Project Charter

Nevada System of Higher Education

Document Revision History

Date	Author	Notes
April 30, 2015	Executive Steering Committee	Approved Original Project Charter
June 23, 2015	Roberta Roth, Pete Zipkin	Revised 'Proposed Timeline', page 29 to reflect decision for concurrent go-live for HCM and Finance, October 2016. Replaced reference from 'staged' go-live to 'concurrent' go-live, page 4.
July 7, 2015	Roberta Roth, Leslie Obourn	Revised 'Proposed Timeline', page 29 to reflect corrections by SCI.

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Project Charter Purpose

Subject to the Terms and Conditions of the contracts between NSHE and Sierra-Cedar, Inc. and between NSHE and Workday, signed January 29, 2015 for the iNtegrate 2 Project, this project charter defines the scope, objectives, and overall approach for the work to be completed. It is a critical element for initiating, planning, executing, controlling, and assessing the project. It should be the point of reference for the iNtegrate 2 project team about the iNtegrate 2 project for project goals and objectives, scope, and organization. In addition, it serves as a contract between the Project Team and the Project Sponsors, stating what will be delivered according to the time constraints, risks, resources, and standards agreed upon for the project. A completed and signed Project Charter is required to staff Workday resources on this engagement.

The Project Charter will help define the success for our project.

Project Overview

Project Executive Summary

In the fall of 2011, NSHE's iNtegrate project's first phase was successfully implemented; all seven NSHE teaching institutions were using the new student system. Building on this success, NSHE is now moving forward to replace the existing legacy Finance and HR systems with technology that will promote highly efficient and effective business practices. The project to replace NSHE's Finance and HR systems is referred to as iNtegrate 2. NSHE's Board of Regents has chosen the Workday HCM and Finance system and Sierra-Cedar (SCI) as its consultant for implementation.

iNtegrate 2 is not merely to replace aging computing systems. It is also intended to provide campuses, the System office, and the Regents with a single version of the fundamental and foundational financial data in the most efficient and effective manner. The Regents' own Efficiency and Effectiveness study set the direction for carrying out the implementation of iNtegrate 2, and the project will make changes that fulfill the letter as well as the spirit of that initiative and the findings of the Huron Associates business process review - to "transform" how NSHE performs those functions.

The iNtegrate 2 project has identified a major goal as the implementation of standardized best practices in business and administrative transactions as well as the reduction of unnecessary duplication of back office functions across all NSHE institutions, while ensuring that consistent and effective operating policies are in place. This approach will likely require significant adjustments to current practices at each institution, but such change is necessary to ensure that the project successfully achieves the operational efficiencies set by the Board of Regents in its approval of iNtegrate 2 and as outlined in its Efficiency and Effectiveness Report.

Human Resource and Financial business processes will be modified to reduce transactional costs, improve the flow of business operations, and streamline operations while increasing service levels across NSHE.

Rather than replicating existing business policies and processes in a new system, the iNtegrate 2 project will implement changes to how NSHE institutions currently conduct business operations. Some of these changes will be cultural -- changing processes for more efficiency-- while other changes may involve implementing alternative methods to provide service enhancements and efficiencies. Technology, specifically, new information systems, will assist in this effort, but first there must be an overall decision about how to best design and structure business and administrative transactions across NSHE. Through this process, we will help ensure that Nevada's investment in its colleges and universities is spent wisely.

Goals of such a new system based on common processes:

- Streamline business processes by adopting best practices
- Reduce transactional costs
- Increase reliability, accuracy and timeliness of transactions
- Improve flow of information and access to business operations across NSHE
- Improve reporting and decision making
- Deliver consistent administrative solutions that best meet the needs of NSHE in the most cost effective manner possible
- Adopt common business practices to ensure standardized and consistent high levels of service across NSHE
- Maximize productivity through shared resources across campuses
- Improve consistency in data and reporting capabilities at the institutional level, as well as reporting and data collection at the System level and to external entities such as the Governor, Legislature, and other stakeholders

Project Goals and Objectives

The overall objective of this project is to implement required functionality available at the time of project startup within Workday's HCM and Financials software and deploy/introduce Workday delivered business processes into the NSHE environment in a single NSHE tenant supporting all eight institutions and the System Office. The business processes, software, application technology, and interfaces/integrations within other internal and external systems common to NSHE institutions and within the hours dedicated in the SCI contract are within the project scope. Workday applications will be deployed as a single project with aconcurrent go-live schedule for HCM/Payroll and Financials, with all campuses going live on the same schedule and will include the Workday components outlined below:

Workday HCM and Payroll

- Core Human Resources
- Compensation & Period Activity Pay
- Benefits
- Benefits Open Enrollment
- Time Tracking
- Absence Management
- Recruiting, including pre-requisites of Job Requisitions, Onboarding
- Talent Management
- Payroll

Workday Financials

- Financial Accounting
- Customer Accounts
- Supplier Accounts
- Business Assets
- Projects
- Expenses (Travel)
- Procurement & Payables
- Banking and Cash Settlement
- Grants Management (Post Award Processing Only)
- Effort Reporting

Reporting & Big Data

- Advanced Analytics
- Executive Dashboards
- System Reporting
- Composite Reporting
- Critical Analysis

Guiding Principles

The following principles will guide our decisions:

- iNtegrate 2 will transform how NSHE does business to ensure standardized best practices are utilized across NSHE with few exceptions, and efficiencies are achieved
- Commonly shared, standardized business processes are the goal of iNtegrate 2. Divergent processes are the exception
- Workday First: Adopt native Workday configured processes wherever workday functionality exists, taking into account recommendations from the Huron Business Process Review and the Huron Chart of Accounts Study.
- Implementation will follow the recommendations of the adopted Board of Regents Efficiency and Effectiveness Study
- The project goal is to reduce unnecessary, inefficient, and duplicative back office operations across NSHE institutions

Scope for Deployment

Workday HCM and Payroll

Core HCM

- HCM Organizations:
  - NSHE System Administration (NSHE)
  - College of Southern Nevada (CSN)
  - Desert Research Institute (DRI)
  - Great Basin College (GBC)
  - Nevada State College (NSC)
  - Truckee Meadows Community College (TMCC)
  - University of Nevada, Las Vegas (UNLV)
  - University of Nevada, Reno (UNR)
  - Western Nevada College (WNC)
- Create supervisory structure
- Create teams (interdisciplinary teams)
- Create unique business sites
- Assign organization responsibilities for each supervisory structure
- Create membership rules for employees belonging to the team organization
- Maintain organizational hierarchies (including Supervisor structure, Cost Centers, Company/Institution, pay groups)
- Assign employees to cost center, company/Institution, and pay group
- Academic Units

Jobs and Positions

- Create job families and job profiles
- Maintain job family groups, titles
- Maintain job classifications for EEO reporting
- Create job components (skills, competencies)
- Create management levels
- Manage positions and headcount groups
- Change Primary Jobs for managing Multiple Positions

Recruiting & Applicant Tracking

- Create applicants
- Maintain applicant personal, identity and contact information
- Qualify applicants for a specific organization, job or position, if needed
- Assign applicant evaluators
- Evaluate applicants

Staffing

- Maintain event categories and reasons
- Hire (or re-hire), Promote, Demote, Transfer, and Terminate employees for North American based employees
- Place employees on and off leaves of absence
- Contract contingent worker
- End contingent worker contract
- Transfer contingent worker
- Assign Costing Allocations

Compensation

- Create compensation packages, compensation grades and compensation grade profiles (location specific compensation min/mid/max)
- Create allowance, hourly, bonus, one-time payment, merit, and salary plans
- Increase/decrease employee's salary (ad-hoc or as a result of a staffing action)
- Setup and launch hourly, bonus, merit, allowance and salary plan events
- Academic Pay
- Merit Process

