



Communications Plan
CAMPUS SOLUTIONS IMPLEMENTATION:
FINANCIAL AID, STUDENT RECORDS, STUDENT FINANCIALS,
ACADEMIC ADVISEMENT
September 2007

Introduction

On July 31, 2006 **Campus Community** and **Admissions & Recruitment**, two modules within Oracle/PeopleSoft's **Campus Solutions** administrative computing system, were successfully implemented in the University of Maine System.

Continuing with the phased implementation of all parts of Campus Solutions, an academic year processing cycle is being adopted: required system components will be phased into use ("production") incrementally, as they naturally occur in the academic year cycle. Thus, in Fall 2007 application fees and enrollment deposits will be processed using the PeopleSoft system, and building of the Fall 2008 class schedule will begin. Enrollment deposit refunds will then be made from the new system in January 2008; in February transfer credit evaluation for Fall 2008 new admits will begin; in March the 2008 Fall Class Schedule will be run in PeopleSoft, and in April registration will occur. And so on, as tasks naturally arise during the course of the academic year, they will be shifted from legacy systems.

In this way, a series of System-wide mini-implementations will occur, involving **Financial Aid, Student Records**, and **Student Financials**, as elements of each module are called into play to meet the requirements of the academic year cycle. Implementation of **Academic Advisement** will be a campus-based decision, with the earliest possible adoption in March 2008.

One very important communications challenge that is specific to these implementations: the Oracle/PeopleSoft system is not one-size-fits-all. Each university is planning to use it slightly differently to fit with their business processes, using slightly different language, and even to begin using it at different times. This makes System-wide communication problematic, and means that individual campus representatives must take responsibility for helping to plan and execute communications that target both topics and audiences at their university.

These implementations—and the planning for them—have had and will continue to have an impact on administrators, faculty, staff, and students throughout the University System. The new software enables the institutions of UMS to initiate innovative changes and improvements in student services that were endorsed by the presidents, the chancellor and the board of trustees in spring 2005.

Purpose

This communications plan is intended to:

- **Introduce** implementation project team members
- **Identify** audiences with whom the project must communicate in order to facilitate the Campus Solutions implementations
- **Define** the appropriate methods of communication
- **Outline** the information to be communicated
- **Highlight** the link between communications, change, and training
- **Develop** a communications and training timeline
- **Describe** how the communication plan's effectiveness will be measured

Project Teams

The project Sponsors and the project Steering Committee serve as the planning advisory groups for enterprise resource planning in the University of Maine System. See Appendix 1 for membership lists.

The Director of Administrative Systems Development and Support within the UMS Office of Information Technology Systems (charged with implementation of this software) is Cindy Mitchell. The Director of the THESIS Project (charged with developing innovative student services processes and organization) is Laurie Pruett. Manager of the Campus Solutions implementation is Darren-Michael Yocum. Project teams include ASDS staff members, university personnel, and specialists in the functional areas of the modules to be implemented. Consultants are also a part of the planning and implementation process.

Functional Specialist Team members are:

Alison Cox	Admissions Subject Matter Expert
Sarah Doheny	Financial Aid Subject Matter Expert
Sharon Nadeau	Student Financials Subject Matter Expert
Peter Reid	Student Records Subject Matter Expert and Academic Advisement Subject Matter Expert

Training and Communications Team members are:

Robin Sherman	Manager of Training
Eloise Kleban	Senior Trainer
Tom Lamontanaro	User Support Analyst
Eddie Meisner	Communications Coordinator
Sally Dobres	Human Resources Liaison

Other critical project personnel include members of the technical team, headed by Jim White, Manager of Technical Services.

In addition to the project teams, campus contacts are essential to ensure that information—especially regarding training needs—flows smoothly between the project teams and the university faculty and staff: end-users whose student services responsibilities are affected by the new system. The campus coordinators must also determine end-user training needs on their campuses and ensure that appropriate training is scheduled and completed. Because the new software accommodates individual university processes, campus coordinators have an especially important role in

designing university-specific communication and training for their faculty and staff end-users.

