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USF Enterprise Resource Planning (ERP) Suite Migration Project Charter

Scope

The USF ERP migration project includes the following major functional areas:

- Advancement
- Finance, including Fixed Assets
- HR
- CRM (Customer Relationship Management)
- Student/Academic Management
- Financial Aid
- Degree Audit
- Housing

All modules should include both robust administrative functionality and user-friendly self-service.

Major cross-functional areas include:

- Document Imaging and Workflow
- Enterprise Reporting, both ad-hoc and executive-level
- Security/Access Management

Vendors will be asked how their systems might integrate with our existing SungardSCT Luminis Basic portal and/or their recommendation for a portal migration – if appropriate.

About USF

USF is a premier Jesuit Catholic, urban university with a global perspective that educates leaders who will fashion a more humane and just world. With a total enrollment of approximately 8,000, USF offers bachelors, masters, and doctoral degree programs in San Francisco, at five regional campuses, and overseas. USF employs approximately 1,600 full and part-time faculty and staff.

Objectives & Measures

Objective	Measure(s)
<ul style="list-style-type: none">• Support excellence in teaching/learning, scholarship and creative expression	<ul style="list-style-type: none">• Improvement in student evaluation of academic advising• Student/faculty satisfaction with user-friendly interfaces which require little or no training.
<ul style="list-style-type: none">• Improve the quality and diversity of USF's applicants and graduates	<ul style="list-style-type: none">• Increased applicant pool• Improved retention• Improved graduation rates
<ul style="list-style-type: none">• Promote collaboration to offer students integrated learning experiences	<ul style="list-style-type: none">• Student satisfaction with seamless service delivery

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	<ul style="list-style-type: none"> • Inter-departmental collaboration based upon shared data
<ul style="list-style-type: none"> • Make USF processes more efficient and effective 	<ul style="list-style-type: none"> • Eliminate many shadow databases and ad-hoc systems currently required to supplement USF's ERP system (SCT Plus). • Document of improved business processes, including adoption of best practices. • Convert paper-based processes to electronic processes, such as purchasing requisitions and payroll timesheets. Corresponding reductions in processing time, data entry labor, and paper costs. • Integrate USF's ERP system with third-party systems in real time rather than through batch processing.
<ul style="list-style-type: none"> • Improve USF's technology infrastructure 	<ul style="list-style-type: none"> • Number of institutions in production on the new platform • Length of product roadmap • Provide 24X7 up time.
<ul style="list-style-type: none"> • Support the Capital Campaign by strengthening USF's long-term relationships with its constituents. 	<ul style="list-style-type: none"> • Increased alumni giving
<ul style="list-style-type: none"> • Support a culture of evidence across the University 	<ul style="list-style-type: none"> • Improve both the quality and accessibility of data, especially for management decision making. Eliminate duplicative, isolated collections of data and conflicting data definitions, including notification to all stakeholders when a defn. is changed.

Core Principles

- USF seeks a single, vendor-supported, integrated suite of applications.
- Implementation must be phased in accordance with the financial and logistical constraints of the University.
- The ERP implementation should create administrative efficiencies which allow for re-direction of resources to other priorities.
- System modifications should be made only in cases where key strategic functionality is at stake, or when regulatory compliance requires a change.
- Supplemental third-party applications may be used in situations where the required functionality is either missing from or significantly inferior in the primary vendor suite.
- The selected solution should be fully accessible via the USF web portal, including current browser support and less than 10 second load times on USF's network.

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- The student and faculty self-service components of the selected solution should be fully cross-platform at the client level (Mac and Windows OS). Modules used by staff only may require the Windows OS, however, full cross-platform accessibility is preferred.
- Skills required to maintain the system should be readily available in the marketplace and provide a career opportunity for staff to pursue both within and outside USF.
- The solution should be logically 3-tiered and consist of industry standard, scalable technical infrastructure. Readiness for Service Oriented Architecture desirable.
- Vendor must have sufficient resources to develop the product at the level of marketplace leadership.
- System should have a projected life that does not require relicensing or major reimplementation within 10 years of licensing.

Project Governance and Community Involvement

Steering committee

USF's ERP project will be governed by an executive level steering committee composed of the following members:

CIO

VP Business & Finance

VP Advancement

VP University Life

Dean of Academic Services

The charge of the steering committee will be to make decisions on key strategic issues such as those included in this charter (project scope, objectives, and core principles), as well as vendor selection and overall budget.

All system modifications must be endorsed by the steering committee and approved by the president. System modifications are changes made to the base code of the vendor solution, changing the design and functionality of the product. Addition of a new field or fields and coding of business rules associated with that field constitutes a modification. Configurations, such as creation of new data elements for existing fields or customization of user interface using supported options, will not be considered modifications.

Replacement of functionality present in the primary vendor suite with a supplemental application must be approved by the steering committee.

Requirements Collection and Vendor Evaluation Input Group

A cross-section of staff, faculty, and students will be consulted during the requirements gathering process, prior to release of the Request for Proposal (RFP) to vendors. These same people will be invited to attend vendor presentations of their responses, and be given the opportunity to complete and submit a form providing their feedback on the presentations. This feedback will be considered by the steering committee in vendor selection.

Core Procurement Team

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One representative for each major module (Student, HR, Finance, Advancement) will be designated to serve on the core procurement team with the ITS ERP Project Manager. The core procurement team will score the base RFP responses in addition to the functional requirement responses for their area, review all scoring as compiled in the overall evaluation framework, and formulate a vendor selection recommendation for the Steering Committee.

Implementation Teams

An implementation team will be formed for each functional module when that module begins the implementation process. The implementation team will include both technical and non-technical staff. Team members will be selected by the executive officer(s) for the functional unit(s) involved. Membership may change over the course of the implementation. Membership should include at least one faculty member and at least one student for implementation of student and faculty self-service modules.

The implementation team should include sub-groups focused on communication, business process analysis, workflow, and reporting.

University Information Technology Committee (UITC) and Trustee Committee on Information Technology Strategy (CITS)

These standing committees will receive periodic ERP project updates and provide advisory input for consideration and action by implementation teams or the steering committee.

Administrative Applications Sub-Committee of the UITC

This committee will serve as an extension of the implementation teams, particularly with regard to core system issues, such as the creation of the person record, design of the chart of accounts, etc.

The Student Information System Users' Group

This group will receive periodic updates and provide advisory input. The group may also serve as a core group of trainers to be trained when we reach the student system implementation phase.

Project Management

- ITS will designate a project manager for the ERP project overall.
- Each implementation team will have a functional lead and a technical lead.

Consulting/Services

Consultants may be used in multiple areas, including but not limited to:

- procurement process support
- supplemental project management
- business process analysis/re-engineering
- technical or functional staff augmentation, either due to excessive workload or gaps in internal staff skill sets
- training
- support