Welcome to Knight Vision

Mike Sink

Interim Vice President and Chief Information Officer

UCF

UCF + workday + accenture = Knight Vision

Agenda

➢ Welcome and Logistics

➢ Importance of Knight Vision

➢ Commitment from UCF

➢ Progress to Date

➢ Project Overview & Next Steps

➢ Meet Workday & Accenture

➢ Questions

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Message from the President

Alexander N. Cartwright
President

Message from the Provost

Michael D. Johnson

*Interim Provost and Vice
President for Academic Affairs*

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Progress to Date

Why Change?
A new vision confirmed

Why?

TRANSPARENCY	MODERNIZATION	PROCESS IMPROVEMENT
We need to arm staff with data, allow for financial transparency, and hold our people accountable.	Our systems are unsupported, disparate, and duplicative. They don't meet current and future needs of UCF.	We need to move away from paper and inefficient processes. Staff should focus on activities that align with our mission.

Why now?

OPTIMAL TIMING	FUTURE INVESTMENT	CAMPUS ENGAGEMENT	LEADERSHIP SUPPORT
UCF has a need to move into more data-driven culture; external forces such as COVID-19 force UCF to change or be left behind.	Shifting away from unsupported technology (i.e. Peoplesoft) and moving to modernized systems will allow UCF to prepare for growth and innovation.	Campus community has demonstrated strong participation and readiness for undergoing significant change needed.	Executive and senior leadership recognizes the important of undertaking this effort and has invested into moving ahead thoughtfully and strategically.

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Approach
Planning for Change

Pre-Launch

- Articulate need for Cloud ERP
- Understand key current-state themes
- Identify systems for retirement and processes in-scope

Pre-Implementation Preparation

Implement changes to support success of ERP implementation (Chart of Accounts structure, business process change, performance improvement, consolidate CRM, etc.)

Vendor Selection

- Select vendor that best fits UCF's needs for Cloud ERP
- Select other dependent applications and tools

Implementation

- Implement core ERP application, including business process change
- Over time, include finance, HCM, and Student applications

Pre-Launch
Preparing for Change

Workshops

110	**5**	**6**	**356**	**11**
Core Workshops	Voice of the Campus Sessions	Workstreams (FIN, HCM, Reporting, Student, Technical, Communications)	Attendees	Weeks