The campus coordinators for the Campus Solutions implementations are:

University of Maine	Dennis Casey, Peggy Crawford, Dawn-Marie Glidden Roberta Hussey, Tammy Light
University of Maine at Augusta	Helene Turcotte
University of Maine at Farmington	Sharon Nadeau
University of Maine at Fort Kent	Tamara Mitchell
University of Maine at Machias	Rose Mondville
University of Maine at Presque Isle	Patric Edward
University of Southern Maine	Marty Berry, Pat Davis, Steve Rand

Identifying the Audiences

A crucial step in the communications process is identifying those individuals who “need to know.” Many employees at all University of Maine System institutions deal with some aspect of student services and are directly affected by these implementations, so the number System-wide with a need to know is large. This includes campus administrators, student services staff who are end-users of the software, departmental staff, faculty who serve as student advisers, and students, both prospective and matriculated.

Audience Analysis

The audience groups noted in the matrix below require varying levels of communication (and/or training), dependent upon the relevant category of change.

Table 1. Audience Groups by Categories of Change

Who?	General “Big Picture” Information	Specific Business Practices in Student Services	Technical Aspects
Board of Trustees	✓		
Presidents	✓		
Sponsors	✓		
Steering Committee	✓		
Chief Academic Officers	✓	✓	
Chief Financial Officers	✓	✓	
Faculty	✓	✓	
Academic Department Heads	✓	✓	
Departmental Administrative Staff	✓	✓	
Student Services Staff	✓	✓	
Help Desk Personnel	✓		✓
Students	✓	✓	

Methods of Communication

The following vehicles may be used to communicate with the identified categories of users:

- Presentations
- Website
- Portal

- Email
- Newsletters
- Information sessions
- Blogs
- Focus groups
- Training
- Other methods as appropriate

Presentations

Members of the project team, including Sponsors and members of the Steering Committee, or local campus teams, may present materials to meetings or groups when information is ready for dissemination, or when a user group requests a presentation. Such meetings and/or groups might include: chief academic officer meetings, university registrar group meetings, faculty senate meetings, professional and/or classified employee group meetings, union meetings, or other functional user group meetings.

Website

The website <http://www.maine.edu/system/mainestreet/> is the repository for project information including timeline, status information, and a calendar for the PeopleSoft software implementations, frequently asked questions, and training materials (reference guides, manuals, on-line tutorials). Employee newsletters and updates are posted on the website, as they become available. The THESIS project web pages (<http://www.maine.edu/system/mainestreet/thesis.php>) provide information about the redesign of student services processes and organization, the history of the effort, guiding principles, employment issues, and current plans.

Portal

The MaineStreet portal (<http://mainestreet.maine.edu>) is the road to online access in the University of Maine System. The “MaineStreet News” pagelet contains important and useful information for all employees and students, including links to all training tools and documentation. Announcements of upcoming implementations and other important news is published on the portal.

Email

As the users within the University System who are affected by the implementations are identified, appropriate electronic mailing lists are established for ongoing communication and discussion.

Newsletters

The *News from MaineStreet* newsletter is published regularly. A link to the electronic version of the newsletter is sent to every University of Maine System employee (including student employees), and hard copies are provided to appropriate campus team members for further distribution.

Blogs or other online updates/discussions

At the individual campus level, online blogs or discussion groups may be used to update end-users about important implementation topics, schedules, or other issues.

Information Sessions

Project team members or Steering Committee representatives may organize informal information sessions or discussions, as needed, to provide updates to campus communities or to specific functional users' groups.

Focus Groups

Classified and professional employee end-user groups may be convened by the project training and communications team to obtain feedback regarding changes in business practices, the impact on end-users' work, and effective strategies that might be used in future training and communication efforts. Such groups may be re-convened or otherwise called upon after implementation for follow-up debriefing.

