management, has been implemented
- SBF/Concur policies have been implemented
- Employee RF Non-Travel reimbursement policy has been implemented

**RISKS:**

- Compliance, adoption and enforceability of program with SB travelers

**PLANNED ACTIVITIES:**

- Continue planning and design of Non-employee/Student Travel Policy
- As we move forward with the WolfieONE implementation, explore how to best integrate Concur into the new Chart of Accounts structure to ensure a seamless transition and maintain financial control and transparency
- Exploring more AI options
- Continued campus outreach and training

# Procurement University Savings

Project Manager: Frank Bowden

Estimated Completion: Ongoing

**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:**

- FY-2024/25 Cost Savings Activity
- Projected FY2024/25 Quarterly Costs Savings Run Rate
  - July 1, 2024, to September 30, 2024 - \$3.0MM
  - October 1, 2024, to December 31, 2024 - \$6.0 MM
  - January 1, 2025, to March 31, 2025 - \$9.0 MM
  - April 1, 2025, to June 30, 2025 - \$12.0 MM
- Achieved Quarterly Costs Savings run rate
  - July 1, 2024, to September 30, 2024 - \$4,878,231
  - October 1, 2024, to December 31, 2024 - \$8,754,924
  - January 1, 2025, to March 31, 2025 - TBD
  - April 1, 2025, to June 1, 2025 - TBD

**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:**

- Review and validate costs savings on a monthly basis
- Report on Quarterly Costs Savings run rate

Project Manager: Budget, Financial Planning & Analysis

Estimated Completion: September 1, 2025

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

**STATUS:** ● Active

**SCOPE:**

- The FY 2025/26 Budget Planning Cycle is in progress with a planned CBM opening date of January 21, 2025, and closing date of March 14, 2025. A SBU Budget Update and CBM Tactical Guidance will be communicated at the January 13, 2025 VPC Meeting.
- The annual Budget to Actuals workstream is in progress and is projected to be completed by end of January..
- The WolfieONE project is currently underway.
- SBU is currently engaged with Huron to support the progression of the New Economic Model. Huron project has been extended through the end of February. Communications about the budget model change, timeline and expectations, will soon be communicated via the BFP&A website.

**STATUS:**

- 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 PFUI meeting is scheduled for January 27, 2025. Please have all PFUI requests submitted by January 20, 2025. Learn about eligibility and guidelines for FY 2024/25 on the BFP&A Policies and Forms page.

**RISKS:**

- n/a

**PLANNED ACTIVITIES:**

- n/a

## HR Now Modernization Initiative

Project Manager: TBA

Estimated Completion: TBA

**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: [Click here for full dashboard](#)

- Workforce Planning: Partnered with ModernThink to conduct an Engagement Survey. This confidential survey will provide valuable insights into our faculty and staff's workplace experience, helping us build a stronger, more supportive environment. We've identified the Stakeholder Committee Members and are holding our first stakeholder meeting around mid-January, with the survey scheduled to be conducted in mid-March.
- Talent Acquisition: Expansion plan kicks off this year with the roll out of an expanded LinkedIn service plan and recruitment is underway for the Talent Acquisition Manager position.
- Culture & Engagement: SEFA campaign, fundraising season kicked off in November. Thank-a-Seawolf initiative is transitioning from President's Office to HR with an announcement forthcoming.
- Biz Library: Filled 2,300 licenses with CEAS, CAS & HSC completed this fall.
- Training & Organizational Development: Completed its first 10 week Supervisor Success training program in December. Formed a new peer network of universities dedicated to discussing and sharing best practices in adult learning - The Excelsior Learning Alliance. The Alliance aims to foster collaboration, innovation, and continuous improvement in team member training programs. Members of the network will have the opportunity to connect with learning and development professionals from other leading institutions, collaborate on innovative approaches to adult learning and share insights and best practices to improve team member training programs.

### RISKS:

- Need for additional resources to support training and engagement programming

### PLANNED ACTIVITIES:

- HR's Workforce Planning Unit & Wolfpack Learning have partnered to create a mentorship program for West Campus/HSC. The pilot group will be the HSC.
- Culture & Engagement will host a take your child to work day event in April as well as collaborate with SBM to kick off the Service Pin recognition program this spring.
- Biz Library continues to work with Wolfie One on integrating the courses into the system in advance of Go Live.

# 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