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Eastern Illinois University EISE Organization Plan

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1 Purpose

The purpose of this Organization Plan is to define and document the committees, teams and groups that will take part in and control the project. It aids in managing the relationship with the client, SCT management and the project team.

1.1 Exclusions

No exclusions to state.

1.2 Related Documents

The communication plan may refer to the following documents.

Document Name	Description/Location
Project Definition	Primary overview of the project controls / project site repository
Configuration Management Plan	Defines the process for changing documents specified as being under the control of configuration management / project site repository
Communication Plan	Communication methods used by the project

2 Project Organization

This section deals with all people and/or departments that will participate in this project.

2.1 Project Team

This is a high-level listing of the primary personnel involved in the project. A detailed list of all project personnel is kept by the EISE Project Manager. Lists of committees, teams, groups and their members are available via the project web site.

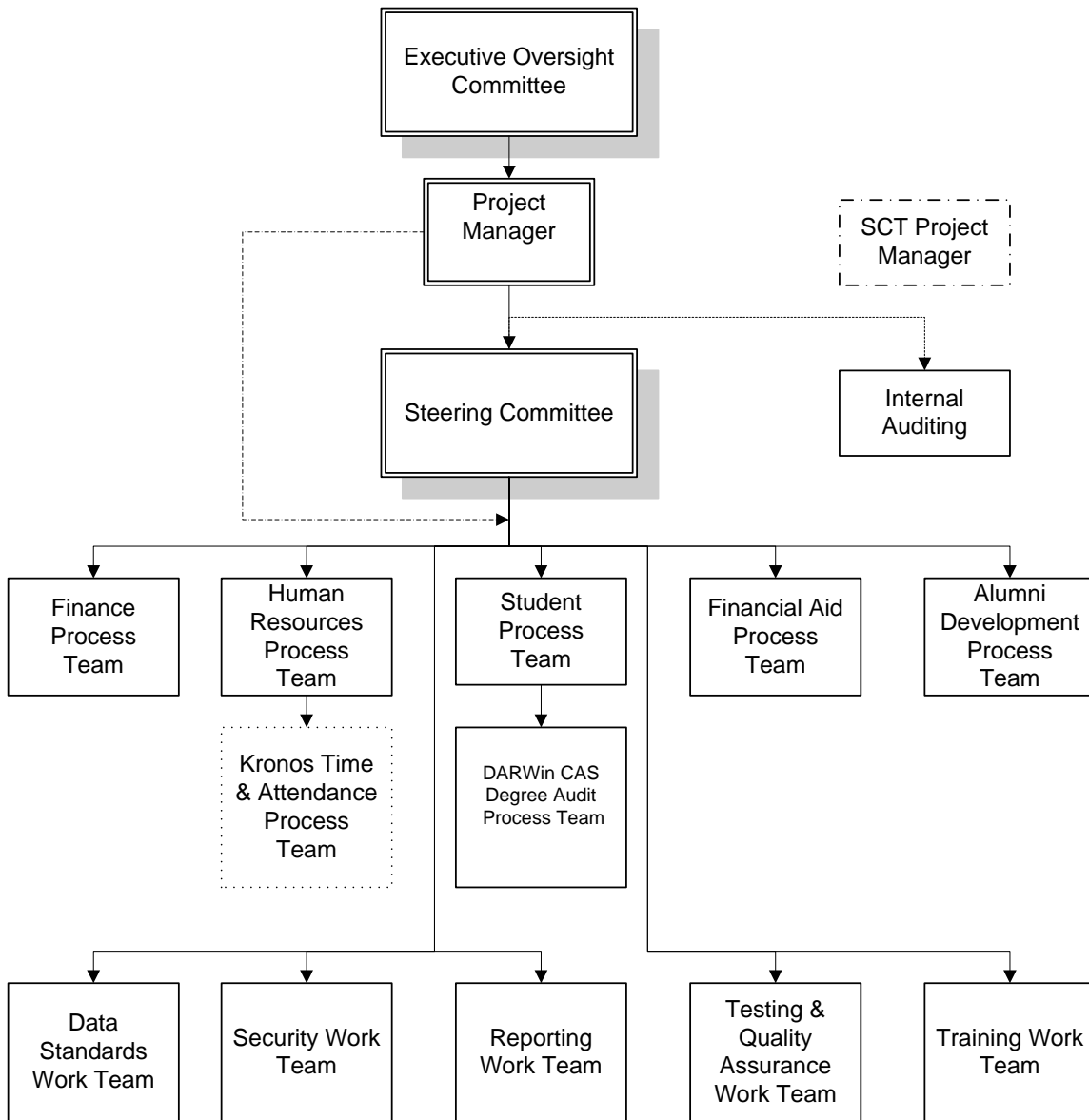
Resource Type	Name	Person Hours or Days Needed	Date Range When Resource is Needed
Project Sponsor	Jeff Cooley & Blair Lord	As needed	Duration of the project
Project Manager	Bill Witsman	24 hours/wk	Duration of the project
Team Leads			
DBA	Ron Mason	37.5 hours/wk	Duration of the project
Technical Leads			
Finance Process Team Lead	Larry Cannon	18 hours/wk	Duration of the project
Human Resources Team Lead	Joy Craft	18 hours/wk	Duration of the project
Student Process Team Lead	Sue Harvey	18 hours/wk	Duration of the project

