



*Co-Pilot Institutions - A Composite Report
iNtegrate Student Services Readiness Assessment*

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Executive Summary

Moran Technology Consulting (MTC) was retained by the NSHE iNtegrate Project Director to conduct a readiness assessment for 4 co-pilot institutions (University of Nevada –Reno (“UNR”), Great Basin College (“GBC”), Western Nevada College (“WNC”) and Nevada State College (“NSC”) involved in the iNtegrate project. The goal of this assessment was to determine the level of readiness of the co-pilot institutions to participate in Phase 1 of the iNtegrate project to implement the PeopleSoft Campus Solutions software. Our focus was to ensure that the co-pilot institutions are prepared with the necessary leadership and functional resources to successfully serve in their role of supporting the development of the core SIS system. The report is organized into the following sections: (1) Executive Summary; (2) Detailed Approach; and (3) Detailed Findings and Recommendations.

As this report only addresses the co-pilot institutions readiness for Phase 1 activities, we recommend that each co-pilot institution be reassessed prior to moving on to implementing the SIS at their own campus in approximately 14 months.

MTC utilized a questionnaire and conducted a series of interviews with each campus executive team and project staff. We conducted a series of individual and group interviews with approximately 55 people over a 4 day period. Although our focus was on the readiness of the co-pilots to deal with Phase 1, because of the timing of our work, the campuses were also eager to share their project experience to date. A number of comments and concerns were mentioned to MTC and while they are out of scope for the readiness assessment, they are, nonetheless, valuable and have been included in a separate Appendix in this report.

Once the data from the questionnaires and interviews was gathered, MTC analyzed it for each institution and provided a detailed institutional report with a readiness ranking for the institution. For the purpose of this consolidated report, we have analyzed all 4 co-pilot reports to look for commonalities and issues that may be similar across all of the institutions. We believe that while all 4 co-pilot institutions are ready, in terms of participating in the first phase of the project, there are some significant concerns that are common to all of the institutions.

The following list outlines the common issues faced by all four institutions:

- **Collaboration model.** There is a need for a more clearly defined and articulated collaboration model that includes:
 - The original C+ model whereby co-pilot institutions were not fully engaged for another 16 months
 - A collaborative governance model
 - A decision making process for collaborative decisions – including what data, business processes etc should be collaborative and what is up to a campus to decide
 - A comprehensive communications plan and toolset so that collaborative decisions and issues can be communicated easily
 - A method/process for sharing resources
 - A process for insuring that all the co-pilot institutions feel empowered to participate and contribute
- **Limited resources.** None of the co-pilot institutions have enough staff resources to work full time on the iNtegrate project and continue to provide services to students, faculty and the institution. Co-pilot and the iNtegrate Project Office must continue to look for creative ways to address this problem. If the institutions do not have more backfilled or cross-trained resources for key project participants during their heaviest times of project involvement, there could be a significant impact upon both team morale and project success.
- **Funding concerns.** Given the state wide budget crisis, all of the co-pilot institutions indicated a deep

concern about their ability to fund the project. However, it is important to continue to communicate to staff and the institutional communities that money to pay for the major external project costs (software, hardware, maintenance and consultants) has already been allocated to the project and cannot be used for other projects. However, additional money will be required from all the campuses to pay for their internal staff costs, so campuses need to develop funding plans that address campus needs and on-going operational requirements. Campuses should use the Phase 1 time to work on developing a detailed project budget and funding for the full implementation.

The assessment scoring for this area is low across all institutions; this is meant to convey the uncertainty that surrounds all funding matters at NSHE institutions at this time.

- **Project team training.** The lack of familiarity with the PeopleSoft product is causing problems for institutions trying to participate in the IDP sessions. Additionally, institutions have been told by CCI that the only training they will receive is through the IDP sessions. This misperception needs to be corrected (the high level product plan and final SOW from CCI both discuss training.) Co-pilots will be asked to make some decisions to help guide the pilot institutions as part of the ongoing collaboration model. Some minimal level of system education is requisite to making informed decisions. To assist with the IDP sessions that are occurring now, a demonstration of system capabilities should be included in each IDP session, a training/demo system should be made available to project teams to use and the Oracle training tool should be made available to all institutions.

End user training. Co-pilots also indicated a concern about end-user training. This stems from the misperception that there will not be any. At this time, co-pilots need reassurance that a Training Strategy and training materials will be developed and tested as part of the pilot activities. Co-pilots also need to be informed that end-users who are not part of a project implementation team do not need system training at this point.

We did find a major strength at all of the campuses: the readiness of the functional staffs to get this project successfully completed:

- **Project support and staff willingness.** Each co-pilot institution indicated, at some level, general support for the project, including: belief in project goals, the benefit to their institution and student services, and willingness to work with peer institutions to make the collaboration successful. This was most evident at the functional staff level. This encouraging finding differs from other implementations that we have observed where top-down support is not shared by the bulk of the front-line staff. This support is not without legitimate concern about funding and resource allocations, however it is an asset to the project and should be nurtured.

