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OHIO UNIVERSITY

STUDENT INFORMATION SYSTEM PLANNING PROJECT

Brice Bible, CIO
The Ohio University
Computer Services Center #352
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Dear Brice,

It is CIBER's pleasure to present this set of deliverables resulting from the Discovery and Planning process for Ohio University's implementation of Oracle's PeopleSoft Campus Solutions. This project, more than most, represented a true team effort between university staff and CIBER consultants engaged on the project. Many OHIO staff contributed their time and attention to this effort, through attendance at Project Charter and Assessment Interviews, participation in Overview and Fit/Gap Sessions, and through review and contribution to written deliverables.

But I'd especially like to note the diligence of the core project team, whose detailed and exhaustive review of written deliverables contributed significantly to the final product. You should be pleased with, and proud of the contribution of this team.

Enclosed in the printed report, you will find:
- This Cover Letter and an Executive Summary,
- The Ohio University SIS Project Charter, which serves as the narrative portion of the Project Plan,
- The Fit-Gap Analysis document, which contains a detailed listing of findings from the Fit/Gap sessions,
- An SIS Project Security Assessment conducted and documented by CIBER's Global Security Practice,
- An SIS Project Technical Assessment.

Two additional items were provided as electronic deliverables only:
- The SIS Project Microsoft Project Work Breakdown Structure (WBS)
- The SIS Project Budget Validation spreadsheet

Two items are not included at this time:
- An estimate of the cost for a hosted solution for OHIO's SIS infrastructure. The work CIBER did as part of hardware sizing will be a useful input for a hosting estimate. But in comparing the different "hosting" options currently available in the marketplace (from remote managed services to full Application Service Provision), it is clear that additional discussion about OHIO's requirements and desired architecture, for both hardware and staffing, are required before a hosting estimate can be adequately specified. CIBER would be happy to have additional conversations with OHIO about hosting.
- The Fit/Gap Analysis document for Non-credit, Distance Learning and the College of Arts and Sciences AIMS system is not included at this time. Deb Benton (rightfully) requested additional clarification and more consistent presentation of the materials for these areas. CIBER will work at no charge through an additional edit cycle on this section of the document to allow the project team time to review and approve this section of the document. CIBER's next editing pass will be completed by August 20th.

We sincerely appreciate the opportunity to be of service to OHIO.

Bruce W. Moore, Director
CIBER Higher Education Practice

EXECUTIVE SUMMARY

The purpose of this deliverable is to provide information to Ohio University (OHIO) stakeholders regarding the Student Information System (SIS) Oracle/PeopleSoft implementation and the overall readiness of the university to embark upon this enterprise-scale project.

OHIO has used the Informs SIS products (previously owned by AMS – American Management Systems and currently owned by Informs, Inc.) for more than fifteen years, and it is the official system of record for core student data including, but not limited to Admissions, Advising, Student Records, Student Accounts, and Housing. Other related systems include SIGMA Student Aid Management System (SAM), Recruitment Plus, the Degree Audit Reporting System (DARS) and the AdAstra class and room scheduling software. Students, faculty and staff at OHIO use Informs SIS, SIGMA SAM, Recruitment Plus, DARS and AdAstra to support their academic and student administrative needs.

The initial impetus for the replacement of the current student system started when Informs announced that support would be discontinued for its middleware (Enterprise Server aka CORE) product. In the Spring of 2006, the Ohio University Board of Trustees approved the initiation of a project to implement a replacement for the Informs Student Information System. OHIO defined 2,500 student system related requirements during an analysis in 2006, demonstrating that *the Student System is one of the most mission-critical systems for OHIO.* Through a vendor selection process, Oracle/PeopleSoft Campus Solutions was selected as the Informs replacement and Adirondack was selected as the housing management software vendor. As part of the implementation, new system architecture, an integrated identity management solution, an enterprise portal, and a data warehouse and enterprise reporting solution are planned to be implemented by OHIO.

The Five Year Academic Action Plan for OHIO emphasizes strengthening undergraduate education, and supporting student success and student retention. *A core component of the success of the implementation will be the delivery of access to integrated online student and faculty services.* In PeopleSoft, these services are based upon a model of "shared data" as opposed to a model in which individual departments "own" data. Student, faculty and staff areas will have access to a "360° student view" in PeopleSoft, and using system security (including identity management security and single sign on), users will have access only to information and resources specific to the role they have at OHIO.

The replacement of the current student system has been designed in a two-phased approach:

> Phase 1: Pre-Implementation Planning, lays the foundation, and establishes the blueprint for the second phase.