Academic Information

- Tenure
- Education
- Appointments
- Academic Units
- Emeritus
- Degree Levels

Benefits Administration

- Maintain benefit plans for North American based employees
- Maintain benefit selection rules for North American based employees (including termed employee's with retirement plan benefits)
- Enroll employees in benefits

Payroll

- Create earning and deduction calculations for US based employees
- Maintain payroll bank account information, payment election rules and support the creation of pay slips
- Maintain federal, state and local tax IDs, rates and calculations
- Create a payroll journal entry and provide integration to a general ledger system
- Build integration to a payroll tax filing provider
- Load employee level payroll data including tax elections, direct deposit accounts and pay input
- Non-Resident Alien (1042)
- Work Study

Absence Management

- Maintain leave of absence families and types
- Maintain PTO types
- Place employees on and off leaves of absence
- Enter employee PTO

Performance

- Create performance appraisal templates
- Launch performance appraisal process
- Complete employee performance appraisals

Setup

- Create custom business processes
- Maintain business process checklists and to-dos.
- Maintain organization roles
- Create system user ids and passwords for employees

Workers

- Employee self-service supported for North American based employees
    - Maintain personal and contact information
    - Maintain dependents, beneficiaries and emergency contacts
    - Maintain education, work experiences, skills, competencies and language profiles
    - Enter paid time off
    - Enroll in benefits
    - Update payroll tax elections
    - Enter direct deposit information
    - Request leave of absence

Workday Financials

Financial Organization

- Create Financial Data Model (chart of accounts)
- Create companies/institutions
- Create cost centers
- Create locations

Financial Accounting

- Create fiscal schedule & fiscal years
- Create account sets & summaries
- Configure posting rules
- Configure custom validation rules
- Journal processing
- Allocations
- Consolidation
- Financial reporting

Supplier Management

- Maintain suppliers
- Maintain resource categories
- Maintain purchase items & catalogs
- Invoicing & payables
- Supplier contracts
- 1099 & 1042 miscellaneous reporting

Revenue Management

- Maintain customers
- Maintain sales items
- Maintain revenue categories
- Customer contracts
- Billing
- Invoicing & receivables
- Revenue recognition
- Foundation accounts

Business Assets

- Maintain business assets
- Business assets tracking
- Business assets accounting
- Record depreciation (accounting)

Cash Management

- Create financial institutions
- Maintain bank accounts
- Bank account reconciliation
- Settlement
- Cash forecasting
- Cash management reporting

Procurement

- Purchase requisitions & purchase orders
- Purchase contracts
- Procure services
- Procure contingent workers
- Receiving
- Supplier collaboration (Punch-out)
- Spent analytics
- RFQs and RFPs

Expenses & Travel

- Maintain expense items
- Configure spend control
- Create expense reports
- Expense credit cards
- Employee payment election
- Expense analytics

Initiatives

- Manage projects & project hierarchies
- Define project templates
- Define project & resource plans
- Maintain internal rate sheets

Education & Government Financial Areas

- Grants Management
- Record Grant Proposals
- Effort Certification
- Position Budgeting
- Pooled Budgets
- Encumbrances

Feature/Processes NOT in Scope for Deployment

- Job History: current jobs are converted
- Migrating data from existing applicant tracking systems
- Detailed journals for current year are in scope (for mid-year conversion). Detailed journals from prior FY not included.

Configured Integrations in Scope

Workday's software is embedded with best practices that provide peak efficiency and effectiveness of workflow. Those practices are quite similar to the future state practices outlined in the business process review conducted by Huron Associates, with whom we contracted leading up to the iNtegrate 2 software decision as well as the recommendations of the Board's own endorsed study of Efficiency and Effectiveness. NSHE will adopt Workday functionality and work processes whenever it is available in the software suite.

The development and deployment of the integrations to third party solutions is a shared responsibility. SCI will take responsibility for coaching and mentoring the NSHE staff in the design and development of required integrations. In the planning stage of the project, SCI and NSHE will jointly determine the appropriate usage of planned support hours as outlined in the contract.

Integrations for this project will be built using Workday integration tools such as Workday Cloud Connect, Enterprise Interface Builder (EIB), or Workday Studio. NSHE will own the integration platform and will provide a Technical Lead and integrations developers. SCI will assign an Integrations Lead. The SCI Integrations Lead will be responsible for all of the Cloud-Connect integrations and will work with the NSHE technical team to design and develop all required integrations. The joint team will follow an approach, similar to the following:

- SCI will lead an Integrations Workshop for the NSHE Technical Team
- SCI will design/develop cloud connects and 5 complex integrations
- SCI and NSHE will design/develop 10 integrations together
- SCI will coach and mentor NSHE staff to develop 5 integrations

Any remaining integrations within the scope of the contracted hours dedicated to this activity will be assigned to the NSHE team, with the SCI Integrations Lead supporting the team, including performing additional development to meet the project schedule.

HCM and Financials Data Loading in Scope

NSHE will be responsible for cleansing and extracting legacy data from the two HCM and eight financial systems to be converted to Workday. This includes responsibility for the quality of conversion data. SCI and Institution staff will work collaboratively to map the legacy data. Conversion data shall include:

- HCM & Payroll:
  - Organizations
  - Translation of existing financial hierarchy elements to Workday Worktags
  - Active Employee Data (including student workers and adjunct faculty)
  - Terminated Employee Data for current year and one prior year
  - Active Contingent Worker Data
  - Leave Balances
  - Year-to-date payroll balances

- Financials:
  - Beginning balance for financial accounts
  - Assets in place as of current year
  - Grants (including activities for grants in place as of the current year)
  - Active Customers
  - Customer Contracts – active contracts at time of conversion
  - Active Suppliers
  - Supplier Contracts – will ask suppliers to re-enter their data.
  - Projects – open projects at time of conversion

- To be manually entered if necessary: open payable invoices, open purchase orders, open receivables, and open bank reconciliations, leave balances

The current support plan includes the following independent data builds; P0, P1, P2, P3, and Gold build. Each data build will take approximately 2 to 3 weeks and will require significant NSHE data validation testing and support from the functional and technical team members. NSHE may request additional data builds and these may be completed for additional cost.

HCM & Financials Data Loading Not in Scope

The following data will not be included in the data loading process.

- Leave of absence history
- Performance review history
- Employee skills and experience
- Migration of additional historical data or any data conversions not specifically identified above.

Sierra-Cedar will work with NSHE to develop a strategy for historical data that may include migrating data after go-live, migrating data using Workday's "History From a Prior System" functionality, or migrating historical data into a data warehouse. Should NSHE decide to migrate historical data into Workday's "History From a Prior System," Sierra-Cedar will train NSHE on how to perform this migration and will assist in developing an Enterprise Integration Builder (EIB) template.

Project Governance

Project governance is a critical element of any project, providing a structured approach to reviewing and evaluating project changes or project activities. The following project governance model outlines the governance framework for iNtegrate 2 project decisions.

Given the size of the iNtegrate 2 project it is reasonable to expect to encounter issues that were not anticipated at the time of project launch. These issues can range from changes in legal and regulatory federal/state compliance to changes in policy and/or business processes/directions of the organization. The key to project success is to manage these changes in a manner that will minimize the impact to the project plan, budget, and implementation schedule. Non-essential changes can be avoided through management of a formal change control process.

NSHE Executive Sponsor and Executive Steering Committee

The iNtegrate 2 Executive Steering Committee, comprised of the Vice Chancellor for IT, the Vice Chancellor for Finance and the Special Advisor to the Chancellor reports to the Chancellor, who serves as the Executive Sponsor of the project. The Committee provides direction and alignment, deals with the major strategic decisions during the project and makes recommendations to the Board related to needed policy change. The iNtegrate 2 Project Director reports to the Executive Steering Committee through its Chair.

