

UPlan

April 24, 2018

Business Day

 **University at Buffalo** The State University of New York



AGENDA

The Basics

- What it is
- Why it's important
- Project Team and Advisory Committee

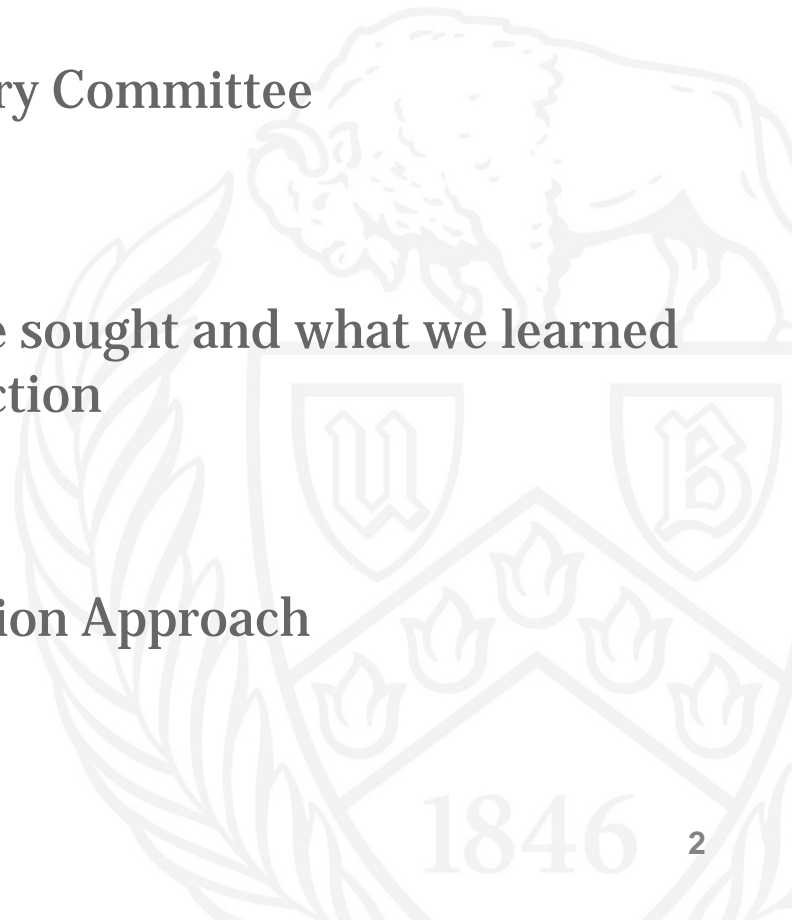
Our Journey

- Progress to date
- Discovery phase: what we sought and what we learned
- Phase One: Solution selection
- Evaluation Committee

Next steps

- Phase Two: Implementation Approach
- How you can contribute

Questions/Comments



UPlan: The Basics

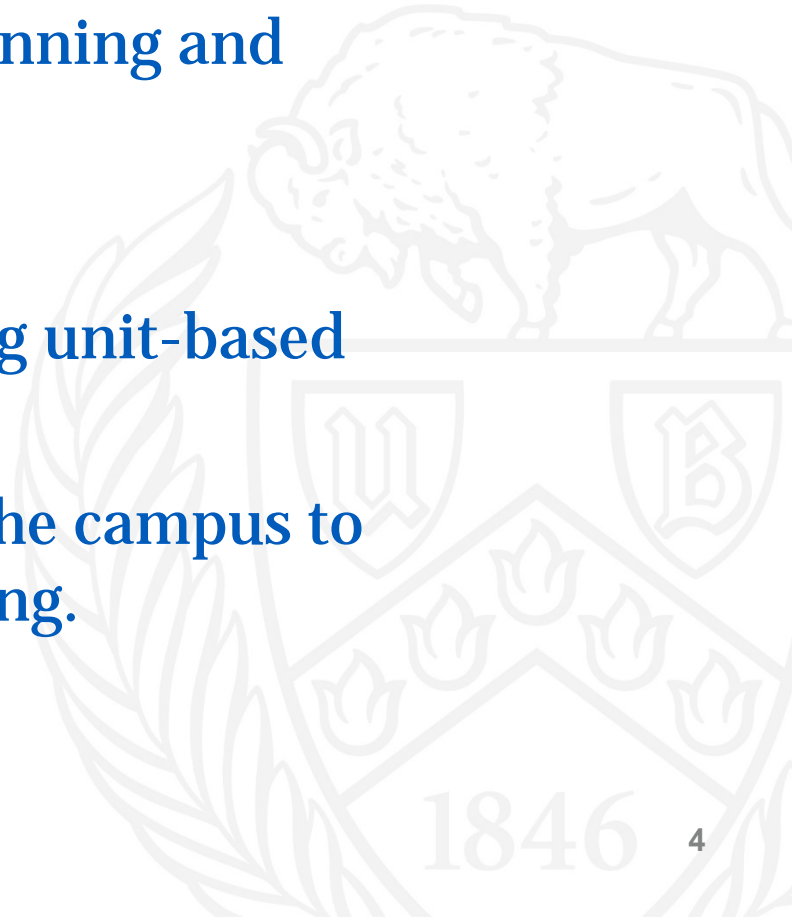


WHAT IS IT?

