

ADMINISTRATIVE MODERNIZATION PROGRAM

BUSINESS PROCESS FORUM // NOVEMBER 2024



Oregon State University

Administrative
Modernization Program





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Adaptive Planning

A budget and planning tool, used to streamline and standardize budget processes.

- Reduces manual effort and improves quality of work
- Allows for greater transparency and collaboration at all stages of budget and planning cycles
- Visibility and analytics using accurate, real-time financial data





Adaptive First Approach

We are implementing Adaptive Planning in advance of the broader Workday implementation of: Human Capital Management, Financial Management, and Grant Management.

Benefits Include:

- Transition from existing MS Excel-based planning tool
- Streamline budget and planning process by utilizing built-in features of a modern cloud tool
- Gain early access and exposure for budget office and impacted end users
- Pilot change management approach, gain a better understanding specific training needs
- Understand issues with the current state Chart of Accounts to inform future state Foundational Data Model (FDM) design

KEY DIFFERENCES FOR ADAPTIVE PHASE 1 & 2 SCOPE

Category	Phase 1	Phase 2
Chart of Accounts	<ul style="list-style-type: none"> Implemented in current state Chart of Accounts from Banner 	<ul style="list-style-type: none"> Will use new Workday Chart of Accounts (known as Workday Foundation Data Model (FDM))
PMO / Project Management	<ul style="list-style-type: none"> Treated as a project within the broader program to streamline governance and decision making 	<ul style="list-style-type: none"> Adaptive Phase 2 managed as a project within AMP from a planning, governance, risk management, and testing/deployment perspective
Modeling Scope	<ul style="list-style-type: none"> Focused on foundational models required for complete income statement (i.e., Workforce, Expenses, Revenue) 	<ul style="list-style-type: none"> Expanded modeling scope to account for college / unit specific planning needs, Balance Sheet, Balance Sheet, and Long-Range Planning
Impacted User Base	<ul style="list-style-type: none"> Focus on requirements gathering and training for Central Budget Office, and with select representation from colleges and units for testing (SMAs & Process Reviewers) Rollout schedule for additional user groups (i.e., Departmental End Users, Deans, etc.) can be staggered based on application readiness Identify interim System Admin role for knowledge transfer throughout Phase 1 to support ongoing budget system maintenance for FY26 and FY27 planning cycles 	<ul style="list-style-type: none"> Use lessons learned from phased rollout in Phase 1 to formalize training plan and schedule for all end users Training materials (i.e., QRGs, recordings, live training) developed and managed formally as part of AMP System Administrators and key budget owners identified and trained as part of planned future state sustainment model
Data Integration & Conversion	<ul style="list-style-type: none"> Integrations built between legacy HR and FIN ERP for inbound and outbound secure file transfer Data conversion scope includes FY24 Actuals, FY25 YTD Actuals data and FY25 Historical Budget data 	<ul style="list-style-type: none"> Integrations developed through core Workday platform using direct connectors between Workday FIN/HCM and Adaptive Data conversion scope is driven by ERP conversion strategy Data conversion scope includes FY25 Actuals, FY26 YTD Actuals data and FY26 Historical Budget data
Security	<ul style="list-style-type: none"> Managed by System Admin directly in Adaptive SSO directly into Adaptive application 	<ul style="list-style-type: none"> SSO via Workday User Sync Enabled

OSU Adaptive Planning Project Team

✦ Helping to Shape the Design of OSU's Budgeting Process

Roles and Responsibilities:

- Executive Advisor/Process Owner: Brent Gustafson
- Lead: Erica Dodson
- Team Configuration Members: Kayla Campbell, RaeLee Aguilar, Tiffany Gillis
- Subject Matter Advisors:



- Jackie Thorsness
- Meaghan Deitz
- LaRae Wallace
- Sheryl Powell
- Aracely Arredondo
- Stephanie Pearse
- Tom Fenske
- Virginia Kestler
- Terri Libert
- Debs Perry-Guetti
- Stephanie Harvey
- Jessica (JT) Thurner-Byers

Project Lead, Configuration Members, and SMAs will provide important input, share ideas, and feedback from your perspective and experience.