Training

Training is delivered as closely as possible to the actual implementation dates for each module. Oracle's User Productivity Kit (UPK) will offer online, user-paced options for learning to use the new system. A playground database is also established in which trainees can practice.

Other

Targeted communications to specific groups may be developed in appropriate formats as issues, needs, and opportunities arise.

Information to be Communicated

Various audience groups have differing requirements for detailed information, but all groups need to understand the basics about the planned implementations and the reasons for planned changes. Presidents, chief academic officers and chief financial officers need high-level information about business practice changes in student services and student financials, and the resulting impact on the institution. Faculty, department heads, and their staffs need to know how the changes affect their advising of students. Faculty in particular want to know what benefits they can expect to receive. The primary end-users—those employees who work directly in the student services arena—require specific details about how their work may change, from input of data to generation of reports, and ultimately, need training in how to accomplish their tasks using the new system. Current and prospective students need to know how to access and use the system for their specific needs, including registering for classes, checking grades, and monitoring financial aid awards.

The addition of campus one-stop centers and the Shared Processing Center to the organization of the University System adds an additional layer of essential information that must be communicated.

Key Messages

Certain messages about the implementation project should be disseminated, including, but not limited to:

- THESIS is a project to redesign student services processes and organization as part of UMS Strategic Direction #7.
- PeopleSoft is the product (tool) that will make portions of this redesign possible.
- The design and implementation of campus one-stop centers and the Shared Processing Center are part of THESIS phase II planning.
- "MaineStreet" is the name for online access to all student services software (and to financials and HR as well) in the University of Maine System.

- Individual universities are able to maintain individual differences in many business processes: PeopleSoft is not being implemented as “one size fits all.”
- Our traditional-aged students are accustomed to doing business and finding answers to questions online. These implementations allow us to serve our students better.

The following tables indicate the types of information to be communicated and the methods by which those communications may be delivered to the audiences.

Table 2. Type of Information by Communication Method

	Presentations	Website	Portal	Email	Newsletters	Information Sessions	Training	Other
High Level Changes/Innovations	✓	✓		✓	✓	✓	✓	
Business Practice Changes	✓	✓		✓	✓	✓	✓	
Reporting Changes		✓			✓	✓	✓	
Technical Changes		✓	✓	✓			✓	✓
Organizational Changes	✓	✓			✓	✓		✓
Training Schedule		✓	✓	✓	✓	✓	✓	✓

Table 3. Audience by Communication Method

	Presentations	Website	Portal	Email	Newsletters	Information Sessions	Training	Other
Board of Trustees	✓							
Presidents	✓							
Sponsors	✓					✓		✓
Steering Committee	✓					✓		✓
Chief Academic Officers	✓					✓		✓
Chief Financial Officers	✓					✓		✓
Faculty		✓	✓	✓	✓	✓	✓	
Academic Department Heads		✓	✓	✓	✓	✓	✓	
Departmental Administrative Staff		✓	✓	✓	✓		✓	
Student Services Core Users		✓	✓	✓	✓		✓	✓
Help Desk Personnel			✓				✓	
Students		✓	✓	✓	✓		✓	✓

Communications and Training Link

End-users must be informed about the innovations in student services and the reasons behind the recommended changes. Successful communication of information—about the overall plan, the reasons for the new software implementation, the relationship between the new software and the campus one-stops and the processing center, and perhaps most importantly, the specific changes in tasks and responsibilities that end-users face during implementation and how these changes affect them—is essential. Effective communication results in users with a basic understanding of the project who are prepared for change and are receptive to training efforts.

Frequent interaction between the project teams and the various constituent groups is vital. Communication with these audiences is accomplished through various modes appropriate to the material and the audience. Overall, communications must be timely, informative, and clear.