Technical Scope

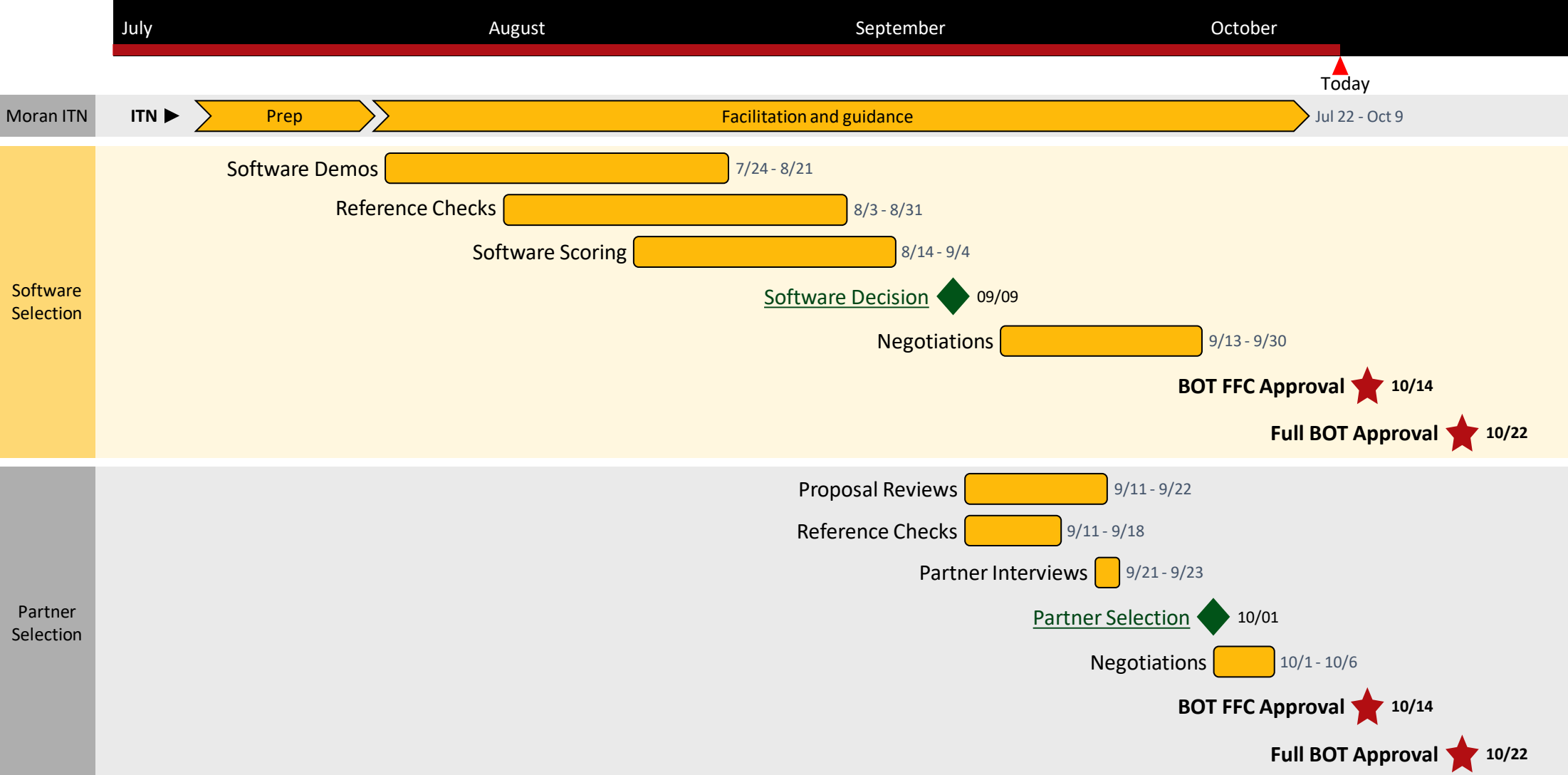| **225**	**179**	**70**	**183**	**75**	**1213**
Applications Identified	ERP Impacted Applications	Replacement Candidates	Interfaces Identified	Conversion Areas	Current Reports

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Vendor Selection
Procurement Timeline

| July | August | September | October | **2020** |

Today

Moran ITN — **ITN ▶** Prep — Facilitation and guidance — Jul 22 - Oct 9

Software Selection

- Software Demos — 7/24 - 8/21
- Reference Checks — 8/3 - 8/31
- Software Scoring — 8/14 - 9/4
- Software Decision ◆ 09/09
- Negotiations — 9/13 - 9/30
- BOT FFC Approval ★ 10/14
- Full BOT Approval ★ 10/22

Partner Selection

- Proposal Reviews — 9/11 - 9/22
- Reference Checks — 9/11 - 9/18
- Partner Interviews — 9/21 - 9/23
- Partner Selection ◆ 10/01
- Negotiations — 10/1 - 10/6
- BOT FFC Approval ★ 10/14
- Full BOT Approval ★ 10/22

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Knight Vision Program Overview