Resource Type	Name	Person Hours or Days Needed	Date Range When Resource is Needed
Financial Aid Process Team Lead	Tracy Hall	18 hours/wk	Duration of the project
Alumni Development Process Team Lead	Jerilyn Hutson	18 hours/wk	Duration of the project
Executive Committee	Jeff Cooley – Chair Blair Lord Jill Nilsen Dan Nadler Bill Witsman – Ex Officio Chat Chatterji – Ex Officio	2 to 5 hours/mo	Duration of the project
Steering Committee	Bill Witsman - Chair Jeff Cross Brenda Major Sue Harvey Linda Moore Jone Zieren Julia Abell Larry Cannon Chuck Phillips Chat Chatterji Kathleen Moreno as (Internal Control Consultant)	4 to 10 hours/mo	Duration of the project
SSCT Project Manager	Neil Plaistow	Per contract	Duration of the project
SSCT Account Manager	Scott Winkler	As needed	Duration of the project
SSCT QA Analyst	Keith Hawkins	Per contract	Duration of the project
SSCT rDBA	Nipesh Saini	Per contract	660 hours or 1 year
Data Standards Team	TBD		
Reporting Team	TBD		
Training Program Coordinator	Sandy Bowman		

2.2 Project Personnel Listing

The official and full listing of all project personnel will be maintained by the EISE Project manager and made available via the EISE website. See the Communication Plan for further details on the EISE website.

2.3 Basic project structure chart



2.4 Project Personnel Qualities, Goals and Dynamics

Following are qualities, goals and dynamics that should permeate each and every committee, team, group and individual related to this project.

2.4.1 Project personnel individual commitments:

To produce a fruitful end, everyone involved in the project must share the following qualifications and commitment.

- Commitment to the successful implementation of the EISE systems
- Commitment to identify and implement improved business practices
- Commitment to the University's, and thus this project's, shared goals
- Willingness and ability to make decisions by consensus
- Acceptance that change can be a positive force for the institution
- Willingness to gain and portray an enterprise point of view
- Willingness and ability to listen and value input from all participants
- The ability to work and interact as a team member
- The ability to work well under pressure and in a professional manner
- Willingness to accomplish specific project related tasks on time with quality
- Willingness to come to meetings on time and prepared (*If you come to a meeting unprepared, you can't talk - no pooled ignorance.*)

2.4.2 Team Vision, Ground Rules and Core Values

Team Vision:

- We are a catalyst for creating a dynamic, inclusive environment for progress.

Team Ground Rules:

- Ground rules apply to everyone.
- We will communicate freely, respectfully and honestly.
- We will do what we say we are going to do.
- We will encourage campus-wide input.
- We will make decisions by consensus whenever possible.
- We will take issues, problems and concerns to the source first.
- We will establish and follow protocols.
- We will frequently and consistently communicate information.

Team Core Values:

- Integrity - Firm adherence to the vision, mission and ground rules
- Inclusion - Consider the ideas of the University community
- Quality - Work toward a standard of excellence
- Mutual Respect - Treat everyone as an individual deserving of consideration (esteem, regard)
- Loyalty - To the project, to each other and the people impacted by the project
- Diligence - Expect each individual to give energetic attention and effort to the project
- Trust - Assume each individual is working to achieve the project mission

2.5 Committee and Team structure.

Executive Committee

The Executive Committee is the top executive oversight group for the EISE project. It is essential that top management become the pioneers and advocates of the business process changes that will take place.

