Project Wahoo Phase I

Team Kick Off Meeting January 17th 2017
Agenda

• Opening Dr. Liz Klonoff
• Project Management Introductions
• Scope
• Timeline
• Teams
• Governance
• Communication Strategy
• Next Steps
• Q&A
Introductions

• Project Management Team
  • Executive Sponsor – Dr. Liz Klonoff
  • Sponsor – Dr. Ozlem Gariby
  • Sponsor – Rebecca Vilsack
  • Project Manager – Charlie Smith

• Attain LLC
  • Mark Davis
  • Evan Roberts
  • Nadia Kikilo
  • Nicole Cohee
  • Dave Reefer
  • Cindy White
Scope

• Research Business Practice and Policy Review Assessment

• eRA Vendor Selection

• UCF Financials / PeopleSoft Environment Review and Assessment for Grants Implementation and Optimization

• Change Management Initiatives
Scope (cont.)

• Research Business Practice and Policy Review Assessment
  • Documentation review
  • Interviews
  • Research Enterprise Operations walk through
  • Integrated review of the Pre Award, Post Award and Grants Accounting Office
  • Identification of gaps in the current state and “To Be” future state in policies, procedures, technologies and reporting
  • Organizational structure review and analysis
Scope (cont.)

• eRA Vendor Selection
  • Requirements development from Research Business Practice and Policy Review Assessment
  • ITN creation to solicit proposals from 3rd party vendors
  • Vendor presentations and product demos
  • Product selection
  • Integrated planning with PeopleSoft Tech, FSS and ARGIS eRA teams
Scope (cont.)

• UCF Financials / PeopleSoft Environment Review and Assessment for Grants Implementation and Optimization
  • Financial Modules, Human Resource, Payroll and integration points
  • Chart of Account design and use
  • Business Unit design – including General Ledger and all Module Business Units
  • Current customization/integrations in place for Grants and Billing
  • Integrated planning with PeopleSoft Tech, FSS and ARGIS eRA teams
Scope (cont.)

• Change Management
  • Support outcomes of Research Business Practice and Policy Review Assessment
  • Support to Executive Sponsor, leadership, and stakeholders for prioritization, planning and roll out of changes
  • Communication plan development for change initiatives
  • Management coordination and implementation of change
Timeline

- Phase I Kick Off
- Project Initiation & Baseline
- Research Business Practice & Policy Review
- Near Term Fixes
- PeopleSoft Assessment
- eRA ITN Development
- eRA ITN Procurement
- Phase I Report Close
- Gate Review Phase II & III Readiness
- eRA and Grants Go Live

Change Management

January 2017

April 2017

May 2017

June 2017

July 2018
Teams

- ORC VP & Provost Office
- ORC Research Info Systems
- ORC Compliance
- UCF CS&T, PMO & Security
- Departmental Research Administrators
- ORC Contracts & Grants
- UCT IT
- Financial Support Services
- Faculty Researchers / PI’s
- ORC Research Foundation
- Finance & Accounting
- Deans, Assoc Deans for Research

Formalize Project Sub Teams
Integrate Teams to Optimize Work Flow Design
Governance
Communication Strategy

• Interviews and surveys
• Sub Team Focus Groups
• Integrated Sub Team Focus Groups
• Email
• Web
  • Wahoo & FSS
• Expanded Project Team meetings
Next Steps

• Initial interviews 1/17 – 1/19
• Creating baseline project schedule
• Scheduling interviews of Project Team and other key stakeholders
• Creation of reoccurring Sub Team meetings
• Selection and delivery of documentation for review
Questions?