OPTIMIZATION OF CAMPUS RESOURCES TASK FORCE MISSION

Achieving Financial Sustainability

INFORMATION
stonybrook.edu/financial-sustainability

CO-CHAIRS
A.J. Nagaraj
Van Sullivan
Staff members from Finance, Budget, IT and data experts will provide resources and advice to the task forces, working groups and leadership. Each task force will have a project liaison to support coordination, note taking and other project activities.
Project Timeline

**STEP 1**
**DEFINITION & DESIGN**

- OCTOBER 1

**INDIVIDUAL TASK FORCE RESPONSIBILITIES**

1. Define and finalize scope
2. Form working groups as needed
3. Define information needs
4. Establish project plan

**STEP 2**
**OPPORTUNITY IDENTIFICATION**

- MID-DECEMBER 2020

1. Engagement—listening sessions, surveys, etc.
2. Group working sessions
3. Initial opportunity prioritization

**STEP 3**
**ANALYSIS & VALIDATION**

- END MARCH 2021

1. Cost savings/revenue enhancement
2. Cost/benefit analysis
3. Risk assessment
4. Final opportunity prioritization

**STEP 4**
**RECOMMENDATIONS**

- END APRIL 2021

1. Desired actions
2. Implementation timeline
3. Metrics
4. Project plan

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**While this process will ultimately deliver strategic recommendations to improve our financial position in the long term,**

*It allows for short-term opportunities to be implemented more quickly.*

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**ONGOING TASK FORCE COORDINATION WITH FINANCIAL SUSTAINABILITY STEERING COMMITTEE**

1. Ensuring strategic alignment
2. Leveraging collaboration opportunities
3. Coordinating support from technical support group
4. Providing regular updates to SBU community on status
The Optimization of Campus Resources Task Force is exploring mission-aligned ways to generate new revenues through campus space utilization and sponsorship partnerships. Additionally, it will identify opportunities to scale support and resources in a manner reflective of the contributions made by a wide array of cultural and athletic programs that support intellectual enrichment, student engagement and public awareness.
Who Is Involved — TF Members

Task Force Co-Chairs
• A.J. Nagaraj
  AVP for Advancement Strategy
• Van Sullivan
  Executive Director, Faculty Student Association

Task Force PMO
• Joan Dickinson
  Director, Community Relations

Technical Support Group Representatives
• Nick Candela
  Director of Financial Planning & Analysis
• Peter Santella
  Associate VP, FP&A

Members
• John Alessio
  Director, Facilities and Services, Campus Operations and Maintenance
• Jeffrey Barnett
  Interim Associate Dean of Students, Student Affairs
• Ahmed Belazi
  Director of Strategic Analytics and Technologies, Student Affairs
• Rob Emmerich
  Deputy Director of Athletics
• Jennifer Filsky
  Director, Advancement Events
• Diana Hannan
  Executive Director of Conferences and Special Events
• Helen Harrison
  Director, Pollock-Krasner House and Study Center
• Keri Hollander
  Director, Office of Computer Services, School of Nursing
• Alan Inkles
  Director, Staller Center for the Arts
• Michele Lake
  Planning and Design Project Manager, Capital Planning
• Sara Lehmann
  Asst. Director, Acct. for Reporting and Expenses, Accounting Services
• Laura Lyons
  Facilities Liaison, Stony Brook Southampton
• Sr. Sanaa Nadim
  Chaplain, Interfaith Center
• Kristen Nyitray
  Director of Special Collections and Univ. Archives, Libraries
• Chris Paparo
  Marine Sciences Center Manager, School of Marine and Atmospheric Sciences
• Phil Setzer
  Professor of Violin and Founding Member, Emerson String Quartet, Music Dept.
• Katie Stockhammer
  Financial Director, Staller Center for the Arts
• Justin Stolarik
  Director, Athletic Bands, Student Affairs
• Marie Turchiano
  Interim Director, Hawrys Campus Recreation & Wellness Center, Student Affairs
Who Is Involved — Experts

Subject Matter Experts

- Alan DeVries Director of Housing Services
- Rob Emmerich Deputy Director of Athletics
- Teresa Flannery Interim Vice President for Marketing and Communications
- Lyle Gomes Vice President for Finance and Chief Budget Officer
- Shawn Heilbron Director of Athletics
- Robert Reeves Associate Provost, Southampton Graduate Arts Campus
- John Sparano Director of Residential Operations
- Tara Stenzel-Fleming Director, Corporate and Foundation Relations
What We Have Learned

1. While a few individual areas of the campus have successfully generated sponsorship revenues, an **opportunity exists in a unified approach to appropriate partnerships** with local and national businesses.

