ASDS Steering Committee  
With Training Coordinators and other guests  
Thursday, August 2, 2007  
Buchanan Alumni House, University of Maine

Present: Allen Berger, Tracy Bigney, Tony Brinkley, Peggy Campbell, Dick Campbell, Ralph Caruso, Dennis Casey, Pat Davis, Carla Degraw, Patric Edward, Tracy Elliott, Sheri Fraser, Berta Hussey, Dick Kimball, Chris Legore, Eldon Levesque, Tammy Light, Lorelei Locke, Eddie Meisner, Cindy Mitchell, Tamara Mitchell, John Murphy, Sharon Nadeau, Steve Rand, Don Raymond, Rosa Redonnett, Linda Reid, Robin Sherman, Mary Stover, Stuart Swain, Joanne Yestramski


Allen noted that the rate of progress has been different on different campuses. We don’t want to push too aggressively for the one-stops given the other things on our collective plates, but progress still needs to be made.

Joanne said that this Report is useful for reporting to the Davis Foundation, source of funding for the one-stops. She is also seeking funding for a followup grant to assist with implementation of e-transcripts (from high schools to universities). Joanne also distributed one copy of the NACUBO book “Student Centered Financial Services” to each campus.

Rosa, who worked with Kathi Brink of CedarCrestone on the report, added that it was exciting to hear from the one stop coordinators about the progress they have made already, especially given their many additional roles, and the very busy time in which the one-stops are being developed. She suggested those with questions after reading the report should contact the appropriate one-stop coordinator.

2. Update on Shared Processing Center
   a. SPC Leadership
   b. Service Level Agreements

Ralph is visiting the campuses and has prepared for each university a draft Service Level Agreement for the loan side and for the admissions side of SPC services. He is presently serving as acting interim director of the Center, and recommends that an internal search for the director position be conducted during the month of August. Should the internal search fail, an external search will immediately begin. He stressed that a permanent solution must be reached no later than March 2008.

Some campus reps believe that backlogs at the SPC may have resulted in lower numbers of out-of-state students for the coming year. It was noted that transfer evaluation is difficult. Ralph is confident that backlog issues have been addressed and next year should go much more smoothly for everyone involved.

3. Consulting Resources for PeopleSoft Student Implementation

The Student Implementation Sponsors (Allen, Rosa, Sue Hunter, Charlie Bonin) have asked Ralph, Cindy, and Darren-Michael to generate proposals for additional human
resources/consulting support. The proposal currently on the table (which the Sponsors support) is for seven or eight consultants (several of whom are already known to the campus IDP teams). A consultant would be available on a campus during the key milestone and go-live times to provide real-time help. These consultants would be involved early enough to be a part of the process, so they will fully understand the principles established, the decisions already made, and the complexities of our system. The cost is estimated at $698K, for support from September 2007 to September 2008, including one person for financial aid and 1 ½ people for student records and student financials.

Cindy stressed the need for immediate help, and said this is the minimum needed to manage risk. Darren-Michael himself cannot be all things to all campuses. If the Steering Committee approves, the proposal will next go the presidents on August 8-9.

The Steering Committee agreed with the need for additional help, and Dick C. encouraged an even longer timeline, suggesting the plan extend through September or October of 2009, though with declining levels of support in the second year.

Joanne authorized Cindy and Ralph to add this option to the plan.

Peggy said (from her perspective in Financial Aid) that help and training at the campus level will be needed so that people can actually manage PeopleSoft after the implementation and will know how to handle the detailed changes that will affect processes down the road.

Eldon added that the complexity of PeopleSoft allows it to offer more than one option to get from here to there. We need people who can assist us in finding the best way to get to the solution, and to help identify how that solution might impact other areas.

John M. observed that the comfort levels for IDP teams would increase if process manuals are available to them sooner rather than later. Excellent documentation is key. Cindy agreed, and said that UPK will help with this.

Ralph noted that a thoughtful discussion is needed about post-implementation services that will be provided centrally, how that will work, the expectations for staff, and how such services, both temporary and permanent, will be funded. Presently only two SMEs are actually on the ASDS staff (Bill Elsemore and Alison Cox).

Allen concluded this discussion by stating the group’s endorsement of the Sponsors’ recommendation to the presidents for the consulting plan and appropriate funding, but noting also that this is regarded as a baseline for continuing conversation about the kinds of ongoing resources and help that will be needed in the future.

3. Campus Training for Student Go-Live
   a. UPK
   b. Communications Tools and Other Approaches to Training
   c. What are our anxieties, perceived needs and challenges? How can we begin to organize to address them?
Cindy quickly went through a Powerpoint that was distributed to Chief Academic Officers last week, including a concise timeline, information about UPK, risk containment issues, and plans for a pre-go-live assessment.

Allen said the CAOs are critical players as we begin to encourage the involvement of faculty, department chairs, and other key people on the campuses in preparing for the coming implementations.