Detailed Approach

MTC utilized the following approach for assessing the readiness of the co-pilot institutions:

- MTC reviewed the CedarCrestone-developed Co-Pilot Campus Readiness Assessment documentation to insure a level of commonality between pilot and co-pilot readiness assessments and added some minor refinements that we felt were necessary.
- The iNtegrate Project Office distributed the final Readiness Assessment questionnaire to the remaining Co-Pilot Institutions. Campus executives, project managers, and functional leads/teams were among the respondents and these were also the people that were interviewed in the face to face meetings that were held.
- The questionnaires and interview results were analyzed and a readiness score was assigned for each of the eight (8) readiness categories. Each score is associated with a level of readiness, a level of risk and an overall rating for the category. The table below displays the scoring levels:

Scoring Levels

Score	Level of Readiness, Level of Risk
1	Low Readiness, High Risk
2	Low/Medium Readiness, High Risk
3	Medium Readiness, Medium Risk
4	Medium/High Readiness, Medium Risk
5	High Readiness, Low Risk

Once all scores were compiled for each readiness category, an average of the readiness categories scores was used to assign an overall level of readiness for the entire institution. These scores were then added together to provide an overall level of readiness for all the co-pilot institutions together.

For purposes of this Readiness Assessment the following definitions were used:

“**Risk**” = the expectation that a threat may arise that results in negative consequences

“**Readiness**” = a measure of the level of commitment and preparedness for a task

Overall Readiness Assessment Score

According to our assessment, the combined co-pilot (for UNR, GBC, WNC and NSC) score is a 3.19 on the co-pilot readiness scale. All four campuses scored in this same assessment range. This represents a Medium level of Readiness and a Medium risk level. Scores for each assessed category are listed below.

Composite Co-pilot Readiness Scores

Readiness Category	Rating	Total
Sponsorship and Commitment	Readiness = Med/High Risk = Med	4.00
Communications Readiness	Readiness = Medium Risk = Medium	3.25
Funding Readiness	Readiness = Low Risk = High	1.50
Project Management	Readiness = Med/High Risk = Medium	4.50
Functional Area Participation	Readiness = Med/High Risk = Medium	4.25
IT Environment and Support	Readiness = Medium Risk = Medium	3.00
Training Readiness	Readiness = Low Risk = High	1.00
Collaboration Readiness	Readiness = Med/High Risk = Medium	4.00
Overall Readiness		3.19

Detailed Findings and Recommendations

Sponsorship and Campus Commitment

The overall score in the area of Sponsorship and Campus Commitment is 4.00. In MTC's opinion, Readiness in this category is Medium/High and Risk in this category is Medium.

Sponsorship and Commitment Strengths

- Executive leadership at all four institutions (WNC, GBC, UNR, and NSC) is fully aware and committed to successfully supporting and achieving the goals and objectives of the project.
- The functional level management teams are committed to supporting the project goals by freeing up key resources as much as possible, though staffing is limited in some areas. Functional areas have identified the key personnel required to participate in the project.
- There is a strong "can-do" attitude from key functional/module leads
- Institution staffs have developed institutional goals for the project
- Institution staffs seem to be clear about their team responsibilities and feel empowered to make decisions for their institutions
- All the institutional leadership teams are facing the same problems including:
 - Competing projects, daily operations and campus master plan development
 - Project challenges: functional and IT staff training, data conversion, configuration, number of instances, IDP sessions, communications
- The executive vision and communications plans are complete or in process at every institution except for UNR, which has not started an executive vision document
- As the project progresses, the co-pilot role is becoming better understood at all levels at all institutions
- All institutions are open to utilizing a collaborative environment (Note: this is especially true for WNC, GBC and NSC)

Areas for Improvement/Suggestions

- Review the original C+ concept with CCI, all the co-pilot campuses, SCS and the Project Office so that everyone understands their roles and responsibilities going forward
- Complete and communicate the executive vision and communications plan for every institution

Communications Readiness

The overall score in the area Communications Readiness is 3.25. In MTC's opinion, Readiness in this category is Medium, and Risk in this category is Medium.