As a high-level decision making body, the Executive Steering Committee approves and oversees priorities for business efficiencies and shared services. They will also be responsible for resolving issues and strategies for funding, organizational changes, staffing, vision, scope changes, and business process exception requests. Their responsibilities include:

- Championing the project
- Ensuring appropriate resources are available for the project
- Working with the iNtegrate 2 Project Director and the Campus Executives Committee to resolve escalated issues in a time-effective manner
- Signing off on key deliverables throughout the project
- Serving as an active and visible resource on the project
- Participating in scheduled Executive Steering Committee meetings to ensure the project is meeting the project's goals and time-frames
- Articulating and demonstrating executive support for the outcome of the project
- Providing project updates to the Chancellor and the Board of Regents

Campus Executives Committee

Each institution President has named an executive to serve on the Campus Executives Committee. The members are expected to understand the strategic goals of the project and to support the realization of those goals.

The Committee will work with the NSHE Project Director and the Executive Steering Committee to:

- Champion the implementation of common system-wide business practices.
- Communicate the project purpose and values to stakeholders
- Encourage a collaborative work environment across institutions
- Remove barriers/obstacles to enable the project team to operate efficiently and successfully
- Ensure that adequate institution resources are provisioned for the project
- Provide input, as requested, concerning the resolution of project issues in a time-effective manner
- Function as principal decision makers on institutional policy & structure

The Chancellor has also charged the Campus Executives Committee with identifying and evaluating additional opportunities, either System-wide or between individual campuses, where shared services and efficiencies can be gained.

Project Scope Changes Requested by NSHE Institutions

Scope changes requested by NSHE institutions include any requested changes that would create a deviation from the original core principles of the project. This includes, but is not limited to, addition of enhancements or exceptions to standard business processes or system functionality. These changes not only impact the cost and implementation schedule of the project, but also the ongoing maintenance of the system.

A formal process will be used to address any changes requested by NSHE institutions. This process will ensure that only necessary and beneficial changes are made, that the changes are communicated to all affected parties and that the impact to the implementation and ongoing support are understood before changes are approved.

All requests for changes or exceptions must be submitted to the iNtegrate 2 Project Director for initial review and acceptance or rejection.

If approved for consideration by the iNtegrate 2 Project Director, the change request will be presented to the Executive Steering Committee for review and a final decision. The Executive Steering Committee may consult with the Campus Executives Committee before making a final decision or brining a recommendation to the Executive Sponsor about institutional scope change requests.

A sample Change Request form is included below. At a minimum, the change request form should contain the following information:

- Originator's name and phone number
- Submission date
- Description of the problem that the change addresses
- Description of the change
- Justification for the change
- Date the change is needed (if applicable)
- Reason for the requested change (e.g., Legal or regulatory requirement changes, policy changes, unique process requirement, etc.)
- A written assessment addressing the affect the change has on the project schedule and budget
- Approval disposition (accepted or rejected boxes)
- Space for the Project Director's signature and date
- Space for the Project Sponsor's approval, signature, and date
- Risk levels of the proposed change
- Degree to which the proposed change requires project rework (if any)
- Additional resources required by the proposed change (e.g., computer time, materials, tools, people, training or technology) If additional resources are required, the requesting institution(s) must identify the source of required funding

If the business process exception is approved, the iNtegrate 2 Project Director will add the tasks and activities to the project plan to assess the impact of the change on the project budget, schedule, and resources. A revised project plan will be developed with the approved changes/tasks and communicated to the project team.

A sample Project Change Request Log is included below.

A sample Request for Change form:

iNtegrate NSHE 2	***NSHE Functional Request for Business Process Exception***

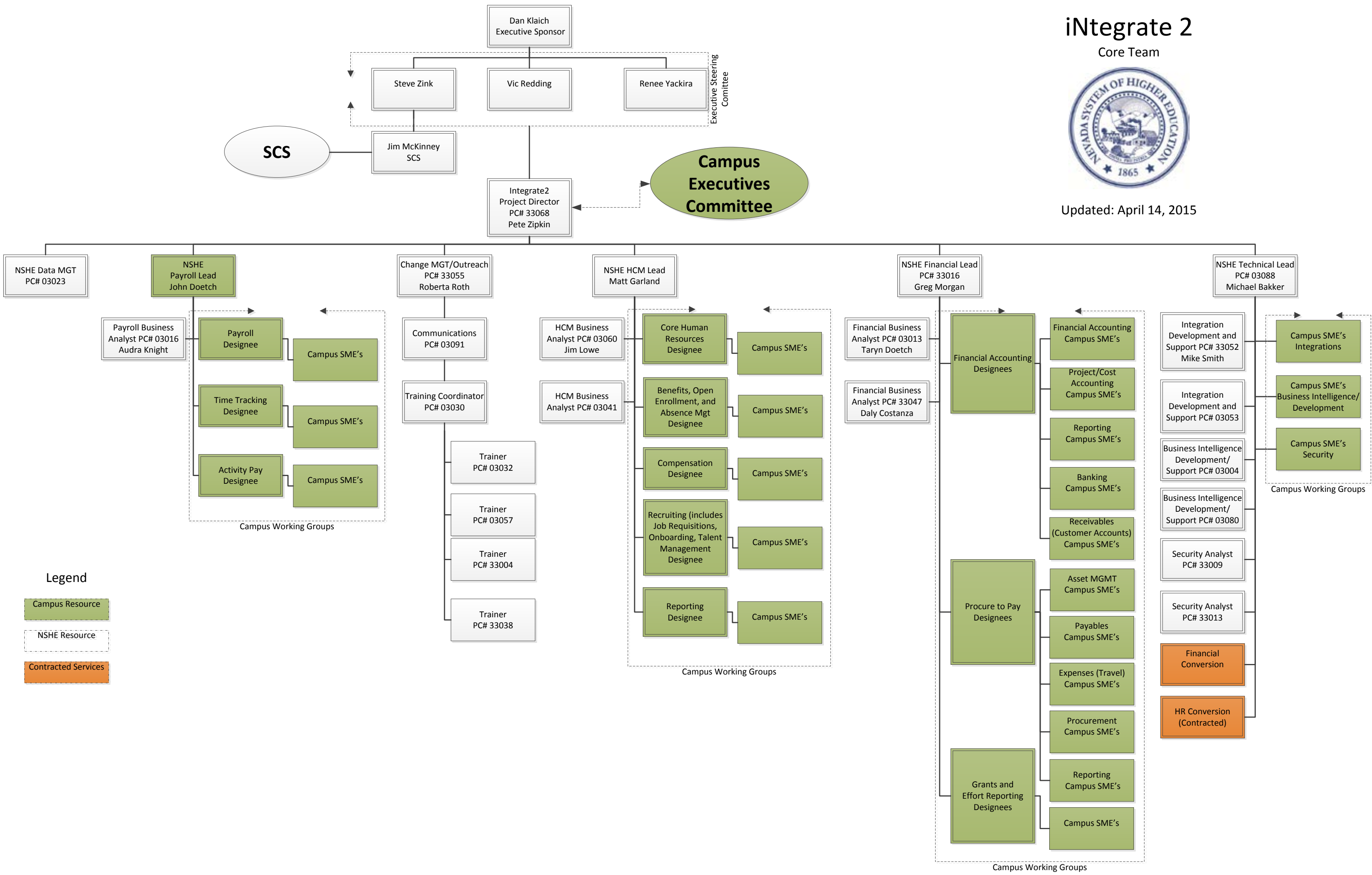
Basic Information From Requester		
High Level Description		
Group or Institution		
Sponsor Name		
Sponsor Institution		
Control Information		
Steering Committee Approval	Approved ☐ Rejected ☐	Enter Date
	Approved ☐ Rejected ☐	Enter Date
Comments		
Modification Number	*SCS Will Populate*	

Detail Request Information – Answer ALL of the following questions
What problem/need does this request address? How does the system address this issue presently and what needs are not being met?
What are the alternatives for addressing this problem/need? If we are not able to make this enhancement/change, what are your alternatives?
Provide detailed functional requirements for this request. Provide narrative information on the background behind the enhancement. Describe how the end user (students, faculty, and staff) will benefit from this enhancement as well as detail how it will affect the experience of the end user. Discuss the impact on the group/institution related to its ability to conduct the business of the institution. Attach additional pages, if needed. Include supporting documentation such the description of data to be handled and business process flows being requested.

