

Cornerstone Forum



Before We Begin...



We are recording. Attendees have been placed on mute.



We will address questions throughout the meeting.



Submit questions for the presenters through the Q&A function.



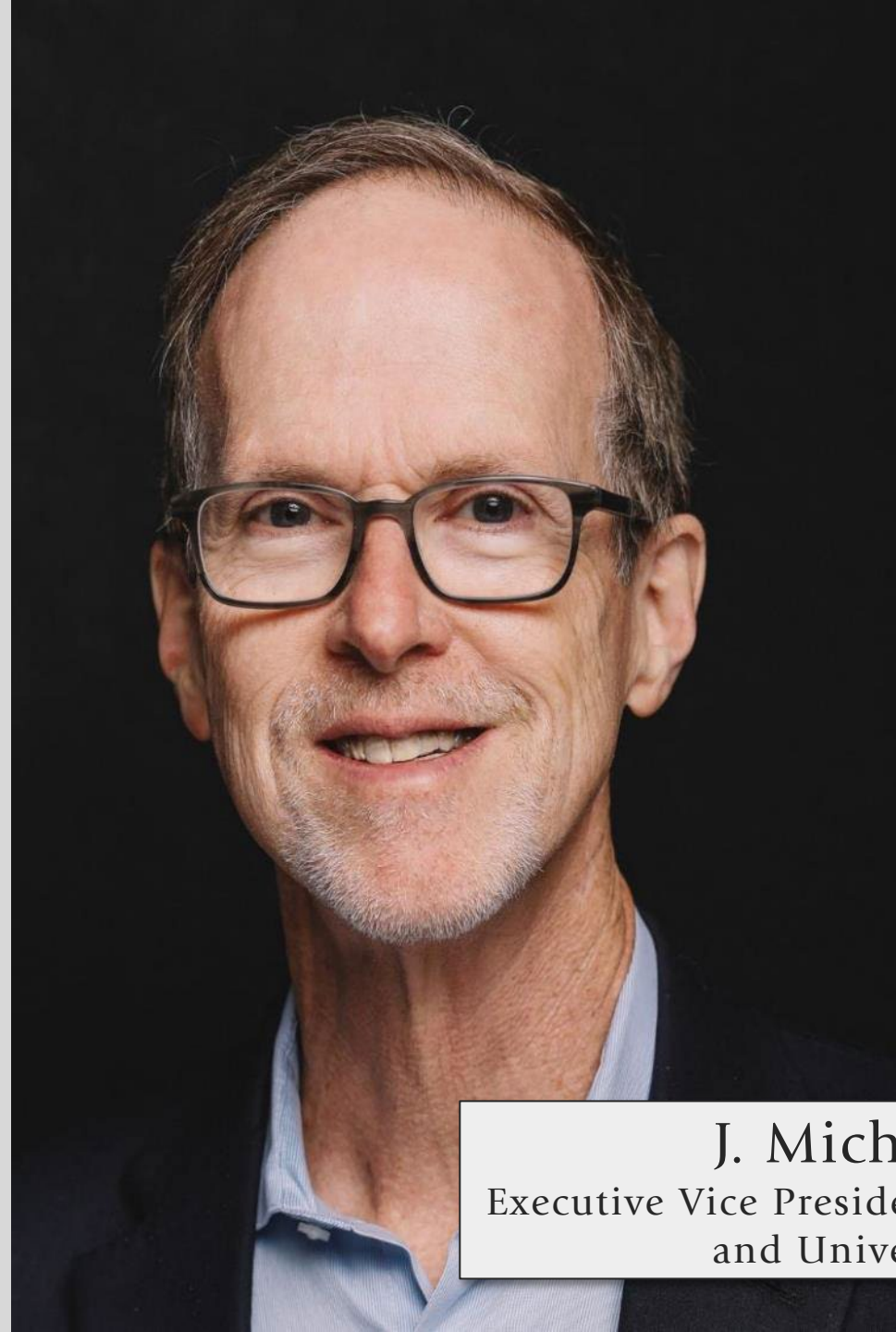
Meeting materials will be available online for download.

