Cornerstone Forum

RUTGERS
University Finance
and Administration

MAY 2023

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

J. Michael Gower
Executive Vice President-Chief Financial Officer & Treasurer

On the Agenda

- Portfolio Prioritization
- Current Initiatives
- Timeline

Michele Norin
Senior Vice President, Chief Information Officer

On the Agenda

- Procurement
- Human Resources/Payroll
- Chart of Accounts
- Lessons Learned & Improvements

John V. Fahey
Associate Vice President,
Project Management Office

On the Agenda

- Scarlet Journey
- Common App
- Student Experience Improvement Initiative

Ellen Law
Associate Vice President, Office of Information Technology Enterprise Application Services

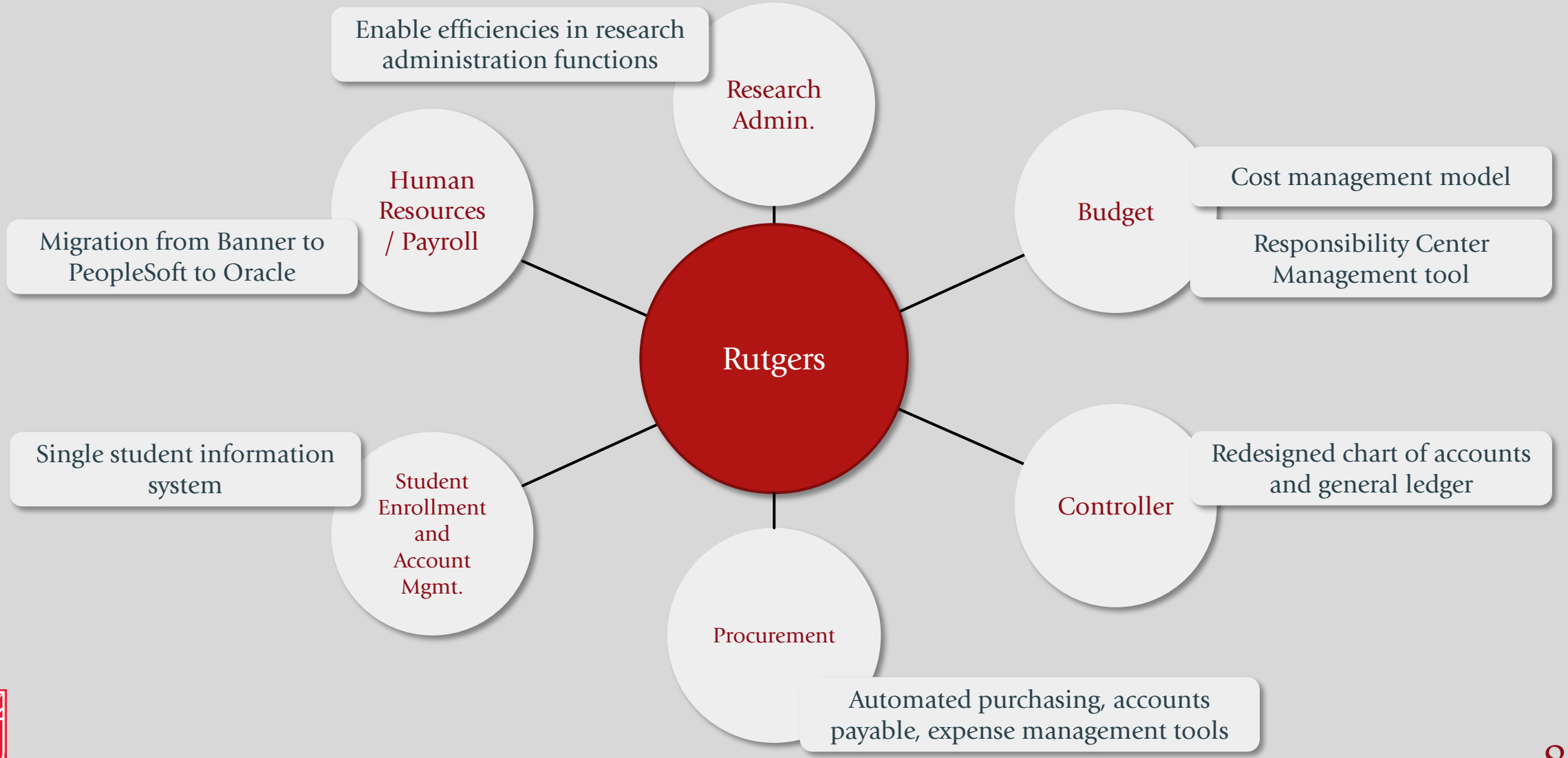
Cornerstone Initiative Overview

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

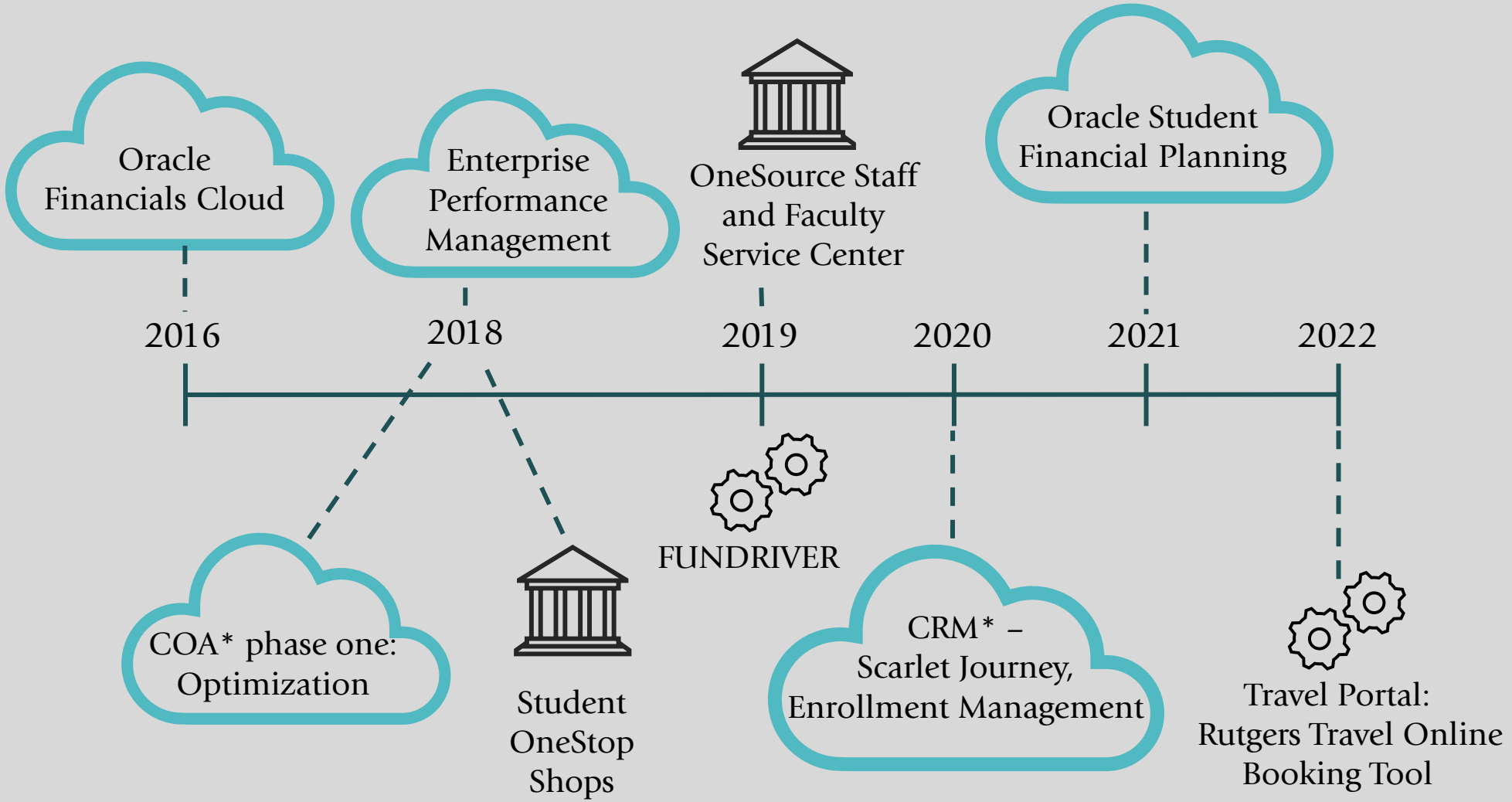
Launched in 2016, Cornerstone is a multi-year strategic initiative to transform the administrative and student information systems and processes for Rutgers University. It lays the groundwork to modernize, unify, and simplify our finance, human resources and payroll, procurement, and expense management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