The Executive Committee will:

- Provide executive oversight for the EISE project
- Make executive decisions related to the project
- Establish high-level goals and objectives
- Communicate the goals and objectives of the project to the University community
- Receive regular reports from the EISE Project Manager and the EISE Steering Committee related to the project status and budget
- Collaborate as needed with the EISE Project Manager and EISE Steering Committee in providing scope, vision, direction, and priorities for the enterprise information system
- Expedite decisions and issue directives within all VP areas of the University
- Approve and issue directives for the allocation of resources that are not already outlined in the project budget
- Garner project support from their divisions.
- Involve other executive management and the Board of Trustees

Time Commitment:

- Committee to meet at least once per month and more frequently as needed
- Members typically spend two to five hours a month for committee meeting, outbound communication and interaction with VP area about the project.

Steering Committee

The EISE Steering Committee serves as the institutional champion for the EISE project and makes policy decisions on project issues. This committee will provide a high-level review of planning, development, and implementation activities of the cross-functionality of the EISE Systems. This Steering Committee will also advise and prioritize personnel resources that may be needed during the various project phases.

Responsibilities of this committee include:

- Communicate across the university and within vertical units to convey "ownership", goals and objectives of the project
- Help define and control project scope
- Ensure that institutional project objectives and goals are achieved
- Ensure that critical business needs will be supported by EISE
- Identify and define institution-wide project issues and policy recommendations
 - Interpret these within the guidelines of EIU IGP
 - Define and approve business process changes as needed
 - As needed make recommendations to the EISE Executive Committee and/or President's Council for changes to EIU IGP
- Assist in expeditious decision making
- Oversee the implementation of EISE Executive Committee directives
- Assist in maintaining the high-level project plan
 - Oversee the timely implementation of all systems by monitoring project plan milestones and benchmarks
- Prioritize major change requests for the EISE Process Teams
- Set priorities for the allocation of resources
- Seek additional resources when needed
- Approve the EISE committee and team structures then oversee with the Project Manager the placement of a chairperson for each
- Review and make recommendations on EISE Project Manager project budget reports
- Ensure vendor contract compliance and EIU adherence to contract provisions within their area of administration
- Ensure proper communication among and between supporting teams to foster congruency within the EISE project
- Manage the resolution of conflicts and unresolved work team problems

Time Commitment:

- Committee to meet at least monthly and more frequently as needed. As the project progresses more meetings may be necessary.
- Members typically spend four to ten hours a month for committee meeting, outbound communication and interaction with their units about the project.
- During the implementation of the system that directly affects their unit, members will spend more time.
- Chairperson will spend more time than most.

Project Manager

The EISE Project Manager is instrumental in creating the overall project structure and activities. The Project Manager oversees the day to day and long term operation of the project. Responsibilities include:

- Provide oversight and overall support for the EISE project
- Serve as project ambassador and lead communicator
 - Acts as the spokesperson on behalf of the EISE Steering Committee and the project as a whole
- Have primary responsibility for the development, delivery and monitoring of the project plan
 - Develops high-level project work plans
 - Monitors the status of deliverables and task completion by all project committees and work groups
- Serve as project liaison to the EISE Executive Committee and President's Council
- Collaborates with administration to provide scope, vision, direction, and priorities for the EISE project
- Monitor and help control project scope
- Oversee the prioritizing and fulfillment of change requests
- Provide the makeup of and oversee EISE committee and work team structures
- Work with campus administration and committee/team leaders to assign individuals to specific committees and teams
- Expedite decision making
- Focuses on coherence, communication, organizational dynamics, and outreach
- Works to solve issues, both immediate and potential, between the various project committees, project teams, EIU administration and the campus community
- Clears roadblocks to the project
- Collaborate with EISE Steering Committee to motivate project committees and work teams
- Manage the primary EISE project budget and expenditures
- Manages vendor relations
- Provide periodic reports for the Steering Committee, Executive Committee and EIU President's Council
- Develop reports for the EIU Board of Trustees as requested by the EISE Executive Committee
- Oversee and/or conduct post-implementation reviews

Time Commitment: The Project Manager will allocate full work time to the project.

