

Administration, Buildings and Grounds

Board of Visitors
November 21, 2024

Evolve to Excel: Optimize places, workflows and systems

- Modernize our campus – dining, dorms, classrooms and other learning spaces
- Attract and retain outstanding employees and students to further our mission
- Create a financial model that ensures an exceptional W&M experience





ERP Modernization Updates

HCM & Finance Deployment Overview

01 Readiness & Plan

Jun 2024 – Jul 2024

Data Gathering sessions, establish strategy documents, and build first Workday environment

02 Architect & Configure

Aug 2024 – Jan 2025

Design, configure, and unit-test Workday, conduct playback sessions for campus, build integrations and reports.

03 Test and Train

Jan 2025 – May 2025

W&M team tests the system end-to-end, conduct payroll parallel testing, change management and training execution

04 Deploy & Support

Jun 2025 – August 2025

System Release, training and hypercare support

05 Phase 2 Deployment

August 2025 – January 2026

Design, configure, and unit test Workday for additional areas: Talent Optimization, Learning Management, and Adaptive Planning

Workday HCM & Finance

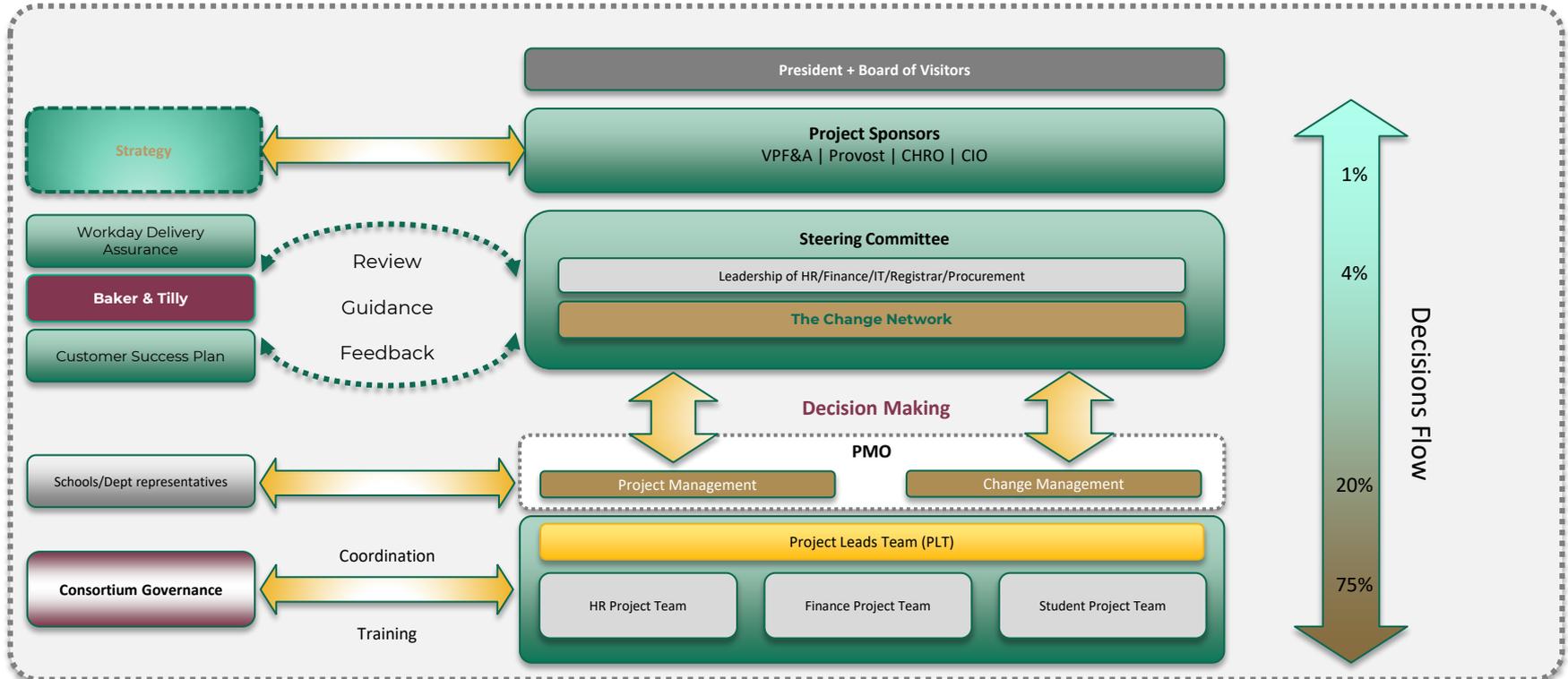
Core HCM
Academics
Core Compensation
Benefits
Absence & Leave
Payroll (US)
Recruiting
Talent Optimization
Time Tracking
Learning

