I. Q&A with Kevin Hegarty

II. Project Organization and Staffing Considerations – (Kristi Fisher)
   - Review considerations
   - AVP of Administrative Systems Replacement-Status (Mary Knight)
   - Implementation Director-Status (Mary Knight)

III. Staff and Resource Planning Recommendation- Change Control Board(s) (Kristi Fisher)
   - Purpose
   - Membership
   - Authority
   - Next Steps
Introduction

The ASMP systems replacement effort is part of the larger Transforming UT initiative. As planning for the systems replacement program and design of the Shared Services Organization (SSO) progresses, decisions around staffing both efforts will be finalized. Business Area owners have been asked to identify and recommend candidates for the positions depicted on the draft Systems Replacement Project Organization Structure while determining staff and resource needs to ensure operational continuity during the transition. These recommendations will be used by the Executive Sponsors, the Associate Vice President of Administrative Systems Replacement and the Implementation Director in making final decisions for the program.

Considerations

- Although the SSO Leads are depicted on the Application Team organization chart, the SSO positions have not been identified. Staffing decisions for the System Replacement program may be impacted as staffing needs for the SSO initiative are more clearly defined.

- Project Leads will need to have strong organizational skills as well as a deep understanding of business processes within their purview. Project Lead candidates recommended for the HR/Payroll, Financials, and Student areas should come from the business community and candidates recommended for the more technical teams, Business Intelligence and Technical, should come from the technical community.

- Because business areas will have a more pronounced system maintenance role and be responsible for evaluating business process and defining requirements, candidates recommended for functional analysts should come from the business community and for technical analysts should come from the technical community where possible.

- Where possible, system replacement program staffing should consider candidates from central and departmental units that will have a role in the future processes.

- There may be areas where program staffing and operational continuity cannot be accomplished with internal departmental staff. Business Area owners are encouraged to identify candidates with special skillsets from other departments, retiree pool, etc. If role cannot be filled, a job posting or staff augmentation may be required.
UT Project Organization: Management and Governance

**Business Services Committee**

- **Executive Sponsors**
  - Mary Knight
  - Brad Englert

- **AVP of Admin. Systems Replacement**
  - TBD

- **Implementation Director**
  - TBD

**Stakeholder Groups**
- **UBOC**
- Student Deans
- Faculty Council
- TXADMIN
- HR Council

**Change Control Board(s)**

**Program Management Office**
- Fiscal Tracking
  - TBD
- Project Reporting
  - TBD
- TBD
- Mgmt. Support
  - Asst. Program Dir.
  - Technical Team
  - Application Teams
  - Change Team

**Advisory Groups and SMEs**

**Steering Committee**
- Mary Knight
- Brad Englert
- Debra Kress
- Shelby Stanfield
- Kedra Ishop
- Tom Melecki
- Kathy Foster
- Carolyn Connerat
- Jamie Southerland
- Mark McFarland
- Kristi Fisher
- Marla Martinez
- Joe Sosler

**Does not currently include integrator roles**

***DRAFT- For Discussion Purposes Only*** 11/05/13 v. 6
Shared Services Organization (SSO)
Does not currently include integrator roles
***DRAFT- For Discussion Purposes Only***
UT Project Organization: Financial Administration
Application Team

Implementation Director
TBD

Financials Lead (Process)-SSO
Procurement Lead (Process)-SSO
TBD

Financials Lead (Systems)
TBD

Budget Module Lead
TBD
- Functional Analyst: TBD
- Technical Analyst: TBD

General Ledger Module Lead
TBD
- Functional Analyst: TBD
- Technical Analyst: TBD

AP/Travel Lead Module Lead
TBD
- Functional Analyst: TBD
- Technical Analyst: TBD

AR/Billing Module Lead
TBD
- Functional Analyst: TBD
- Technical Analyst: TBD

Purchasing Module Lead
TBD
- Functional Analyst: TBD
- Technical Analyst: TBD

Asset Management Module Lead
TBD
- Functional Analyst: TBD
- Technical Analyst: TBD

