Western Oregon
UNIVERSITY

University Council Fall Term Meeting
WUC, Columbia Room
December 11, 2024
9:30am-10:30am

The University Council is responsible for determining the degree to which the university is meeting its mission and is engaged in comprehensive, ongoing, systematic assessment of its work that leads to mission fulfillment and improvement.

AGENDA

1. Banner Optimization Project *(Tom Litterer)*
2. Strategic Plan Update *(President Peters)*
3. Accreditation Update *(Judy Sylva)*
4. Advisory Committee Updates
   - UBAC (*Zach Hammerle*)
   - UDIAC (*Dominique Vargas*)
   - UTAC (*Chelle Batchelor*)
5. Announcements

   Upcoming meetings: March 12, 2025 & June 11, 2025

Mission Statement: *Western Oregon University provides a personalized learning community where individuals experience a deep sense of belonging and empowerment.*

WOU Banner Project
11 DEC'24

Western Oregon
UNIVERSITY

Where *You* Belong

Agenda & Intended Outcomes

Expected meeting outcomes: Inform University Council on current project status & path forward through JUN'25;

Agenda:
1. UBAC Survey
2. Project Funding
3. Problem Statement
4. Overall Plan
5. FY'25 Plans
6. Project Governance

Western Oregon
UNIVERSITY

Where **You** Belong

University Budget Advisory Council Survey

UBAC respondents request to enhance:
- Automating payroll
- Fillable forms
- Overhauled webpages
- Eliminating paper forms
- Streamlined processes

Banner users want to reduce effort, remove customizations, make work enjoyable, and get all the juice from our squeeze

Western Oregon UNIVERSITY

Where *You* Belong

Project Funding

Based on UBAC feedback, the President (with support of the President's Cabinet) 100% of sustainability dollars are allocated toward the Banner Optimization project and include:

- Business process analysis consulting (Strata Information Group)
- Change / project management hours
- Limited duration backfill employees
- Software licensing

Funding from FY '24 through FY '28, with a bulk of expenditures in FY '25 and FY '26

Western Oregon
UNIVERSITY

Where You Belong

Problem Statement

1. WOU Banner adoption 30 years ago.
2. WOU optimized business processes for that instance of Banner.
3. WOU upgrades don't reflect current industry best practices.
4. Lack of modernization hinders WOU from providing best in class services with high efficiency.

Success is:
1. WOU aligned with modern tools and best practices.
2. WOU Banner is SaaS ready.
3. WOU campus operations, including Banner, capability is materially more efficient with significantly less risk.
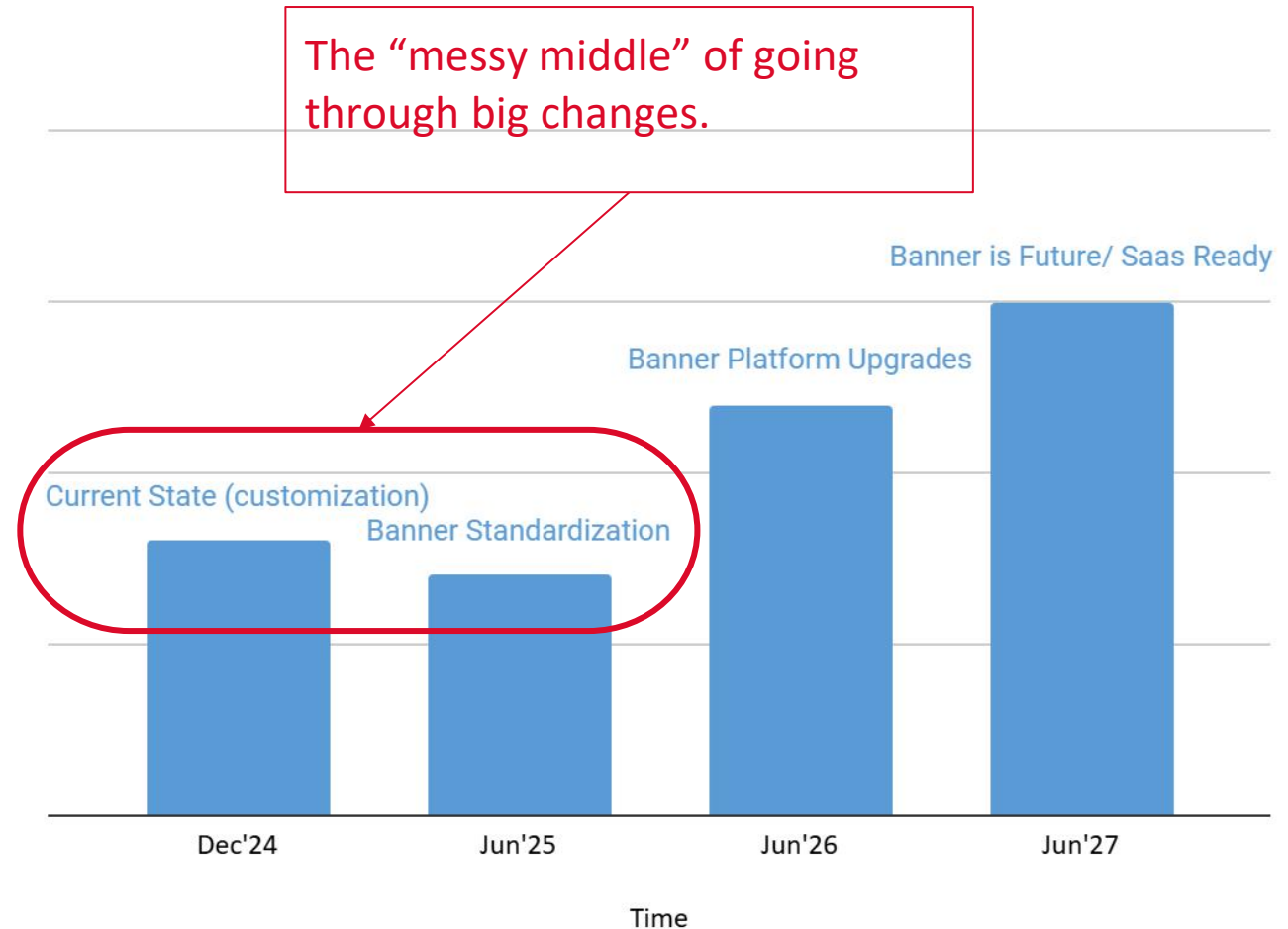
Overall Banner Plan