Process Teams

Process Teams carry out the implementation plan for each major EISE operational system; Financial Aid, Finance, Human Resources, Student/Degree Audit and Alumni Development. Each Process Team is the primary liaison between groups and offices involved in their particular system/solution implementation. Process teams are composed of people who are closely affected by the processes of the system they are working to create and implement.

The Process Team Leader will be the chairperson and facilitator for the team.

Team Leader responsibilities are:

- Develop and track the project work plans of the team
- Organize and facilitate team meetings
- Coordinate activities among other teams and committees
- Identify and suggest solutions to issues
- See that meeting notes and agenda are created and appropriately distributed
- Provide appropriate status and progress reports to the Project Manager and Steering Committee

The Process Team will perform the following for their particular EISE sub-system:

- Design the future business solutions using EISE provided systems
- Determine true project deliverables
- Ensure the proper implementation of the sub-system within designated time frames and budget
- Ensure that the configured system meets the institution's processing needs
- Develop tasks, assign responsibilities and carry out those tasks
- Ensure the completion of tasks assigned from the Project Manager or Steering Committee
- Review problems and issues, then make recommendations to the Project Manager, or Steering Committee when necessary
- Effectively communicate the goals and activates of the project to other teams, committees and University constituencies
- Make decisions by consensus
- Foster decision consensus among and between process teams, committees and work groups to foster congruency within the EISE sub-systems
- Develop operational procedures, documentation and training material that support the implementation and operation of the system
- Continuously evaluate new processes to take full advantage of the capabilities available
- Serve as subject matter experts for other University employees
- Each member must attend assigned vendor education sessions and otherwise learn software capabilities

Qualifications for Process Team Members:

- Detailed knowledge of their operational area
- Ability to work within a team environment and interact regularly to accomplish specific tasks
- Committed to and involved in clear, shared goals
- Ability to express positive solutions and participate in discussions and decisions
- Ability to listen to other team members and respect their ideas and work

- Open to volunteering when work and leadership needs arise
- Willingness to play an active role in research and provide input to team decisions and recommendations
- Ability to lend support for final decisions

Time Commitment:

- During the implementation of the system that directly affects this team, the team will meet as frequently as requested by the Team leader (sometimes with input from the SCT Functional Consultant), but not less than weekly.
- Members typically spend 20% to 40% of their work week for committee meetings, project work, outbound communication and interaction with their units about the project.
- During the implementation of the system that directly affects their unit, members may spend more time.
- Chairperson will spend 40% to 60% especially during system implementation times.

Special Work Teams and Groups

Special work teams and groups deal with specific project issues that cross multiple operational sub-systems such as Security, Data Standards, Reporting, Change Management, Implementation, Testing/Quality Assurance and Training. These teams share many of the attributes of the Process Teams but do not focus on any specific sub-system. Some of these teams will be very temporal and will disband once their specific task has been completed.

The Special Work Team Leader will be the chairperson and facilitator for each the team.

Team Leader responsibilities are:

- Develop and track the project work plans of the team
- Organize and facilitate team meetings
- Coordinating activities among other teams and committees
- Identifying and suggest solutions to issues
- See that meeting notes and agenda are created and appropriately distributed
- Provide appropriate status and progress reports to the Project Manager and Steering Committee

The Special Work Team will perform the following for their particular issue:

- Determine true project deliverables and completion of these within designated time frames and budget
- Ensure that the configured system meets the institution's processing needs
- Develop tasks, assign responsibilities and carry out those tasks
- Ensure the completion of tasks assigned from the Project Manager or Steering Committee
- Review problems and issues, then make recommendations to the Project Manager, or Steering Committee when necessary
- Effectively communicate the goals and activates of the project to other teams, committees and University constituencies
- Make decisions by consensus
- Foster decision consensus among and between process teams, committees and work groups to foster congruency within the EISE sub-systems
- Develop operational procedures, documentation and training material that support the implementation and operation of the system
- Continuously evaluate new processes to take full advantage of the capabilities available
- Serve as subject matter experts for other University employees
- Each member must attend assigned vendor education sessions and otherwise learn software capabilities

Qualifications for Team Members:

- Detailed knowledge of an operational or technical area
- Ability to work within a team environment and interact regularly to accomplish specific tasks
- Committed to and involved in clear, shared goals
- Ability to express positive solutions and participate in discussions and decisions
- Ability to listen to other team members and respect their ideas and work
- Open to volunteering when work and leadership needs arise

- Willingness to play an active role in research and provide input to team decisions and recommendations
- Ability to lend support for final decisions

Time Commitment:

- Since the work of these teams will vary depending upon the project schedule and activities, so will their time commitments. A team will meet as frequently as requested by the Team leader, sometimes with input from the SCT Functional Consultant and/or EISE Project Manager.
- During the most active times, teams will experience time commitments similar to the Process Teams.

