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
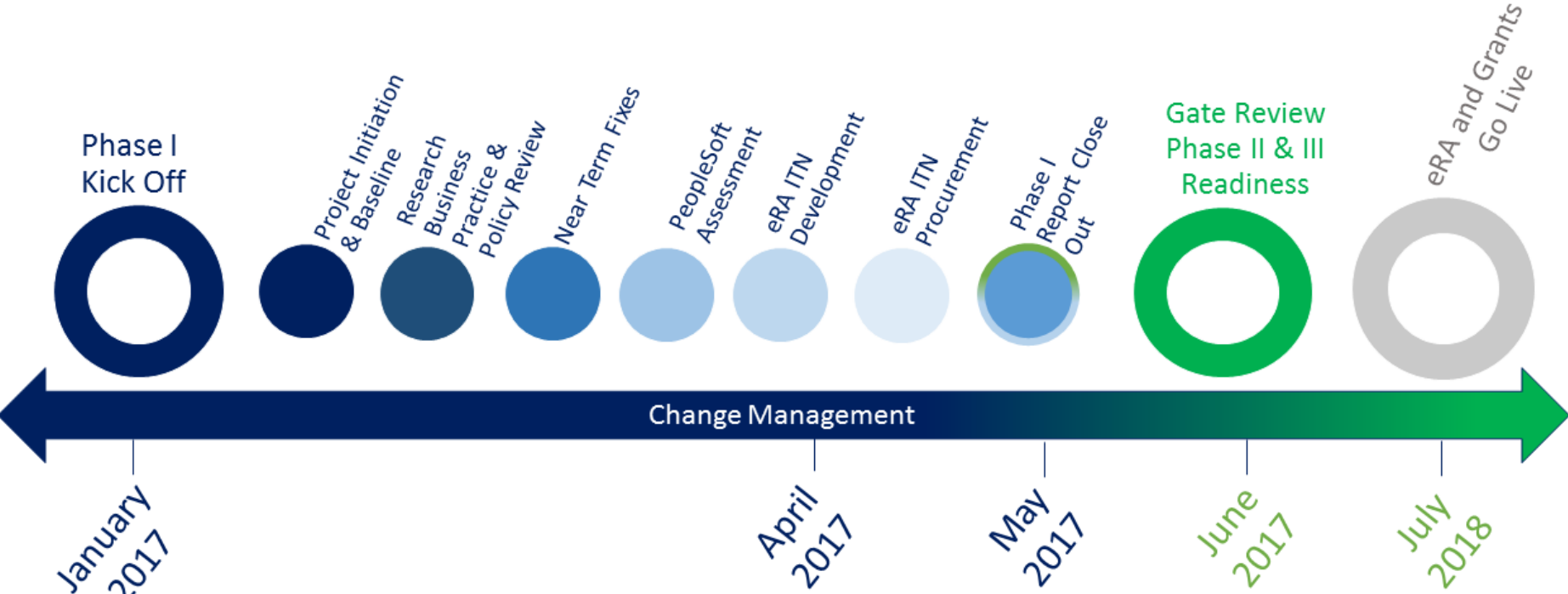   - Integrated planning with PeopleSoft Tech, FSS and ARGIS eRA teams