UPlan is a university initiative to develop a fully integrated, all-funds budgeting, planning and forecasting system.

This new system will:

1. Replace and enhance the varying unit-based processes that are used today.
2. Provide consistent data across the campus to support strategic decision-making.



WHY IS IT IMPORTANT?

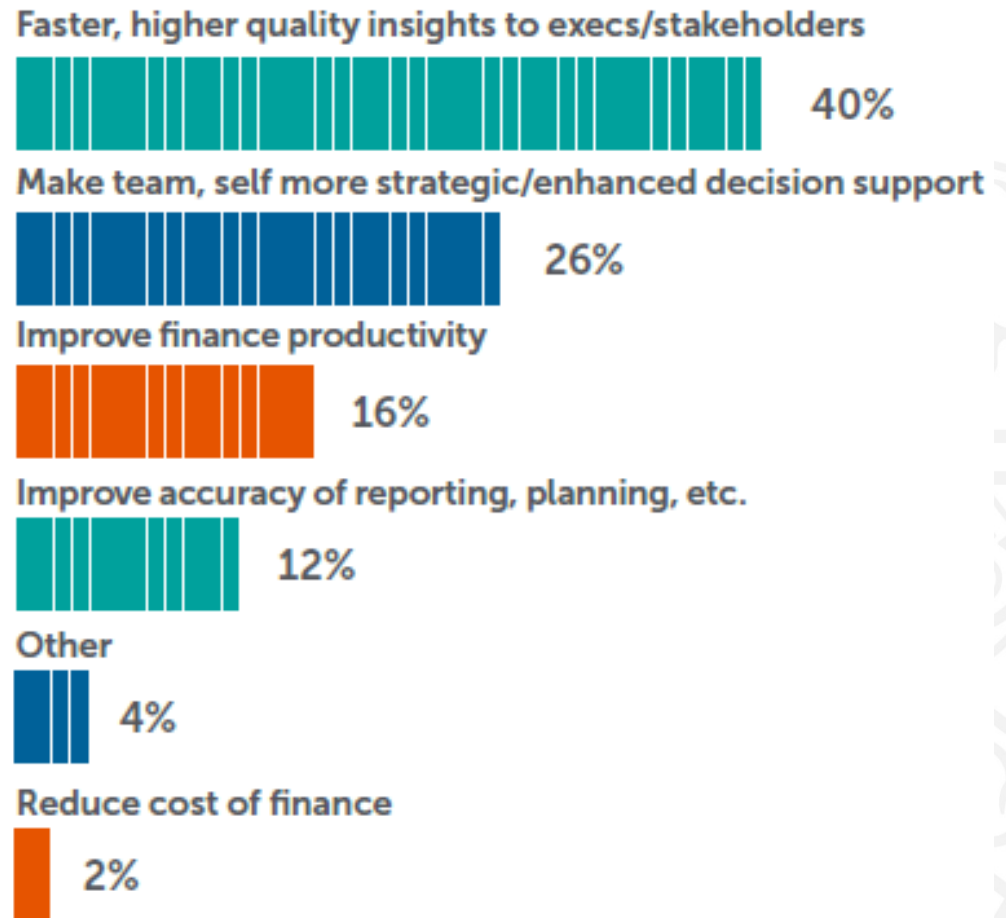
UPlan will:

- Move Operational Excellence forward
- Replace “failing” technology for an Internal Financial Plan System
- Create a vertically integrated & comprehensive university budget
- Integrate the resource planning (budget) process with current systems/databases
- Improve forecasting, financial reporting and scenario planning
- Provide departments and units with a commitment management tool
- Create an agile system to respond to ad hoc reporting needs and information requests
- Create a common, agreed-upon set of data

Key Drivers for Automating

Automation will likely spell the end for manual data gathering, consolidation, verification and formatting. These non-value added tasks consume almost 80% of a teams time, leaving just 20% for analysis.

