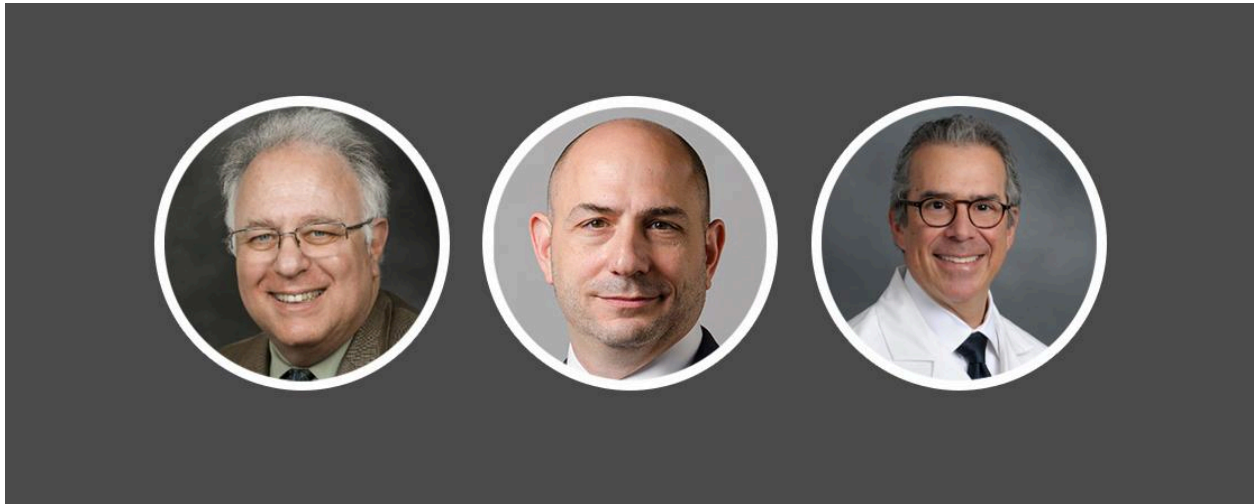


# WolfieONE

eNewsletter | January 2024

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## Official Campus-Wide Announcement of WolfieONE



**Senior Vice President for Finance & Administration Jed Shivers, Provost Carl Lejuez, and Interim Executive Vice President for Stony Brook Medicine, William Wertheim show support for WolfieONE in a campus-wide message inviting our Stony Brook University and Stony Brook Medicine teams to engage and learn about this exciting development.**

Welcome to the WolfieONE eNewsletter! Each month, the Office of Change Management will be sending a digital update to the Stony Brook Community about major happenings, project-related information, shout-outs and more! Our hope is

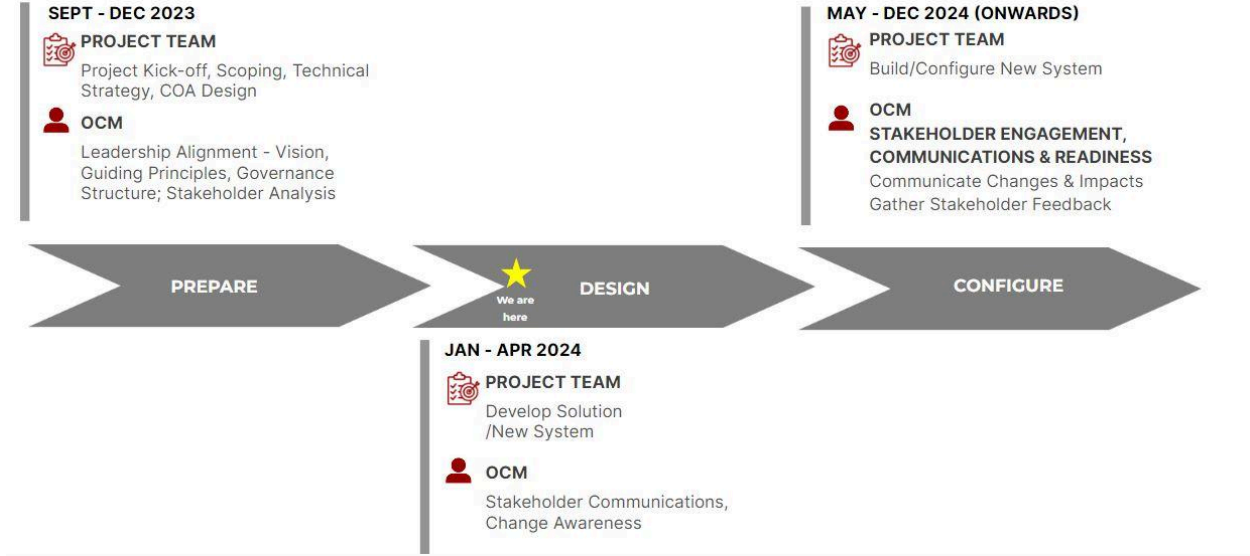
that this will help you gain a better understanding of what's going on throughout this transformational initiative. As always, we welcome your [feedback](#) and ideas for future newsletters.