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
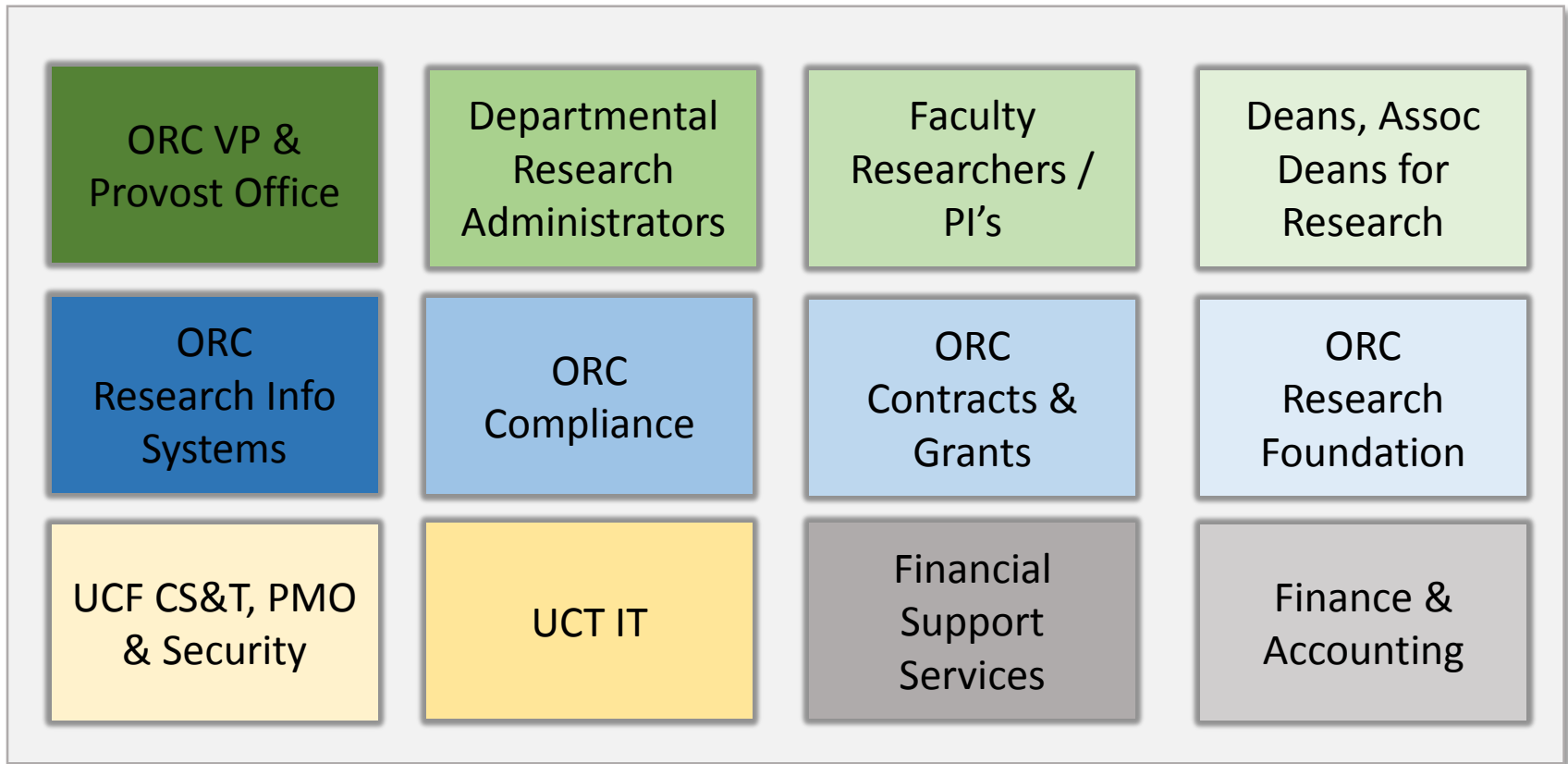 - Integrated planning with PeopleSoft Tech, FSS and ARGIS eRA teams

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 Out — Gate Review Phase II & III Readiness — eRA and Grants Go Live

