Before We Begin...

We are recording. Attendees have been placed on mute.

We will address questions throughout the meeting.

If you have questions for the presenters, use the Q&A function.
On the Agenda

Welcome
Cornerstone Overview & History
Lessons Learned
On the Agenda

Portfolio Prioritization
Current Initiatives
Timeline
On the Agenda

Procurement
Human Resources/Payroll
Chart of Accounts
Lessons Learned & Improvements
On the Agenda

Scarlet Journey
Common App
Student Experience Improvement Initiative
Cornerstone Initiative Overview

The 2013 merger with the University of Medicine and Dentistry of New Jersey necessitated a migration to a single enterprise resource planning platform.

Launched in 2016, Cornerstone is a multi-year strategic initiative to transform the administrative and student information systems and processes for Rutgers University. It lays the groundwork to modernize, unify, and simplify our finance, human resources and payroll, procurement, and expense management systems and processes.

This is a pivotal move toward creating a single identity and culture, standardizing practices, and improving collaboration across Rutgers University–New Brunswick, Rutgers Biomedical and Health Sciences, Rutgers University–Newark, and Rutgers University–Camden.
Organizational, Process, and Technology Changes

Enable efficiencies in research administration functions

Migration from Banner to PeopleSoft to Oracle

Human Resources / Payroll

Single student information system

Student Enrollment and Account Mgmt.

Research Admin.

Automated purchasing, accounts payable, expense management tools

Procurement

Redesigned chart of accounts and general ledger

Controller

Cost management model

Responsibility Center Management tool

Budget

Rutgers
A Brief History

Oracle Financials Cloud

2018

Enterprise Performance Management

2019

OneSource Staff and Faculty Service Center

2020

Oracle Student Financial Planning

2021

COA* phase one: Optimization

2016

Student OneStop Shops

2022

FUNDRIVER

CRM* – Scarlet Journey, Enrollment Management

Travel Portal: Rutgers Travel Online Booking Tool

COA: Chart of Accounts
CRM: Constituent Relationship Management
Lessons Learned

• More time needed for system optimization and user adoption
• Greater collaboration and broader engagement
• Cannot underestimate impact of change
• Increase focus on people and process
Portfolio Prioritization

• In fall 2022, Cornerstone Executive team led portfolio prioritization
• Recognition of resource constraints across the university
• Impact of too much change at once
• Realization of time needed to stabilize new systems
• Several projects slowed down or paused to allow greater focus on critical initiatives
Current Initiatives

Scarlet Journey (Salesforce CRM)
- Foundation and Alumni Relations
- Athletics
- Enrollment Management Phase 2
- Common App

Student Experience Improvement (SEII)
- Oracle Student Financial Planning Stabilization
- Student Alignment Process
- Student Management Cloud

HR/Payroll Transformation
- Oracle Human Capital Mgmt. Cloud
- Chart of Accounts Phase 2

Procurement
- SAP Concur Travel Expense Mgmt.
- Lease Administration
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Estimated end dates are for full completion, many projects will be phased with multiple releases delivered during the implementation phase.
## Procurement Projects in Progress

<table>
<thead>
<tr>
<th>Project</th>
<th>Summary</th>
<th>Anticipated Launch</th>
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</table>
| Lease Administration                  | • Phase 2 implementation  
• Enhanced data and reporting  
• Government Accounting Standards Board 96 compliance | July 2023          |
| Travel and Expense Management System  | • Enhanced travel expense management in a single SAP Concur system    | January 2024       |
## HR/Payroll Transformation Initiative

### Background
Update the current Oracle Human Capital Management (HCM) to a cloud-based format to best position the university for future technology enhancements, improve Human Resources and Payroll capabilities and self-service functionality, and facilitate better organizational alignment.