Project Change Request Log								
CHANGE REQ. NO.	**DATE SUBMITTED**	**DESCRIPTION OF CHANGE**	**Priority** (Normal or Urgent)	**ESTIMATED COST**	**REVISED COMPLETION DATE**	**APPROVED /REJECTED**	**DATE**	**COMMENTS**

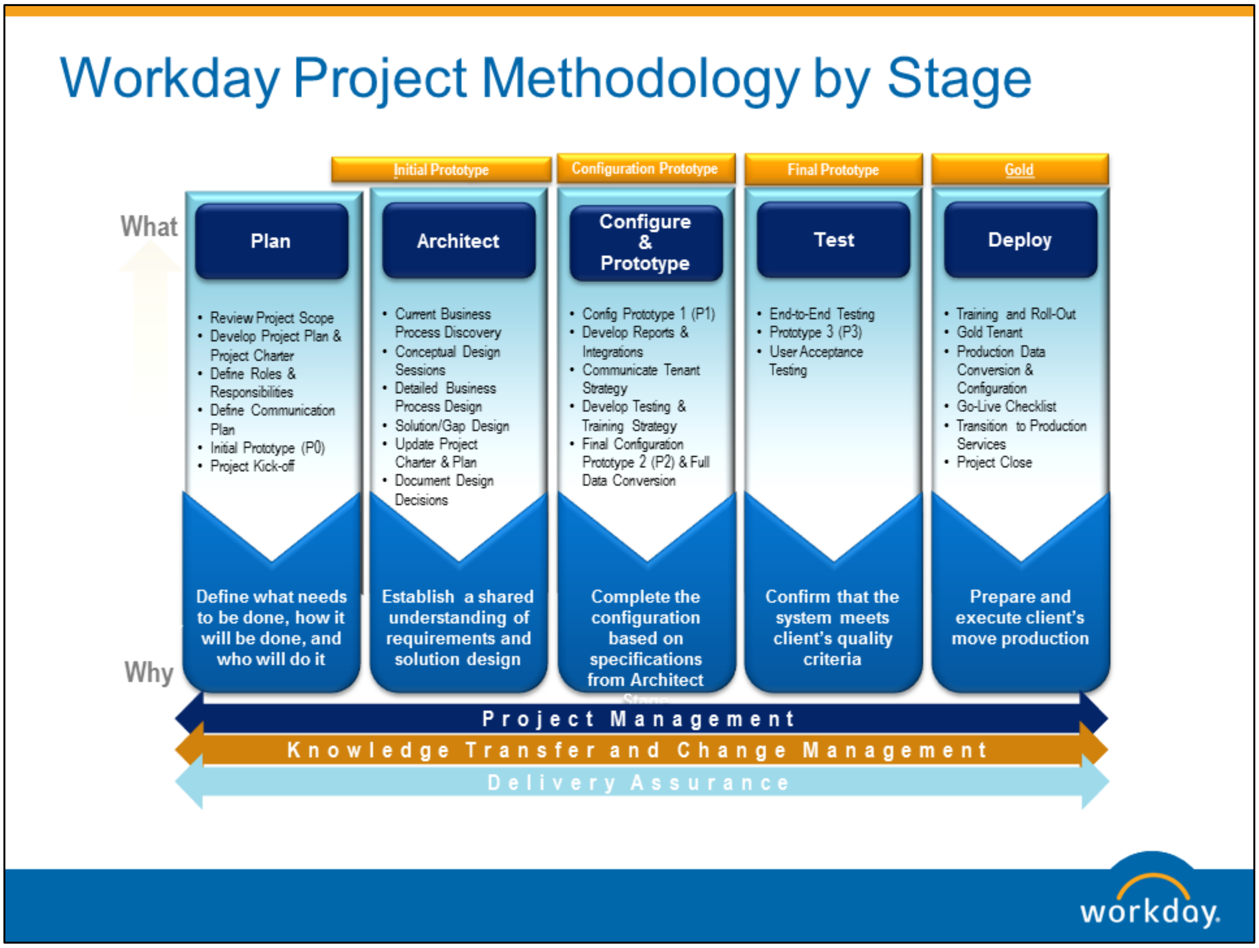
Team

The success of this project depends on the following NSHE project organizational structure:



Methodology

Overview



Workday's Deployment Methodology consists of the following:

Plan

- Project Preparation
- Scope Discovery
- Functional
- Integrations
- Project Management and Planning
- Core Team Training
- Initial Prototype (P0)
- Project Kick Off

Architect

- Current Business Practice Discovery
- Architect – Core Concepts
- Architect – Detailed Functional Area Design
- Architect – Global Blueprint

- Architect – Business Process Design and Roles
- Architect – Integrations
- Architect – Reports

Configure & Prototype

- Configuration Prototype (P1)
- Integration and Report Development
- Testing and Training Preparation
- Final Configuration Prototype (P2)
- Full Data Conversion

Test

- End to End Testing
- User Acceptance Testing
- Parallel Testing
- Prototype 3 (P3)

Deploy

- Training & Roll-out
- Gold Tenant
- Final Data Conversion & Configuration
- Go-live Checklist
- Transition to Production Support

Roles

The following roles are required to ensure that the project is successful.

NSHE Roles

ROLE	Responsibilities
Leadership & Management	
Executive Sponsor	▪ Provides direction for the project and how it links with NSHE's overall business strategy ▪ Champions the project at the executive level ▪ Maintains relationships with the Workday and Sierra-Cedar executive sponsors for the project ▪ Reviews and approves recommendations from the Executive Steering Committee
Executive Steering Committee	▪ Responsible for championing the project ▪ Ensures that the appropriate resources are available for the project ▪ Works with the NSHE Project Director and the Campus Executives Committee to resolve escalated issues in a time-effective manner ▪ Signs off on key deliverables throughout the project ▪ Acts as an active and visible resource on the project ▪ Participates in regularly scheduled Steering Committee meetings to ensure

ROLE	▪ Responsibilities
	the project is meeting the goals and time-frames outlined at the beginning of the project ▪ Participates in regularly scheduled meetings with the Executive Sponsor ▪ Articulates and demonstrates executive support for the outcome of the project ▪ Responsible for securing spending authority and resources for the project ▪ Legitimizes the project's goals and objectives ▪ Keeps abreast of major project activities and is a decision-maker for the project ▪ Assists with major issues, problems and policy conflicts ▪ Removes obstacles ▪ Participates in planning the scope ▪ Approves scope changes ▪ Signs off on major deliverables ▪ Signs off on approvals to proceed to each succeeding project phase ▪ Builds relationships across functions ▪ Acts as a change management champion and catalyst for transformation through all phases of deployment and once in production ▪ Sets the organizational message and expectations for all Workday users
Campus Executives Committee	The Campus Executive's Committee is charged with assisting the Project Director and the Executive Steering Committee with Project issue resolution and identifying and evaluating other opportunities either System-wide or between individual campuses where efficiencies can be gained. The campus representative to this System committee must be able to: ▪ Demonstrate campus executive support for the project. ▪ Serve as a vocal and visible project champion ▪ Articulate the project's goals and objectives ▪ Keep abreast of major project activities ▪ Remove campus obstacles ▪ Act as a catalyst for business transformation through all phases of deployment and once in production ▪ Provide input concerning the resolution of project issues ▪ Act as principal decision makers on institutional policy and structure
Campus Project Manager	While the titles of this position may vary by campus, this individual will operationally be involved on a daily basis with the project on their campus. The responsibilities of this individual will likely include: ▪ Be responsible for managing the project completion on campus ▪ Develops, manages, and maintains the project work plan for the campus in partnership with the overall System implementation efforts ▪ Manages the campus issues and key decision logs ▪ Sets campus deadlines and evaluates milestones, reflecting the overall System Implementation

