INFORMATION ITEM #1
Finance and Human Resource Modernization Initiative Update
(Stacy Pearson/Matt Skinner)

TO ALL MEMBERS OF THE BOARD OF REGENTS

SUBJECT: Finance and Human Resources Modernization Initiative Update

SUBMITTED BY: Stacy Pearson, Vice President, Finance & Administration

BACKGROUND INFORMATION: The following serves as a brief update to the Facilities and Infrastructure Committee regarding the on-going preparation for the modernization of financial and human resource processes and systems.

Since the last update provided in May 2017, WSU has made considerable progress in preparation for this critical initiative.

• Selected Information Services Group, Inc. (ISG) to serve as external procurement consultants to guide the design of the ERP procurement process and resulting contract negotiations.
• Engaged stakeholders from all campuses and colleges to finalize system requirements and critical outcomes for the Request for Proposals (RFP).
• Finalized the procurement strategy.
• Finalized membership on the Steering Committee for the next phase of the initiative.
• Held on-campus meetings with our assigned consultants from the Office of the Chief Information Officer. Initiated the required Security Design Review as part of the RFP process.

Looking ahead, an increasing number of critical activities will help prepare for implementation (not an exhaustive list and subject to change):

• Ongoing: Continue engagement with the University Community, the Office of the State CIO and the Board of Regents.
• September 2017: Release the RFP for finance, payroll and human resources software.
• Fall 2017: External firm completes the independent Readiness Assessment.
• Winter 2017: Submit preliminary Investment Plan for approval by the Office of the State CIO.
• Spring 2018: Release the RFP for software implementation services.
• Spring 2018: Update funding model for project based on RFP results.
• Spring 2018-Summer 2018: Approve contracts with Board of Regents.
• Summer 2018: Complete preparations, finalize university-wide financial data model (chart of accounts), major business process approval design, etc.
• Summer 2018: Initiate funding model.
• Summer 2018: Begin implementation phase of the initiative.
• Summer 2020: Begin natural transition to the stabilization and optimization phase of the initiative.