On the Agenda

Welcome

Cornerstone Roadmap

Procurement Projects:
Travel and Expense



J. Michael Gower

Executive Vice President-Chief Financial Officer
and University Treasurer

On the Agenda

Human Resources /
Payroll Transformation
Initiative



Vivian Fernández
Senior Vice President, Human Resources

On the Agenda

Human Resources /
Payroll Transformation
Initiative

Scarlet Journey – CRM

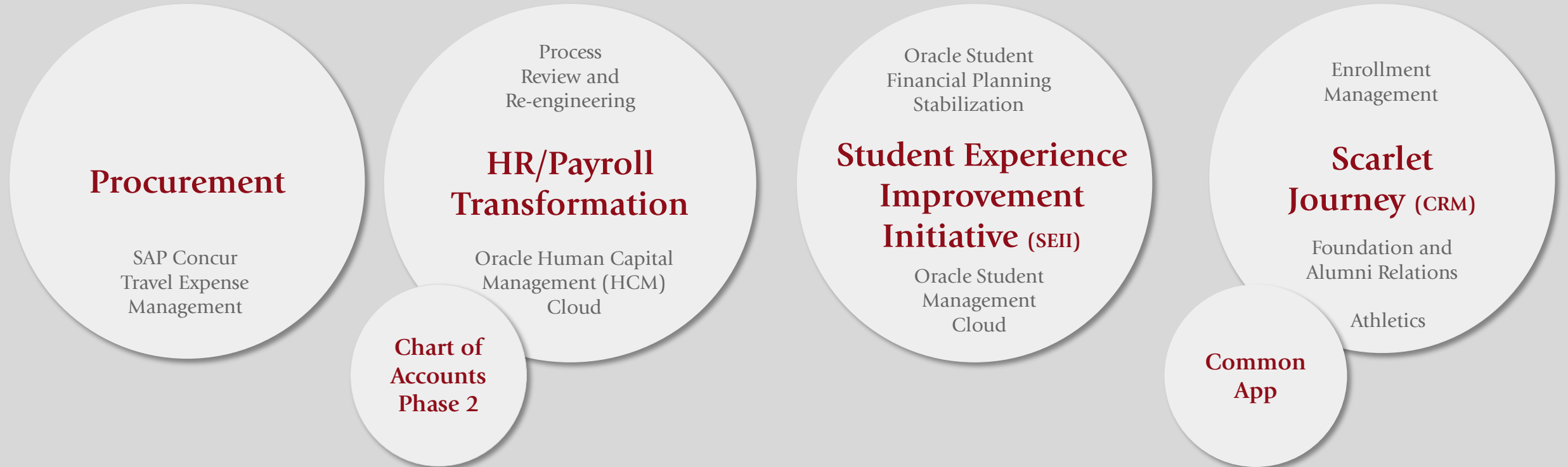
Student Experience
Improvement Initiative



John V. Fahey

Vice President for UFA Operations and
Project Executive

Roadmap Update *Current Initiatives*



SAP Concur Travel and Expense Management

Background

Enhanced travel and expense management in a single SAP Concur system providing a simple, all-inclusive, mobile-ready travel booking and expense management experience that meets policy and university traveler needs.

This includes:

- A consolidated travel and expense portal to book flights, hotels, and car rentals for both domestic and international travel
- A complete credit card management system to support all credit card activities
- A process for pre-trip approval
- Cash advance requests

Key Benefits and Improvements

- Mobile Ready
- Comprehensive customer service (24/7/365)
Enhanced duty of care
- Integration with credit card charges
- Pre trip approvals
- Use Single Sign-On (SSO)

Current Status

- Preparing for User Acceptance Testing
- Building training materials
- Completing integrations
- Designing reports
- Planning and communicating for go live

Next Steps

- User Acceptance Testing
- User Training

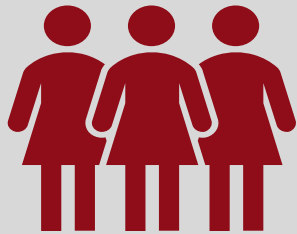


HR/Payroll Transformation Initiative

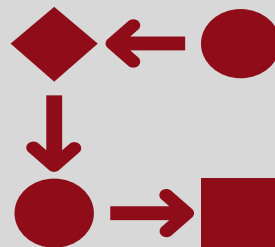
HR/Payroll Transformation Initiative

The “What”

- Transforming how Rutgers works, individually and collectively
- Three elements: **People. Process. Systems.** The three **MUST** go hand-in-hand.
- The work we’ve done—with engagement across Rutgers—has led us to this point.



People



Process



Systems

HR/Payroll Transformation Initiative

The “Why”

- Modernization is critical to our success.
- Current state: Individual units handle the same processes differently.
- We want everyone on the same page: One Rutgers.
- To reach One Rutgers, we must standardize to reduce deviations.
- Updates will improve how everybody at Rutgers manages time and gets paid.