Role	Responsibilities
	▪ Assigns responsibilities to other campus project participants (leads for finance implementation, HR implementation, subject matter experts, etc.)
NSHE Internal Auditor	▪ Works with the project team to ensure proper procedures are followed and proper controls are in place ▪ Responsible for providing compliance-related guidance and expertise to the project team
NSHE Program Manager	▪ Responsible for coordinating activities across this project and other aspects of the program. This includes, but is not limited to, other Institutional projects that may impact the Workday deployment.
NSHE Project Director	▪ Responsible for managing the project to completion ▪ Develops, manages, and maintains the Project Work Plan in partnership with Sierra-Cedar Project Manager ▪ Manages the issue and key decision log ▪ Sets deadlines and evaluates milestones ▪ Assigns responsibilities ▪ Escalates issues to the Steering Committee and/or Executive Sponsors that may impact the go-live date ▪ Advises the Executive Steering Committee about issues, risks and project progress
Functional	
NSHE Team Leads	▪ Leads the business analysts for NSHE ▪ Coordinates activities with the Consultant Solution Architect / Principal Consultants and other Institutional functional resources ▪ Attends business process analysis sessions to identify opportunities for improvement, areas for standardization, unique variances and potential gaps in functionality ▪ Performs Business Analyst responsibilities such as: - Communicates business requirements - Validates architecture and design - Identifies data to be converted - Cleanses data - Validates data conversions - Tests business processes and configuration - Develops customer-specific training and documentation - Gathers reports and defines reporting requirements
Functional Area Designees	▪ Subject Matter Experts (SMEs) who have been deemed to have the highest level of expertise within NSHE for a specific functional area ▪ Coordinates activities with the Team Lead, SMEs, and Institutional functional resources from all institutions ▪ Attends business process analysis sessions to identify opportunities for improvement, areas for standardization, unique variances and potential gaps

Role	Responsibilities
	in functionality from an NSHE perspective ▪ Performs Business Analyst responsibilities such as: - Communicates business requirements - Validates architecture and design - Identifies data to be converted - Cleanses data - Validates data conversions - Tests business processes and configuration - Develops customer-specific training and documentation - Gathers reports and defines reporting requirements
NSHE Business Analysts	▪ Business Area Experts representing a specific area of functional expertise ▪ Perform Business Analyst responsibilities such as: - Identify data to be converted - Cleanse data - Validate data conversions - Test business processes and configuration - Develop Institution-specific training and documentation - Provide functional knowledge and expertise on requirements - Gather reports
Reporting Designees	The Reporting Designees will work with the Consultant Reporting Lead and Vice Chancellor of Finance to define the reporting strategy, schedule a reporting workshop, and planning for the use of remaining Consultant reporting support. Responsible for coordinating and managing reporting design activities and resources that are the institution's responsibility. Their responsibilities include the following: ▪ Provide knowledge of Institutional IT applications and architecture as it relates to the in scope applications. ▪ Provide technical design / background into the "as-is" Institutional reports. ▪ Understand the Source Systems of data. ▪ Provide Project Work Planning details for the Project Work Plan. ▪ Assist in gathering any existing technical requirements and design documents. ▪ Participate in workshops as needed. ▪ Be the focal point of contact for requests and questions regarding technical design documents. ▪ Coordinate tasks / communication with other Institutional IT organizations and resources. ▪ Facilitates sign-off on requirements.
Campus Subject Matter Experts (SMEs)	▪ Subject Matter Experts representing specific schools / departments / areas of functional expertise, who exhibit the highest level of expertise in performing a specialized job, task, or skill within an institution. The SME should know the who, what, when, how and why of steps within the business process and have the authority to speak for their home institution

ROLE	Responsibilities
	in design sessions ▪ Perform Subject Matter Expert responsibilities such as: - Identify data to be converted - Cleanse data - Validate data conversions - Test business processes and configuration - Develop Institution-specific training and documentation - Provide functional knowledge and expertise on requirements - Gather reports
NSHE Testing Lead	▪ Defines the Testing Strategy and Testing Plan (with support from Consultant) ▪ Coordinates all testing activities including the creation of test scripts and executing testing ▪ Gathers testing scripts from leads and populates test scenario workbook
Technical	
NSHE Technical Team Lead	▪ Responsible for overseeing the Institutional technical resources on the project and assigns deliverables accordingly ▪ Provides Project Work Planning details for the Project Work Plan ▪ Provides status on integrations, conversions and reporting during project status meetings
Integration Development/Support	▪ Responsible for providing technical knowledge and expertise related to Institutional integration requirements ▪ Develop and test integrations ▪ Validate that the Institution's environment can support the integrations
Business Intelligence Development/Support	▪ Develop and test custom reports in accordance with functional requirements
Security Analyst	▪ Defines and updates security groups ▪ Defines and maintains domains and business process security policies ▪ Tests security group membership ▪ Analyzes and audits security policies and procedures ▪ Activates pending security policy changes
NSHE Data Migration (Conversion) Lead	▪ Responsible for providing technical knowledge and expertise related to current systems used by the Institution. ▪ Assist with data mapping ▪ Extract data from legacy systems ▪ Lead data validation activities
Campus Integration Developers	▪ Responsible for coordinating with NSHE Technical Team to create campus specific integrations

Role	Responsibilities
	▪ Develop and test Integrations ▪ Provides status on integrations during project status meetings
Change Management	
NSHE Change Management / Outreach Lead	▪ Conducts readiness assessments ▪ Leads the change management plan execution ▪ Leads the departmental impact analysis and change management deliverables ▪ Develops the Communications Strategy and Communications Plan ▪ Assists with the Training Assessment and Training Strategy ▪ Leads the execution of the Communications Plan, coordinating representation
Communications Lead	▪ Facilitate the sharing of project information and campus preparedness to the institution and project stakeholders. ▪ Responsible for development and publishing information to support project communication, including, but not limited to Web pages, newsletters, bulletins and presentations. ▪ Coordinate change activities through the Change Management and Communication Lead ▪ Monitor and assist in executing the project's Communication Plan ▪ Identify key transformational changes for the school / department and ensures these changes are incorporated into communication and training plans ▪ Responsible for participating in the communications committee and providing campus feedback to shape communications ▪ Facilitating the sharing of project communications and providing status of campus preparedness to the institution and project stakeholders.
NSHE Training Coordinator	▪ Develop training strategies and standards ▪ Oversee the development of training curriculum ▪ Monitor the success/effectiveness of the training
NSHE Trainers/Help Desk (4)	▪ Assist with the development of a training strategy including optimizing Workday's training tools where applicable ▪ Develop Documentation & Training Plans ▪ Develop training templates and materials ▪ Conduct end user training ▪ Provide support to help desk