Project Team

✦ Helping to Shape the Design of OSUs Budgeting Process

Roles and Responsibilities:

▪ Process Reviewers:

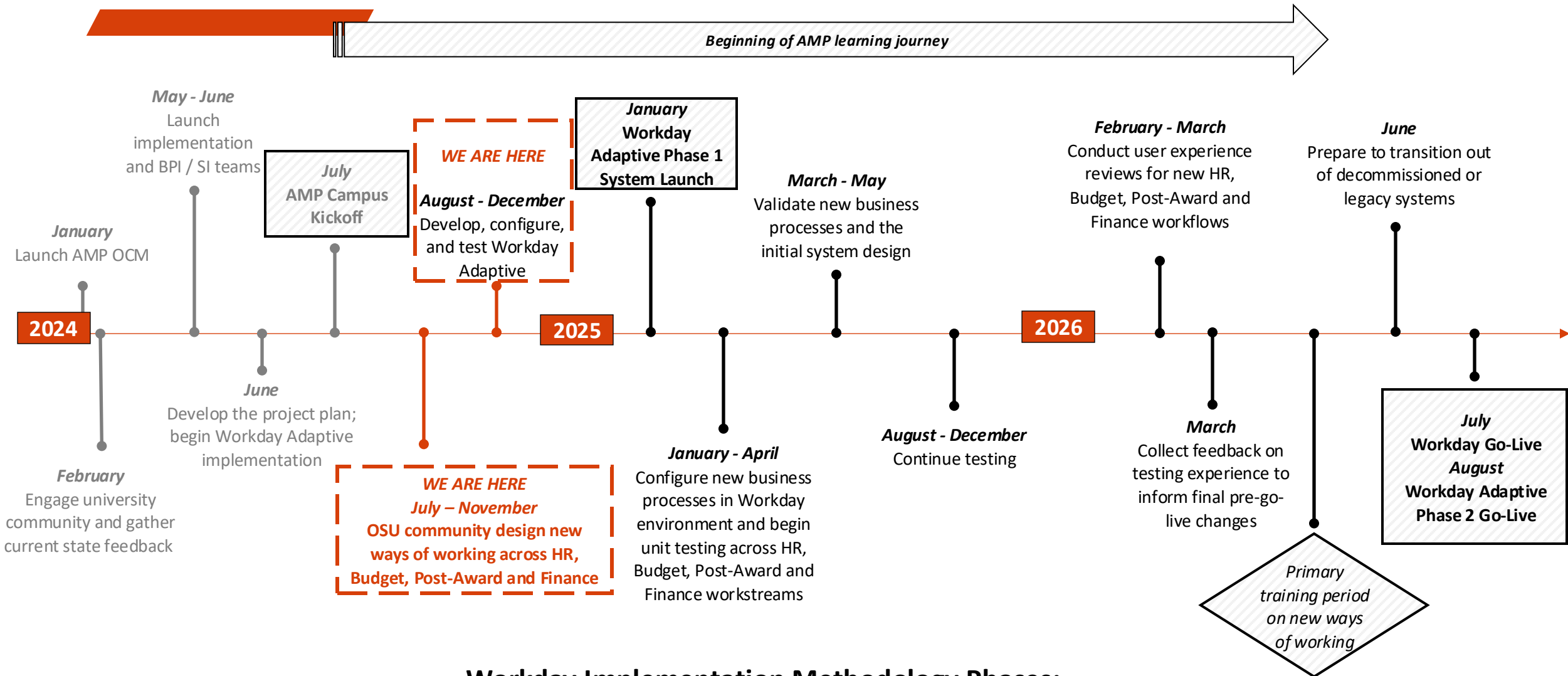


- Jacqueline Bruns
- Steve Hoelscher
- Thom King
- Nick Fleury
- Courtney Seton
- Yu Gillian
- Cathryn Knock
- Marc Norcross
- Carolyn Warfield
- Karley Lewis
- Andrea Friesen
- Niddy Lindsley
- Chris Warner
- Kelly Warner
- Erica Stillwagon
- Jenn Creighton
- Leroy Fenn

The Process Reviewers will review, test and make recommendations on the work coming from the Project Lead, Configuration Members, and SMAs and will help to finalize the future state process design.