Grants Module Lead
TBD
- Functional Analyst: TBD
- Technical Analyst: TBD

Application Programming Team
TBD
- TBD
- TBD

Shared Services Organization- SSO
Does not currently include integrator roles
***DRAFT- For Discussion Purposes Only***
UT Project Organization: Student Administration
Application Team

Implementation Director
TBD

Student Lead (Systems)
TBD

Recruit/Admissions
Module Lead
TBD

Financial Aid
Module Lead
TBD

Student Records
Module Lead
TBD

Student Billing
Module Lead
TBD

Application Programming Team
TBD
TBD
TBD

Recruit/Admissions
Functional Lead:
TBD
Technical Lead:
TBD

Financial Aid
Functional Lead:
TBD
Technical Lead:
TBD

Student Records
Functional Leads:
TBD-Student Records
TBD-Advising
TBD-Curriculum
Technical Lead:
TBD

Student Billing
Functional Leads:
TBD
Technical Lead:
TBD

Does not currently include integrator roles
***DRAFT- For Discussion Purposes Only*** 10/04/13 v. 5
UT Project Organization: Business Intelligence/DW Team

- Implementation Director
  TBD

- Business Intelligence Lead
  TBD

- Data Warehouse
  TBD

- Strategic Reporting
  TBD

Does not currently include integrator roles

***DRAFT- For Discussion Purposes Only***

10/04/13 v. 5
UT Project Organization: Enterprise Readiness Team
(Shared Service and System Replacement)

- Implementation Director
  TBD

- Enterprise Readiness Lead
  TBD

- Organizational Readiness
  TBD
  TBD

- Communications
  TBD

- Training
  TBD
  TBD
  TBD

Does not currently include integrator roles
***DRAFT- For Discussion Purposes Only***
UT Project Organization: Technical Team

Implementation Director
TBD

Technical Lead
TBD

Project Coordinator
TBD

Technical Team

- Data Conversion Team
  - TBD

- Technical Architecture
  - TBD
  - Sys Admin
    - TBD
  - General Software Configuration Mgmt
    - TBD
  - Database Admin
    - TBD
  - Integration Infrastructure
    - TBD

Integration
TBD

- Integration Architect
  - TBD

Integration
TBD

- Workflow
  - TBD

- ESB
  - TBD

- Services Design
  - TBD

Interface Development
TBD

- Functional Coordinator
  - TBD

Interface Development
TBD

- Performance
  - TBD

- Security
  - TBD

- Accessibility
  - TBD

Does not currently include integrator roles

***DRAFT- For Discussion Purposes Only***

10/04/13 v. 4
### Project Organization:

**HR/Payroll Advisory Groups and SMEs (EXAMPLE)**

<table>
<thead>
<tr>
<th>Applicant Services</th>
<th>Personnel</th>
<th>Benefits</th>
<th>Position Management</th>
<th>Compensation</th>
<th>Payroll</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mark Barber, Leslie Saucedo,</td>
<td>Adrienne Howarth-Moore;</td>
<td>K. Chawner; K. Del</td>
<td>K. Chawner; K. Del</td>
<td>Mark Barber, Leslie Saucedo,</td>
</tr>
<tr>
<td></td>
<td>Dave LeBlanc, Jimmy Harper,</td>
<td>Jerome Lomasney; K. Lomasney;</td>
<td>Pino, Mark Barber, Jackie</td>
<td>Pino, Mark Barber, Jackie</td>
<td>Jackie McKay, Jerome LeBlanc,</td>
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<tr>
<td></td>
<td>Jackie McKay, Claire Knauth,</td>
<td>S. Moore; Kelly Lomasney,</td>
<td>McKay, Jerome LeBlanc,</td>
<td>McKay, Jerome LeBlanc,</td>
<td>Claire Knauth, Elvia Rosales,</td>
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<td></td>
<td>Chawner, K. Del Pino, Jim McElroy</td>
<td>Jen Shipman, Jen Shipman,</td>
<td>Pino, Mark Barber, Jackie</td>
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<tr>
<td></td>
<td></td>
<td>Mark Barber, Leslie Saucedo,</td>
<td>McKay, Jerome LeBlanc,</td>
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<tr>
<td></td>
<td></td>
<td>Dave LeBlanc, Jimmy Harper,</td>
<td>Claire Knauth, Elvia Rosales, Ashley Nemec, Leslie Saucedo, Rich Jern, Jen Shipman</td>
<td>Mark Barber, Leslie Saucedo, Jackie McKay, Krista Knauth, Mary Knight</td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>Name(s)</td>
<td>Responsibilities</td>
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<td>-------------------------------------------</td>
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<td>--------------------------------------------------------------------------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>Executive Sponsors</td>
<td>TBD</td>
<td>Executive Sponsors create the strategic direction and have the ultimate accountability for the program. The Program Director will be the main point of contact between the program and the Executive Sponsors.</td>
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<tr>
<td>Steering Committee</td>
<td>TBD</td>
<td>The Steering Committee is comprised of senior-level executives that represent the operational business areas affected by the program. The Steering Committee should receive frequent program updates and provide guidance and decision-making when key issues cannot be resolved by the project teams. The Program Director will be the main point of contact between the program and the Steering Committee.</td>
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<tr>
<td>Stakeholder Groups</td>
<td>TBD</td>
<td>These are existing stakeholder groups for the business functions included in scope. The communication plan should include updates to the stakeholders throughout the transition. The Program Director will be the main point of contact between the program and stakeholder groups.</td>
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</tr>
<tr>
<td>AVP of Administrative Systems Replacement</td>
<td>TBD</td>
<td>The AVP-Admin. Systems Replacement and Implementation Director (Directors) provide overall program leadership by establishing the objectives of the program, setting due dates for deliverables, performing reviews of status, and ensuring effective communication between the Project Teams, Steering Committee, Executive Sponsors, and Stakeholder Groups. The Directors participate in discussions about key challenges, provide general direction, and participate in the supervision of each project’s work effort. They also assist in resolving difficult and non-routine issues the Project Leads may encounter.</td>
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<tr>
<td>Implementation Director</td>
<td>TBD</td>
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<tr>
<td>Change Control Board (CCB)</td>
<td>TBD</td>
<td>The CCB(s) makes decisions regarding whether or not proposed changes to systems (legacy and new) should be implemented. The change control board(s) is constituted of project stakeholders or their representatives.</td>
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<tr>
<td>Role</td>
<td>Name(s)</td>
<td>Responsibilities</td>
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<tr>
<td>Program Management Office (PMO)</td>
<td>TBD</td>
<td>The PMO exists at the program level where there are several projects (HR/Payroll, Finance, Student) running under a program. The PMO will support the Directors, Project Leads and Project Teams. Responsibilities of the PMO include fiscal tracking of program budgets, onboarding of project assigned personnel, collecting and organizing project related data from the project teams to create program-level reporting for Directors/Steering Committee, ensure process adherence, identifying project dependencies and coordination between projects within the program, and providing management support in risk and issue management at the Project Lead and Director level. The PMO reports to the Implementation Director.</td>
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<tr>
<td>Advisory Groups and SMEs</td>
<td>TBD</td>
<td>The Advisory Groups and SMEs are non-project assigned operational resources that will be leveraged to provide content knowledge and expertise throughout the transition. Activities include, but are not limited to design, configuration, user acceptance testing, etc. Advisory Groups will be engaged by Team Leads at the appropriate project activity.</td>