This month, we hosted a Workstream Team kickoff via Zoom to help onboard the workstream members who will be actively working on this project in 2024. We also began a Road Show, where members from the project will be visiting with all VP areas to help create project awareness. A campus-wide Town Hall is being planned for later this semester. Another major development is the appointment of **Lyle Gomes**, VP for Finance, as the WolfieONE Program Executive who will serve as the point person dedicated to managing holistic decisions while also understanding and appreciating the unique needs of each entity that will be impacted by this transformation.

## Communications Updates

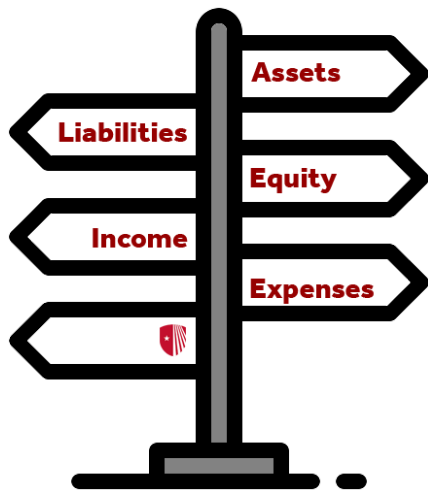
The [WolfieONE website](#) is continuously being updated with information about the initiative, project-related resources and much more! Check back often for updates.

## Timeline: Summary of Activities



*\*This is a tentative timeline subject to change depending on actual project task completions. Visit the WolfieONE website periodically for updates and the latest version.*

## Workstream Update: Chart of Accounts



The Chart of Accounts (COA) team has designed the new COA structure with defined [segments](#) and purposes for each segment. This work is the result of a series of meetings with key stakeholder groups to ensure the new COA meets the business needs of our institution. This is the [link](#) to read about the background research to map the current state and leading practices applied in this process. We will now begin to create and map the segment values

and hierarchies.