Communications Readiness Strengths

- Project Managers/Team Leads are taking care to forward iNtegrate email communications to appropriate team members as needed
- Communications from System Administration (Robyn Render's office) is working well. The information comes to the project lead and is then distributed to functional leads
- Communications within the institutions generally works well

Areas for Improvement/Suggestions

- Develop a formalized project communications plan, with associated messages, and tools. It should be developed for each campus AND for the co-pilots together to:
 - Establish and maintain a consistent Web-accessible calendar of communication events
 - Develop and publish well defined projects goals for each institution AND for the co-pilots together
 - Complete and distribute the communications plan for each institution AND for the co-pilots together
 - Complete and distribute project vision and scope for each institution AND for the co-pilots together
- Develop a mechanism to routinely check with project staff on each institution to insure that everyone feels that project communications are clear, effective and meeting needs

Funding Readiness

The overall score in the area Funding Readiness is 1.50. In MTC's opinion, Readiness in this category is Low, and Risk in this category is High.

Funding Readiness Strengths

- Project monies have already been approved by the NSHE Board of Regents for the hardware, software, maintenance and consultants

Areas for Improvement/Suggestions

- State-wide funding reductions are a concern for all institutions
- Each institution needs to develop a funding plan that addresses supporting campus needs and on-going operational requirements. While the initial co-pilot participation activities and staffing requirements took the co-pilots by surprise, these expenditures should become manageable as the collaboration model solidifies and cooperation between institutions increases. Institutions should use the co-pilot phase of the project to work on develop a detailed project budget and funding for the full implementation.
- Work with iNtegrate project management to develop a prioritization plan for limited travel funding
- Some institutions indicated that the cost of the project (from their perspective) is an unknown. It is not clear how will this project be funded and how many resources are required. There has been some initial work done by the other campuses with respect to resources needed and potential project funding, this needs to be updated and shared with campuses and project staff
- The state wide budget crisis is clearly a factor in this project but it is also a known problem. Instead of tossing in the towel and saying the project cannot be done because of funding – contingency plans need to be developed (at the institutional level as well as the iNtegrate level)
- Develop and communicate a clear message that indicates that the project is going forward, regardless of the state wide budget situation

Project Management Readiness

The overall score in the area Project Management is 4.50. In MTC's opinion, Readiness in this category is Medium/High, and Risk in this category is Medium.

Project Management Strengths

- There are identified managers, co-managers, leads and teams for the project at all institutions
- Institutions understand their roles and responsibilities within their campus
- Most institutions have tools such as SharePoint, IM, Microsoft Project, etc. in place for sharing project information within their own teams, although not with other NSHE institutions

Areas for Improvement/Suggestions

- Develop a high-level project plan that integrates the iNtegrate project plan with specific institutional milestones and constraints.
- Once the institution project plan has been developed, it needs to be communicated to the project team and managed at the institutional level
- Develop a mechanism for coordinating with the overall project management with Robyn Render's area and so that institutional issues that affect the overall collaboration are brought to the table and addressed
- Develop a mechanism for communicating and involving those parties at each campus (e.g. faculty) who have the responsibility for making institutional changes to policies - where it makes sense

Functional Area Readiness

The overall score in the area Functional Area Participation is 4.25. In MTC's opinion, Readiness in this category is Medium/High, and Risk in this category is Medium.

Functional Area Participation Strengths

- Key project staff have been identified
- The project teams are eager to start the implementation and have a "will do whatever it takes" attitude
- Current business processes are either documented or are being documented on the campuses. This will assist as staff responsibilities are adjusted in order to accommodate the demands of project activities and may also assist in the identification of areas that could be streamlined
- Staff are committed to evaluating and changing existing business processes – not wedded to current processes
- Most campuses are re-evaluating current projects on the table and putting them on the back burner in order to focus on iNtegrate
- Functional leads feel empowered to make decisions and feel supported by executive leadership

Areas for Improvement/Suggestions

- There is a concern that the backfill will not be sufficient to support the project. Because of budget cuts over the past couple of years the functional areas are already short-staffed
- At some institutions, Project Managers are also serving as module leads for multiple functional modules or there isn't enough staff for a team so a single person (or perhaps 2) is all that a campus can commit. This is problematic since it essentially requires more than a 100% time commitment along with daily staffing responsibilities.
- Functional teams are not familiar with the PeopleSoft product
- Not all functional team members are aware of the extent to which they will be asked to modify business processes in order to accommodate the software
- Functional representatives need to pay close attention to some implementation decisions, especially those concerning housing and upper division courses taught by community colleges
- These campuses should develop cross-training plans for staff in functional areas in order to pick up day-to-day responsibilities as co-pilot and implementation demands change
- All co-pilot institutions noted that there has been a lot more initial participation in the IDP sessions than they expected. This cannot continue the project as a whole needs to return to the original idea of limited co-pilot participation in the IDP sessions (e.g. don't need every team member at every session, institute the Friday team calls, collaborate with other co-pilots so that a given campus can take the lead for all the co-pilots in a functional module)
- Retention strategies and/or incentives for keeping project (as well as day to day staff) need to be addressed
- Collaboration wherever possible and feasible needs to be strongly encouraged

IT Environment and Support Readiness

The overall score in the area IT Environment is 3.00. In MTC's opinion, Readiness in this category is Medium, and Risk in this category is Medium.