2. There is significant opportunity to **more fully utilize campus spaces** (e.g., meeting venues, recreation fields, Southampton facilities) during off hours and in the summer to generate new revenues.

3. There is an **insufficient understanding of the measurable impact that specific cultural and athletics** programs and events have on institutional goals. In addition to solving this challenge, there is also an opportunity to increase participation in these events and programs, thus increasing their influence on campus life.
Opportunities

Generating New Revenues Through Sponsorships and Branding Partnerships

• Consult best-in-class higher ed institutions on creation of new function/process.
• Conduct cost-benefit analysis on SBU-managed vs. outsourced partnership development.
• Explore relationship between sponsorships and other SBU corporate engagement efforts (e.g., student recruitment partners, corporate prof. educ., research partnerships)
• Consider revenue sharing models that balance incenting divisions/areas to participate in partnership opportunities and ensuring central function’s net revenues are optimized.
• Solicit student and community feedback on brand and industry preferences to inform partner selection and better understand and prepare for likely reaction to increased sponsorships.
Opportunities (continued)

Generating New Revenues Through Facilities and Programs

Conference Services and Events Structure
Support the establishment of a comprehensive Conferences Services and Events Department that makes full use of our wide array of facilities, generates additional revenue and supports the campus mission.

• Established working group to propose CSE structure based on C&U best practices
• Support provided by shared working group with Operations Alignment Task Force
• Completed comprehensive space asset inventory; next steps include rates and services assessment.

Use of Facilities — Revenue Enhancement
• Near-term sample priorities: E-sports, Arena and Stadium rental for H.S. graduations, ITK Studio rental
• Working group formed to document summer programs/services and assess opportunity landscape
• Additional ideas being studied for quick implementation include: Summer Bay Exploration, OLLI, outdoor markets
Opportunities (continued 2)

Optimizing Revenue and Scaling Resources in Cultural and Athletic Programs and Events

Create scaling and assessment methodology

*Establish standardized and collaborative tool to scale support and resources in a manner reflective of the contributions made by a wide array of cultural and athletics programs and events.*

- Request academic and campus expertise in program assessment, success metrics and social impact KPIs to inform methodology.
- Utilize EAB implementation model of transparency, data, success, stakeholders and sustainability.
Opportunities (continued 3)

Optimizing Revenue and Scaling Resources in Cultural and Athletic Programs and Events

Optimize Current Programs

Broadly review campus programs to maximize exposure to athletic and cultural programming, encourage attendance and engage the community.

- Assess SBU constituencies and develop data-driven marketing plan at the level of event calendar, exploring CRM and existing technologies.
- Create master events calendar at a senior level that optimizes event scheduling and generates the basis for tactical planning; suggest overt campus strategies to increase participation and attendance.
- Research expense optimization through shared use of programmatic resources.
What’s Next?

The Road Map to April

A total of seven proposed working groups will continue work on our major priorities, with recommendations and deliverables ultimately shared with the steering committee.

- External clients
- Sponsorships and branding partnerships
- Conference services and events
- Resource assessment and scaling model development
- Market research and optimization
- Summer initiatives and events
- Near-term projects to be implemented in the COVID era

Engagement Opportunities

Many of you completed the campus-wide survey. Thank you!

If you have specific suggestions for the task force, please contact:
aj.nagaraj@stonybrook.edu or van.sullivan@stonybrook.edu
OPTIMIZATION OF CAMPUS RESOURCES

A.J. Nagaraj
Van Sullivan

Survey Update

2,230 Respondents

<table>
<thead>
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<th>Category</th>
<th>Percentage</th>
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<td>T/TI faculty</td>
<td>452 (%)</td>
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<tr>
<td>NTT faculty</td>
<td>303 (%)</td>
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<td>176 (%)</td>
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<tr>
<td>Hospital/LISVH</td>
<td>377 (%)</td>
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<tr>
<td>Other</td>
<td>118 (%)</td>
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Overall Response Rate: 13%

How closely have you followed the development of Stony Brook’s Strategic Budget Initiative?

- Very closely: 13%
- Somewhat closely: 41%
- Not very closely: 31%
- Not at all: 15%

How are you getting information about SBU’s budget?

- President’s letters on the Strategic Budget Initiative: 91%
- Virtual campus conversation: 41%
- Achieving Financial Sustainability website: 26%
- Participation in a SBI working group or Task Force: 9%

Stony Brook University
Q&A
Thank you for joining us.

OPTIMIZATION OF CAMPUS RESOURCES TASK FORCE

CO-CHAIR
A.J. Nagaraj
Assistant Vice President for Advancement Strategy

CO-CHAIR
Van Sullivan
Executive Director, Faculty Student Association

MODERATOR
Rose Martinelli
Vice President for Strategic Initiatives

FAR BEYOND