A Brief History



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

Foundation and Alumni Relations

Athletics

Scarlet Journey (Salesforce CRM)

Enrollment Management Phase 2

Common App

Oracle Student Financial Planning Stabilization

Student Alignment Process

Student Experience Improvement (SEII)

Oracle Student Management Cloud

Process Review and Re-engineering

HR/Payroll Transformation

Oracle Human Capital Mgmt. Cloud

Chart of Accounts Phase 2

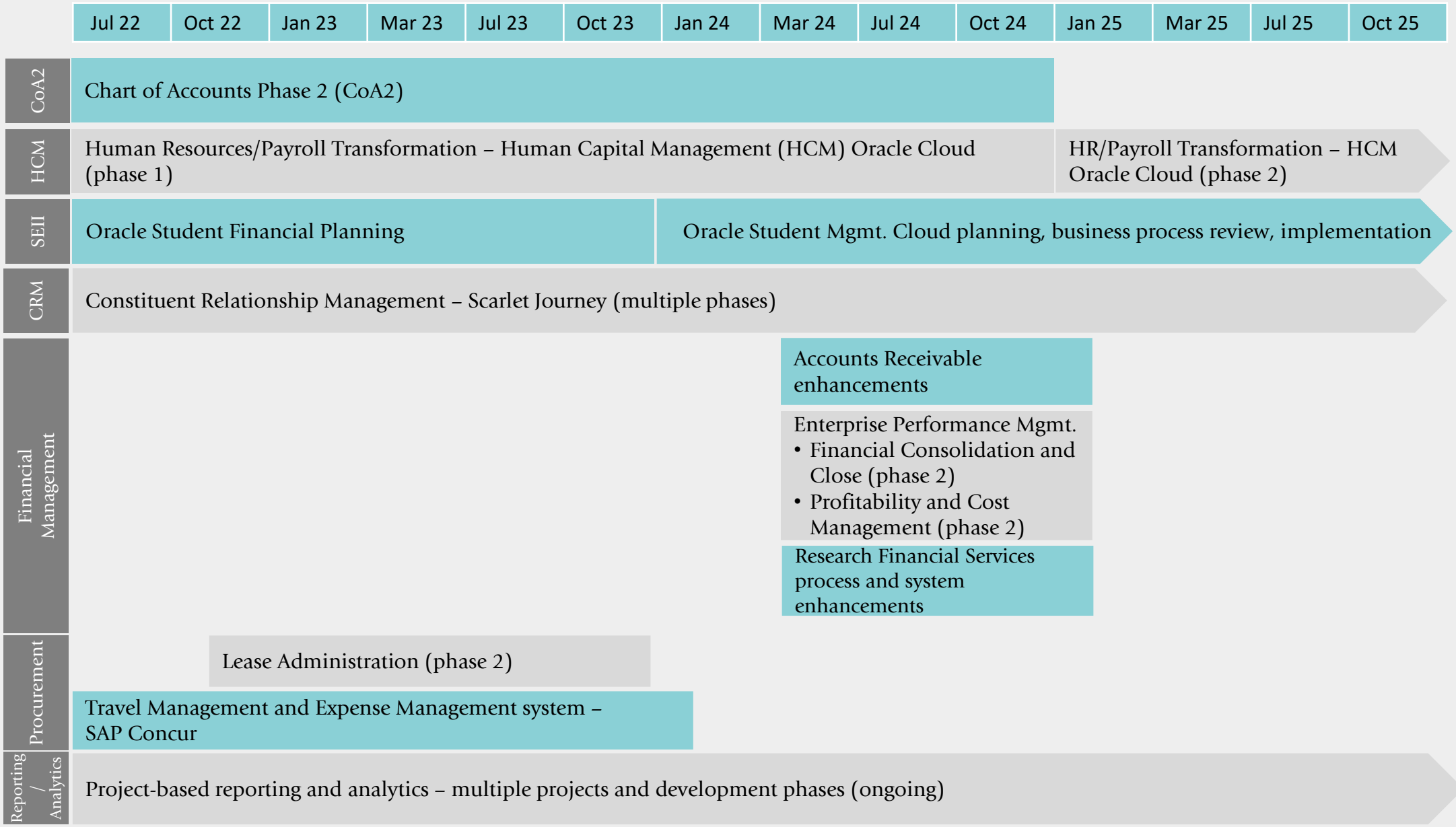
SAP Concur Travel Expense Mgmt.