Sierra-Cedar Roles

SIERRA-CEDAR ROLE	RESPONSIBILITIES
Leadership & Management	
Executive Sponsor*	▪ Responsible for being the point of contact representing Sierra-Cedar management team ▪ Works with the Account Manager so that escalated issues do not impact the project timeline ▪ Maintains an ongoing relationship with the customer's executive contacts
Account Manager	▪ Participates in regularly scheduled Executive Steering Committee meetings, which ensure that the project team is being held accountable for dates and commitments agreed to in the Project Work Plan ▪ Makes resource allocation decisions ▪ Oversees consulting resources ▪ Monitors program progress ▪ Addresses any customer issues or concerns about consulting resources or timelines ▪ Addresses additional consulting needs resulting from changes to project scope
Quality Assurance Consultant	▪ Performs periodic quality assurance reviews across the program at key milestones. ▪ Provides recommendations to promote project success
Engagement Manager	▪ Responsible for working with NSHE and Workday to bring the overall project to completion ▪ Defines project standards, policies and procedures to be used across projects ▪ Monitors compliance with these project management standards, policies, procedures, and templates via project reviews and assessments ▪ Develops manages, and maintains the project plan ▪ Performs financial management across the project ▪ Manages the project issues, risks and key decision log ▪ Sets priorities and deadlines and evaluates milestones ▪ Assigns responsibilities ▪ Provides project health reports to upper management and Workday on a regular basis ▪ Through the NSHE Project Director, escalates issues to the Executive Steering Committee that may impact the go-live date ▪ Participates in internal review meetings, which help ensure the project is meeting deadlines and mitigating risk. ▪ Interacts with Workday Delivery Assurance, Product Strategy and Development
Engagement Management Support	▪ Provides support to the Engagement Manager including: ▪ Updating and modifying the project plan ▪ Scheduling resources to align with project priorities

Sierra-Cedar Role	Responsibilities
	▪ Issue management ▪ Risk management
Functional	
Solution Architect	▪ Responsible for leading workshops during the Architect stage and ensuring business processes are designed from a cross-functional perspective ▪ Provides a framework for explaining the impact of key design decisions ▪ Articulates the impact of the Workday Roadmap to customer requirements
Principal Consultant	▪ Responsible for working with NSHE to design business processes ▪ Gathers functional and reporting requirements ▪ Maps client data to Workday ▪ Configures Workday according to customer requirements ▪ Documents any areas where requirements are not met ▪ Supports testing, data conversion, and integration development efforts ▪ Escalates issues that may impact the go-live date to the NSHE Project Director
Security Consultant	▪ Defines and updates security groups ▪ Defines and maintains domains and business process security policies ▪ Tests security group membership ▪ Analyzes and audits security policies and procedures ▪ Activates pending security policy changes ▪ Transfers knowledge to the client security administrator
Technical	
Technical Lead	▪ Responsible for overseeing the technical consultants on the project ▪ Provides Project Work Planning details for the Project Work Plan and communicates status updates and issues to the project Coordinates Tenant Management activities including iLoad checklist, Audit checklist, and integration tenant checklist.
Integration Architect	▪ The Integration Architect is responsible for the overall strategy, design and development of the Workday integrations. Responsibilities include planning, leading, and facilitating integration workshop(s) during the early stages of the project ▪ Insight regarding the impact of the Integration Roadmap on customer requirements ▪ Develop high-level integration strategy and design ▪ Provide Project Work Planning details for the Project Work Plan ▪ Provide guidance on integration design decisions and downstream impacts for integration. ▪ Provide oversight during the Configure & Prototype phase to verify the design principles are followed ▪ Communicate design standards to developers to provide consistency across integrations

Sierra-Cedar Role	Responsibilities
	▪ Provide guidance to integration consultants and NSHE team members ▪ Prepare integration documentation for the tenant review ▪ Liaise between the project team and Workday development team on any integration issues, as well as upcoming changes ▪ Coordinate the resolution of issues during testing and deployment for integrations for which Team Sierra-Cedar is responsible ▪ Provide knowledge transfer to the NSHE integration team members ▪ Provide quality assurance on integrations developed by Sierra-Cedar
Integrations Consultants	Works with the Team Sierra-Cedar functional consultants and the NSHE Development team and Subject Matter Experts to gather and document integration requirements. Responsibilities include: ▪ Support the design, configuration and testing of Workday integrations in scope for the implementation ▪ Document design decisions for integrations assigned to Team Sierra-Cedar ▪ Develop and unit test Workday integrations assigned to Team Sierra-Cedar ▪ Support NSHE with the development and testing of integrations assigned to NSHE ▪ Work with the NSHE team to resolve issues ▪ Provide knowledge transfer to the NSHE integration team members
Data Conversion Consultant	▪ Responsible for converting customer data into Workday ▪ Resolves data related issues during conversions
Change Management	
Change Management Lead & End User Training Strategy	▪ Coach and Mentor to NSHE's Change Management and Communication Lead(s) ▪ Facilitates design, development and execution of the Change Management Strategy and Roadmap ▪ Conducts the Readiness Assessment ▪ Conducts Training Needs Assessment ▪ Conducts Go-Live Readiness Assessment ▪ Facilitates design, development and execution of Communication Plan ▪ Facilitates design, development and execution of Knowledge Transfer Plan ▪ Facilitates design, development and execution of Training Strategy and Plans, including facilitation of training delivery ▪ Delivers cutover support and coaching for future services ▪ Leads the Lessons Learned session ▪ Prepares End User Training Strategy Document ▪ Prepares End User Training Plan

Sierra-Cedar Role	Responsibilities
	▪ Defines End User Training Curriculum and Audience ▪ Assists with planning for NSHE Continuing End User Training Program Post Go-Live for Phase 1
End User Training Specialists	▪ Prepares End User Training Content using Workday Adoption Toolkit ▪ Conducts Pilot End User Training ▪ Delivers End User Training ▪ Prepares NSHE trainers to perform these activities for Phase 2

Tenant Management

A Workday tenant is defined as an instance of the Workday software. Multiple Workday tenants are used during the deployment for particular purposes, including the testing, conversion, etc. NSHE will have many tenants for HCM and Financials throughout the deployment. The following tenants may be used during the life of the project:

Initial Deployments

- Alma Mater University (AMU) tenant: The AMU tenant is a demonstration tenant with a sample university pre-populated by Workday. It is used for sample data, continued learning, and running sample scenarios.
- Test tenant:
    - Prototyping: An empty tenant that is loaded by the deployment team. It includes NSHE company/institution data and is configured to meet the business requirements. This tenant is fully configured during the Architect stage based on requirements gathering and business analysis. A subset of company/institution data (employees) is loaded to allow for prototyping. The data is scrubbed of sensitive information prior to loading.
    - System testing: After prototyping and during the Configure and Prototype stage, the tenant is rebuilt from scratch based on the lessons learned during prototyping. The full company/institution data set (employees) is loaded into the new tenant, with the sensitive data being scrubbed prior to loading. This version of the tenant is used for system testing.
- Integration tenant: The integration tenant is a copy of the test tenant and is used for building and testing integrations. It is created by copying either the prototype version or the system test version of the test tenant, depending on the timing of the integration effort.
- Conversion tenant: The conversion tenant is a copy of the test tenant and is used to validate the conversion of company/institution data. A separate tenant is used for this validation so the data is not modified by testing efforts, since that would compromise the conversion validation. The conversion tenant is created by copying the system test version of the test tenant.
- Gold Tenant: The Gold tenant is built in a pre-production staging area and then moved to the production data center once the final decision is made to move into production.