### Current Status
- Developed detailed framework for business process review and requirement sessions
- Technical process reviews and system requirements gathering in process
- Resource engagement with all Chancellor and central administration offices, establishing governance committees and working groups

### Next Steps
- Kick off functional business process reviews
- Schedule system demonstrations
- Begin design and prototyping
- Launch Phase 1 on January 1, 2025
HR/Payroll Transformation Initiative

Phase 1
• Core HCM
• Payroll – critical path to launch Jan. 2025
• Strategic workforce planning
• Benefits
• Compensation
• Faculty lifecycle
• Absence management
• Time and labor

Phase 2
• Recruiting
• Performance management
• Talent management
• Succession planning
• Career development
• Learning

Phase 3
• Scope to be defined during discovery in phases 1 and 2
**Chart of Accounts Phase 2**

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<td>Further optimization of chart, data clean up, redefining of current chart segments usage and values.</td>
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<th>Current Status</th>
<th>Next Steps</th>
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<td>• Validating organizational alignment between financial and HCM systems</td>
<td>• Coordination of implementation and rollout schedules with HR/Payroll Transformation</td>
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<td>• Working with all Chancellor units and central administration offices on operational improvements</td>
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# Scarlet Journey (CRM)

## Background

Scarlet Journey, is a multi-year, universitywide Constituent Relationship Management (CRM) implementation built using Salesforce’s Education Cloud. The program will enable Rutgers University to create exceptional experiences and impactful relationships with its constituents through a connected understanding of needs, improved interactions and tailored services.

## Accomplishments (Enrollment)

- Completed second year of admissions cycle (applications processed: 149,661 (academic year 2022/23) 160,706 (academic year 2023/24))
- Implemented Fonteva, Marketing Cloud, Conga
- Integration with Student Financial Planning System

## Current Status

- **Enrollment Phase 2**
  - Integration with medical, dental, law and business schools
  - System enhancements
  - Additional reporting and analytics

## Next Steps

- Continue to evolve roadmap
## Foundation and Alumni Relations

<table>
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<tr>
<th>Accomplishments</th>
<th>Current Status</th>
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| • Completed phase 1 of Marketing Cloud for emails sent by Foundation Communications for centralized communications. | • Marketing Cloud phase 2 for emails from clubs, schools, and units in progress. Launch is scheduled for Sep. 2023.  
• Implementation of Affinaquest system for use by prospect management and front-line fundraisers in progress with anticipated launch of Sep. 2023.  
• Commerce Cloud implementation to replace current primary giving site is in process. Launch is scheduled for Sep. 2023. | • Phase 2 of Affinaquest implementation for gift processing, bio data processing, grateful patient, institutional giving, connection to Marketing Cloud and reporting. Anticipated launch is late 2024. |

**Athletics**

• Requirements gathering and assessment
# CRM – Common App

## Background

Common App is a hosted, online college application which allows students to apply to more than 1,000 member colleges and universities, streamlining the data entry process for applicants.

## Current Status

- Through collaboration with all Chancellor units, finalized requirements and integration design for system
- Configuration of system and development of integrations in progress
- System testing planning is underway

## Next Steps

- Assess impact on Chancellor units
- Begin testing with all impacted schools
- Complete system integration testing
- Deliver training
- Launch new application in August 2023
The Student Experience Improvement Initiative (SEII) advances the University’s dedication to providing seamless, integrated, consistent, effective, and responsive services that meet Rutgers students’ needs. The project focuses on understanding and improving student service levels, business processes, compliance risks, technology, and supporting organizational structures resulting ultimately in the implementation of a single university wide student information system within our Oracle Cloud enterprise.

**Accomplishments**
- Established and launched One Stop Student Service Centers in Newark, New Brunswick, Camden
- Completed initial implementation of Student Financial Planning, with integration to Banner and student record database

**Current Status**
- Continue to stabilize Student financial planning system
- Enhance reporting and analytics capabilities

**Next Steps**
- Universitywide business process review and standardization
- Kick off implementation of Student Management Cloud
# Lessons Learned and Improvements Made

## Bolstered Project Management Office
- New Change Management Office
- Improved training programs
- New Project Portfolio Management platform
- Hands on experience for users earlier in the process
- Standardized tools and methodologies
- New training lab

## Enhanced Program Governance Model
- More inclusive decision making
- Solicit feedback and get input from broader stakeholder groups
- Increased collaboration across all units

## Expanded Communications
- Program and project websites
- Newsletters
- Universitywide forums
What to expect going forward

✓ Universitywide Cornerstone newsletter, forums
✓ Regular website updates
✓ Change agent networks
Project Management

For more information on the UFA Project Management Office, visit the UFA website!

Click images to open project websites.
Thank you!