Cherie Herrin

Director, IT Program Management

Knight Vision ***Program Manager***

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Project Scope
Phases

Knight Vision Now
HR & Finance System Replacement
Est. 24 Months

Financials

Research

Planning & Budgeting

Human Capital Management

Reporting & Analytics

Student Integrations

Technical

Service Delivery

Future Project
Student System Replacement
Est. 20 Months

Student

ERP Retrofits

Technical

Reporting & Analytics

Service Delivery

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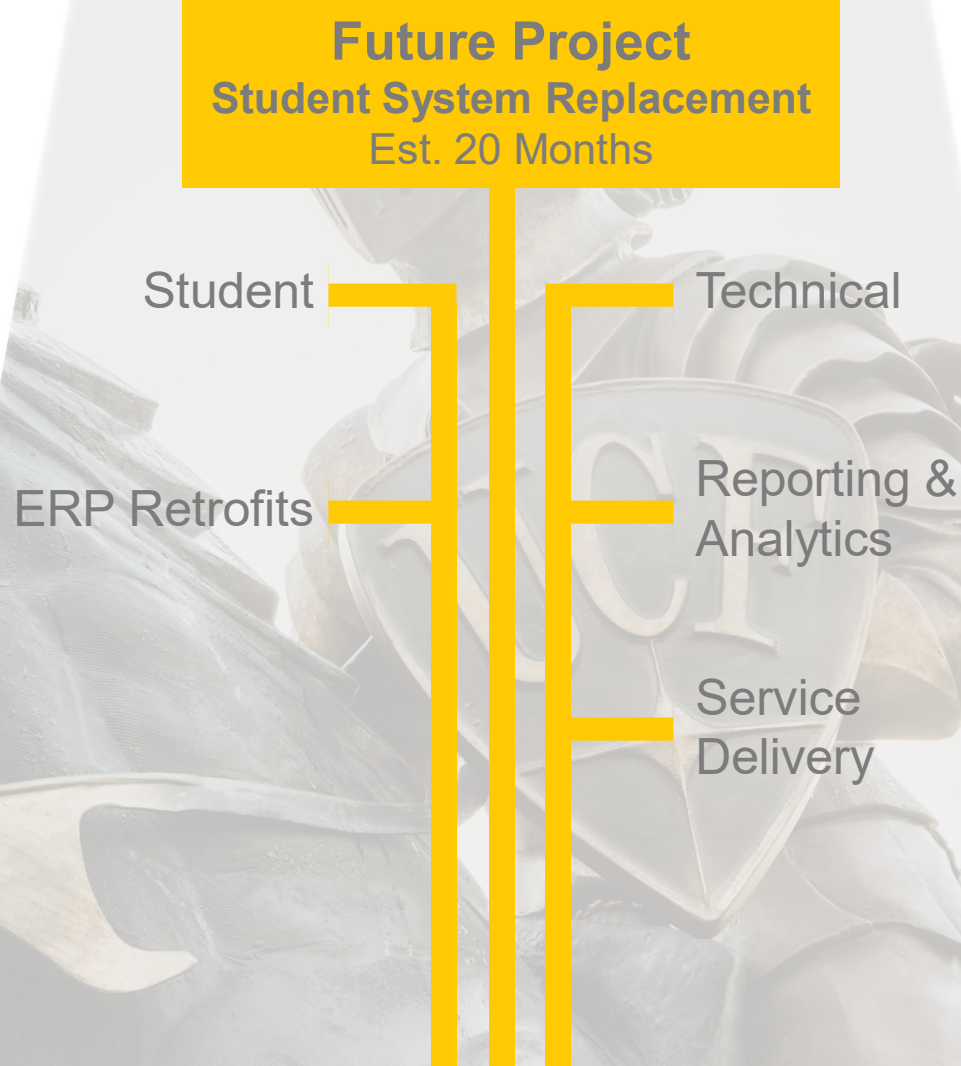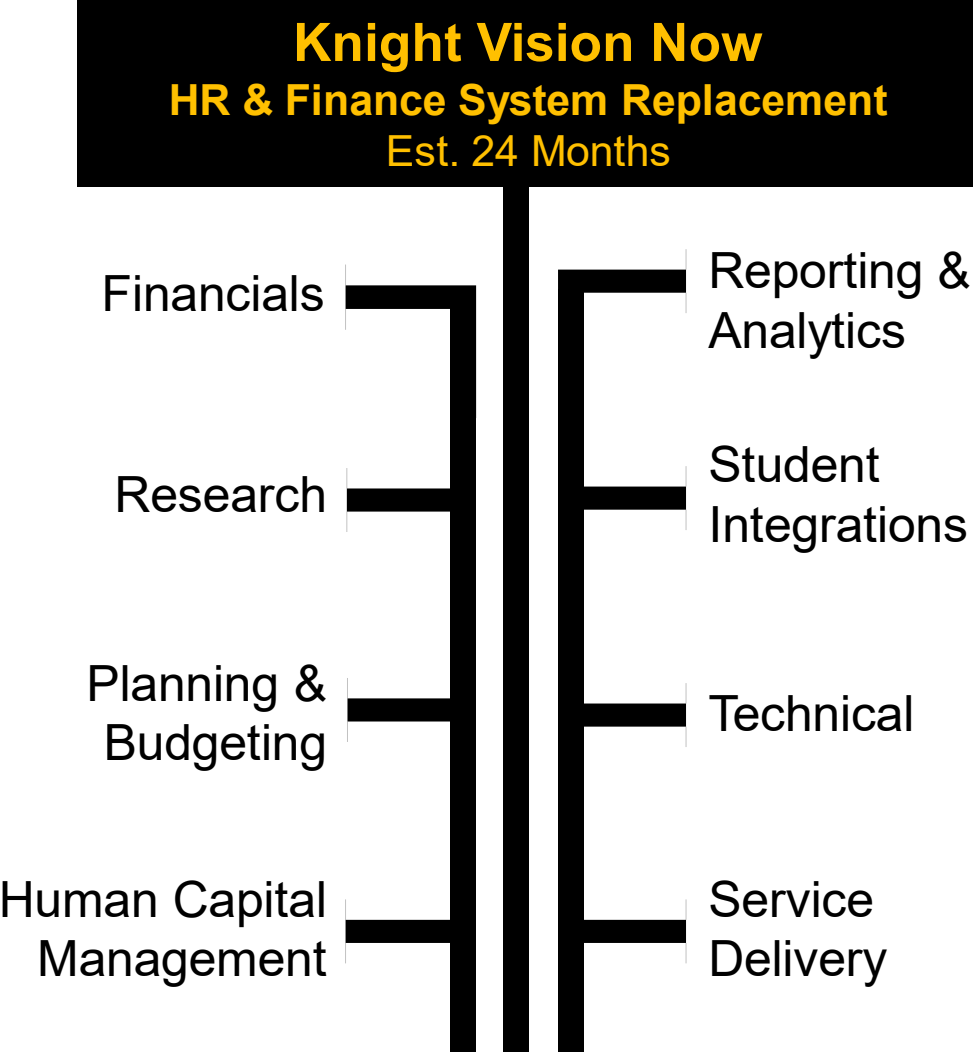
Knight Vision Program
Guiding Principles