Cross Functional Collaboration Group

The Cross Functional Collaboration Group will deal with project issues that cross the boundaries of Process Teams such as system and data integration. The members are the Team Leaders of each Process Team, the Project Trainer, the Steering Committee member from the Office of Planning & Institutional Studies, at least one technical resource person from Information Technology Services for each Process Team and the Associate Director of Information Technology Services who oversees these technical resource people.

The Associate Director of Information Technology Services, mentioned above, is the chairperson and facilitator for the team.

See the section entitled “Special Work Teams and Groups” in this document for further details as to the responsibilities of this group.

This group will meet as often as they deem necessary to carry out their charge.

Data Standards Team

The purpose of the Data Standards Team is to produce and maintain a Data Standards Document for the University. The document will be approved by the EISE Steering and Executive Committees and have long term affects on the EISE project and other University information technology applications.

See the section entitled “Special Work Teams and Groups” in this document for further details as to the responsibilities of this group.

This group will meet as often as they deem necessary to carry out their charge.

The members of this team will be determined by the EISE Project Manager and the Steering Committee.

General purpose of document

The data standards document provides

- Clear guidelines (rules and policies) for all data within the Banner, DARWin and certain other related systems
- General and specific guidelines for data being passed between Banner and other systems
- Guidelines and measures for the entry, protection, access, use and dissemination of this data

The standards primarily govern three characteristics of specific data items

- Definition (name, purpose and description) of the data item
- Format in which the data item is to be entered
- Department/area responsible for updating, maintaining, and ensuring adherence to the data standards

Colleges and departments may have individual guidelines that supplement, but do not replace or supersede these guidelines.

The document will also stipulate who is responsible for the following long term tasks.

- Interpreting the document policies
- Confirming compliance with the standards
- Reconciling related issues

Reasons for needing these standards

The purpose of these guidelines is to ensure that the integrity of the University’s databases is maintained at all times.

Data standards ensure correct, accurate, and consistent data, standardized for use throughout the University.

Within an integrated database various modules share data items, thus it is critical that data items are entered and used in a definitive and consistent manner throughout all systems by all University personnel.

Additions and modifications to data items affect reporting and/or processing for functional areas outside the department that enters the data. It is crucial that data shared among the different University departments is consistent. Good data provides easier search capabilities and will assist with decision-making.

3 Procedures for Organizational Change

The following outlines the procedures that will be followed in regards to changing the project organization structure and personnel.

3.1 Changes to Organization Structure

Changes to the responsibilities and commitments of the Steering Committee will be reviewed and approved by the EISE Executive Committee.

The EISE Project Manager and the EISE Steering Committee may authorize the addition of work teams and groups as needed by project demands. The section in this document that describes “Special Work Teams and Groups” will control the responsibilities and commitments of these teams.

Changes will be documented in this Organization Plan. Although this document is not controlled by the Configuration Management Plan, the same change procedures will be followed except that the final approvals will be as mentioned above. The naming and storage of this document are also similar as others controlled by the Configuration Management Plan.

3.2 Changes to Project Personnel

Personnel membership of the EISE Steering Committee will be approved by the EISE Executive Committee upon recommendations from the EISE Project Manager or Steering Committee.

The Team Leaders and Team members of all work teams and groups will be approved by the EISE Project Manager with consultation with the EISE Steering Committee.

4 Approval to Proceed

Specify the approvers in the work products database or list them here.

Name
Title
Date

Name **Jeff Cooley**
Title **VP Business Affairs– Project Sponsor**
Date

Name
Title
Date

Name **Bill Witsman**
Title **Project Manager**
Date

Name
Title
Date

Name
Title
Date

Name
Title
Date

Name
Title
Date

Document History

Revision Record

Number	Date and Sections	Author	Notes
10.0		EISE Steering Committee	Final draft approved by Project Sponsor and Steering Committee

5 Acronyms

See the Project Definition Document and the project web site.

6 Definitions

See the Project Definition Document and the project web site.