Overall scheme:

- Standardize
- Optimize standardized base
- Achieve Future/Saas readiness

Different areas (Financial Aid, HR, Student, Finance, Accounts Receivable) will move through these phases at their own pace.

The "messy middle" of going through big changes.

Banner Efficiency

Banner is Future/ Saas Ready

Banner Platform Upgrades

Current State (customization)
Banner Standardization

Dec'24   Jun'25   Jun'26   Jun'27

Time

Action Plan for FY'25

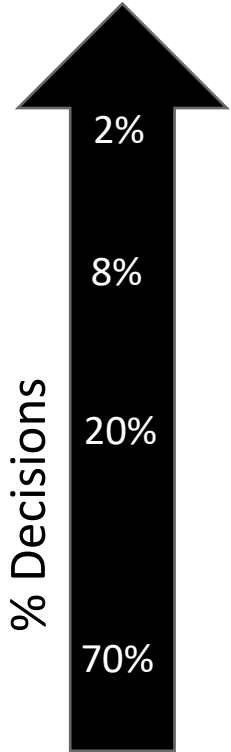| Milestone	Duration	Actual / Predicted Timeframe
Back to Basics Preparation (Financial Aid, HR, & Student)	2 months	Dec'24 - Jan'25
Back to Basics Workshops & Recommendations	1 months	Varies by area
Develop and commit to roadmap (different for each area)	1-2 months	Varies by area
Initial roadmap execution, first set of projects	2-4 months	Jun'25

External Copy: HECC - Banner Optimization detail 2024

Western Oregon
UNIVERSITY

Where *You* Belong

Banner Project Governance Structure

Project Manager – Michael Wolman

Business Analyst - Katlin Barnhill (SIG)

Change Manager – Sean Bangs

Executive Sponsor -Tom Litterer

Steering Committee – Tom Litterer, Michael Green, Tina Fuchs, Dr. Jose Coll, Pres. Dr. Jesse Peters*, Gabe Williams**

Core Project Team – Gabe Williams, Beverly West, Kella Helyer, Amy Clark, Chelle Batchelor, Paige Jackson, Desiree Noah, Breeann Flesch, Shadron Lehman

Work group

Work group

Work group

2%

8%

20%

70%

% Decisions

*Optional

**Non-voting member, also the Product Owner

WOLVES

Western Oregon
UNIVERSITY

Where **You** Belong

University Council Actions

- Talk about and emphasize the opportunity this project presents

- Understand and encourage embracing these changes

- Listen for and communicate concerns to project leadership (Tom)

BACKUP

Mike & Sean Bios

Michael Wolman joined Oregon State University in April 2024 as a project manager in EPPMO. Prior to OSU, Michael worked as a project manager spanning two decades at financial and banking institutions such as USAA and Fidelity Investments in a variety of areas including IT, anti-money laundering, client management, defined contributions and student health insurance. Additionally, Michael serves as a Medical Service Corps officer in the 315th Aeromedical Evacuation (AE) Squadron (Reserve) and has overseen medical operations, training, logistics and readiness across three continents.

Michael received his MBA from the University of North Texas and has PMP and PROSCI Change Practitioner certifications.

Since joining OSU, Michael has had the opportunity to work on the following initiatives:

- Coordinated the Strategic Plan (Prosperity Widely Shared) financial model assessment which impacts overarching 10-year financial assumptions and models.
- Implemented the streamlined processes and technology platforms for the staff of the Patricia Valian Reser Center for the Creative Arts (PRAx), enabling consistent and secure methods for 20 staff members positively impacting an estimated 17,000 attendees at the state-of-the-art performance art center.
- Oversaw the procurement of an upgraded Student Learning Assessment and Accreditation Enterprise Solution which will contribute to the assessment requirements under the NWCCU Standard One accreditation.

