

# Draft Banner Team Charter

---

**Team:** *Financial Aid Team*

**Purpose:** The *Financial Aid Team* is primarily responsible for implementing the Banner Student system's Financial Aid module.

Additionally, the Team will support the implementation of the other Banner Student system modules, the selected academic advising/degree audit software system, and other selected ancillary systems.

**Team Sponsor:** Bill Fritz, Banner Project Leader

**Team Members:**

- Dave Bledsoe, *Financial Aid Team* Leader
- Gwyn Francis
- Sally White
- Yu-Hsiu Lin

**Resources:**

- Joann Worthington
- Debbie Cox
- Karen Daniel
- Winnie Tsang-Kosma
- Ken Davidson

**Duties of this team:**

1. Identify Needed Resources. To identify resources needed for the project and communicate these needs to the *Implementation Team*.
2. Project Plans. To assist in the development of implementation project plans and be responsible for providing status updates for tasks and activities that have been assigned to them.
3. Plan Execution. To ensure that the project plans are executed and that the system is implemented on time and within the approved budget.
4. Communication. To communicate and coordinate with the *Implementation Team*, all end-users,

# Draft Banner Team Charter

---



- University students, and project stakeholders.
5. Communication Plan. To ensure that the communication plan is implemented and to carry out audits to ensure that effective communication is occurring to the *Implementation Team*, end-users, University students, and project stakeholders.
  6. Address suggestions for new or modified academic policy with the Banner Conversion Task Force (BCT). Suggestions for new academic policies or changes to existing academic policies will be addressed with the BCT.
  7. Analysis of current business processes. To analyze current business processes and to suggest possible reengineering opportunities to take advantage of Banner processing.
  8. Data conversions. To assist in identifying requirements for conversion of data from legacy systems into Banner.
  9. System interfaces. To assist in identifying requirements for system interfaces:
    - a. from existing GA State systems to Banner Student (and other systems implemented as part of this project) and,
    - b. from Banner Student (and other systems implemented as part of this project) to existing GA State systems.
  10. System Set-Up. To optimally configure the Banner Student-Financial Aid system and selected ancillary systems to satisfy the academic and business needs of the University.
  11. System Security. To design and implement the required security features.
  12. Training. To work with the in-house Banner trainer to develop an overall plan for training end-users including identifying who will be trained, when training will occur, what subject matter will be covered, the development of training materials, and

# Draft Banner Team Charter

---



- the delivery of the training.
13. Testing. To develop and execute test plans and to ensure user acceptance of the Banner Student-Financial Aid system prior to moving it into production mode.
  14. De-commissioning OASIS. To assist in planning for the de-commissioning of the OASIS system.
  15. Transition to Banner. To ensure a smooth transition from the legacy OASIS and PACE systems to Banner.
  16. Transition to Production Mode. To ensure a smooth transition from 'implementation mode' to 'production mode'.
  17. Response to Problems. To develop contingency plans for likely problem scenarios and as problems arise to effectively deal with them to minimize their impact on the project and the University.
  18. Vendor Performance. To assess and provide feedback to project vendors to ensure quality performance and service for the University.
  19. Pro-Banner PR. To continuously sell the benefits of Banner to the University community.

- Success Measures:**
1. The Team's primary success measure is that:
    - a. The Banner Financial Aid module will be in production to support Fall 2002 semester no later than 1/31/2002.
  2. In support of the implementation of the other Banner Student system modules and other selected ancillary systems, the Team's secondary success measures include:
    - a. The Banner Catalog module will be in production to support the Fall 2002 semester no later than 10/31/2001.
    - b. The Banner General Person module will be in production to support the Fall 2002 semester no later than 11/30/2001. General

# Draft Banner Team Charter

---



Person information from OASIS will be converted and loaded into Banner no later than 11/30/2001.

- c. The Banner General Student module will be in production to support the Fall 2002 semester no later than 12/31/2001. General Student information from OASIS will be converted and loaded into Banner no later than 12/31/2001.
- d. The Banner Academic History module will be in production to support the Fall 2002 semester no later than 1/31/2002. Academic History from OASIS (with grades through the Fall 2001 semester) will be converted and loaded into Banner no later than 1/31/2002.
- e. The Banner Location Management, Faculty, Scheduling, Recruiting, Admissions, and Transfer Articulation modules will be in production to support the Fall 2002 semester no later than 1/31/2002.
- f. Admissions data from OASIS will be converted and loaded into Banner no later than 5/31/2002.
- g. Academic History from OASIS (with grades through the Spring 2002 semester) will be converted and loaded into Banner no later than 5/31/2002.
- h. A system to replace the current PACE academic advising/degree audit system will be in production no later than 5/31/2002.
- i. The Banner Registration and Accounts Receivable modules, and selected cashiering and electronic payment systems will be in production to support registration for the Fall 2002 semester no later than 5/15/2002.
- j. An ADVANCE Banner web registration for Fall 2002 semester will occur May 28