Change Management

January 2017 — April 2017 — May 2017 — June 2017 — July 2018

Teams

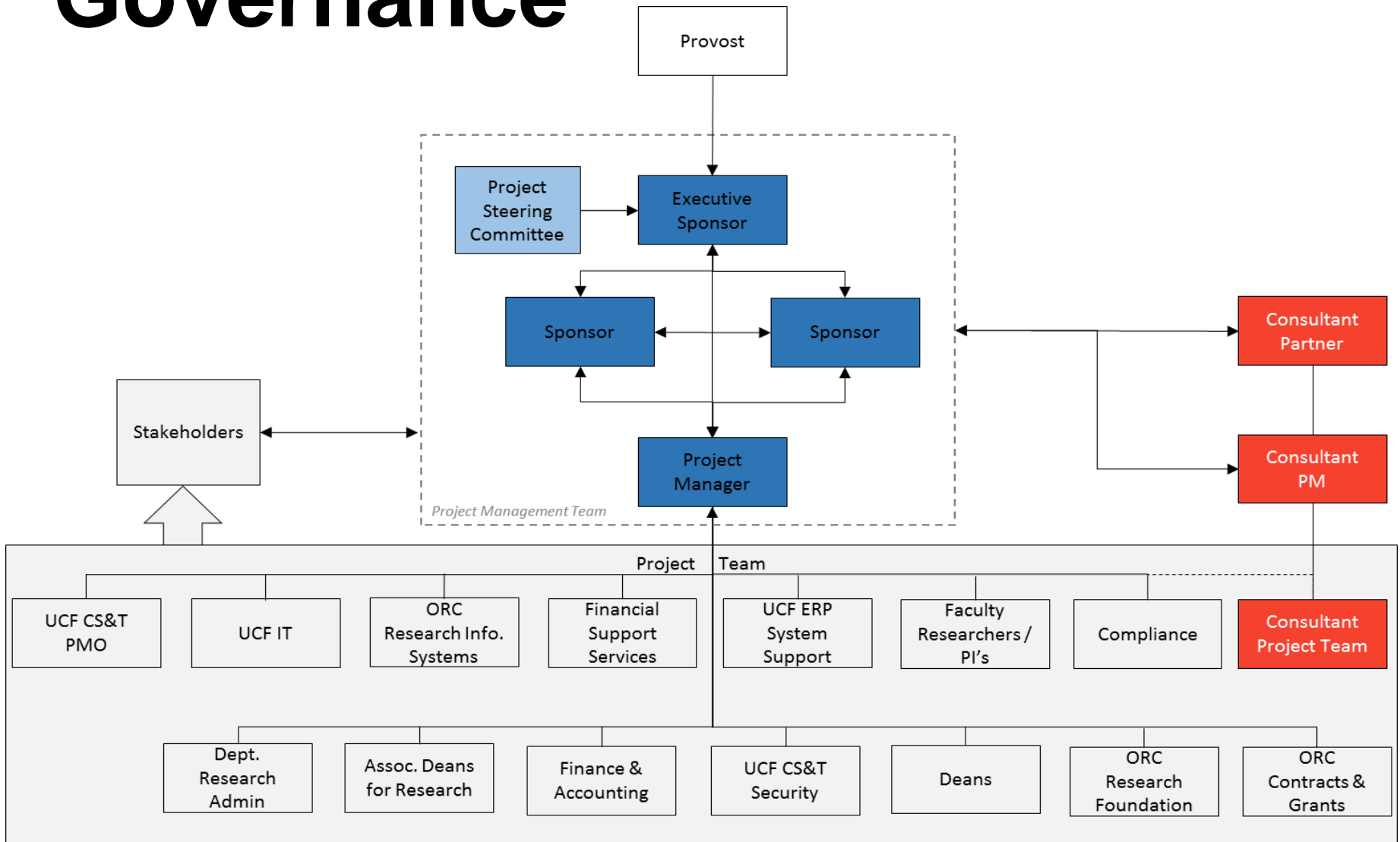|			
ORC VP & Provost Office	Departmental Research Administrators	Faculty Researchers / PI's	Deans, Assoc Deans for Research
ORC Research Info Systems	ORC Compliance	ORC Contracts & Grants	ORC Research Foundation
UCF CS&T, PMO & Security	UCT IT	Financial Support Services	Finance & Accounting

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?