Source: Adaptive Insights CFO Indicator Q4 2017



GUIDING PRINCIPLES

- Senior administrators, faculty and staff should have easy, well-supported electronic access to the data and information necessary to perform and manage their university functions, thereby eliminating the need to create shadow and supplemental systems.
- For every budget, planning and forecasting-related process, we will:
 - Identify the customers of the process.
 - Work with customers to determine their real needs.
 - Strive to provide them with outstanding customer service.
- We will treat information as a strategic asset that is:
 - Commonly defined.
 - Electronically captured once at its point of origin.
 - Appropriately shared across the entire institution.

GUIDING PRINCIPLES - Continued

- We will become an institution that makes data-based decisions.
- We will collaboratively develop common business processes and data.
- Customizations to the new system will be kept to an absolute minimum.
- We will establish decision due dates to keep our projects on time and on budget.
- We will work as a silo-free team to solve the problems of our students, faculty, staff and institution.
- We will create customer participation opportunities and two-way communications
- Full participation is expected - non-responsiveness or non-engagement implies agreement.
- Review and approval by the VPCIO and VPFA.

THE PROJECT TEAM

EXECUTIVE SPONSORS

- Brice Bible, VP and Chief Information Officer
- Laura Hubbard, VP for Finance & Administration

LEADERS

- Laurie Barnum, Resource Planning
- Beth Corry, Business Services

COMMITTEE

Technical leads

- Tom Okon, Business Reporting and Systems
- Gary Pacer, Enterprise Application Services

Functional leads

- Joe Lewandowski, Resource Planning
- Jennifer Pesany, Financial Management

User liaisons

- Katie Beakman, Jacobs School of Medicine and Biomedical Sciences
- Nancy Kielar, CIO Administrative Operations Office

- Larissa Kowalczyk, Campus Living
- Bill McDonnell, School of Engineering and Applied Sciences

Communication liaison

- Kathleen Manne, University Communications

Project manager

- Amy Dauber, University Communications

Project support

- Kelly Stich, Business Services

ADVISORY COMMITTEE

- Craig Abbey, Office of Institutional Analysis
- Erika Bagnoli, Office of the Vice President for Philanthropy and Alumni Engagement
- Michelle Burger, Chemistry
- Jane Brewer, School of Dental Medicine
- Mark Coldren, Human Resources
- Chris Decker, Endowments and Gift Administration, UBF
- Sandy Drabek, Jacobs School of Medicine and Biomedical Sciences
- Christina Hernandez, Student Life
- Lynne Karlsen, School of Dental Medicine
- Kara Kearney-Saylor, Internal Audit
- Joe Kerr, College of Arts and Sciences
- Michelle McCartney, Financial Management
- Gary Mahon, School of Nursing
- Lee H. Melvin, Enrollment Management
- Jeff Murphy, School of Dental Medicine
- Brian O'Connor, Office of Institutional Analysis
- Tonga Pham, University Facilities
- Mike Redfern, School of Public Health and Health Professions
- Betty Smith, Research and Economic Development
- Debbie Street, College of Arts and Sciences
- Ken Suski, School of Management
- Jill Uebelhoer, School of Dental Medicine
- Cheri Weber, Procurement Services
- Nate Wills, Division of Athletics

UPlan: Our Journey



Discovery Phase



DISCOVERY PHASE: WHAT WE SOUGHT

Visioning Survey:

- Aimed at all stakeholders with direct or indirect influence on Annual Resource Planning process
- Participants were asked to provide feedback on current process and input into what a new system should provide

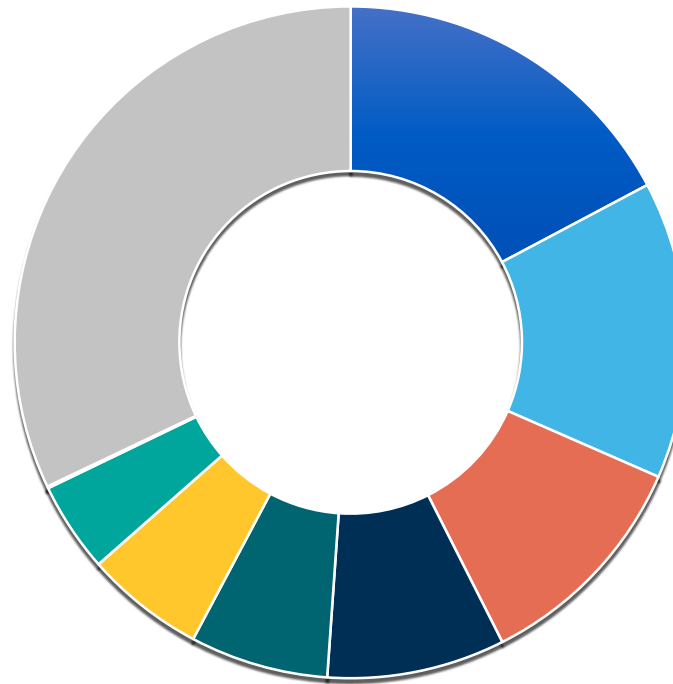
Requirements Activity:

- Aimed at stakeholders in a position to provide more critical insight
- Participants were asked to identify which items in the new system would be required, which would be desirable but not required
- Feedback was used for development of the RFP

DISCOVERY PHASE: PARTICIPATION

Visioning Survey

- 336 invited
- 221 participated
- 66% participation rate
- All campus units represented

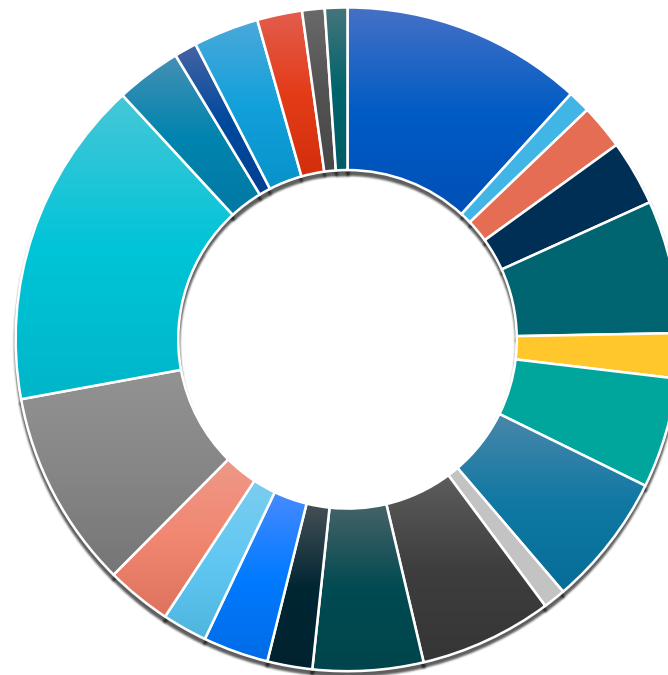


- Senior Leadership
- VP/Decanal Unit Business Officer
- Department Chair
- Department Business Officer
- Assistant to the Chair
- Budget/Resource Analyst
- Faculty
- IT Support
- Staff

DISCOVERY PHASE: PARTICIPATION

Requirements Activity

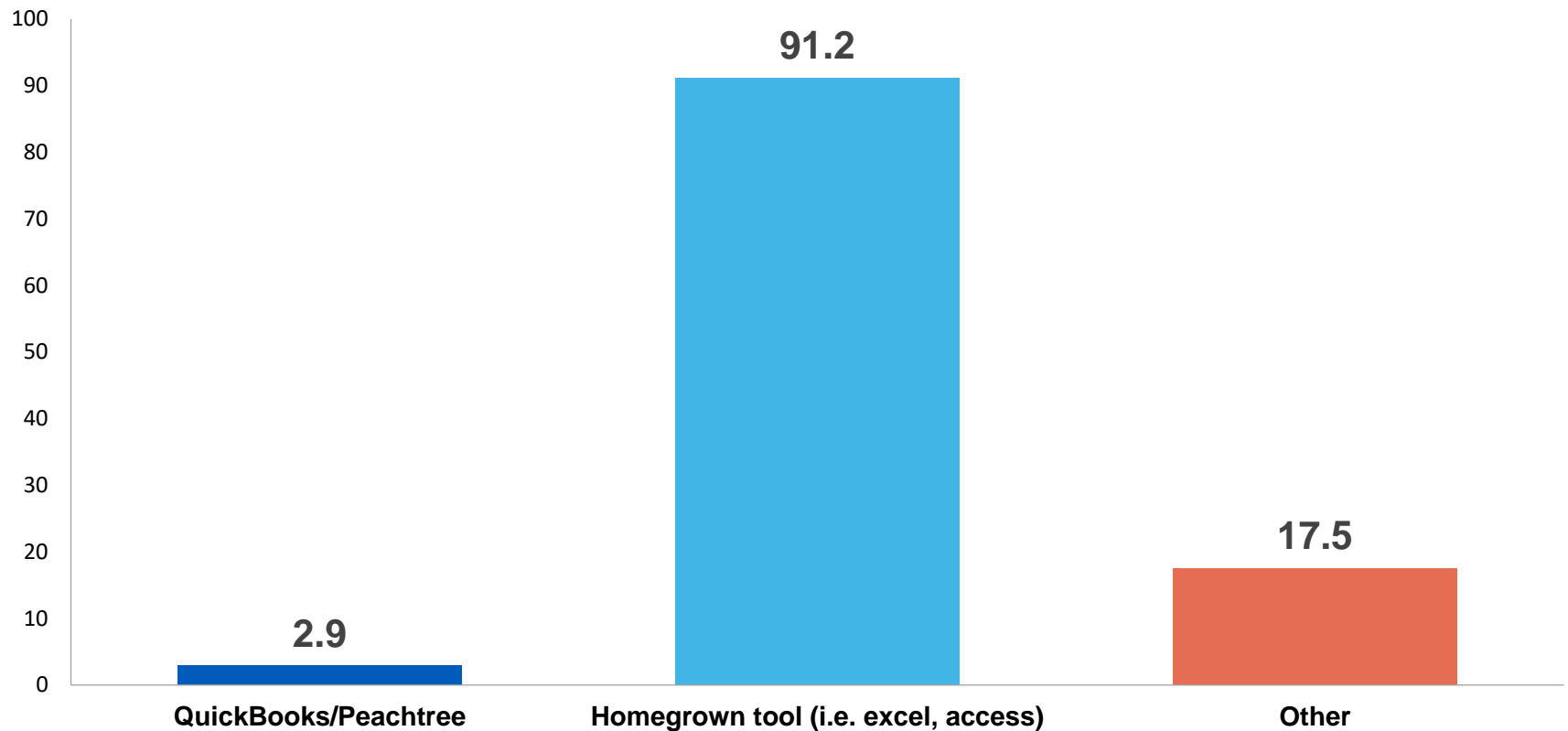
- 214 invited
- 93 participated
- 44% participation rate
- 564 comments reviewed
- Several requirements revised
- 14 requirements added