Financial Accounting
Banking
Projects
Assets
Expenses
Grants
Endowments
Customer Accounts
Adaptive Planning
Prism Analytics

Start

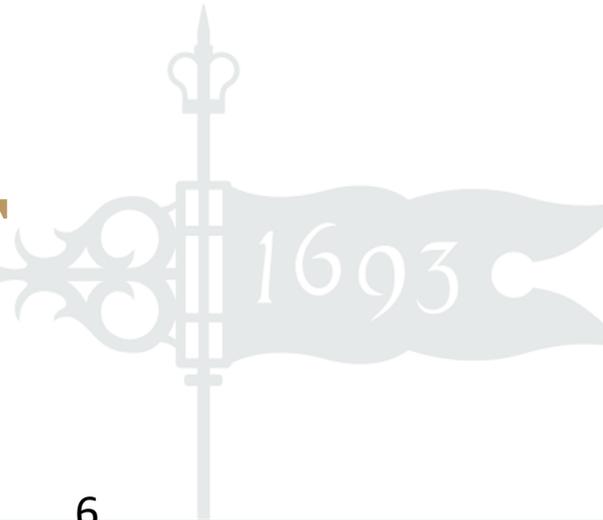
Finish

ERP Project Governance & Management



Governance & Management Review

**BAKER TILLY'S AUDIT
REPORT SUMMARY**



Project Strengths Highlighted

Leadership Endorsement

- Active engagement and support from University leadership emphasizes project significance and empowers the project team to prioritize project work.

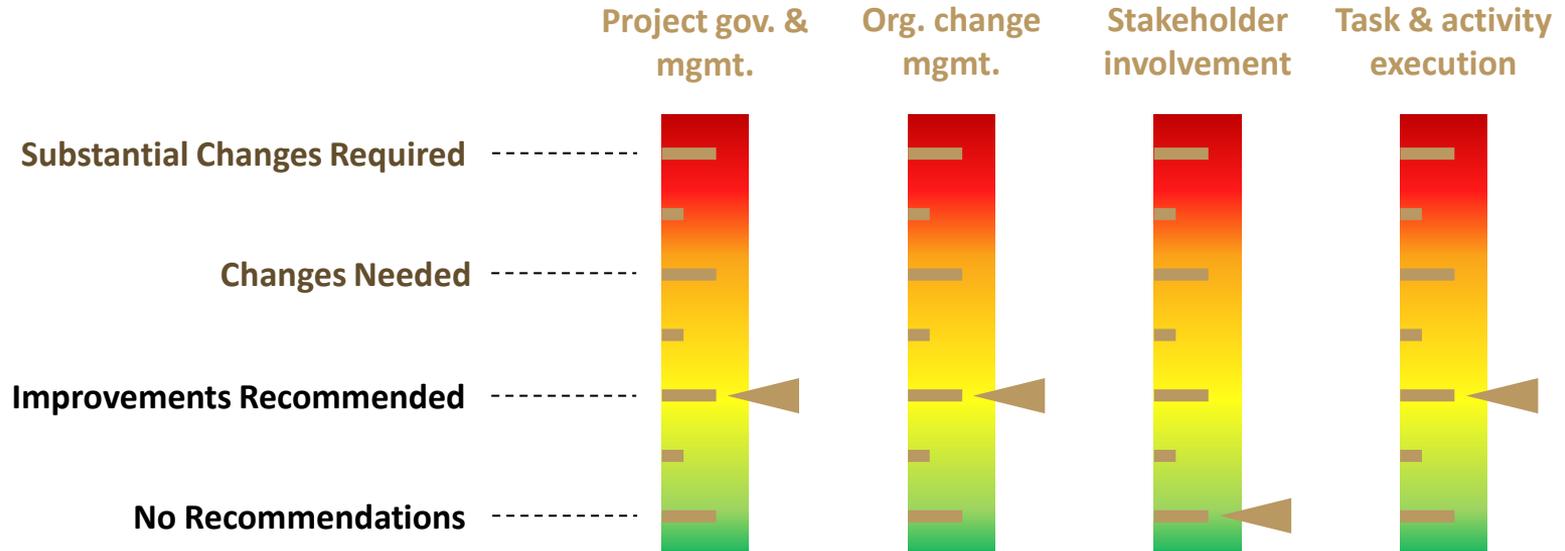
Guiding Principles

- Project approach of configure over customization should save effort during implementation and streamlines business processes.

Joint Responsibility

- Distribution of responsibility amongst groups of people (e.g., PMO) reduces single point of failure risk and increases flexibility for project workload management.