AMP Timeline at a Glance



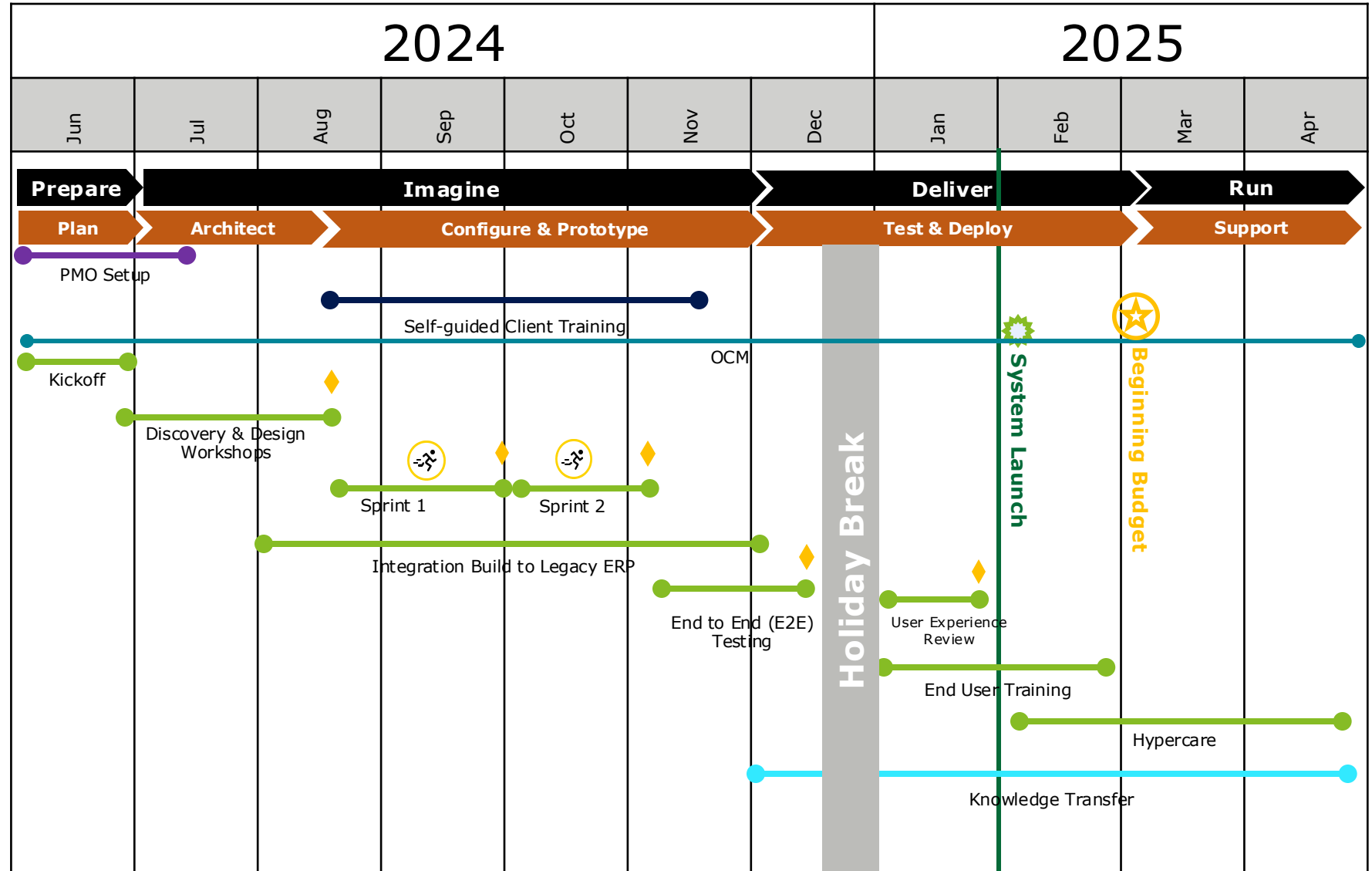
Workday Implementation Methodology Phases:



INITIAL WORK PLAN FOR ADAPTIVE PHASE 1

This timeline illustrates the Adaptive Phase 1 implementation from project start in June 2024 through go-live at the end of January 2025. Three (3) months of Hypercare are included from February to April 2025.