- Office of the Provost
- School of Architecture & Planning
- Division of Athletics
- College of Arts & Sciences
- School of Dental Medicine
- Graduate School of Education
- School of Engineering & Applied Sciences
- School of Public Health & Health Professions
- Law School
- School of Management
- Jacobs School of Medicine & Biomedical Sciences
- School of Nursing
- School of Pharmacy & Pharmaceutical Sciences
- Office of the President
- School of Social Work
- Student Life
- Finance & Administration
- Research & Economic Development
- University Libraries
- Philanthropy & Alumni Engagement
- Chief Information Officer
- University Communications
- UB Foundation

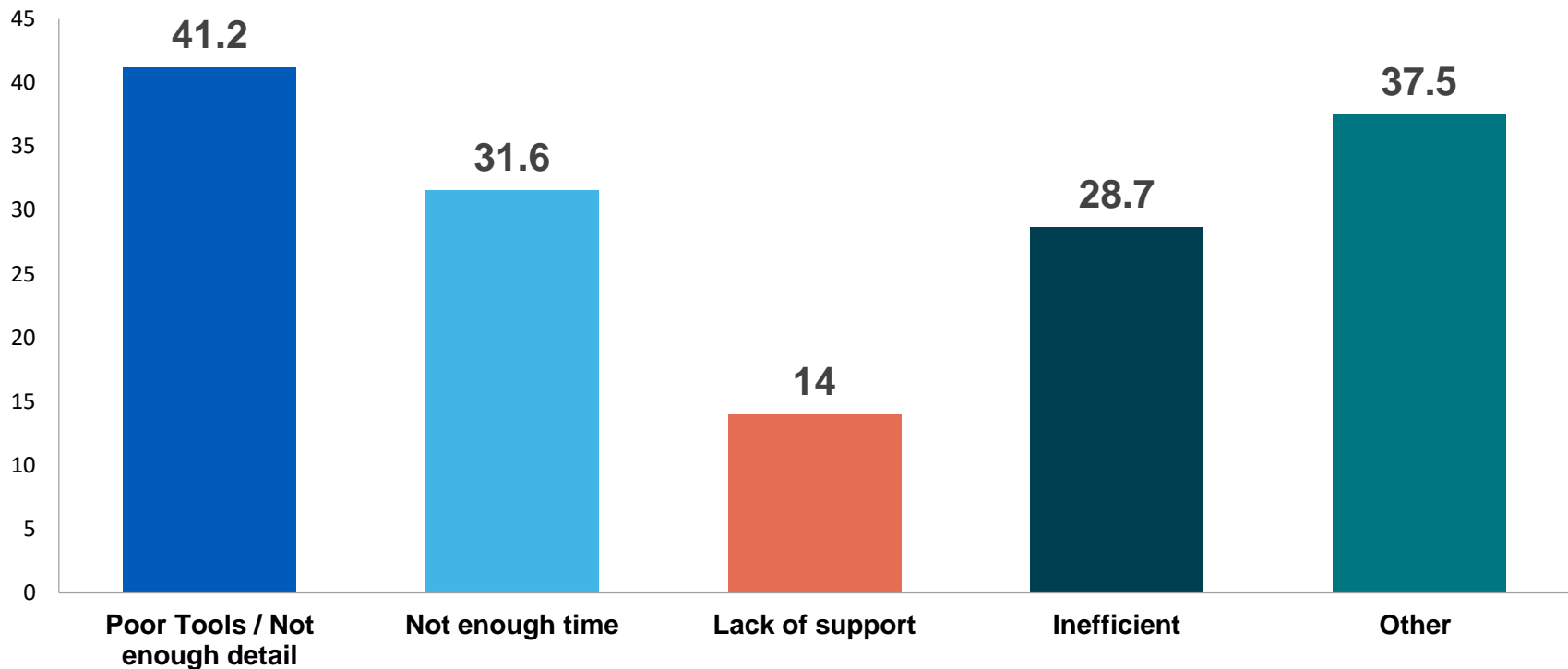
DISCOVERY PHASE: VISIONING SURVEY FEEDBACK