Simplification & Standardization — Maintain an "ERP First" mindset and strive to use out-of-the-box functionality, seeking to standardize technology across units

Transformative Change — Transform UCF's business processes to follow best practices, remain consistent across units, and offer increased service

Measurable Results — Track key project and institutional performance metrics, to measure ongoing performance and increased efficiencies

Transparent & Inclusive — Make decisions transparently and share information frequently, asking end-users for input and feedback

Enhanced Accountability — Project team members and governance groups will be held accountable and be empowered to make critical decisions

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Program Overview
Knight Vision Workstreams

Workday ERP Implementation	Reporting & Analytics	Service Delivery Transformation	Adaptive Planning Ph 1
Financial Management Grants Management Human Capital Management (HCM) Technical	Data Governance Data Warehouse Enterprise Analytics Platform Workday Reporting	Organizational design and business process transformation to ensure more effective and efficient administrative services across UCF	Budget Planning Software Parallel Budget Model Aligned Phase 1 by Spring 2021

Change Management

Communications	Training & Support	Change Network	Internships

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Staffing the Project
Hiring and Backfill Considerations

Identify Project Roles: specific functions and positions are needed to do much of the project work and ensure project success
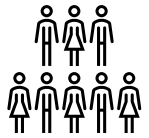
Hire Project-Based Staff: interim project roles will be posted, following standard UCF Human Resources policies, processes, and procedures
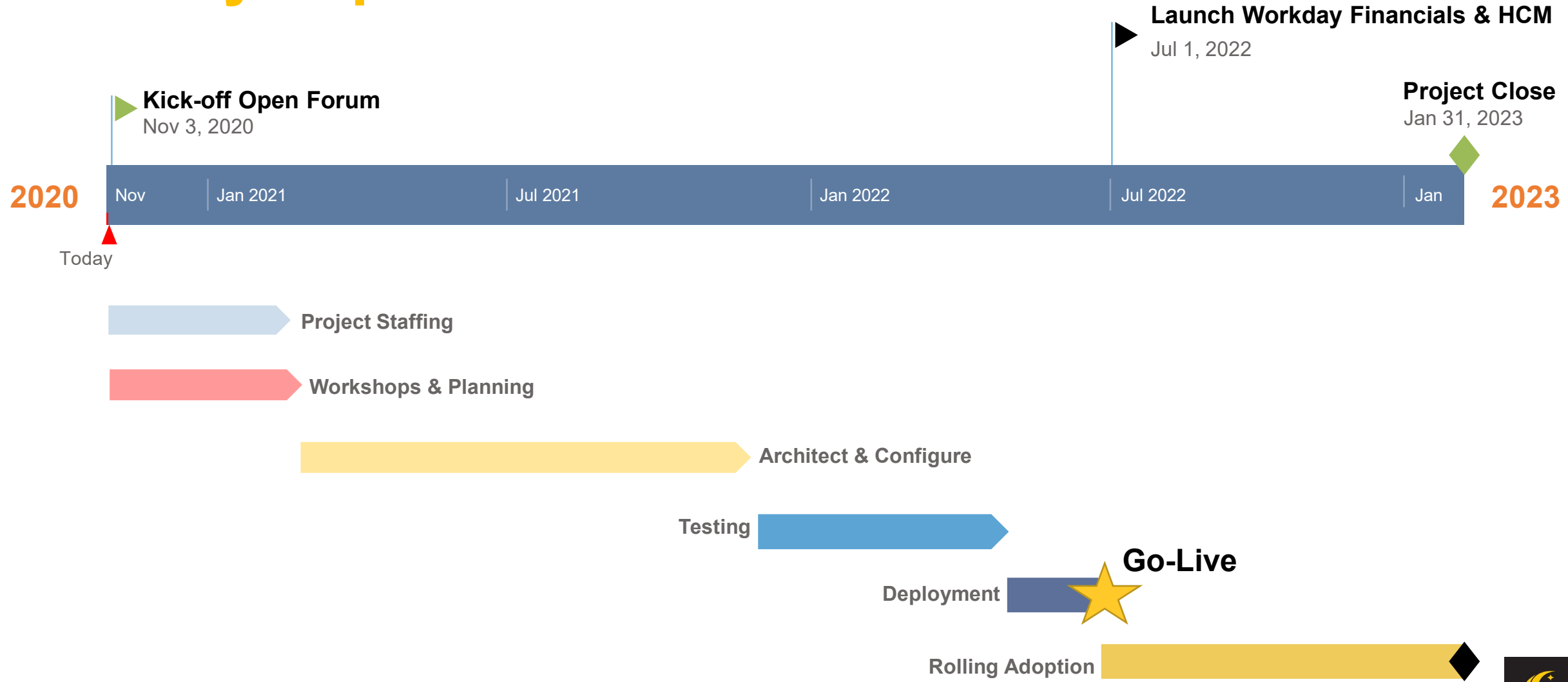
Backfill Approach: units may fund interim backfill positions using residual budget which will become available when compensation for Knight Vision personnel is absorbed completely or in part by the Knight Vision project budget

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High-Level Timeline
Workday Implementation

Launch Workday Financials & HCM
Jul 1, 2022

Kick-off Open Forum
Nov 3, 2020

Project Close
Jan 31, 2023

2020

| Nov | Jan 2021 | Jul 2021 | Jan 2022 | Jul 2022 | Jan | **2023** |

Today

Project Staffing

Workshops & Planning

Architect & Configure

Testing

Go-Live

Deployment

Rolling Adoption

19

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Program Overview
Governance Roles & Responsibilities

Day-to-day decision making and ownership of project deliverables

Ensure collaboration, adherence to standard methodology, and escalate risk

Provide guidance on strategic and tactical issues, review key decisions

Ensure compliance and strategic alignment of overall program objectives, advocate for change

Assess overall direction and objectives of program, monitor value

Project Team

Program Management

Business Owners Council

Executive Steering Committee

Board of Trustees

Faculty Advisors

Executive Sponsor

Operational Liaisons

Campus Community Advisory Group

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Program Leadership
Executive Steering Committee (ESC)

The Executive Steering Committee (ESC) advocates for change, provides guidance, and ensures alignment of the Knight Vision program with UCF strategic objectives

Michael Johnson
Interim Provost and Vice President for Academic Affairs

Michael Sink
Interim Vice President and Chief Information Officer

Theodorea Berry
Vice Provost of Student Learning and Academic Success and Dean, College of Undergraduate Studies

Paige Borden
Associate Provost and Chief Analytics Officer

Maribeth Ehasz
Vice President for Student Development and Enrollment Services

Paul Jarley
Dean of the College of Business

Mike Kilbride
Assistant Vice President for Administration and Operational Innovation

Elizabeth Klonoff
Vice President for Research and Dean of the College of Graduate Studies

Misty Shepherd
Interim Vice President and Chief Operating Officer

Robert Taft
Chief Audit Executive

Joseph Trubacz
Interim Chief Financial Officer

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Program Leadership
Business Owners Council (BOC)

The Business Owners Council (BOC) reviews key decisions and provides direction to the Knight Vision project team on strategic and tactical issues.