Procurement

Lease Administration

Cornerstone Program Timeline

As of April 2023. Timelines are proposed and subject to change.



Estimated end dates are for full completion, many projects will be phased with multiple releases delivered during the implementation phase

Procurement Projects in Progress

Project	Summary	Anticipated Launch

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	Next Steps
• 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	• 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

Background	
Further optimization of chart, data clean up, redefining of current chart segments usage and values.	
Current Status	**Next Steps**
• Validating organizational alignment between financial and HCM systems • Working with all Chancellor units and central administration offices on operational improvements	• Coordination of implementation and rollout schedules with HR/Payroll Transformation

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)	**Current Status**	**Next Steps**

• 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
	• **Enrollment Phase 2**
	  • Integration with medical, dental, law and business schools
	  • System enhancements
	  • Additional reporting and analytics
		• Continue to evolve roadmap

Scarlet Journey (CRM) – cont.

Foundation and Alumni Relations		
Accomplishments	**Current Status**	**Next Steps**
• 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	Next Steps
• 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	• Assess impact on Chancellor units • Begin testing with all impacted schools • Complete system integration testing • Deliver training • Launch new application in August 2023

Student Experience Improvement Initiative (SEII)

Background
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 single university wide student information system within our Oracle Cloud enterprise.

Accomplishments	Current Status	Next Steps
• 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	• Continue to stabilize Student financial planning system • Enhance reporting and analytics capabilities	• 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