What ancillary systems do you currently utilize for financial reporting, resource planning/budgeting and forecasting?



DISCOVERY PHASE: VISIONING SURVEY FEEDBACK

What are your major pain points with the current Annual Resource Planning process?



DISCOVERY PHASE: VISIONING SURVEY FEEDBACK

What would you like a new system to do that the current process does not do?

“Create a more concise faculty and staff roster with the ability to project under different scenarios.”

“Allow me to be involved and understand the process.”

“[Function as] a fully electronic and integrated system that ties all stages of the resource planning process together.”

“Eliminate shadow systems...[serve as a] major flexible report generator for both the department and individual faculty.”

“[Include] easy-to-use reporting tools.”

DISCOVERY PHASE: VISIONING SURVEY FEEDBACK

What are your areas of concern? Suggestions for successful implementation?

“Taxation without representation—a decision will be made without input from the people who will use this daily.”

“Demonstrate the benefits.”

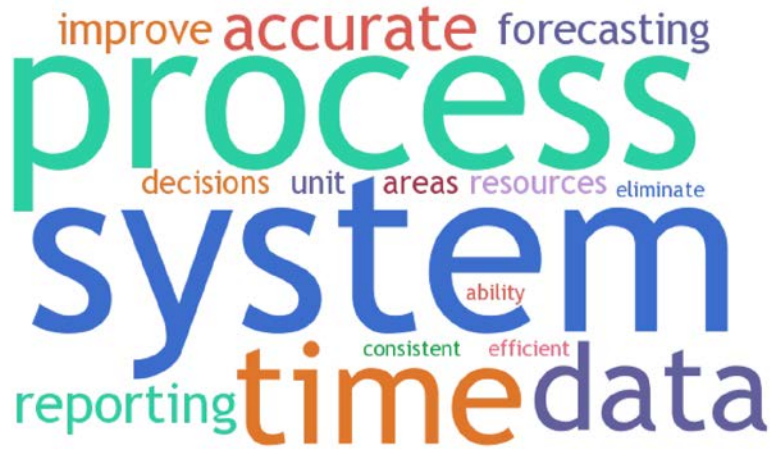
“Clear and concise communication. Getting feedback from end users. Adequate mandatory training that dives deeper into the tool, as well as online training portals available for reference.”

“Do not rush and thoroughly test the system before going live across the university.”

“Have town hall or discussion sessions to get feedback from end users.”

How would a new system improve the operations of your unit? The university?