Michael Sink
Interim Vice President and Chief Information Officer

Kathy Mitchell
Associate Vice President of Financial Initiatives

Maureen Binder
Associate Vice President and Chief Human Resources Officer

Paige Borden
Associate Provost and Chief Analytics Officer

Gordon Chavis
Associate Vice President of Enrollment Services

Kristie Harris
Associate Vice President of Financial Affairs

Margaret Jarrell-Cole
Associate Vice President and Legal Counsel

Delaine Priest
Associate Vice Provost, Student Success and Advising

Dorothy Yates
Associate Vice President of Research Administration

Input from Faculty Advisor(s) and Campus Community Advisory Group

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Campus Community Involvement
Campus Community Advisory Group (CCAG)

The Campus Community Advisory Group (CCAG) will provide a campus perspective on Knight Vision initiatives and offer input to the program team and BOC on key processes, impacts, and decisions.

Vision	**To serve as an advisory council to the Project Team, BOC and ESC, providing campus community involvement and information sharing based on a diverse knowledge and campus perspective**
Proposed Member Profile	➢ Senior-level unit administrators (administrative and/or faculty) with expertise in grants pre-award, post-award, budget/finance, and/or Human Resources ➢ Minimum two years at UCF; deep understanding of UCF processes & needs ➢ Application must be endorsed by their Dean/Director (or designee) ➢ Two-year terms ➢ Applications will be available in the next few weeks

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Workday & Accenture

Message from Workday

Robert joined Workday in 2011 and has worked to build Workday's higher education community from its inception. Today, Robert serves as Vice President of Workday's higher education practice, responsible for sales, strategy and oversight of customer operations.

He began his career in higher education as a practitioner, serving in the Office of the Registrar at Georgetown University and as a communication officer at The George Washington University. A proud first generation college graduate, Robert is the founder of The First Generation Project, a non-profit organization dedicated to supporting first generation degree seekers.

Robert Steele, Jr.

Vice President – Higher Education

JOHN HARRISON
Co-Executive Sponsor

John runs **Accenture's Workday Higher Education Practice**. John specializes in transformational Workday projects across higher education and has **served** more than **30 Workday projects as Executive Sponsor**, including all ten of Accenture's Workday higher education projects in Florida.

WORKDAY HIGHER EDUCATION PRACTICE

We have the largest Workday practice in the ecosystem dedicated to serving the needs of Education and Government clients.

Accenture E&G Workday By the Numbers

63 colleges and universities

103 HE Workday deployments Projects as Prime Vendor

98 Live

300 Workday Consultants

125
Workday Consultants dedicated to Higher Education, averaging 14 years of HE experience

1005
Workday certifications, including 40 for Workday Student

40 HCM/Payroll Deployments

37 Financials Deployments

5 Student Deployments

STUART BROWN
Co-Executive Sponsor

Stu serves as both the **Office Managing Director for our Central Florida team**, including offices and operations in Tallahassee, Tampa, and Orlando. Stu is also the Chief Technology Officer for the Accenture Microsoft Business Group; a joint venture between our two companies.

As a proud **UCF graduate** (BSME, '97) and member of the **Golden Knights Club**, Stu is passionate about building a long-lasting relationship with you.

Next Steps

Next Steps
What to Expect

➤ Knight Vision Job Postings

➤ Business Process Workshops with Accenture

➤ Establish Campus Community Advisory Group

➤ Identify Faculty Advisor(s) to BOC & ESC

➤ Quarterly Open Forums & Frequent Communications

➤ Focus on Knight Vision Work / Stringent Guidelines on Projects

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ERP Transformation Name Contest Winner
Congratulations and Thank You!

Knight Vision

Jessica Scheck
University Accountant III
UCF Finance & Accounting

Questions & Answers
Submit Questions Via Zoom

Submit questions to the panel via the Q&A button on the Zoom window

Upvote questions to move them up in the order they will be answered.

➢ Click the "thumbs up" icon below any question to upvote.

➢ The icon will turn blue when clicked

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Stay Informed
Knight Vision Updates

Thank you for attending!

Keep up to date by visiting the [Knight Vision](knightvision.it.ucf.edu) website at **knightvision.it.ucf.edu**

Email: knightvision@ucf.edu