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<tr>
<td>Project Leads</td>
<td>TBD</td>
<td>Project Leads provide daily supervision of the project through scheduling, controlling, and assigning work. The Project Leads also monitor, control and report on project progress, resolve critical project issues and participate in key project decisions. The Project Leads have direct responsibility for the day-to-day operations of the project. The Project Leads are ultimately responsible for ensuring that the project team completes all of the work tasks and activities in the work plan and that all deliverables are reviewed and approved by appropriate stakeholders. The Project Leads report to the Implementation Director.</td>
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<tr>
<td>Process Leads (HR/Payroll, Finance/Procurement, IT)</td>
<td>TBD</td>
<td>Process Leads are business function owners in the Shared Services Organization (SSO.) It will be imperative that the Process Leads and Project Team Leads work together to design and configure business processes that support the Shared Services model and operational excellence.</td>
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<tr>
<td>Application Module Leads</td>
<td>TBD</td>
<td>Application Module Leads have deep functional expertise and provide tactical leadership in completing work tasks.</td>
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<tr>
<td>Role</td>
<td>Name(s)</td>
<td>Responsibilities</td>
<td></td>
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<tr>
<td>• Functional Analyst</td>
<td>TBD</td>
<td>Functional Analysts evaluate business processes, configure software, resolve functional issues, define requirements for business functions not supported by native Workday, and participate in the testing effort.</td>
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<tr>
<td>• Technical Analyst</td>
<td>TBD</td>
<td>Technical Analysts work with Functional Analysts to provide technical considerations for transitional or permanent solutions for business functions not supported by native Workday. These “gaps” could be solved through integration or may need a custom solution. The Technical Analyst coordinates with the Application Programming Team, Integration Team and Interface Development Team.</td>
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<tr>
<td>• App Programming Team</td>
<td>TBD</td>
<td>Provide programming for any required custom development.</td>
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<tr>
<td>Business Intelligence/DW Lead</td>
<td>TBD</td>
<td>The Business Intelligence Lead provides strategic and tactical leadership in delivering tasks related to the data warehouse and strategic reporting.</td>
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<tr>
<td>Organizational Readiness Lead</td>
<td>TBD</td>
<td>The Organizational Readiness Lead coordinates the day-to-day activities for the end user readiness and change management areas for both ASMP System Replacement and the rollout of the Shared Services Organization (SSO.) The Readiness Lead manages work effort and team members for readiness initiatives.</td>
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<tr>
<td>Communications Lead</td>
<td>TBD</td>
<td>The Communications Lead coordinates the day-to-day communication activities for both ASMP System Replacement and the rollout of the Shared Services Organization (SSO.) The Communications Lead manages work effort and team members for communication initiatives.</td>
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<tr>
<td>Training Lead</td>
<td>TBD</td>
<td>The Training Lead coordinates the day-to-day training activities for both ASMP System Replacement and the rollout of the Shared Services Organization (SSO.) The Training Lead manages work effort and team members for training initiatives.</td>
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<tr>
<td>Technical Architecture Lead</td>
<td>TBD</td>
<td>The Technical Architecture Lead will manage the work effort for developing the architecture necessary for the system to operate. Although Workday is a cloud solution, the integration architecture and development architecture will reside on-premise.</td>
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<tr>
<td>Role</td>
<td>Name(s)</td>
<td>Responsibilities</td>
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<tr>
<td>Data Conversion Lead</td>
<td>TBD</td>
<td>The Data Conversion Lead will manage the work effort related to data mapping and data conversion from the legacy system to the new system. The Data Conversion Lead will work closely with the Business Intelligence Lead and Application Team Leads.</td>
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<tr>
<td>Integration Lead</td>
<td>TBD</td>
<td>The Integration Lead will manage the work effort related to the design and delivery of the integration architecture.</td>
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<tr>
<td>Interface Development Lead</td>
<td>TBD</td>
<td>The Interface Development Lead will manage the work effort associated with the development of temporary and permanent interfaces. This role will work closely with the application team Technical Analysts.</td>
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<tr>
<td>Technical Testing Lead</td>
<td>TBD</td>
<td>The Technical Testing Lead will manage the work effort associated with the Performance, Security and Accessibility Testing.</td>
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</tbody>
</table>
Purpose