# Draft Banner Team Charter

---



- through June 2. A/R holds and balances from OASIS and Summer 2002 Phase 1 course registrations from OASIS will be converted and loaded into Banner just prior to this ADVANCE registration period.
- k. An EARLY Banner web registration for Fall 2002 semester will occur July 5 through July 10. Incremental A/R holds and balances from OASIS and Summer 2002 Phase 2 and 3 course registrations from OASIS will be converted and loaded into Banner just prior to this EARLY registration period.
  - l. A REGULAR Banner web registration for Fall 2002 semester will occur the first week in August 2002. Incremental A/R holds and balances from OASIS will be converted and loaded into Banner just prior to this REGULAR registration period.
  - m. Academic History from OASIS (with grades through the Summer 2002 semester) will be converted and loaded into Banner no later than 8/31/2002.
  - n. A LATE Banner web registration for Fall 2002 semester will occur during the first week of Fall 2002 classes. Incremental A/R holds and balances from OASIS will be converted and loaded into Banner just prior to this LATE registration period.
  - o. The production Banner Alumni & Development and Housing modules will be integrated with Banner Student and Financial Aid as part of this project. This will result in a single, integrated database supporting all of the installed Banner modules.
3. Post-implementation clean-up will be completed no later than 12/31/2002.
  4. End-users will be adequately trained in the use of

# Draft Banner Team Charter

---



- the system prior to module 'go live' dates.
5. An easy to use, end-user reporting environment will be designed and implemented as part of this project. Critical, must have reports, that are not provided as part of the purchased system will be developed and available prior to module 'go live' dates.
  6. Technical and end-user documentation will be developed and available prior to module 'go live' dates.
  7. Processes and procedures for operating the Banner system in a production mode will be developed and implemented by 12/31/2002.
  8. All maintenance and support responsibilities will be turned over to the appropriate functional and technical groups by 12/31/2002.
  9. The Banner project team will be de-commissioned at the end of the implementation project – 12/31/2002.
  10. This project will be completed at or under the approved budget.

**Budget:**

The approved budget for the Banner Student-Financial Aid Implementation Project is \$11.0M.

**Boundaries:**

1. During the project, the *Financial Aid Team* will strive to minimize negative impact on the operations of the University and customer service to the University community (students, faculty, and staff).
2. There will be a “freeze” on non-critical enhancements to the legacy student information system (OASIS) and to the legacy academic advising/degree audit system (PACE). Modifications to OASIS and PACE will only be made to fix 'broken' code, to correct corrupted data, or if the modification is required to satisfy

# Draft Banner Team Charter

---

mandated/legislated requirements.

3. There will be a strong prejudice against modifying either baseline Banner or the BOR/OIIT Georgia modifications to Banner. All suggested modifications will have to go through a review process.
4. The *Financial Aid Team* will not be empowered to establish or modify academic policy. Recommendations for new academic policies or changes to existing academic policies will be raised to the Banner Conversion Task Force (BCT).

## **Operating Guidelines:**

1. The *Financial Aid Team* will receive direction from and be responsible to the Banner Implementation Team.
2. The *Financial Aid Team* will meet twice per month during the life of the project, or more often as needed.
3. The *Financial Aid Team* will be a model for effective team processes.
4. The *Financial Aid Team* will make decisions through consensus and then represent the team as a whole.
5. The *Financial Aid Team* will communicate their activities, decisions, and action steps, as appropriate, to various project personnel.

## **Ground Rules:**

1. Agendas for *Financial Aid Team* meetings will be sent out at least 72 hours in advance.
2. Meeting minutes will be circulated within 48 hours of each meeting.
3. Respect confidentiality
4. Team member etiquette:
  - a. Come prepared
  - b. Participate
  - c. Complete assignments
  - d. Be an active listener

# Draft Banner Team Charter

---



- e. Stay focused
- f. Project a positive attitude
- g. Critique an idea, not the person
- 5. Respect other's ideas/opinions/roles:
  - a. Be open-minded
  - b. Don't interrupt while others are speaking
- 6. Be respectful of other and individual roles
- 7. Be committed to the project
- 8. Meeting courtesy:
  - a. Arrive on time
  - b. Start on time
  - c. Stay for the entire meeting
  - d. Inform meeting leader before meeting if unable to attend or need to leave early
  - e. Turn off your cellular phone or switch to vibrator mode