## Spotlight and Shout Outs



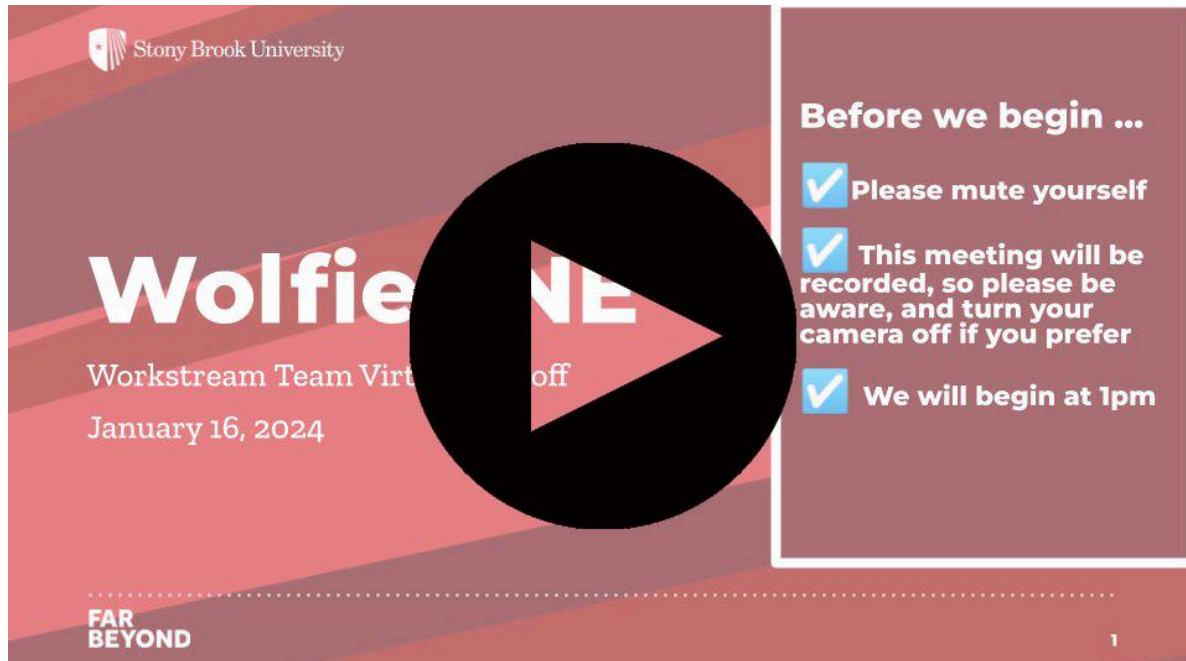
**Stony Brook's Katherine Soto:** Katherine is an integral member of our team for the WolfieOne EPM implementation. She brings years of valuable institutional knowledge from her role as Budget Systems Administration Manager to our conversations with our various project partners. Katherine's experience has proven to be a great asset to the project team and has allowed her to foster a great relationship with our colleagues in Human Resources. She is a valued member of the HCM

workstream and we look forward to her continued contributions throughout the project. ***Thank you Katherine for all your hard work and contributions!*** - Nick Candela, Director for Budget Systems and Decision Support Reporting, Stony Brook University and EPM Workstream Team Lead

**Katherine's Response:** Considering the significant reliance of our current budget process on personnel data, actively engaging with the HCM workstream not only fosters mutual understanding of existing interdependencies but also kick-starts

collaborative efforts to safeguard functionality and capitalize on the inherent efficiencies of this transformation.

## Workstream Team Kickoff Meeting



On January 16th, 163 representatives from Stony Brook University, Stony Brook Medicine, the Research Foundation and SUNY attended a virtual kickoff meeting designed to onboard members of the workstream team to the WolfieONE project. During the 90-minute session, attendees learned about the initiative, heard from each workstream lead about progress that has been made in their respective areas, viewed a timeline for implementation, had the opportunity to ask questions, and reviewed change management strategies for the project.

Links to previous recordings and other useful resources can be found on the [WolfieONE website](#).

## OCM Updates

The Office of Change Management has now onboarded six students onto the WolfieONE team, as part of our ongoing Student Experiential Learning (Pilot) Program ([SELP](#)). The students will be developing new skills across their respective

functional areas, including consulting, project management, cloud technology, and change management. They will receive foundational instruction from Deloitte and then be coached by the WolfieONE project leads and gain hands-on experience on a large scale ERP implementation.

As part of organizational readiness, OCM has also kicked off stakeholder engagement activities to socialize and build change awareness around WolfieONE. Over the past couple of weeks, the OCM team has been joining leadership and department meetings across various VP areas and special groups such as the Academic Budget Cabinet, RCOC, etc., sharing information about WolfieONE and the expected impacts and benefits. These interactions have also been a great opportunity to answer questions and capture feedback from the audiences. The team will continue engaging with more stakeholders over the next couple months to ensure transparency and establishing open communication. Our goal is to bring every impacted stakeholder along this change journey to enable a successful implementation and adoption of WolfieONE. We look forward to engaging with groups across campus in future months via readiness surveys, roundtables, focus groups and upcoming Town Halls.

If you have any questions, concerns or feedback, please feel free to share it here [Feedback Form](#).

## **Important Links**

[WolfieONE Website](#)

[OCM Website](#)

[Feedback Form](#)

[Student Experiential Learning Program](#)