HR/Payroll Transformation Initiative

The Future State

Through this initiative, we will:

- Combine HR/Payroll systems to create a more consistent employee experience.
- Align and redesign business processes to be more efficient and consistent.
- Implement the Oracle Human Capital Management cloud-based Human Resources/Payroll software solution, which will further transform how we work.

HR/Payroll Transformation Initiative

- ✓ *Completed Systems Business Process Review (BPR)*
 - ❑ Technical requirements gathering

- ✓ *Completed Current State Assessments for Functional Business Processes*
 - ❑ 39 weeks, 150+ meetings, 500+ hours, 200+ participants

- *Next Steps **Functional BPR***
 - ❑ *Future state process reengineering - May-December 2024*
 - ❑ *Focused on Phase 1 processes only*

Phase 1

- Core HCM
- Payroll
- Strategic workforce planning
- Benefits
- Compensation
- Absence management
- Time & Labor

HR/Payroll Transformation Initiative

- ✓ *Completed* Interactive Design and Prototype sessions
 - ❑ Core team + design Review Board (80+ members from all four CLUs and central administration offices)

- ✓ *Completed* Configuration Sprints
 - ❑ 11 weeks - detailed requirements review and design / build of system configurations

- ✓ *Completed* Phase One system configuration

- *In Progress* **Design confirmation**
 - ❑ Six weeks of configuration review and use case testing with core team and design review board

Next Steps

- Systems integration testing starts in late **April 2024**
- Kick off future state process reengineering in **May 2024**
- User acceptance testing and parallel payroll testing begins in **July 2024**
- Prepare for user training and continue execution of change management plan
 - Change Agent Network – 250+ members

Phase 1
GO LIVE
January 2, 2025

also coming in 2025...

Phase 2

- ✓ Recruiting
- ✓ Performance management
- ✓ Talent management
- ✓ Succession planning
- ✓ Career Development
- ✓ Learning

Student Experience Improvement Initiative

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 student needs. The project focuses on improving student service levels, business processes, compliance risks, technology, and supporting organizational structures.

Accomplishments

- Opened One Stop Shops on campuses in Camden, Newark, and New Brunswick in 2019
- Launched Oracle Student financial Planning (OSFP) in 2021
- Enhanced OSFP reporting and analytics capabilities with first two phases of new Tableau solution
- Significant progress on transitioning OSFP support to operational staff at Rutgers

Current Status

- Continue to stabilize student financial planning system
- Testing FAFSA simplification-related changes in OSFP, preparing for next cycle of financial aid packaging and disbursements in OSFP

Next Steps

- Kick off Student Management Cloud Business Process Review (BPR)
- Third release for new OSFP reporting and analytics Tableau solution

FAFSA Simplification

Background

- FAFSA forms have not been significantly changed in the last 40+ years and are very complex. As part of Consolidated Appropriations Act passed by Congress in 2021 the Dept. of Education (ED) is “simplifying” the forms beginning with AY 2024-25
- Original target date for release was October 2023, but due to issues that was delayed to December 2023. However, continued issues necessitated further delays in release to prospective students (to January 2024, three months behind typical schedule).
- Institutional receipt of the records from ED also was delayed; we typically start getting the new FAFSA records in November, but due to the issues and delays, this did not begin until mid-March.
- Currently we have received over 70,000 records and we are currently testing those to ensure data accuracy.
- This impacts all schools across the nation and like many of those institutions, Rutgers delayed its priority filing deadline (from February 15 to March 15) and admissions deadline (from May 1 to June 1).

Oracle Student Financial Planning (OSFP) Update

Financial Aid Packaging

Background

As we enter another financial aid cycle utilizing OSFP, we would like to provide a few data points on the last few cycles.

Fall 2022 and Spring 2023 Financial Aid Packaging

Students Provided with Financial Aid Packages

New Brunswick	33,442
Newark	9,661
Camden	5,645
RBHS	3,706
Total	52,454

Fall 2023 and Spring 2024 Financial Aid Packaging

Students Provided with Financial Aid Packages

New Brunswick	35,894
Newark	9,755
Camden	5,670
RBHS	4,164
Total	55,483

Note: The total number of students packaged by OSFP increased by 3,029 from 2022-23 to 2023-24.

Oracle Student Financial Planning (OSFP) Update

Financial Aid Packaging

Background

As we enter another financial aid cycle utilizing OSFP, we would like to provide a few data points on the last few cycles.