“Go live” for Phase 1 takes place when all data in scope (see Appendix) has been converted/integrated into Adaptive, and all Phase 1 testing has been completed. The intent is that the core team of users are ready to begin using the tool to support development of the FY26 Annual Budget using the current chart of accounts.



Sprint scheduling subject to change as Architect Phase wraps up.

What has been completed?



- Formed the project team including Project Lead, Configuration Members, SMAs and Process Reviewers
- Familiarity with Adaptive Planning functionality
- Held interactive discovery sessions
- Participated in design workshops
- Completed Sprint 1 detailed design sessions: Compensation Planning and Non-Compensation Expense
- Collected feedback from campus Subject Matter Advisors
- Begun creating reference sheets and budget development dashboards
- Completed Sprint 2: Revenue Planning, Amendments, Reporting, and Overall Budgeting Process
- Starting End-2-End testing Nov 12 – Dec 13
 - Testing configuration and Identifying and resolving defects

What's coming up?



- Identify Trainers, early November
- Building the training curriculum, November through December
- Budget and Finance Community, Check-in early December
- Training begins, January
- User Experience Review Testing, January
 - Testing configuration and Identifying and resolving defects
- OCM Project Interview Series, Adaptive Planning highlighted

Upcoming AMP Event: Community Check-Ins

The AMP team is hosting a series of University Community Check-Ins. These sessions are designed to **introduce preliminary changes** to OSU's administrative tools and processes that will broadly affect the community and provide a **forum for feedback**.

AUDIENCE

All OSU employees are invited, with a special focus on **administrative staff from colleges and distributed units** who can offer insights around different community administrative experiences.

TOPICS

- **HR: Hire, Time, Absence:** topics may include hire employee, requesting time off, requesting leave of absence
- **Budgeting & Fin:** topics may include the annual budget development process; new chart of accounts (FDM), business assets.
- **Grants:** topics may include charging expenses to sponsored projects & non-labor cost transfers, labor management, and effort reporting

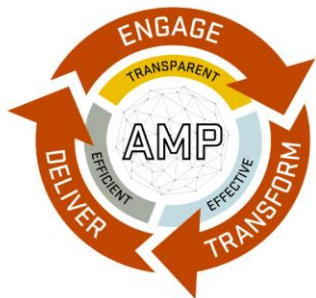
WHEN

HR: Wednesday, 12/4: 1:00-3:00pm

Budget/Finance: Friday, 12/6: 9:00-11:00am

Grants: Wednesday, 12/11: 11:00-12:30pm

Options will be available for virtual or in-person



Session Objectives:

- A forum for **information sharing** about how processes are changing
- An opportunity for the OSU community to **learn more about design activities**
- An avenue to **share feedback** that will support the AMP team with change management activities
- A forum to share changes and impacts for specific OSU communities and to **collect additional nuanced considerations** as we continue to build and refine new ways of working



AMP Resources

AMP SharePoint – [Home](#) (Welcome to the AMP Intranet!)

AMP Inbox– amp@oregonstate.edu

Suzanne Grey, OCM Lead,

suzanne.grey@oregonstate.edu

Leslie Wolgamott, Budget, Finance, and Interim Grant Lead,

leslie.wolgamott@oregonstate.edu

Trudy Larsen, Human Resources Program Lead,

trudy.larsen@oregonstate.edu



Administrative Modernization Program (AMP) Overview

What is AMP?

- AMP is an ambitious initiative that advances action in OSU's strategic plan to **integrate and simplify technology systems, data practices, and policies.**
 - Replace outdated core administrative processes
 - Increase resource capacity
 - Standardize processes and tools
 - Streamline support capabilities
 - Update data ecosystem with increased automation and implementation of Workday
- AMP is funded by \$50m in OSU bond proceeds and is comprised of multiple individual project stages over a five-year period.