IT Environment and Support Strengths

- There is some collaboration with IT staff from SCS and the smaller co-pilot schools occurring
- Effective communication is occurring between the project team and IT

Areas for Improvement/Suggestions

- There may be a need for additional hardware (in terms of workstations for staff) at some campuses. Institutional project management should work with iNtegrate project management to understand the minimal necessary hardware configurations for workstation readiness, and then compare to workstations currently in use
- There has been some discussion on campuses about the need for dual monitors to enable key staff members to easily compare legacy system functionality with the new system. This may not be necessary and the co-pilot schools should first allow the pilot schools to determine the usefulness of that approach
- While there is communication and collaboration with SCS in place, it's not clear what role the technical staff at the campuses will actually play. This should be clarified and included in a technical project plan
- There is concern about how much SCS staff can absorb since they will need to maintain legacy systems as well as work on the new system
- It is not clear whether or not the institutional IT staffs are fully aware of the project, the impacts that may exist to the legacy systems and other technical issues with the project
- Like the functional teams, technical support is currently overwhelmed and no new resources are planned. Technical staff need to look at what work they can shuffle and/or change in order to free up time to work on the iNtegrate project
- There is a lack of overview of PeopleSoft from a technical perspective

Training Readiness

The overall score in the area Training Readiness is 1.00. In MTC's opinion, Readiness in this category is Low, and Risk in this category is High.

Training Readiness Strengths

- Co-pilot team members are actively involved with pilot IDP sessions as a way of learning system functionality
- The functional teams on most institutions have begun cross-training other staff (e.g. work study, high school students, etc) on legacy tasks
- Some institutions have discovered a lot PeopleSoft documentation on the web from other implementations. This has been very helpful and has helped bridge the gap with the lack of training (Note: this is not a substitute for actual training.)
- Since there has not been any formal training from CCI, except what can be picked up in the IDP sessions, functional staff have begun to train themselves using whatever tools (documentation, demo sites, etc) that they can find. Project staff feel confident that with some training they would be able to pick up the ball and run with it

Areas for Improvement/Suggestions

- Develop and communicate a formal training plan and strategy training for project team members and end users. The training plan should maximize reuse of publicly available training materials and computer-based training focusing primarily on the delivered PeopleSoft functional capabilities
- Project team members have been told by CCI that there is no other training available except what is done in the IDP sessions. This is a mis-perception on CCI's part and needs to be addressed
- The PeopleSoft terminology and structure is confusing and has not really been addressed. A comprehensive demo of the entire system that shows how all the pieces inter-relate would be very useful. A glossary of terms that maps PeopleSoft terminology to the campus terminology should be created and distributed
- Implement the training tools (provided by Oracle) for the co-pilots now to help facilitate familiarity with the system
- Create a sandbox system for the co-pilots now so that staff can begin learning about the system
- Staff that are not on the project should be formally cross-trained in order to pick up additional work responsibilities as may be required throughout the project
- A number of other PeopleSoft schools (notably the CSU system and AZ schools have offered access to their documentation and training materials. Access to this information should be provided to all campuses

Collaboration Readiness

The overall score in the area of Collaboration Readiness is 4.00. In MTC's opinion, Readiness in this category is Medium/High, and Risk in this category is Medium.

Collaboration Readiness Strengths

- There is an expressed belief that common business practices and common data elements are possible
- Project team members are aware of their roles and responsibilities vis-à-vis their peers at the pilot institutions
- There is a history of collaborating with other institutions within the co-pilot group and a strong willingness and desire to partner with each other
- There has been formal and informal communication between other institutions for years at the functional level so there is precedent and successful collaboration between functional areas

Areas for Improvement/Suggestions

- Develop a clear governance and infrastructure to support cooperation and coordination with other pilot and co-pilot institutions. It is not clear what decisions should be collaborative and what decisions are made by individual campuses. Consider adopting a team approach (where a campus takes the lead on a particular module and the other campuses agree to follow their decisions and lead). This should include all the co-pilots, SCS and the project office and should be formally documented as part of the project charter
- Insure that all vendors working on the project (CCI, the hardware vendor, etc) have a good understanding of project's co-pilot strategy for the project, their use of collaboration and the relationships to the pilot institutions
- Develop a mechanism for insuring that the co-pilot institutions are kept in the communications loop. Some co-pilot institutions have expressed a feeling that the pilots, system office and consultants have no inherent interest in keeping the co-pilots involved in the process
- Continue to explore and develop as many common business processes, rules and data structures as possible in order to minimize the need for modification and to help insure a vanilla implementation
- Develop a greater understanding of how the role of co-pilot institutions roles will change during the transition from Phase 1 to full implementation and communicate this to the pilot institutions