Communications and Training Timeline for Campus Solutions

Building on the experience gained during implementation of the Human Resources, Financial Management, Campus Community, and Admissions & Recruitment modules of PeopleSoft, we can anticipate some specific times when communication is required. As the project evolves, additional communications events may be added when needs are identified.

The following table illustrates the communications and training timeline as it is currently envisioned.

Table 4. Communications and Training Timeline

	May 07	Jun 07	Jul 07	Aug 07	Sep 07	Oct 07	Nov 07	Dec 07	Jan 08	Feb 08	Mar 08	Apr 08	May 08	Jun 08
Communications Plan draft updated	✓	<i>Communications Plan will be updated as necessary throughout planning and implementation.</i>												
Audiences identified	<i>Specific audiences will be identified as IDP sessions work through processes.</i>													
New Roles/Responsibilities communicated	✓	✓	✓	✓	✓									
Business Practice Changes identified	✓	✓	✓											
Newsletters released	✓		✓		✓	✓	✓	✓	✓	✓	✓			
Website available	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			
Presentations			✓	✓	✓									
Information sessions					✓	✓	✓	✓						
Emails	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				
Focus Groups	<i>Focus or pilot groups will be planned as appropriate with Manager of Training.</i>													
Training					✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Other														

✓ indicates targeted months for selected communication/training efforts. All efforts will be continuously monitored and added to or removed from this timeline as circumstances warrant. This is a working draft only and is updated from time to time.

Measuring Effectiveness

End-users and others targeted by this communications plan have opportunities to provide feedback to the project teams both during and after implementation of the PeopleSoft and THESIS pieces of the project. Both the MaineStreet website and the *News from MaineStreet* newsletter regularly provide options for reader reactions. Trainees are asked to evaluate training sessions. As was offered post-financials implementation, an online survey also may be made available to all end-users who undergo training.

Conclusion

Implementation of the new PeopleSoft Campus Solutions module simultaneously with the redesign of student services processes is a major undertaking within the University of Maine System. These efforts involve many individuals with a variety of job responsibilities, and prospective and matriculated students are also affected. This Communications Plan has attempted to define the audiences, types of messages, and methods of communicating them that will be most effective in providing the information necessary to encourage a smooth transition to the use of a new and powerful administrative software tool within a new student services structure in the University of Maine System.



Appendix

Project Sponsors

Joanne Yestramski, CFO & Treasurer, University of Maine System, Chair
Allen Berger, Provost/Vice President for Academic Affairs, UMF
Tracy Bigney, Vice Chancellor for Human Resource and Organizational Development
Charles Bonin, Vice President for Finance, UMPI
James Breece, Vice Chancellor for Academic and Student Affairs, UMS
Sue Hunter, Associate Provost for Undergraduate Education, UMaine
Rosa Redonnett, Vice President for Enrollment Management, USM

Project Steering Committee

Allen Berger, Chair
Includes Sponsors above, plus
Tony Brinkley, Faculty Representative, UMaine
Richard Campbell, Vice President for Finance, USM
Tony Enerva, Faculty Representative, UMFK
Frank Gerry, Director of Labor Relations, UMS
Richard Kimball, Vice President for Academic Affairs, UMPI
Chris LeGore, Director of Distance Education, UMS
John Murphy, Vice President for Administration, UMFK
Tom Potter, Vice President for Administration and Finance, UMM
Laura Pruett, Vice President for Finance, UMA
Janet Waldron, Vice President for Administration and Finance, UMaine
William Wells, Chief Information Officer, USM

Ex Officio:

Ralph Caruso, Chief Information Officer, UMS
Tracy Elliott, Director of Finance and Controller, UMS
Tom Hopkins, Director of Compensation and Benefits, UMS
Cindy Mitchell, Director of Administrative Systems Development & Support, UMS

Staff as needed:

Janet Boucouvalas, Data Operations Manager, Shared Processing Center
William Gilfillan, Director of Budget and Internal Reporting, UMS