Why AMP?

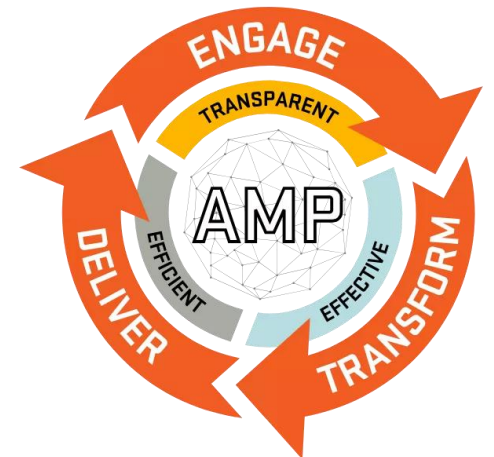
The expectations on higher education are changing rapidly. OSU's current digital ecosystem is increasingly incapable of meeting the expectations of faculty, staff, students, and other community members

- Provide faculty, staff, and students the tools to do their best work
- Make data more accessible and standardized
- Retire aging systems
- Redirect cost savings to mission critical work
- Simple and more efficient administrative processes
- Update technological infrastructure that supports the university's long-run success

Value and Benefits

While there are many benefits and values that AMP will bring to OSU, the most significant impacts are highlighted below:

- Enhances the OSU experience
- Enables data-informed decision making
- Supports financial transparency and accountability
- Allows for quick and accurate decision-making and swift distribution of information
- Re-directs resources to support mission critical work
- Supports the broader Oregon community



AMP GUIDING AND DESIGN PRINCIPLES

Our Guiding Principles will help facilitate purposeful decisions and actions by ensuring the alignment of OSU's values and practices. Our Design Principles will help the project team ensure its activities, approach and decisions are fully aligned with the desired outcomes for AMP.

ENGAGE with the OSU community

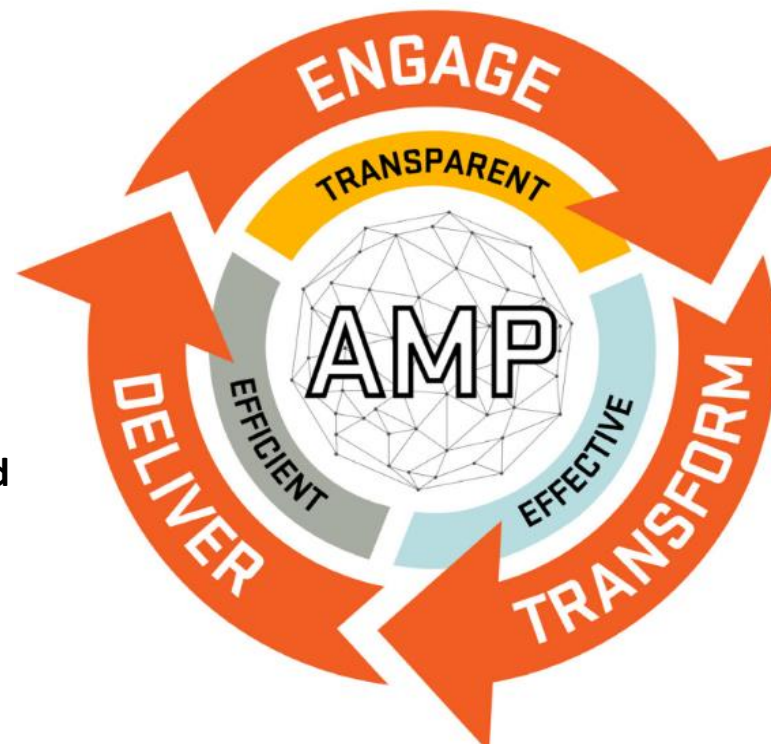
- Enable early and robust input, so that design is informed by the best ideas
- Provide robust communications to the community at all stages of implementation