> Phase 2: Implementation of the new system.

The Pre-Implementation Planning phase, conducted from February through June 2008, included purchasing the PeopleSoft Campus Solutions software and hiring CIBER as the services vendor. The primary deliverables from CIBER included: the Project Charter, the Project Plan including specific resource requirements, a Technical Assessment, and a recommended approach to Data Warehousing, Enterprise Reporting and Portal.

Each of the above stated CIBER deliverables is supported by a detailed document. The following section summarizes CIBER's assessment of OHIO's organizational and technical readiness, as well as a summarization of the risks and dependencies for the new SIS project.

Organizational Readiness

- Executive support for the project is present, made up of the appropriate individuals, and the Executive Project Sponsors have been appropriately visible in their support of the project at this early phase. As noted in the Risks section below, these executives need to begin to be more visible in championing the project to the university community.

- Funding has yet to be allocated, and the project does not have authority to spend. The budget has been developed, validated and presented to the Board. The project has some unexpended funds available from this phase to bridge into the next phase, but spending authority should be granted as soon as possible.

- The core Project Team is working well together, understand their roles and responsibilities, and are taking unusual and commendable ownership of the project and it's deliverables at this time. But this team structure is still informal. The team, including Project Director, Functional and Technical Leads needs to be finalized and formally announced to the university community as soon as possible so that they do not lose momentum. Regardless of the formal announcement, the team should be committed fulltime to the project beginning August 1, 2008 to coincide with the beginning of the implementation in January 2009.

- The combination of implementing Campus Solutions, a Business Intelligence/Data Warehouse solution, a Portal solution and a Recruiting solution; together with integration with DARS, a potential upgrade to DARS and the need to move from quarters to semesters, will impose significant direct project staffing and backfill requirements on the university. Project staffing needs have not been adequately defined and discussed at this time, and it is not clear whether the institution can easily support this full scope.

- Both functional and technical team members are looking forward to the project and to learning new technologies. There is not significant resistance to change in key positions in the team, and this is a very positive thing. Both institutionally, and at the core team level, OHIO must continue to actively manage organizational change, and the attitudes of stakeholders toward change.

- The regional campuses appear to be appropriately involved in the project to this point. Representatives were included in the Project Charter interviews, Fit/Gap sessions and reviews of the deliverables. OHIO needs to continue to actively involve the regional campuses throughout the project.

- Faculty have been invited to attend various activities, but faculty involvement to this point has been limited. OHIO will need to find ways to better involve faculty as the project moves forward. Options include appointing a Faculty Special Interest Group, who would meet periodically to review project progress and deliverables; using faculty as subject matter experts where appropriate, or appointing a "faculty liaison" to the project.

- The implementation of PeopleSoft requires a move away from "silo" data and toward more flexible controls over who can see and update information. This has obvious advantages, but also introduces an element of organizational change that must be actively managed and encouraged.

Technical Readiness

- OHIO does not currently have the required technical architecture in place to support a PeopleSoft implementation, however funds have been budgeted (and validated) to resolve this. OHIO could also consider a hosted solution for technical architecture. The hardware sizing process used as part of budget validation would be a useful starting point, however to get an accurate comparison of hosting options would require additional discovery to be done, since hosting goes beyond hardware to Service Level expectations. The process to either select a hosting vendor, or price, select and install hardware should begin no later than August 2008, to coincide with the beginning of the implementation in January 2009.

- OHIO does not have experience with PeopleTools, or with integrating multiple components (Campus Solutions, CRM, and Business Intelligence/Warehouse) of large PeopleSoft projects. However the technical team is motivated to learn the new tools, and funding for technical training has been included in the budget. It is important that OHIO move forward with technical training for this team. Team training should be "just in time" to coincide with the beginning of the implementation in January 2009.

- The organizational structure in the Office of Information Technology (OIT) includes most of the right technical roles already. Obviously, OIT is not adequately staffed to support both the legacy system and new system development effort throughout the implementation, but production staffing levels may require only minor augmentation (in system and database administration) to support PeopleSoft.

- OIT will need to revise their approach to new development (and migration of new development into production) to better align with PeopleSoft best practices. Using the approach outlined in the CIBER Technical Assessment document will be beneficial across the organization.

Risk Summary

OHIO will implement a comprehensive risk management process, as described in the project controls section of the Project Charter document.   This process will be used to identify and manage risks throughout the project, and will be an on-going and dynamic process. A detailed list of preliminary project risks and potential mitigation strategies appears in the risk management section of the Project Charter document.