Fall 2022 and Spring 2023 Disbursed Financial Aid

	Amount of Disbursed Financial Aid	Students with Disbursed Financial Aid
New Brunswick	\$405,774,258	25,774
Newark	\$128,779,327	8,151
Camden	\$84,900,654	5,314
RBHS	\$144,374,158	5,280
Total	\$763,828,397	44,519

Fall 2023 and Spring 2024 Disbursed Financial Aid

	Amount of Disbursed Financial Aid	Students with Disbursed Financial Aid
New Brunswick	\$428,220,095	26,610
Newark	\$136,155,537	8,242
Camden	\$90,389,264	5,244
RBHS	\$136,371,083	5,106
Total	\$791,135,979	45,202

Note: The total dollar amount of financial aid disbursed increased by approximately \$27.3MM between 2022-23 and 2023-24.

The number of students universitywide with disbursed financial aid increased by 683 between 2022-23 and 2023-24.

Enterprise Oracle Student Financial Planning Analytics Project

Purpose

- OIT Enterprise Application Services team launched this effort last year developing a new Tableau solution to build and provide financial aid reports/dashboards to all campus units utilizing data from OSFP.
- The new Tableau solution consolidated approximately 80 CU-provided report requests into 20 Tableau reports with additional dashboards available enhancing our analytical capabilities.

Next Steps

The final phase of the project, Phase 3, is currently in User Acceptance Testing and targeting a production release date of April 15

- Phase 3 reports include SAP, AGI & Awards, Over Awarded, Student Loans, Honors or EOF, Accelerated Bachelor of Science in Nursing (ABSN) and Subpar Registration.
- Additional insights into the reports currently in UAT revealed several optimizations and enhancements OIT is making to further improve the reports

Oracle Student Financial Planning (OSFP) Update

Transition to Operational State

Purpose

The PMO has been working closely with OIT, UES, and our OSFP implementation partner to complete knowledge transfer activities to ensure a smooth and complete transition of system and process support responsibilities from the project team and implementation partner to designated Rutgers operational support staff.

Progress

Significant progress made in the following areas:

- Review and understanding of Oracle Integration Cloud Service (OIC) integrations
- Understanding of how custom BI Publisher reports are used by our integrations and how to support them
- Understanding of and support of our custom Groovy scripts (scripting language used for enterprise integration tasks, data integration, and application integration)
- Operational staff continue to support business processes relative to OSFP and work with the campuses to train and familiarize them with any changes
- Operational staff are becoming more proficient in issue/ticket flow and resolution

Student Management Cloud (SMC)

Business Process Review (BPR)

Background

- An extensive business process review is needed across the University, its campuses, and functional areas to understand and prepare for the future state design and implementation of the Oracle Student Management module and overarching Oracle Student Cloud.
- A significant process reengineering effort will be required to enable many of our existing processes to support SMC and a new Student Information System (SIS).
- Implementing common, efficient, less complex processes across the University's campuses is necessary for the implementation to succeed. These reengineered processes will allow staff to focus on higher value-add work and spend more time working directly with students to support their success.

Next Steps

Project Planning

- The primary goals of the Project Planning activities are to understand who will be engaged with the BPR activities and to prepare a strong project foundation. Some of the activities in this phase include preparing the project plan, developing a resource plan and roles and responsibilities, creating the stakeholder engagement matrix and establishing the project governance model and committees.

Constituent Relationship Management (CRM)

Scarlet Journey

Salesforce

Enrollment Management

Background

Three application cycles have been completed since the initial implementation of Scarlet Journey, a multi-year, universitywide Constituent Relationship Management (CRM) implementation built using Salesforce. The program has enabled Rutgers to create exceptional experiences and impactful relationships with its constituents through a connected understanding of needs, improved interactions, and tailored services.

Accomplishments

- Implemented Marketing Cloud for Rutgers Business School and RU Global
- Added Scholarship widget to applicant's portal page
- Updated AY24-25 applicants' fast track criteria
- Implementation of Marketing Cloud filters

Current Status

- Update admit letters using Conga
- Implement automations (visa status, EOF checklist, alumni application fee waivers, etc.)
- Integrate School of Dental Medicine. Currently in UAT with a planned launch in early April.
- Requirements gathering underway with Law school to integrate data into Salesforce

Next Steps

- Integration with Robert Wood Johnson Medical School and New Jersey Medical School
- Work with Chancellor-led units' enrollment teams on prioritization of system enhancements for the upcoming application cycle.

Common App

Background

On August 1, 2023, Rutgers launched Common App for first-year undergraduate applications. 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.