TRANSFORM processes and systems

- Improved user experiences
- Better clarity around roles
- Access to insights and trusted data
- Efficiency and effectiveness

DELIVER flexible and scalable processes and tools

- Improved capacity for innovation and continuous improvement
- Greater efficiency in administration
- Adaptability as conditions change



TRANSPARENT

- Champion change
- Inclusion and engagement
- Leadership alignment
- Strong and transparent governance
- Communicate frequently and fully
- Data as a strategic asset
- Measure community readiness

EFFICIENT and EFFECTIVE

- Measure impact
- Current processes will not be recreated with new technology
- Everything is on the table for adjustment or redesign
- Prioritize the user experience
- Maintain capability levels
- Simplification and consistency
- Data-informed decisions
- Intentional systems architecture
- Maximize resources

Systems Implementation Team



Chris Wawner

Adaptive SMA
Deloitte Consulting



Ryan Loftus

Adaptive Lead
Deloitte Consulting



Ashlei Scott

Adaptive Consultant
Deloitte Consulting



Vikas Sahu

Adaptive Consultant
Deloitte Consulting

Project Team

✦ Helping to Shape the Design of OSUs Budgeting Process

Roles and Responsibilities:

▪ Logistics Team:



- Kent Kuo, Enterprise Computing
- Jason Peak, Analyst Programmer
- Shelby Towns, Training Coordinator
- Erik Calbreath, Testing Coordinator
- Bob Imhoff, Project Manager
- Leslie Wolgamott, Budget and Finance Program Lead

Change Champion Network

✦ Building accountability and ownership, accelerating the adoption of change, promoting understanding, and advocating positive change.

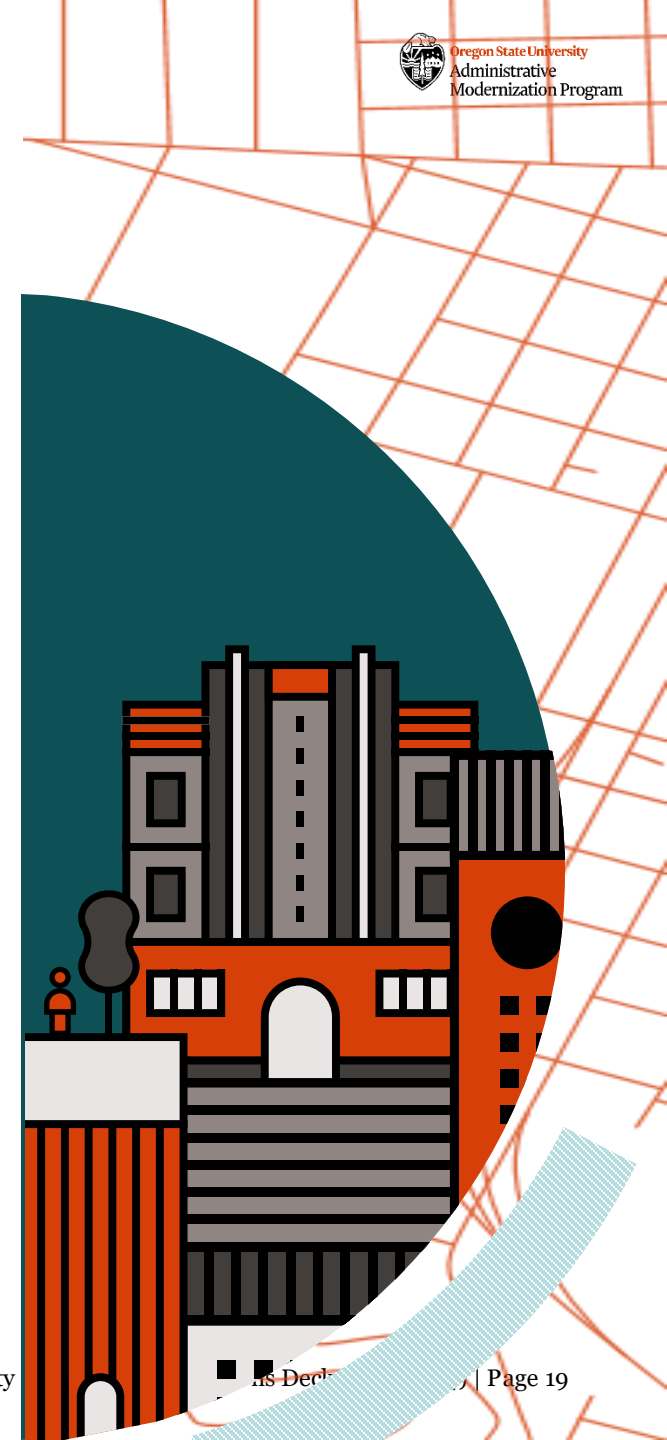
- **Enrollment:** Keeley Abbot
- **UHR:** Brittany McDonald
- **UHR:** Alicen Billings
- **UHR:** Jaime Zinck
- **UHR:** Megan Hickman
- **Student Affairs:** Steve Hoelscher
- **CU:** Christina Saechao
- **CU:** Andrew Stahl
- **CU:** Trina McGaughy
- **CU:** Jennifer Cowan
- **CU:** Leticia Hernandez
- **BRP:** Erica Dodson
- **DRI:** Sara Begley
- **DRI:** Kristal Fehring
- **Ed Ventures:** Carlea White
- **Extension:** Alisha Hutchinson
- **Extension:** Shevon Hatcher
- **Extension:** Clay Guetling
- **Extension:** Holly Lyons
- **UIT:** Brendan Brucker
- **UIT:** Kelly Walker
- **OSUF/Dev:** Patti Nowak