The top six project risks requiring executive attention at this phase of the project are summarized here:

1. Conversion from Quarter to Semester term: Although the project team assumes that a conversion from quarters to semesters will occur for Fall 2011, OHIO has not yet made a formal decision on this issue. This is the most significant risk for the SIS Project, because it will affect the overall timeline, and may require OHIO to revisit staffing and scope. Consultants involved to this point strongly recommend that the cutover to PeopleSoft and the conversion to semesters be conducted as separate projects, at different times. Doing both projects at once significantly increases the risks for both.

2. Funding: Funding has not yet been approved or allocated for the project. In order to move forward with staffing, hardware purchases, software licensing and team training during the five months prior to the beginning of implementation, funding needs to be approved soon, and approval to spend should be effective upon acceptance of the Project Charter.

3. Executive Support: OHIO has named Executive Project Sponsors, and this is very positive. These executives, and in particular Kathy Krendl, as the project sponsor, need to begin to be more visible in championing the project to the university community. This reinforces their support for the project, and continues to demonstrate that the project is real, ongoing, and has priority within the university community.

4. Student Financial Aid (SFA) conversion from summer header to summer trailer. For the purpose of aligning the SFA calendar with the academic year calendar, the project team has recommended that the SFA summer term be converted from a header to a trailer. This recommendation is currently being evaluated within the SFA office, and a formal proposal will be submitted soon. The decision must be finalized before the configuration of Financial Aid begins.

5. Staffing: The project team is working well together and has good momentum, but there are many key tasks to be accomplished prior to the beginning of implementation in January 2009. In order to maintain momentum and successfully navigate the work of the next five months, the core project team (including an OHIO Project Director) must be formally named and dedicated fulltime to the project.

6. Technical Infrastructure: In order to begin the implementation process in January 2009, OHIO must either finalize a hosting arrangement, or purchase hardware and implement the required technical architecture to support the project. Either process is likely to require some months of effort, and must begin no later than August 2008.

7. Dependencies of other Projects or Initiatives: Dependencies are other projects or efforts that are intended to happen, but that are not part of the scope of this project. They must be considered in the context of the Oracle/PeopleSoft SIS implementation project because they may offer strategic opportunities, and because their success or failure may significantly impact this project. They may also compete for resources. The project management team for the Implementation project, and each of the projects noted below must maintain regular communication. Because of this, the governance structure for each major project should include a liaison from the other projects considered to be significant dependencies. Significant changes in resource needs, deliverables or timing for any of these projects may need to be handled through risk management for this project. Significant dependencies include:

    a. Quarter-to-Semester conversion

    b. Identity Management (including Oracle Data Privacy Shield, "data vault")

    c. Data Warehousing and Enterprise Reporting

    d. Constituent Relationship Management (CRM) solution

    e. Other major projects or initiatives that require significant effort prior to Fall 2011

Implementation Approach

Generally speaking, PeopleSoft Student system implementations are 24 to 30 month projects. The university has already completed three months of the fit/gap analysis work, so it's conceivable to conclude that OHIO should plan for a 21-27 month implementation timeline. The time to complete the project is, of course, also dependent upon the level of resource commitment and scope of work.

The Quarter-to-Semester conversion project should follow the implementation of the new Student system. In this way, the university is in a better position to first verify the data conversion from PeopleSoft to Informs on the current quarter calendar, and then perform a separate verification of the academic calendar conversion.

The following timeline is an approach to accomplishing both the new system implementation as well as the academic calendar conversion by the Spring of 2012:

1. August 15, 2008 - <u>Executive project sponsors</u> sign Project Charter (intent to fund is granted). The signing of the charter authorizes the SIS Core Project Team to begin work. ***Note: the Project Director and the Admission's Functional Lead positions are not yet determined.***
2. September 30, 2008 – <u>Project Team</u> delivers Request for Proposal (RFP) for Implementation Services to vendors
3. October 31, 2008 – <u>Executive project sponsors</u> approve funding and allocate project budget
4. November 15, 2008 – <u>Project Team</u> awards Implementation Services RFP
5. February 27th – <u>Project Team</u> concludes initial team training, and completes dependent projects.
6. March 2, 2009 – Project Initiation
7. December 31, 2010 – New PeopleSoft Student System in production (this is assuming a 24 month implementation timeline and working in parallel with the Quarter-to-Semester Transition teams)
8. April 2012 – New system ready for semester calendar