Production

- Production tenant: The production tenant is the actual production system for the company/institution. It is built from scratch based on the lessons learned during system testing and conversion validation.
- Sandbox tenant: The sandbox tenant is a copy of the production tenant and is used to test changes prior to implementing the change in production. Workday refreshes the sandbox weekly.
- Preview tenant:
    - The Sandbox Preview tenant is a copy of the Production tenant, but it additionally contains new functionality that may be available in a future Feature Release. Generally, the preview features will be targeted for the next Feature Release, but that is not guaranteed. Preview features could be targeted for an unspecified future Feature Release. In addition, Preview features could undergo changes based on feedback or new desired behavior, or could be retracted as a Preview feature and never released.
    - The creation of your Sandbox Preview tenant coincides with the timing of your initial Workday Service go-live date and it stays in existence forever.

- The Sandbox Preview tenant allows you to test new functionality as it become available between Feature Releases. For the five weeks prior to a Feature Release, the Sandbox Preview tenant is not refreshed to allow the opportunity to do testing with the new features.

Proposed Timeline

Stage	HCM& Payroll and Financials Proposed Start/End Date
Project Initiation	February 2015
Planning	February 2015 – September 2015
Architect	May 2015 – February 2016
Configure & Prototype	September 2015 – August 2016
Test	April 2016 – September 2016
Deploy	September 2016 – November 2016
Implementation	October 2016

Project Communication Plan

The Communications Plan outlines the roles and responsibilities of project participants in the review, approval, and dissemination of information about key project processes, events, documents, and milestones.

The iNtegrate 2 Communications Director will work with the iNtegrate 2 Project Director and the project team to finalize a communication plan and then will monitor the ongoing execution of that plan. The iNtegrate 2 Project Director is responsible for ensuring that the communications plan provides sufficient communications about the project throughout implementation and is properly executed.

Implementing a well thought-out Communications Plan will:

- Help manage expectations regarding the Project
- Will identify the audiences with whom the Project must communicate
- Ensure methods used for communication will be most effective
- Outline the type of information to be communicated
- Assure appropriate levels of communication with internal and external project stakeholders
- Provide relevant, accurate, consistent information at all times
- Generate and sustain enthusiasm and support for the Project

The following groups will require communication related to the nature of change:

Who?	Changes in:				
	Business Practices	Reporting	Financials and HR	Technical	Project Status/Project Progress
Board of Regents					
Presidents					
Campus Executives Committee Members					
Chief HR Officers					
Chief Financial Officers					
Employees and Staff					
Academic Department Heads					
Administrative Department Heads					
Departmental Administrative Staff					
Core Users Financials					
Core Users Human Resources/Student Employment					
Help Desk Personnel					

This table will be completed early in the project plan and an updated table will be added to the Charter at that time.

Methods of Communication

The following vehicles may be used to communicate with the identified categories of users:

- Presentations - Project team members or a local campus staff member may present communications/training to groups when information is ready for dissemination, or when a stakeholder group requests a presentation. Such meetings and/or groups might include chief financial or HR officer meetings, university finance or HR departmental meetings, faculty senate meetings, other university stakeholder meetings, or functional user group meetings.
- Website - The NSHE iNtegrate 2 website is the repository for project charter, work plan, timeline and status information, FAQs, training plans, and other project documents. Project newsletters will also be posted on the website, as well as reference guides, and links to available training materials. The website will generally serve as a repository for materials more directly pushed out to stakeholders.
- Email - While every member of the NSHE community will be affected by the iNtegrate 2 project, various listserv's or mailing groups can be built around interests and desired levels of communications.
- Newsletters - While a traditional project communication media, this may be less effective than more targeted mailings with subsequent curation of such communications on the project website.
- Information sessions - The campus communication/training coordinators may organize information sessions to be held at various campus communities to provide updates regarding the status of the project, important business changes, and to address questions.
- Training - For identified users, training related to Workday modules will formally begin in March 2015.
- Other - Targeted communications to specific campus groups (administrators, end-users, et al.) will be employed, in appropriate formats, as issues and needs arise.

Type of Information by Communication Method

	Presentations	Website	Email	Newsletters	Training	Other
High Level Changes	✓	✓	✓		✓	
Business Practice Change	✓	✓	✓		✓	
Reporting Changes	✓	✓			✓	
Transaction Changes	✓				✓	
Technical Changes		✓	✓		✓	
Training Schedule		✓			✓	
Project Updates/ Progress				✓		✓
Awareness/ General Information				✓		✓
Project Vision and Goals	✓			✓		✓

Audience by Communication Method

	Presentations	Website	Email	Newsletter?	Informational Sessions	Training
Regents	✓			✓		
Presidents	✓			✓		
Campus Executives Committee	✓		✓	✓		
Core Team	✓	✓	✓			✓
Chief HR Officers	✓		✓			
Chief Financial Officers	✓	✓				
Employees/Staff	✓	✓	✓	✓	✓	✓
Academic Department Heads		✓			✓	
Administrative Department Heads		✓			✓	
Departmental Administrative Staff		✓		✓	✓	
Core Users Financials		✓	✓		✓	✓
Core Users Human Resources/Student Employment		✓	✓		✓	✓
Help Desk Personnel		✓	✓			

A combined communications and training timeline will also be developed as part of the project, as a more detailed project plan is developed. An example of that timeline is below:

Communications and Training Timeline

DATES (Months)												
Website brought up to date												
Audiences Identified												
New Roles/Responsibilities communicated												
Business Practice Changes Identified												
Financials functionality												
Changes to Chart of Accounts communicated												
Presentations												
Informational Sessions												
Emails												
Training												

Team Meetings

The following table outlines the planned regular meetings that will be scheduled for the project:

What	Responsibilities	Frequency	Owner	Attendees
Executive Sponsors Meeting	▪ Building partnership ▪ Understanding business issues ▪ Monitor effectiveness of change management ▪ Understand project status and ways to help ensure project success	Quarterly	Executive Sponsor, NSHE	Executive Sponsor, NSHE Executive Sponsor, Workday
Executive Steering Committee Meeting	▪ Understand strategies & allocate overall project budget ▪ Executive decision on project direction ▪ Final line of escalation	Ongoing	NSHE Project Director	Executive Steering Committee members, NSHE Project Director, SCI Project Manager
Campus Executives Committee	▪ Advocates the project within their organization ▪ Demonstrates importance of project & gets buy-in, support, provides approved resources ▪ Understand high level aspects of the project and its implications to their primary organization ▪ Assists Project Director and Executive Steering Committee with project issue resolution ▪ Principal decision makers on institutional policy & structure	Every one-two months or as necessary	NSHE Executive Steering Committee	Named Executives from NSHE Institutions; Project Director; Executive Steering Committee

What	Responsibilities	Frequency	Owner	Attendees
Core Team Status Meetings	▪ Weekly status meeting with key project team members ▪ Review project tasks accomplished /commitments being met ▪ Technical status ▪ Conflicts and issues (technical, resources, tools, schedule, cost, etc.) ▪ Changes in commitments ▪ Schedule Tracking ▪ Training Status ▪ Testing Status ▪ Assignment of New Action Items	Weekly	NSHE Project Director & SCI Project Manager	Regular: Project Director, NSHE Leads As Requested: Functional SME's, Technical SME's, SCI Consultants
Team Meetings (for specific functional/ technical area)	▪ Ensure solution meets business objectives ▪ Owns their functional area & manages their individual work plans against the project work plan with key milestones dates ▪ Provides status on key accomplishments, next steps, track to key deliverables /milestones, and dependencies ▪ Escalates any risks & issues to project management. ▪ Resolves issues and actions identified during design sessions and testing.	Weekly/TBD by Functional Area Lead	NSHE Team Lead	Functional Team Lead and Members, SCI Consultants

Risks

Project risks are characteristics, circumstances, or features of the project environment that have the potential of adversely affecting the project or the quality of its deliverables. An ongoing risk management plan document will be created and maintained by the iNtegrate 2 Project Office. After identifying each risk, the plan will also include the activities required to eliminate or mitigate the risk. In some cases, risks with a medium probability of occurring are also listed. A plan will be put into place to minimize or eliminate the impact of each risk to the project. Project risks may include, but are not limited to the following items:

- Insufficient backfill
- Inadequate project resources
- Inadequate Executive Sponsorship at campuses
- Resistance to Change/Fear of Change
- Inadequate Resources devoted to Change Management, Communications and Training
- Failure to maximize on the Workday components available in the product
- Failure to make timely decisions
- Poor data conversion quality
- Major legal/policy changes at NSHE

NSHE Approved or Initiated Change Order Process

If a project scope change is approved by the Executive Steering Committee or if the NSHE Project Director requests additions or changes to the current scope of the project, a formal change request will be delivered to the SCI Project Manager for the purpose of assessing whether the change will incur additional cost, if any, to the project, whether the change will impact the overall timelines and milestones for the project, and what additional NSHE and SCI resources will be required to accommodate the change request.