Change Champion Network

✦ Building accountability and ownership, accelerating the adoption of change, promoting understanding, and advocating positive change.

- **OID:** Keeley Abbot
- **CAS:** Stephanie Harvey
- **DFA IT:** Andy Cadotte
- **Risk:** Aliesha Milligan
- **UHR:** Megan Hickman
- **PCMM:** Hanna Emerson-Steed
- **Enrollment:** Brian Palmer
- **Enrollment:** Jay Well
- **Enrollment:** Regan Kaplan
- **Enrollment:** Bobbi Jo Williams
- **Enrollment:** Brandon Swindon
- **Cascades:** Terri Libert
- **DRI:** Sara Begley
- **DRI:** Kristal Fehring
- **Ed. Ventures:** Carlea White
- **Libraries:** Angela Haney
- **Registrar:** Katrina Highland
- **Business:** Malcolm LeMay
- **Education:** Sheri Lopez
- **Forestry:** Scott Levensgood
- **Forestry:** Mindy Crandall
- **VetMed:** Jens Odegaard



Change Champion Network

✦ Building accountability and ownership, accelerating the adoption of change, promoting understanding, and advocating positive change.

- **Grad School:** Maureen Childers
- **Health:** Marc Norcross
- **CLA:** Laura Blackwell
- **Health:** Jessica Iverson
- **Honors:** Kevin Stoller
- **Health:** Rocci Taylor
- **CLA:** Karley Lewis
- **UIT:** Ramee Kelly
- **CLA:** Nicole Wolf
- **Extension:** Debbie Sayer
- **CAS:** Tim Rager
- **Extension:** Kathy Chase
- **Health:** Debi Rothermund
- **Forestry:** Adirenne Wonhof



Finance Project Teams

✦ Helping to Shape the Design of OSUs systems and processes

Finance Project Teams:

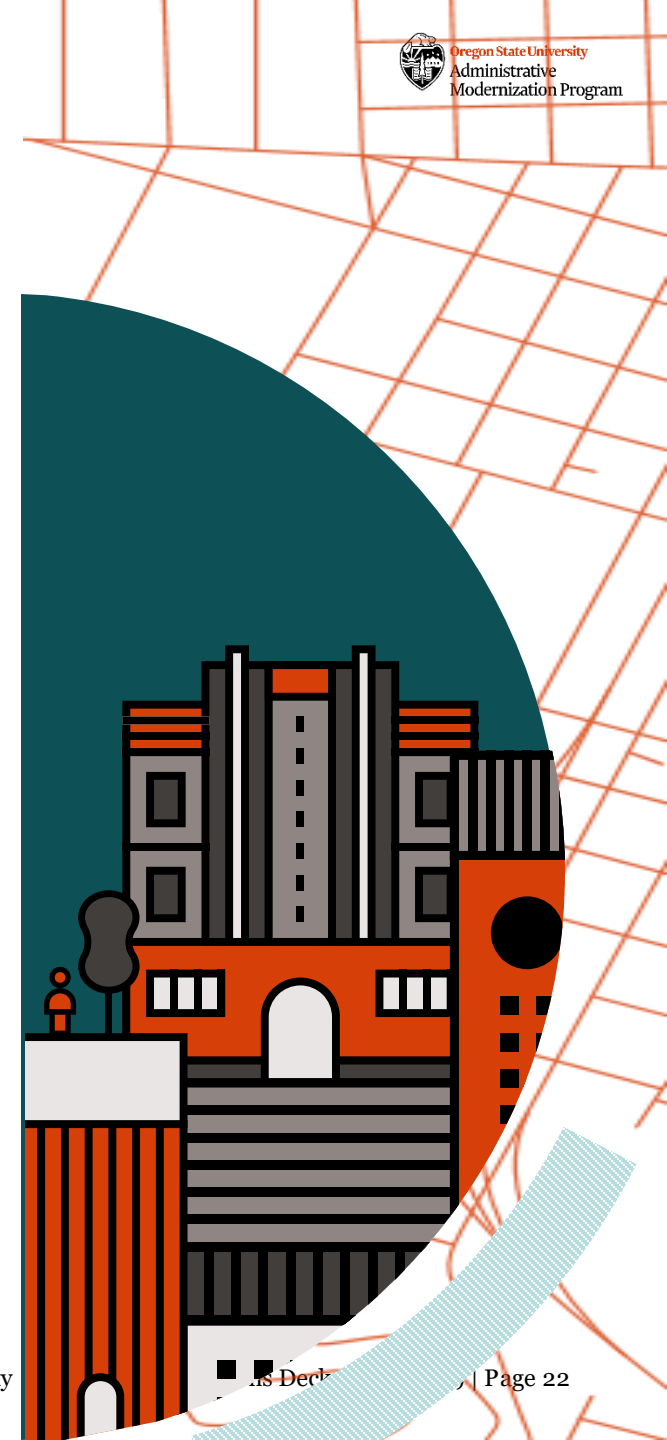
- **Spend:** Alex Sims
- **FDM** (chart of accounts): Trina McGaughy
- **Revenue:** Dwight Brimley
- **Business Assets:** Charlotte Rooks
- **Payroll:** Morgan Hatch & Melissa Stuart
- **Core Finance:** Paul Garza & Heather Hesano



Grants Project Teams

✦ Helping to Shape the Design of OSUs systems and processes

- **Project Teams:** Identify and confirm Core Project Teams
 - **Overall Lifecycle:** Kristal Fehring
 - **Award Setup and Pre-Award Spending:** Amanda Watts
 - **Labor Management/Effort Reporting/Subaward:** Aedra McCarthy
 - **Award Closeouts and Invoicing:** Heather Toro
 - **A/R and Cash Management:** Sandy Cobb
 - **Charging Expenses to Sponsored Projects:** Aedra McCarthy



HR Project Teams

✦ Helping to Shape the Design of OSUs systems and processes

▪ Project Teams:

- **Academic:** Carolyn Warfield, Jennifer Short
- **Benefits:** Jessica Dalziel, Audrey Roberson
- **Compensation:** Jenna Reeves, Megan Hickman
- **Learning:** Katy Ahlvin
- **Performance:** Jaime Zinck
- **Time & Absence:** Bonny Ray and Carolyn Warfield
- **Core HCM:** Brittany McDonald, Angela Williamson, Jaime Zinck, Jennifer Short
- **Talent Acquisition:** Robbin Sim, Angela Williamson, Chris Lewis, Jaime Zinck

