Draft Banner Team Charter

Team: Implementation Team

Purpose: The Implementation Team is responsible for implementing SCT’s Banner Student-Financial Aid software system, the selection and implementation of a academic advising/degree audit software system, and the selection and implementation of other required ancillary systems.

Team Sponsor: Ron Henry, University Provost

Team Members:
- Bill Fritz, Banner Project Leader
- Cherise Peters, Banner Associate Project Leader
- Dan Hammond, representing the Office of the Registrar
- Charles Gilbreath, representing the Office of the Registrar
- Ricky Boyd, representing the Office of the Registrar
- Carolyn Alexander, representing the college schedulers group
- Dan Niccum, representing Admissions
- Dave Bledsoe, representing Financial Aid
- Tim Woltering, representing the Student Advisement Center
- Joann Worthington, representing Student Accounts
- Mike Moore, representing Institutional Research
- Trey Chiles, representing Auxiliary Services
- Keith Campbell, representing UCCS

Resources:
- Wanda Taylor, project administrative assistant
- John Pratt, Cornelius & Associates – project management support
- Winnie Tsang-Kosma
- Bill Evans
- Faye Borthick
Duties of this team:

1. **Identify Needed Resources.** To identify resources needed for the project and communicate these needs to the *Steering Team*, and in the case of University personnel resources to the units that the required resources belong to.

2. **OASIS/PACE Change Requests.** To assess the impact of legacy system change requests on the Banner project and make recommendations that will minimize impact on the project.

3. **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.

4. **Plan Execution.** To ensure that the project plans are executed and that the system is implemented on time and within the approved budget.

5. **Focus Teams.** To direct the activities of the various project Focus Teams and to provide support to the teams as needed.

6. **Communication.** To communicate and coordinate with the *Steering Team*, appropriate academic committees, all end-users, University students, and project stakeholders.
7. **Communication Plan.** To ensure that the communication plan is implemented and to carry out audits to ensure that effective communication is occurring to the *Steering Team*, appropriate academic committees, end-users, University students, and project stakeholders.

8. **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.

9. **Analysis of current business processes.** To analyze current business processes and to suggest possible reengineering opportunities to take advantage of Banner processing.

10. **Data conversions.** To assist in identifying requirements for conversion of data from legacy systems into Banner.

11. **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.

12. **Advising / Degree Audit system.** To review the Banner CAPP module and make a ‘go / no go’ decision regarding its use as a replacement for PACE. A decision to not use CAPP will require that a 3rd party system be selected and implemented.

13. **System Set-Up.** To optimally configure the Banner Student-Financial Aid system, the selected advising/degree audit system, and selected ancillary systems to satisfy the academic and business needs of the University.
14. **System Security.** To design and implement the required security features.

15. **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 the delivery of the training.

16. **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.

17. **De-commissioning OASIS and PACE.** To assist in planning for the de-commissioning of the OASIS and PACE systems.

18. **Transition to Banner.** To ensure a smooth transition from the legacy OASIS and PACE systems to Banner.

19. **Transition to Production Mode.** To ensure a smooth transition from ‘implementation mode’ to ‘production mode’.

20. **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.

21. **Vendor Performance.** To assess and provide feedback to project vendors to ensure quality performance and service for the University.

22. **Pro-Banner PR.** To continuously sell the benefits of Banner to the University community.

**Success Measures:**

1. All selected Banner Student-Financial Aid modules and the selected academic advising/degree audit system will be in production no later than 8/31/2002. Post-implementation clean-up will be completed no later than 12/31/2002.

2. The Banner Catalog module will be in production
to support the Fall 2002 semester no later than 10/31/2001.

3. The Banner General Person module will be in production to support the Fall 2002 semester no later than 11/30/2001. General Person information from OASIS will be converted and loaded into Banner no later than 11/30/2001.

4. 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.

5. 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.

6. The Banner Location Management, Faculty, Scheduling, Financial Aid, Recruiting, Admissions, and Transfer Articulation modules will be in production to support the Fall 2002 semester no later than 1/31/2002.

7. Admissions data from OASIS will be converted and loaded into Banner no later than 5/31/2002.

8. Academic History from OASIS (with grades through the Spring 2002 semester) will be converted and loaded into Banner no later than 5/31/2002.

9. A system to replace the current PACE academic advising/degree audit system will be in production no later than 5/31/2002.

10. 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.
11. An ADVANCE Banner web registration for Fall 2002 semester will occur May 28 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.

12. 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.

13. 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.

14. Academic History from OASIS (with grades through the Summer 2002 semester) will be converted and loaded into Banner no later than 8/31/2002.

15. 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.

16. 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.

17. End-users will be adequately trained in the use of the system prior to module ‘go live’ dates.

18. 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.

19. Technical and end-user documentation will be developed and available prior to module ‘go live’ dates.

20. Processes and procedures for operating the Banner system in a production mode will be developed and implemented by 12/31/2002.

21. All maintenance and support responsibilities will be turned over to the appropriate functional and technical groups by 12/31/2002.

22. The Banner project team will be de-commissioned at the end of the implementation project – 12/31/2002.

23. 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 Implementation 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 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 Implementation 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 Implementation Team will receive direction from and be responsible to the Banner Steering Team.

2. The Implementation Team will meet twice per month during the life of the project, or more often as needed.

3. The Implementation Team will be a model for effective team processes.

4. The Implementation Team will make decisions through consensus and then represent the team as a whole.

5. The Implementation Team will communicate their activities, decisions, and action steps, as appropriate, to various project personnel.

Ground Rules:

1. Agendas for Implementation 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
   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