KEY: **Blue** = complete **Yellow** = watch/discuss **Green** = progressing according to plan **White**: Chartering/Planning **No fill**: Not started **Black** Canceled or moved **TEXT** – **Red** = missed milestones; **Green** = met milestones; **Black** = upcoming milestones

SUNY Research Foundation Operating Plan

Strategies	RF Fiscal Year 2018 - July	Key Performance Indicators (KPIs)

Provide faculty with efficient and effective sponsored program administration

FY 2018 Q1			FY 2018 Q2			FY 2018 Q3			FY 2018 Q4		
July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June

SUNY PACS – Oracle Award Establishment and RF Report Center Integration (John)

SUNY PACS (Robert)   SEE INTERNAL QA REPORT FOR SCHEDULE ANALYSIS   12/20/17 (orig. 12/31/2016)

Manager Self Service (Susan)   9/30 SOW NCCIT   TBD

E-time Reporting Phase 2 (Susan)   4 SOWS of work   4/30

Documentation of Personal Cost/Uniform Guidance (Susan)   Defining plan for moving forward with campus team

Report Center Training (John)   9/30 Secure Vendor   10/30 Training   12/31 Enhance myRF page 10/12   6/30 Report Center Training Plan and Completion of Data Dictionary   6/30

Campus Learning and Development Needs Analysis (Jenna)

SciQuest Western NY (Chris/Dave)   1/31 UB and Geneseo   2/28 2-3 campuses   3/30 2-3 campuses   3/30

KPIs:
- *Sponsored Program Expenditures*
- *Sponsored Programs Organized Research Expenditures.*
- *Number of Proposals by Campus*
- *Efficiency Metrics*

Provide faculty with effective and efficient Technology Transfer

Oracle/Inteum Integration (Matt)   TBD

TAF (Matt)   Planning with Grace will determine milestones and dates

KPIs:
- *Business and Industry Expenditures*
- *Invention Disclosures*
- *U.S. Patent Applications Filed*
- *U.S. Patents Issued*
- *License and Option Agreements Executed*
- *Royalty Income from Licensing*
- *New Start-ups Formed to Commercialize SUNY Technologies*
- *Number of Operational Startups*
- *SUNY-born Technologies, Products, and Services Publicly Available*
- *Number of New Inventors by Fiscal Year*
- *Number of Innovations Licensed or Optioned by Fiscal Year*
- *Dollar value of sponsored research expenditures for/on clinical trials (APLU)*

Corporate Initiatives

Fringe Benefit Implementation - Tier V (Christa)   12/1 Benefits Materials Updated   1/1 Tier V Effective   1/31

Orcale Portal Analysis (Al) implement Google Analytics 7/17 Static Content Analysis & Clean Up- 8/17 Portal Authentication Services 8/17   Technical Overview 10/17 Usage Analysis 11/17 Buisness Requirement Doc 12/17

Measurable Continuous Improvement (Ellen) 8/30 Pilots complete   10/8-9 BoD   11/30

Postdoc Employee Fringe Benefit Rate (Kate)   7/2019

RF Website Links (Katie)   7/31 Procedure links   8/31 Forms and Rates 9/15 web pages   9/30 customer satisfaction   9/30

RF Strategic Plan (Cathy)   6/30 planning   12/30 Critical Issues/Conversations complete   2/28 Draft PlanBoD   Approval5/8-5/9   TBD

IT Service Analysis (Al) NCCIT   8/30

Project Budgets

Initiative/Program	Investment	Allocated (funds are allocated when a project charter is approved by leadership)
Campus Learning and Development	$0	N/A
Documentation of Personal Cost	$34,250 rollover from FY2017	No
E-time Reporting Phase 2	$0 new dollars in FY 2018 Total project budget is $350,000 to be paid back by campuses starting in FY 2018.	Yes
Fringe Benefit Implementation	$120,270 *(charged to fringe pool)*	N/A
IT Services Analysis	$0	N/A
Manager Self Service	$129,250	No
Measurable Continuous Improvement	$200,000	Yes
Oracle Portal Analysis	$0	N/A
Oracle/Inteum Integration	$54,400 rollover from FY2017	No
PostDoc Employee Fringe Benefit Rate Implementation	$6,600	No
Report Center Training	$75,000	No
RF Strategic Plan	$20,000	No
SciQuest Western NY	$63,750	Yes
SUNY PACS	$0 new dollars in FY 2017 Total project budget is $6.5 million to be paid back by campuses starting in FY 2018.	Yes
SUNY PACS - Oracle Award Establishment and RF Report Center Integration	TBD in final charter – part of $6.5 budget	No
Technology Accelerator Fund (TAF)	$50,000	No
Website Imiprovement Project – Fix Links	$0	N/A