Accomplishments

- Continue to successfully load student information, including prospects and submitted applications into CRM (Salesforce).

Current Status

- Integration of official high school transcripts into Rutgers systems, currently in UAT with a planned launch of early May.

Next Steps

- Configuration of environments based on Common App's annual updates for the upcoming 2024-2025 application cycle.

By the Numbers: Salesforce/Common App Applications Submitted

Undergrad Applications: Year over Year Comparison

AY2023/AY2024	AY2024/AY2025	% Increase
131,646	211,844	61%

Total AY2024/2025 Applications*

	Undergraduate	Graduate	Total
Camden	37,888	3,555	41,443
New Brunswick	127,846	23,118	150,964
Newark	45,629	2,021	47,650
RBHS	481	3,613	4,094
Total	211,844	32,307	244,151

Note: Number of applications by campus above are not "unique" applications and includes multiple school applications for single applicant

*Reflects total number of applications submitted as of 03/20/2024

Positive trends continue since the launch of Salesforce and the Common App...

- Received a total of **211,844** undergraduate & graduate student applications for AY2024/2025
 - 177,949** from Common App
 - 33,895** from Salesforce
- Also loaded contact information into Salesforce for over **70,000** prospective applicants from Common App

Rutgers Foundation/Scarlet Journey

Foundation and Alumni Relations

Transforming systems to modernize and advance operations at the Rutgers Foundation allows work at scale.

Marketing Cloud Email Concierge

- Communications to Foundation constituents (alumni and donors) from clubs, schools and units
- Launched early September

Commerce Cloud (give.rutgersfoundation.org)

- Replacement of our current main online giving site
- Launched mid-September
- Crowdfunding and giving days functionalities implemented in March

Affinaquest Implementation for our CRM

- Launched Phase 1 (Prospect Management-focused) mid-October
- Currently in Phase 2 – Campaigns, Gifts, Engagement, Reporting, and connection to Marketing Cloud

Rutgers Foundation/Scarlet Journey

Foundation and Alumni Relations

Transforming systems to modernize and advance operations at the Rutgers Foundation allows work at scale.

Current Status

- Live for entry of critical fundraising data such as activity reports, prospect management and opportunity management
- Testing for Campaign sprint and mapping and functional testing for Gift sprint are in progress
- Engagement sprint kicked off in March

Next Steps

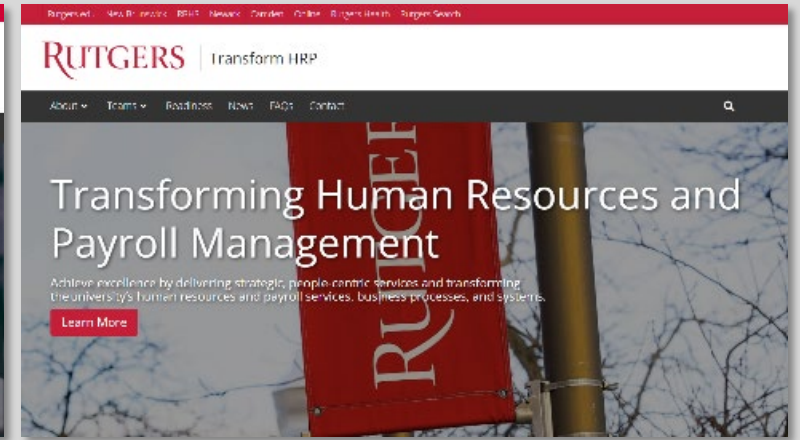
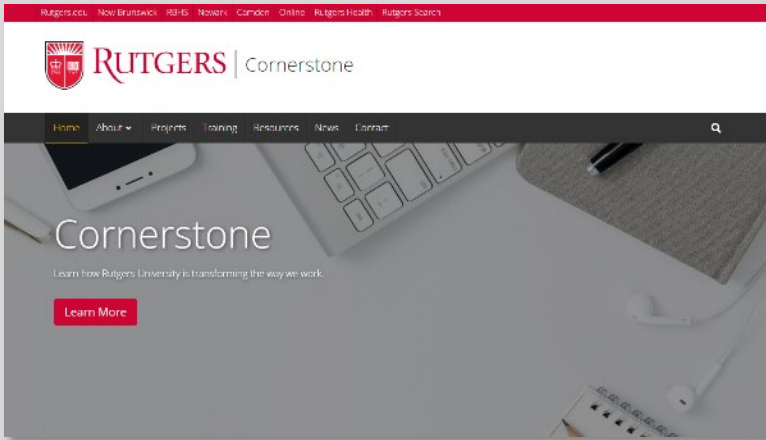
- Document Management, Reporting/CRM Analytics
- Connection of all components of Salesforce ecosystem occurring in 2024 – CRM, Marketing Cloud and Commerce Cloud