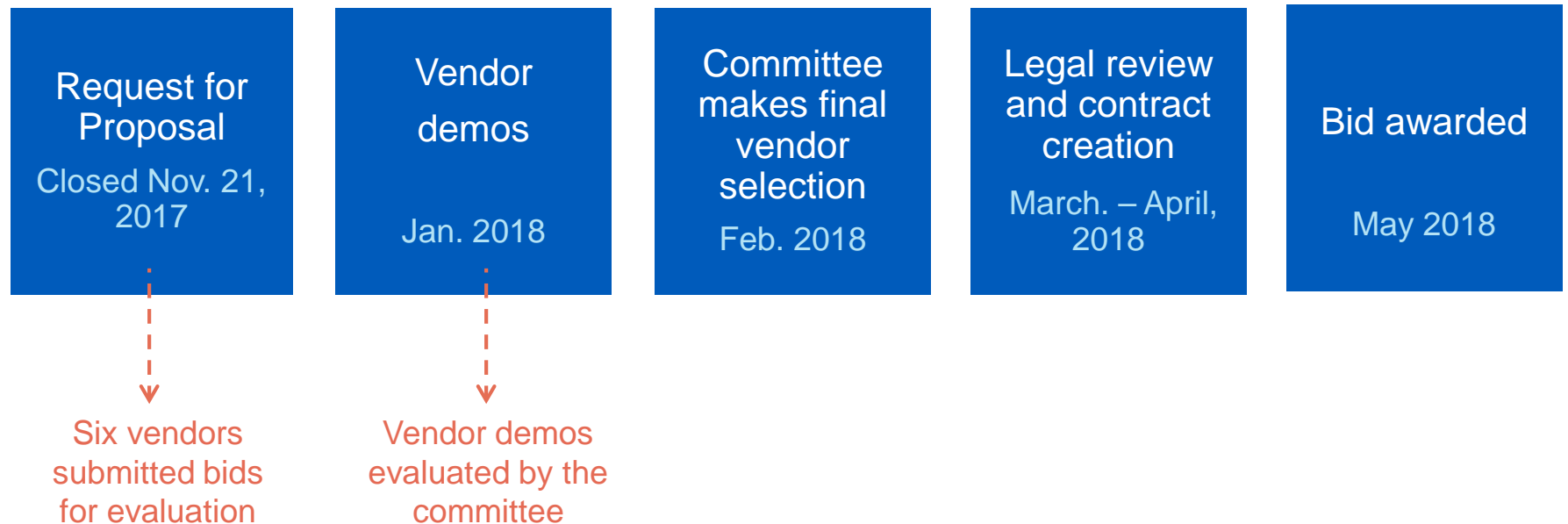
RESPONSE RE: UNIT



RESPONSE RE: UNIVERSITY



Phase One – Solution selection



Evaluation Committee

FUNCTIONAL EVALUATORS

Laurie Barnum, Resource Planning
Beth Corry, Business Services
Joe Lewandowski, Resource Planning
Jennifer Pesany, Financial Management
Nancy Kielar, CIO Administrative Operations Office
Larissa Kowalczyk, Campus Living
Bill McDonnell, School of Engineering and Applied Sciences

TECHNICAL EVALUATORS

Tom Okon, Business Reporting and Systems
Gary Pacer, Enterprise Application Services

PRICING EVALUATORS

Lance Mahalic, Financial Management
Ashley Kravitz, Resource Planning



UPlan: Next Steps



Phase Two: Implementation Approach

- Initiate implementation strategy
- Design training plan
- Build implementation timeline
- Test and deploy in a phased rollout



What does success mean?

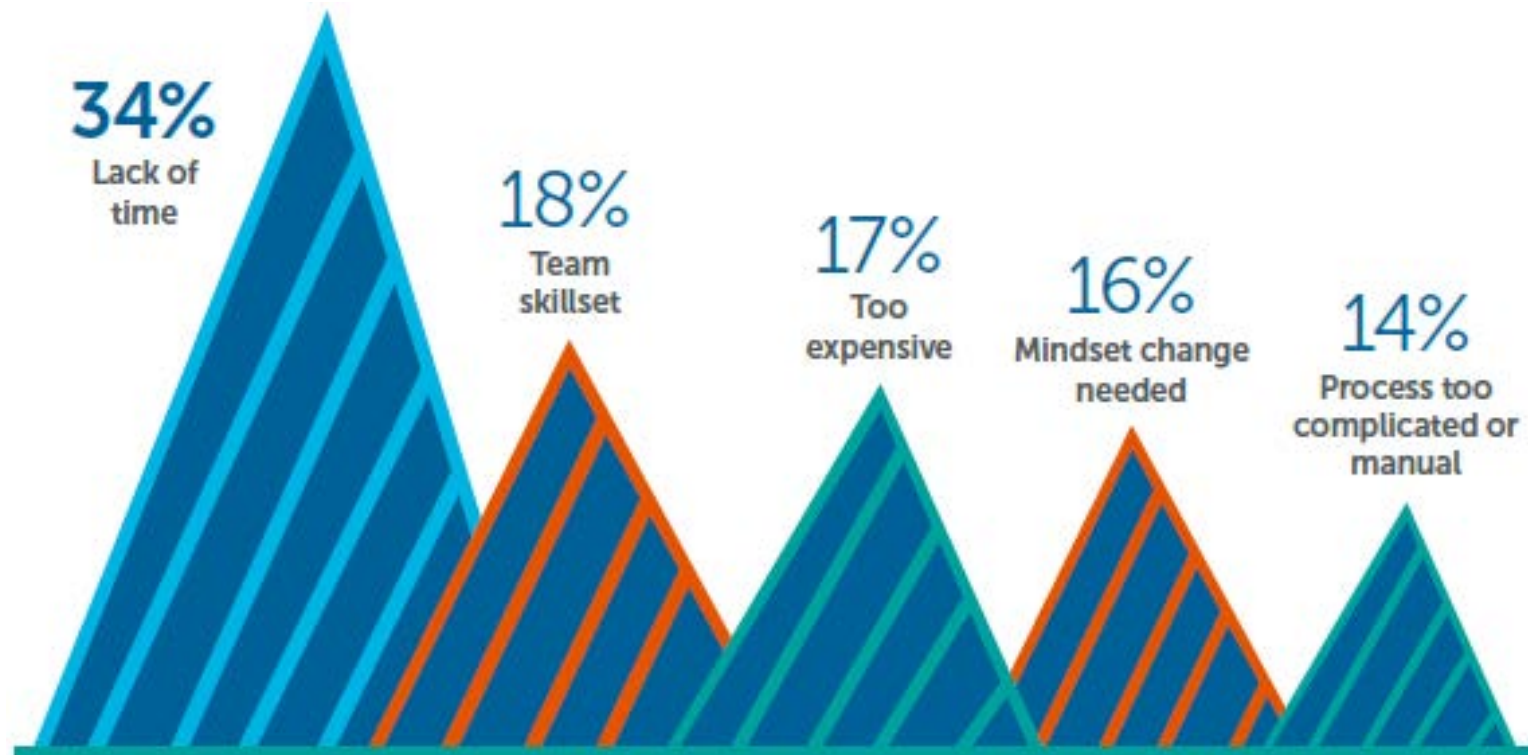
- A fully integrated all funds financial system that encompasses the needs and reporting at the department, unit, and central level in order to create a comprehensive university budget, eliminating the need to create and maintain shadow and supplemental systems.

