



**CSUF Readiness Assessment Summary
for CMS Website:
Campus Declared Ready to Implement CMS**

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Summary of CMS Readiness Assessment for CMS Website:

Campus Declared Ready to Implement CMS

One of the steps required by the CSU in the planning phase of a Common Management System (CMS) implementation is a readiness assessment. This diagnostic tool is considered a fair gauge of an institution's commitment to the CMS project and its level of thoroughness, preparation, planning, and understanding of what the institution is about to undertake. In September, Cal State Fullerton engaged Io Consulting to review campus preparation over the last several years, particularly since April 2004. In the course of the CMS readiness assessment, some seventeen people were interviewed, including members of the steering committee and members of the Financials, HR and IT functional teams.

Io Consulting confidently endorsed CSU Fullerton as being very well positioned to undertake successful implementation projects on each of CMS baseline Human Resources and Finance products. The University has been very diligent in putting the components in place that would prepare it for success. Now it is well positioned to build on this foundation and successfully implement the CMS baseline products.

Io's rating on each of the ten categories indicates their endorsement of the University's readiness to take on the CMS projects. The experience and commitment of the functional and technical staff, the support of senior management, and the project management skill that will provide guidance to these projects is critical success factors in which the University excels. Io concluded that CSU Fullerton meets and/or even exceeds the highest level criteria in all categories stated within the CMS guidelines.

Project executive sponsor Mike Parker credits our success so far to the helpful advice from other CSU campuses, particularly San Francisco State, CSUN, and San Marcos.

Category 1: Project Sponsorship and Campus Commitment

Consistent throughout Io Consulting interviews on campus was the theme that University senior management is committed to the CMS project and to its success. CSUF Management are resolute in their expectation that the entire campus community will be supportive of making these two CMS implementations successful in order to forward the University's educational mission. The overall commitment of project sponsors is that no current business process is untouchable and unchangeable. In some departments there exists a desire to change their existing business processes; it is being embraced with excitement, not apprehension or denial. Project sponsors have a very realistic appreciation for the challenges posed by a project of this size and complexity and projects are being staffed with the best and most knowledgeable staff from the respective business areas. Cross-functional teams and committees have been formed to assure that all relevant representatives have input and to assure project success.

Category 2: Communications

During the readiness assessment interviews Io Consulting found there was an outstanding understanding of the purposes, goals, roles, and responsibilities related to the Financials and Human Resources CMS projects. CSU Fullerton has developed, documented, and implemented a very complete communications strategy and plan (Project Charter and Communications Plan) that encompasses the entire University community and beyond. Clarity and understanding exist at all organizational levels as to the purpose, goals, benefits, roles, and responsibilities related to the CMS projects. There is a positive and supportive tone toward the CMS projects that pervades throughout project teams, management, and sponsors. The President's involvement and support of CMS is exceptional. Cross-functional composition of implementation teams and committees will enhance communications and cooperation, and will help prevent actions from one project team creating inadvertent problems for one of the other project teams. Once the project is underway, frequent communications are planned to keep project teams, sponsors, management, faculty, staff, and students informed of project progress.

Category 3: Project Management

Io found several strengths in this category, including a full-time Project Director who brings to the University strong implementation experience as well as higher education experience. Clear decision-making lines of authority have been developed and documented. Types of decisions are categorized; who has the responsibility for making the decision is identified; the role or committee having final decision-making authority is listed; and the role having final approval authority, if any, is listed. Plans are in place to address the resource constraint issues related to projects of this size and the demands the project will place on department staffing. These plans include backfilling, student assistance, contracting for specific consulting services, and reassigning tasks among current department staff. Project management recognizes the touch points between the PeopleSoft applications and has developed cross-functional and cross-departmental project teams to address these integration issues and to assure proper representation and communication on these critical points. Project roles and responsibilities are clearly understood by project management staff, University leadership, and project team members. Functional Team Leads experienced and dedicated to the project are assembled and clear on their roles.

Category 4a: Campus Functional Area Participation – Financials

The CMS Financials baseline will be the second of the three CMS projects that CSU Fullerton will implement. Slated to begin in July 2005, the Financials Project is scheduled to “go-live” no later than July, 2006. The Project Functional Lead for the Financials team is a very experienced department manager and is dedicated to the project as needed. The Project Technical Lead for the Financials team has been through prior system implementations and is very knowledgeable of the CSU Fullerton legacy financial systems. Respected and skilled users from academic areas and University support areas have been identified and obtained as project team members. Current financial business processes are defined, mapped, and well understood. Required

interfaces to other systems and applications have been identified, prioritized and the relevant processes mapped.

Category 4b: Campus Functional Area Participation – Human Resources

The HRMS team is well positioned to move forward with the implementation of the first CMS baseline product; the “go live” date is November 2005. High-level team meetings have already been established and team members have been selected and approved. The functional Project Lead for the Human Resources team is a very experienced department manager and is dedicated to the project as needed. Core team members have been identified for all HR areas and are ready to participate. Supervisors and Department Heads are aware of their staff’s time commitment and have already started to acquire three additional backfill personnel to assist with the lower level work. Human Resources staff is prepared to modify current business processes if they are not consistent with delivered baseline.

Category 5: Funding

A comprehensive and very detailed budget exists for CSU Fullerton’s entire CMS project (covering Financials, Human Resource and Student Administration projects). The budget includes all expenses that can be directly attributed to the project, so no costs are hidden or inappropriately buried indirectly in other University budgets. This budget includes funding for project management, facilities, training of project team members and end users, consulting, backfilling, and equipment related to the CMS projects. CSUF has set aside funds for the CMS project that extend through the 2007/2008 and this funding has been secured. There are no immediate contract issues or relationships that will result in any negative consequences for the University. This includes such areas as legacy system relationships, third-party vendors, or other contractual relationships related to the Financials, Human Resources projects.

Category 6: Information Technology Support

Technical support for the CMS project will be provided by the IT Project Support Services group. Their primary areas of focus will be in providing conversion plans, executing data conversions, identifying and developing all required CMS interface programs, creating security plans, implementing CMS security, and serving as a liaison to the system-wide TUG group. All interfaces and interface requirements for the HR system have been identified and documented.

Category 7: Network Readiness

CSU Fullerton is using tools to monitor and effectively manage the campus network. Current network utilization shows that the backbone has capacity to support additional applications. Plans are in place to expand the capacity of the current network prior to the CMS implementation.

Category 8: Workstation Readiness

CSUF has gone through an extensive rollout of updated workstation equipment in the past few years. In preparation for CMS, end user surveys have been completed. Analysis currently is underway to identify gaps between end user desktop environments and those currently supported by PeopleSoft and CMS.

Category 9: Help Desk Readiness

A help desk tracking system has been established for the CMS project and dedicated Help Desk staff are identified and in place.

Category 10: Training

The CSUF Desktop Computing Services office will be responsible for ensuring that training occurs at all levels of the University; i.e., project team members, end users,