Scarlet Journey (CRM)

Next Steps

- Continue to implement enhancements for Enrollment Management
- Continue and complete phase 2 for Foundation
- Kick off and discovery for Phase 3 - Athletics
- Reassess research and corporate engagement
- Continue to evolve roadmap

Project Management Office Websites



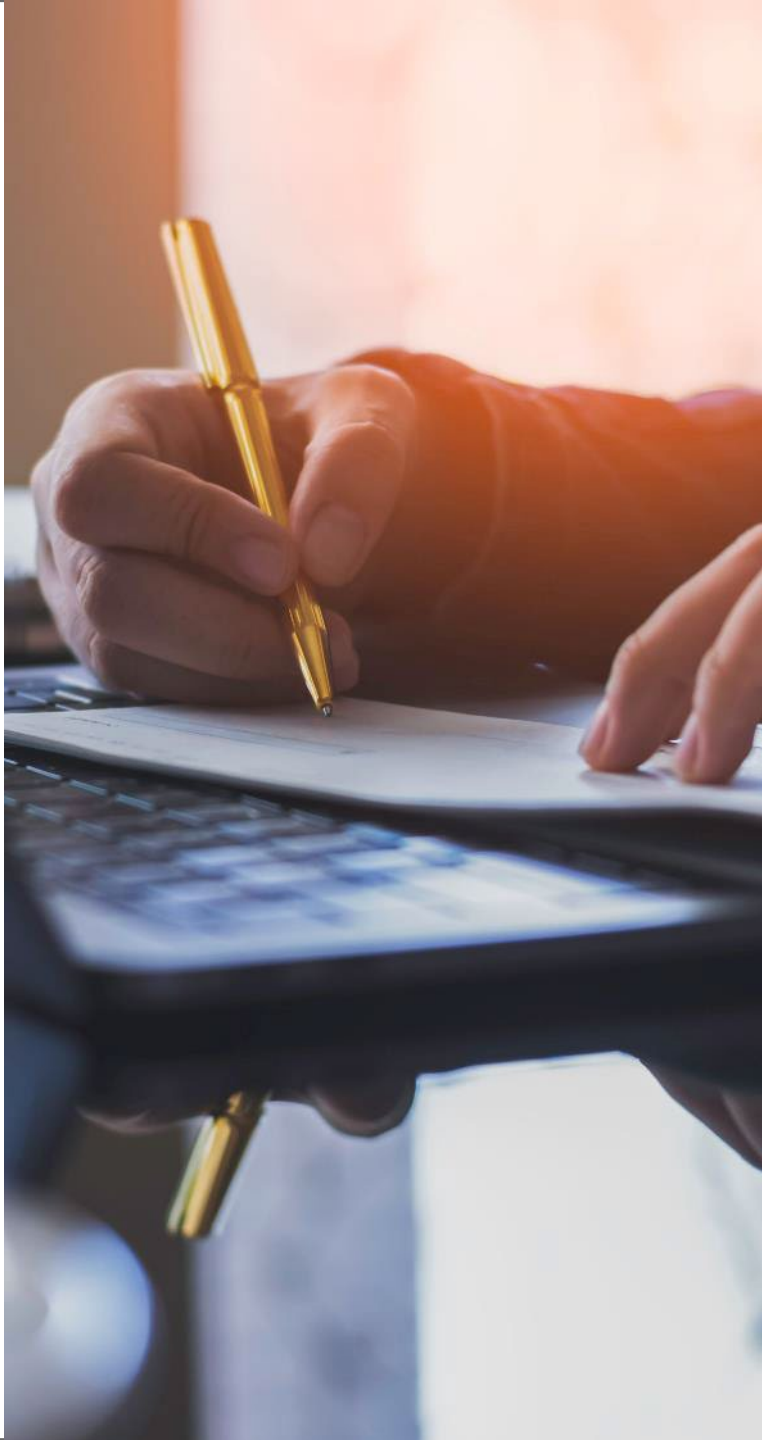
For more information on the UFA Project Management Office, visit the [UFA website!](#)

Note: Images contain hyperlinks that can be clicked to access featured project websites.



What to expect going forward

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



Questions

Cornerstone Forum



Thank you!