Summary Results by Project Success Area



Critical: Risks mostly unmanaged, will have significant adverse effect; substantial changes required

High: Risks partially unmanaged, very likely to have serious adverse effect; changes needed

Moderate: Risks generally managed, could have a limited adverse effect; improvements recommended

Low: Risks managed, likely no adverse effect; no recommendations

Summary of Recommendations

Project governance & management

- Develop monitoring for business process modernization
- Develop monitoring for people workloads
- Provide core team with project governance process refresher training

Organizational change management

- Develop Workday sustainment plan for long-term support model

Task & activity execution

- Dedicate additional project team resource hours for certain project roles
- Continue monitoring the progress of integrations work to determine additional resources needs



Campus Updates

Campus Infrastructure Updates

- Active projects remain on schedule, on budget across campus
- Spring BOV tour of one or more construction sites
- Update on 1732 President's House
- Expansion of the Memorial Garden

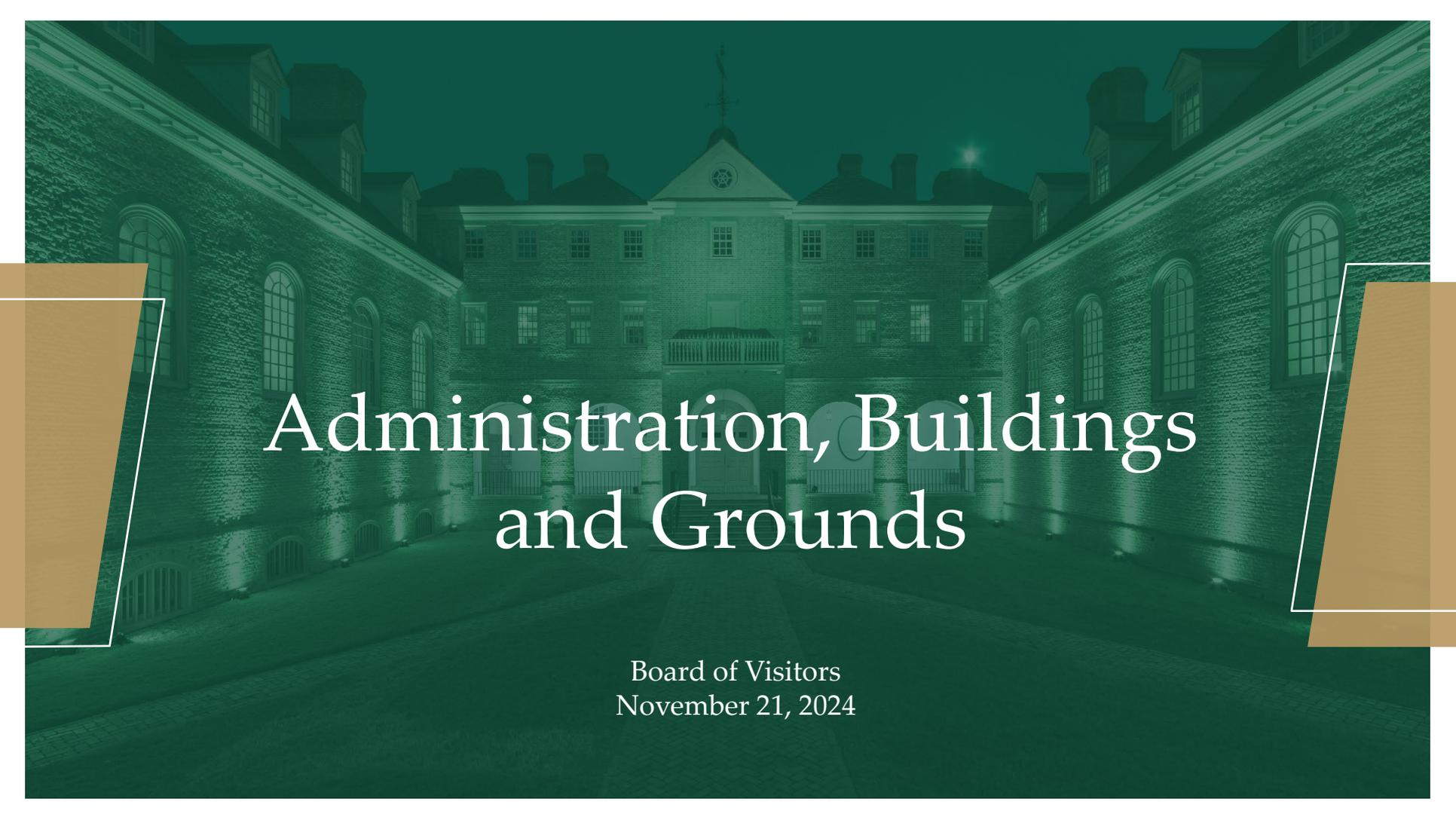




Items for Action

Resolutions before the Committee

- **Resolution to Approve the Expansion of the Memorial Garden**
- **Resolution to Approve Non-General Fund Infrastructure Project at the Batten School of Coastal & Marine Sciences**



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