Allen and Cindy both emphasized that there is much less commonality in the student administration areas than was in the case in both financials and HR implementations. Many processes are specific to a campus. For these reasons, it is the responsibility of the Chief Academic Officer and training coordinator(s) to get the message out to their campus, and they will need the assistance of the IDP team members—those with expertise about PeopleSoft—to accomplish this.

An important slide which Allen pointed out is entitled “What we need from you...[the campuses].” It emphasizes the necessity of executive support and enthusiasm for the project. Allen noted that a similar message will be delivered to the presidents at their August 8-9 retreat. They must be a visible presence and cheerleaders for the project.

This Powerpoint can be shared widely. Darren-Michael will prepare some additional slides that include pictures and screen shots. Campus folks are free to pick and choose from among all slides when preparing presentations for faculty and staff meetings and retreats.

Robin demonstrated how Oracle’s UPK (User Productivity Kit, and no, the name cannot be changed) provides easily accessed, web-based training and help for end-users.

In addition to the online screens, UPK also allows nearly instantaneous creation of documentation (manuals, job aids [“quick guides”], user test scripts) that are campus-specific.

Links to the “See It, Try It, Know It” options in UPK will be available from the MaineStreet portal and reside in a UPK database. The “Do It” help is accessed by clicking on the “Help” icon while on a “live” page in PeopleSoft production. “Do It” walks the user step-by-step through the process to its completion.

UPK will be rolled out gradually as the specific processes are beginning in PeopleSoft during the academic year business cycle. One of the first processes to benefit from UPK will be receipt of application fees this fall.

Robin and her team will initially create the UPK materials, but will require much communication and coordination with campus functional teams to ensure the materials are correctly personalized for each campus. At the outset, it is anticipated that updating of materials will be done centrally (updating requires training and a developer license).

Suggestions from the group included:
   Make links to help on the portal campus-specific.
   List UPK directories by campus.
Develop a clear system for communicating process changes and modifications to and from Robin.

Have at least some UPK processes ready for campuses to show and tell with enthusiasm at start of semester (in four weeks!).

Make Faculty Center available asap for ease of training faculty.

**Eddie noted the communications challenges** presented with this implementation, since so many processes are campus-specific. She can help with general, high-level information and provided a Communications Tool Kit with ideas and templates that can be used and personalized by the campuses, in addition to the Powerpoint slides seen earlier.

**Anxieties, needs, and challenges:**

Need to emphasize what value will be added beyond just replacing legacy systems.

Need different focus for faculty skeptics than for larger community.

Need to be proactive in getting word out to wider audience—newspapers, public arena—that this will help us better serve students in Maine.

Communicate with faculty on paper; with students electronically.

Awareness—this is totally new and different and will affect everyone on campus.

Could Communications Tool Kit items be made available on (secure) clearinghouse on website in template form, so campus folks could access and download?

Campus-specific branding may be needed on some items. Others might be okay generic.

Don’t forget Admissions!

Campus leadership must take the lead; if PS is the only tool we will have, that must be clearly communicated.

Need a specific leadership plan to get optimal buy-in and support.

Department chairs (at UMaine) are key people.

This implementation needs to happen, and not everyone will like it.

Faculty tend to have a cultural “thing” that they can choose to use PS or not, but this is not a choice.

Useful for faculty senates and reps to Board to meet with Steering Committee?

How to change campus culture? (PeopleSoft is “evil.”) Dissociate administrative decisions from software.

Non-tech-savvy students can get help at the campus one-stops.

How to reach faculty who don’t interact with the computer now? How to move them along? Peer support is generally most effective. Cool tools. Make them want to enter the new world.

Useful to convene a committee of student leaders System-wide to get their input on how to approach students?

Put out a good product and students will find it. Students have a right to good service. If students demand it, faculty will come around (Blackboard for example). Faculty who care about students will respond to their concerns.

Encourage, do not force.

Ask: what is your resistance? What worries you most? What are you most afraid of?

Don’t presume someone (faculty, staff, or students) can’t do it simply because they have not yet had to. Give them the tools and show them the plusses and they will move to it. Make people feel “I’m the kind of person who is willing to do this.”
Payoffs are in efficiency, quality of service to students, decreased (or eliminated) use of paper.
We're not really reinventing many of these processes, at least on some campuses (online grading, course catalog, photos of students on class lists, et al. already exist).
Be clear in what we ask people to do.
Inform faculty of cultural shift with students – many high school students in Maine—soon to be all—are already used to having instant access to their grades and they will be expecting at least this in university.
PS must operate efficiently and quickly. No half-hour waits to enter a grade list.
A current month-by-month timeline—what is when?—will help.
All pieces of the system must be working for testing.
Financial Aid is implementing "vanilla." Enhancements are down the road.
How will multi-campus students be handled?
Need moratorium on changes in fees, degree requirements, etc. while preparing PS for implementation.

Allen thanked the group for their active participation.

The next meeting of the Steering Committee will be determined via email.

The meeting was adjourned.

Respectfully submitted,
Eddie Meisner, Recorder