This includes:

- One common, agreed-upon set of data and well-supported access to data and information
- One tool for forecasting, financial reporting and scenario planning
- One agile system for ad hoc reporting and information needs
- One commitment management tool

Challenges that impact our success:

Barriers to automation



Source: Adaptive Insights CFO Indicator Q4 2017

How can you contribute?

Prepare your unit for Uplan

- Be Ready
- Be Engaged and Contribute
- Be Open-Minded

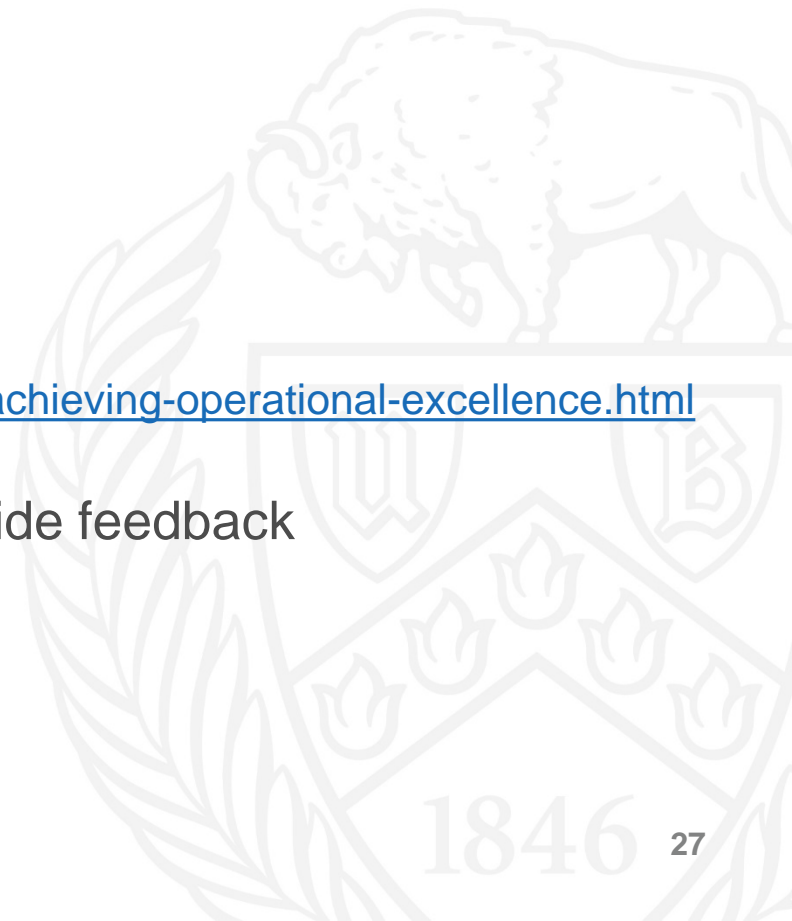
Stay informed

www.buffalo.edu/administrative-services/about-us/achieving-operational-excellence.html

Partner with us on this initiative and provide feedback

Ub-uplan@buffalo.edu

Be an advocate for change!





Questions/Comments