Subject to the Contract terms and conditions, the following process for requesting a change in project scope will be followed:

a) SCI will prepare an amendment for NSHE's review documenting the change, including relevant information such as additional resources required, revised end-dates, and additional fees, if applicable;
b) When SCI and NSHE have agreed on the contents of the change order, both parties shall so indicate, either by signing the change order or transmitting approval of the change order via fax, email, or other electronic means.
c) Once a change order has been agreed to by the parties, it will amend the relevant SOW as provided in the contract between SCI and NSHE.
d) No work will be performed until all approvals are received.

For avoidance of doubt, while non-material changes may be documented through the change control process set forth herein, such non-material changes shall not incur additional charges. If Consultant wishes to propose (i) additional services that are believed to add value to a particular project or (ii) propose a tangential value-add project, Consultant shall prepare a proposal for review with the Client. If the Client wishes to move forward with the proposed work, the parties shall execute a Change Order to the existing SOW or execute a new SOW for the additional new work. To avoid confusion, in such a circumstance, Consultant shall not perform the new work, without the business relationship being documented through the Change Order process or by executing a SOW.

Assumptions

- **Challenge the Current State**. Current practices, policies, and organizations have evolved incrementally over several decades of unprecedented growth in higher education in Nevada. To move forward in today's business environment, the current way of doing business must be challenged and pushed to change.

- **Policy and procedure** will be clearly developed and documented to articulate the roles and responsibilities of various offices, units, and individuals across NSHE and each institution. These defined Roles and Responsibilities must be communicated and understood in order to enable fully all business processes so that they can be performed as recommended.

- **Trust the Process.** The NSHE community consists of approximately 20,000 employees, many of whom will be trained with the implementation of new processes, and responsibilities can and should be appropriately leveraged to all levels of the NSHE organization. Every process must include the appropriate checks and balances, but NSHE should "trust the processes" to work as they were designed and minimize extraneous verification and "check" steps – especially manual ones.

- **Manage Change.** The successful implementation of any change is based more on the implementation effort than the change itself. In order to put any new process, technology or policy in place, the elements of Change Management - training, communication, and monitoring – must be deeply ingrained in the implementation effort from the beginning.

- **Cultural change** in back office administration and internal control will be required. Technology, in the form of Workday, will assist in these changes, but the real change must occur in the culture. Cultures cannot shift without executive leadership actively championing the new culture.

  Auditors need to leverage technology to review risks and policy variances on a comprehensive and continuing basis, inform governance using trends and benchmarks, and focus on material operational issues.

- **Efficiency and effectiveness** gains in administrative operations can support the redirection of available resources to NSHE's primary missions of instruction, research, and public service. This will be accomplished by:
  - Changing business practices and policies to leverage Workday's processes and drive efficiencies.
  - Minimizing variations in business processes
  - Increasing reliability, accuracy and timeliness of transactions
  - Improving flow of information and business operations across the system for improved decision making
  - Improving consistency in data and reporting capabilities throughout the System
  - Reducing the cost per transaction of back-office operations throughout the System.

- **Shared Services** will maximize productivity and result in more efficient, effective, and accountable business processes and systems

As recommended in the Huron report prepared for NSHE, “the Institutionally Shared Services model is one where all NSHE institutions ‘share’ services provided by a single unit under NSHE, as opposed to obtaining these services from an institution-based unit only serving that specific institution. In general, organizations similar to NSHE with “service users” at each institution benefit from an aggregate Shared Services delivery model. These Shared Services can better establish, monitor and target Service Level Agreements for customers, adjust to variations in workloads over time and staff, allow for a consolidated training and on-boarding program and better ensure business processes are consistently executed. Enabling factors such as standardized processes and a single technology instance are necessary to the successful establishment of an Institutionally Shared Service model.”

Such shared service delivery is most easily applied and financially beneficial in areas that are highly transactional in nature, with stable, predictable transaction volumes, and proximity requirements. Huron highlighted 10 process areas that were candidates for such service.

- **Process Alignment.** Processes identified to fall outside of permitted regulations and/or policies will be corrected to fall within guidelines; when such a process is identified as a legitimate need by executive leadership and the policy is within the purview of NSHE, steps will be taken to revise the policy.

  Demonstrable System and Campus executive commitment and sponsorship across NSHE is critical to success.

  Maximizing leverage offered through native electronic transactions and workflow, including, but not limited to:

  1. Delivery of remittance advices and replace with mandatory self-serve option.
  2. Continue universal direct deposit, or as an alternative for some employees, provide payment cards.
  3. Standardize across the System all earnings codes, deduction codes, and other processes to facilitate cross-system reporting.
  4. Centralize Administration of Payroll Operations
  5. Vendor Self Registration

  System will support alternative service delivery models, with special emphasis on institutionally shared service delivery model as defined below:

  Begin-to-End Business Processes will be evaluated and adjusted as appropriate to utilize effectively the Workday-delivered business processes, Huron recommendations, available functionality, and configuration options. Additions or changes to this scope could result in additions or changes to the estimated effort and cost.

  Temporary integrations with external systems will be evaluated for need and cost justification. As a result of these decisions, some aspects of a business process may temporarily need to be performed manually, during the implementation.

- **Project Logistics**
  - Newly available functionality from Workday updates not already identified in the project scope, during the implementation, will be assessed for potential inclusion in project scope, as agreed upon between NSHE and SCI.

- A cut-off date will be established for inclusion of newly available functionality to mitigate deployment risk.
- Prompt decision-making and problem resolution by NSHE will be required to complete the project on time and within budget and meet Institutional expectations. SCI and NSHE will work together to determine what is “prompt.”
- NSHE and SCI will work together to identify timelines for decision making and will devise a governance and decision structure that will enable rapid decisions related to process standardization.
- Delivery Assurance, Product Training, and Customer Success Support are required by Workday and have been contracted directly with Workday. SCI will coordinate activities required for Delivery Assurance reviews with Workday.
- SCI will be given access to all business process related preparatory analyses, including readiness assessments, requirements analyses, Huron report, and Workday fit/gap assessments.
- SCI Team will be housed at SCS in LV and Reno and will alternate sites on a regular schedule.
- SCI is responsible to ensure adequate Knowledge Transfer
- English will be the only language used for the implementation, communications, and training materials.
- Training will be centrally developed and deployed to be used by campuses
- Configuration changes and workflow changes of the system is performed by NSHE project personnel

Signatures for Project Charter Approval

Title	Signature	Date
NSHE Executive Sponsor	Daniel Klaich	April 30, 2015
NSHE Project Director	Pete Zipkin	April 30, 2015
SCI Executive Sponsor	Todd McElroy	April 30, 2015
SCI Engagement Manager	Leslie Obourn	April 30, 2015
Workday Executive Sponsor	Dave Duffield	April 30, 2015
Workday Delivery Assurance	Naveen Athuluru	April 30, 2015