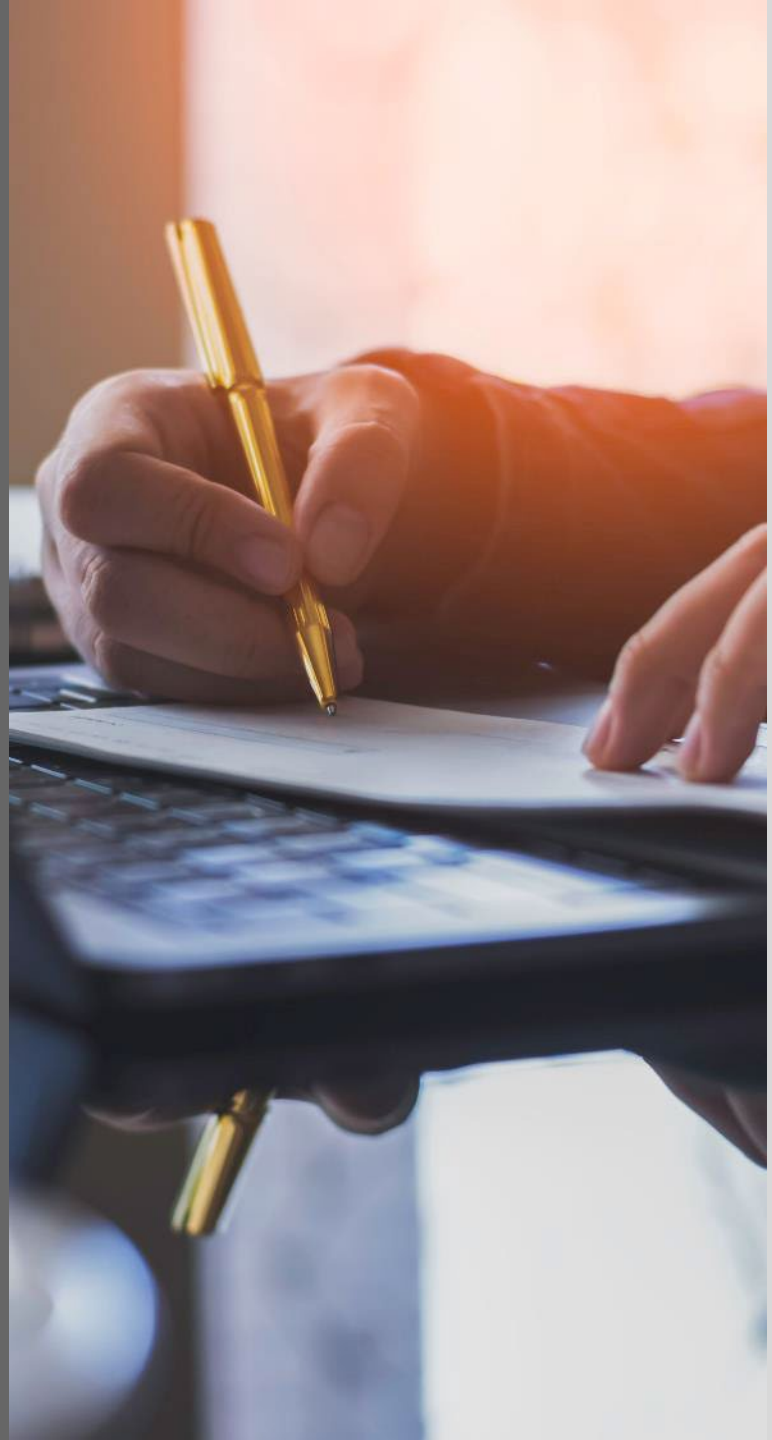
- More inclusive decision making
- Solicit feedback and get input from broader stakeholder groups
- Increased collaboration across all units

Expanded Communications

- Program and project websites
- Universitywide forums
- Newsletters

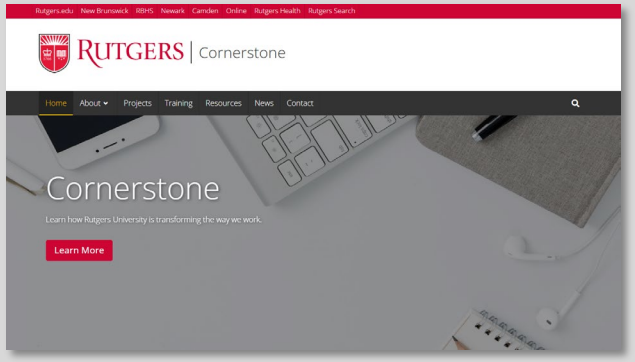
What to expect going forward

- ✓ Collaboration. Communication. Engagement.
- ✓ Universitywide Cornerstone newsletter, forums
- ✓ Regular website updates
- ✓ Change agent networks



Questions

Project Management



Click images to open project websites.

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

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