PeopleSoft Enhancement
Functional Area Steering Team (FAST)

Prepared By: C.J. Winger  Updated: 7-18-2017

A Purpose of the Steering Team

Primary Functions

The purpose of the PeopleSoft Functional Area Steering Team is to identify, approve, and prioritize discretionary enhancement opportunities from a campus-level perspective. This team will meet regularly to decide what enhancements are most valuable and desirable to PeopleSoft users and functional areas, then provide guidance and sponsorship on priority, scope, and scheduling of enhancement implementation. This will ensure effective use of development and testing resources, and alignment with campus strategic goals and initiatives.

The Steering Team provides a stabilizing influence so PeopleSoft / GullNet direction and concepts are established and maintained with a strategic vision. Members of the team provide functional area insights on long-term strategies in support of the campus strategic plan, legislative mandates, reporting requirements, and audit compliance. Group members ensure the most essential system objectives are being adequately addressed, processes remain stable, and system functions are improved. In practice these responsibilities are carried out by performing the following activities:

- Monitor and review high-impact PeopleSoft enhancements at recurring Steering Team meetings (monthly);
  - High Impact Enhancements: Have high level of change/disruption/training for faculty, staff, or students with a medium/high level of risk identified (e.g. FERPA, PCI, HIPAA, etc) OR
  - Tangible product costs exceed $50K over 5 yrs OR
  - Internal staff costs associated with request implementation exceed $3,200 or approximately 80hrs development time ($40/hr dev rate).
- Resolve enhancement priority conflicts and disputes, reconciling differences of opinion and approach;
- Formally accept enhancement project deliverables and timelines
- Provide assistance and high-level objectives of each enhancement when required;
- Control enhancement scope as emergent issues force changes to be considered, ensuring that scope aligns with agreed business requirements of functional area and stakeholders;

Approval Responsibilities

The Steering Team is responsible for approving major enhancement elements such as:

- Prioritization of objectives and outcomes as identified by functional area or campus business need;
- Deliverables as identified in the enhancement project scoping;
- Schedule and deadlines for implementation, testing, QA, training, and deployment
- Estimated effort, value, scope, schedule, and changes as appropriate to stakeholder expectations;
- Risk management strategies to identify, acknowledge, and address potential threats to project success, and ensure threats are regularly re-assessed;
- Project management and quality assurance practices.
B Steering Team

Membership

Initially, the Steering Team membership will be based on the most active PeopleSoft functional areas, development work (PUR load), and corresponding change approver availability/interest. Other Functional Areas representatives will be invited to participate ad-hoc, depending on meeting topics and enhancement impacts.

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
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<tbody>
<tr>
<td>CIO</td>
<td>Ken Kundell</td>
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<tr>
<td>EIS Director (Facilitator)</td>
<td>C.J Winger</td>
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<td>Core PS Functional Area Reps</td>
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<tr>
<td>Registrar</td>
<td>Jackie Maisel</td>
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<td>Admissions</td>
<td>Beth Skoglund</td>
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<td>Financial Aid</td>
<td>Barri Zimmerman</td>
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<td>Housing</td>
<td>Diana Federici</td>
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<td>Student Financials</td>
<td>Tabitha Pilchard</td>
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<td>UARA</td>
<td>Maureen Belich</td>
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<tr>
<td>Advising</td>
<td>Melissa Boog</td>
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<td>Payroll</td>
<td>Charlotte Rayne</td>
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<tr>
<td>Administration &amp; Finance</td>
<td>Tony Pasquariello</td>
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<td>HR</td>
<td>Wendy Denny</td>
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<tr>
<td>Other Ad-Hoc (e.g. Student Affairs, Graduate Office, Advancement, OIE, Career Services, Athletics, Health Services, Inventory, etc)</td>
<td>TBD</td>
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Role of a Steering Team member

It is intended that the Steering Team leverage the experiences, expertise, and insights of key individuals in each functional area to build consensus on what enhancements will provide the most value to campus. Steering Team members are not directly responsible for managing enhancement project activities, but provide support and guidance for those who do. They are expected to help establish reasonable timelines and scope. Thus, individually, Steering Team members should:

- Understand the strategic implications and outcomes of PeopleSoft system changes and how they relate to campus initiatives;
- Appreciate the significance and complexity of prioritizing multiple enhancement projects for the campus and all major stakeholders, and represent a functional area’s interests while maintaining a campus-wide perspective;
- Be genuinely interested in enhancement initiatives and be an advocate for broad support of pursued outcomes;
- Have or gain a working understanding of PeopleSoft, proposed solutions/requests, resource limitations, and project management approach.
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In practice, this means during meetings, team members:

- Review the status and progress of major PeopleSoft enhancement projects;
- Confirm enhancement outputs meet requirements of business owners and key stakeholders;
- Help balance multiple projects and make decisions on conflicting priorities;
- Consider ideas and issues raised and propose alternatives where applicable;
- Check adherence of enhancement to best practices within SU and in wider higher education context;
- Foster positive communication outside of the team regarding enhancement progress and outcomes;

### C Steering Team Meetings

**Meeting Schedule and Process**

The team will meet monthly or as required to keep track of discretionary major enhancement projects, implementation progress, and on-going support and discussions from stakeholders.

The EIS Director facilitates the Steering Team meeting. Prior to each meeting, an enhancement list will be distributed. The team will review suggested enhancement list, and decide on campus level priorities based on impact, estimated effort, scope, available resources, timeline, funding, and value to campus. Members will give updates on status where applicable.

**Meeting Agenda**

At each meeting, a discretionary enhancement project list will be reviewed and updated using a format similar to the following:

A. Introductory items such as:
   - Status updates on action items, milestones achieved since previous meeting, etc

B. Suggested enhancement list
   - Status Review and Discussion
     - Scope, Schedule, Funding as applicable
     - Reason for any deviation or issues and/or next steps
   - Addition of new items
     - Discuss estimated campus effort, scope, value, impact, and priority
     - Formal acceptance of new items and deliverables
   - Outstanding issues, open points, project conflicts
   - Specific requests for assistance of the Steering Team

C. Review and summarize approvals, decisions, and actions from meeting

D. Confirm date and location for next meeting