In order to prepare for the increased resource demands of the ASMP system replacement effort, the Staffing and Resource Planning Sub-Committee made recommendations around the creation of a governance and prioritization model for resource demands. Recommendations included:

1. Leveraging existing governance structures for organization and escalation, create a new Governance Group (a "Change Control Board") that will have the authority and responsibility to:
   a. Prioritize and approve any changes to existing ERP Administrative systems, processes and interfaces for large modifications and/or when multiple areas are impacted.
   b. Approve major modifications, process and interface changes to the new ERP systems during the implementation phase.
   c. Approve major modifications process and interface changes to the new ERP systems after go live.
2. Create a rubric for the above, using parameters such as size/cost of effort, necessity of effort, resources/skills needed to implement the change, priority in comparison to other requests. Define approval, escalation and appeal procedures.
3. Create a submission and review process for reviewing and approving requests in a timely manner.

1. Create a Change Control Board(s)
   - Can we function with one Change Control Board for all Administrative Systems?
     - Financial Administration
     - HR/Payroll Administration
     - Student Administration
   - Who should be on the Change Control Board(s)?
   - What will be the authority of the Change Control Board(s)?

2. Create a Rubric for Prioritization
   <Sample- for discussion purposes only>

   1st Level: Sort by non-discretionary vs. discretionary

<table>
<thead>
<tr>
<th>Nondiscretionary Requests (Must be addressed)</th>
<th>Discretionary Requests (Should be reviewed and prioritized)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mandatory</td>
<td>Enhancement Requests</td>
</tr>
<tr>
<td>System totally stopped, no workaround exists. Major security or regulatory requirement.</td>
<td>Usually business critical or process critical and enhances existing functionality already active in the system</td>
</tr>
<tr>
<td>Incidents/Problems (break/fix)</td>
<td>New Functionality Requests</td>
</tr>
<tr>
<td>Process has stopped, no workaround, major impact or severe data integrity issue</td>
<td>New functionality to enhance the user experience</td>
</tr>
</tbody>
</table>
2\textsuperscript{nd} Level: Give a Priority Setting

\begin{center}
\begin{tabular}{ccc}
High & MED & HIGH & VERY HIGH \\
LOW & MED & HIGH & \\
LOW & LOW & MED & \\
\end{tabular}
\end{center}

3\textsuperscript{rd} Level: Provide a Business and Technical Score from Internal Analysis

\begin{tabular}{|l|c|}
\hline
Non-Discretionary & Yes/No \\
\hline
1. Is this item mandated by legislation or other legal requirement? & \\
2. Does this item support on-demand research or reporting for University President, Board of Regents, Legislature, etc.? & \\
3. Does a policy rule have to be implemented in the system? & \\
\hline
Business (Discretionary) & Yes/No \\
\hline
1. Does this item support significant improvements to business process efficiencies? & \\
2. Is this time sensitive-due next week? & \\
3. Is this time sensitive-due next month? & \\
4. Does this item resolve significant problems and/or issues affecting less than 100 users? & \\
5. Does this item resolve significant problems and/or issues affecting between 100 and 1000 users? & \\
6. Does this item resolve significant problems and/or issues affecting over 10000 users? & \\
7. Does this item resolve significant problems and/or issues affecting between 1000 and 10000 users? & \\
8. Does it affect pay? & \\
9. Is there a financial benefit <100K? & \\
10. Is there a financial benefit <100K and <500K? & \\
11. Is there a financial benefit >500K? & \\
\hline
Technical (Discretionary) & Yes/No \\
\hline
1. Is the time to implement less than one week? & \\
2. Is the time to implement less between one week and 1 month? & \\
3. Is the time to implement less between one month and 3 months? & \\
4. Are cost-effective technical alternatives available? & \\
5. Does this change support significant improvements to technical process efficiencies? & \\
\hline
\end{tabular}

3. Create a Submission and Review Process

Submission and Review process key components:

- Change Request Form
- Change Request Repository and Tracking Tool
- Review Process and Disposition
- Resource Planning and Assignment of Approved Development items