Sean Bangs joined OSU's Enterprise Project Portfolio Management Office in January 2024. He has over 25 years as a Project Manager and leader within industries such as the military (US Army), technology (Intel Corporation), and education technology in the non-profit sector (NWEA). His project experiences include large military operations, factory/foundry operations, Mergers/Acquisitions/Divestitures, enterprise level implementations, and educational assessment products for K-12 students. Sean completed his undergraduate degree in Economics at Portland State University and his MBA at City University. He holds PMP and DASM certifications.

His projects at OSU include Project Manager on the ServiceNow IT Help Desk implementation:

- The OSU IT Help Desk environment had ~ 600 employees, across 41 different IT groups, utilizing 8+ work management systems, supporting over 40,000 customers.
- Participation in the new platform was voluntary for each IT group. This project included a focused and intensive organizational change management workstream aimed at driving IT adoption.
- In less than 6 months, OSU implemented ServiceNow as the shared IT Help platform for the campus. This platform is currently used by 95% of OSU IT and is receiving very positive feedback from both customers and the IT community.

Western Oregon UNIVERSITY

Where *You* Belong

NWCCU Timeline

- July 21, 2023
  - Reaffirmation of Accreditation
- March 1, 2024
  - Spring 2024 ad hoc report submitted on Recommendation 2
- July 12, 2024
  - Spring 2024 ad hoc report accepted with feedback
  - Notice of Concern - an official action, but not a public document.

Western Oregon UNIVERSITY

Where **You** Belong

Recommendation 1: Spring 2024 Ad Hoc Report

(formerly Recommendation 2 Spring 2023 Evaluation of Institutional Effectiveness)

Expeditiously implement plans for development of financial resources, including strategic enrollment management, to ensure short term financial health and long-term financial stability and sustainability. (2020 Standard(s) 2.E.2)

NWCCU Timeline

- December 20, 2024
  - DUE draft Financial Resources Review (FRR) and Spring 2025 ad hoc report on Recommendations 1 and 3 for feedback
- February 21, 2025
  - Spring 2025 ad hoc report DUE on Recommendations 1 & 3
- February 28, 2025
  - FRR DUE
- April 4, 2025
  - Site visit for Recommendations 1 & 3

Recommendation 1: Spring 2023 Evaluation of Institutional Effectiveness

Continue its efforts to establish an ongoing and systematic evaluation and planning process that supports the demonstration of continuous improvement and to inform and refine its effectiveness, assign resources, and improve student learning and achievement objectives and measures. (2020 Standard(s) 1.B.1)

Recommendation 3: Spring 2023 Evaluation of Institutional Effectiveness

Deploy current higher education best practices, including the effective use of technology, to ensure attainment of industry standard practices to achieve its organizational responsibilities and the integrity and continuity of its educational programs (2020 Standard(s) 2.F.3)

NWCCU Timeline

- Mid-Cycle Review Spring 2026
- Year 6 - Standard 2 - Policies, Regulations, and Financial Review Spring 2029
- Year 7 - Evaluation of Institutional Effectiveness Spring 2030

Where *You* Belong

Next Steps

- Team is mobilized to develop draft of FRR
- Collecting information for draft of Spring 2025 Ad Hoc report
- Working closely with our NWCCU liaison to develop reports
- Save the date for site visit: **Friday April 4, 2025 9am-4pm**

University Technology Advisory Committee Report

University Council Meeting, December 11, 2024

Areas of Focus for AY 2024-2025

- Digital Accessibility Policy (Fall / Winter)
- Data Governance (Winter / Spring)
- Software Procurement (Spring / Summer)
- Banner Optimization

Digital Accessibility Policy - Strategic Alignments

University Vision Statement

"Our vision is for Western Oregon University to be a model of intentional inclusion and accessibility."

University Strategic Goal - Transformational Diversity

"Foster an inclusive educational, living, and work environment at Western Oregon University, ensuring that students and employees feel a profound sense of belonging and have abundant opportunities for growth and success."

Equity Assessment Action Plan

"Develop physical and digital accessibility policies"

Digital Accessibility Policy - Update

- The Accessibility at WOU working group met with UTAC in October to discuss the digital accessibility policy. UTAC agreed to start working on a digital accessibility policy.
- A UTAC subcommittee was recruited for and formed in November and met for the first time in December.
- Subcommittee members will review resources and meet in January and February to develop a first draft of the policy.

Data Governance - Strategic Alignments

University Core Value - Centering Students

"Our decision-making is guided by a commitment to meeting student needs through innovation, inspiration, and data."

University Strategic Plan - All Goals

Data governance structures and policies help universities effectively use metrics to track performance on strategic outcomes.

Data Governance - Update

- The Data Integrity Group (DIG), a standing subcommittee of UTAC, has begun conversations about data governance.
- DIG will join UTAC in Winter term to discuss next steps in establishing a data governance strategy