





Basis Project Coordinator- Dick Cottrill	current
Overall Basis Project Planning	
Attend All Basis Meetings	
Liaison to Steering Committee	
Keeping VCFA Informed	
Planning Basis Module Priorities	
Basis Scheduling	
Financial Liaison- Colleen (permanent position)	current
Attend Basis Meetings	
Presents to Steering Committee	
Keeping AVCF Informed	
Planning Financial Affairs Module Priorities	
Scheduling- Financial Affairs	
Assist Tech Writer w/ Documentation & Users Guide- Financial Affairs	
Testing	
Financial Functional Area Leader-	\$38,000.00
David Hyatt (suggested) (permanent position)	
Attend Basis Meetings	
Meet with Financial Affairs Personnel	
Coordinate Financial Affairs Concerns	
Formulating Test Plan- Financial Affairs	
Coordinates Testing- Financial Affairs	
Testing	
Business/Purchasing Liaison- David Keith or Hire (permanent position)	\$38,000.00
Attend Basis Meetings	
Presents to Steering Committee	
Keeping AVCB Informed	
Planning Business Affairs Module Priorities	
Scheduling- Business Affairs	
Assist Tech Writer w/ Documentation & Users Guide-Business Affairs	
Testing	
Business/Purchasing Functional Area Leader-	\$38,000.00
Donna Carter (suggested) (Temporary position)	
Attend Basis Meetings	
Meet with Business Affairs Personnel	
Coordinate Business Affairs Concerns	
Formulating Test Plan- Business Affairs	
Coordinates Testing- Business Affairs	
Testing	

Human Resource Liaison- Bill Overby (permanent position)	current
Attend Basis Meetings	
Presents to Steering Committee	
Keeping AVCB Informed	
Planning Human Resource Module Priorities	
Scheduling- Human Resources	
Assist Tech Writer w/ Documentation & Users Guide- Human Resources	
Testing	
Human Resource Functional Area Leader-	\$38,000.00
Becky (suggested) (temporary position)	
Attend Basis Meetings	
Meet with Human Resource Personnel	
Coordinate Human Resource Concerns	
Formulating Test Plan- Human Resources	
Coordinates Testing - Human Resources	
Testing	
Technical Writer- Hire (temporary position)	\$28,000.00
Attend Basis Meetings	
Write Documentation & Users Guide- One person writing all documentation can maintain a single format and style. With the input of the area Liaisons, one writer can pull together all documentation into one <u>Basis</u> manual.	
Basis Trainer- Joe	Current
Attend Basis Meetings	
Basis Training	
Assist with Documentation & Users Guide	
Financial Analyst/EDP Reviewer- Hire (permanent position)	\$28,000.00
Attend Basis Meetings	
Attend Basis meeting to provide input on auditor and FMAN concerns	
Keeping Director of FMAN Informed	
Monitor Life Cycle Development of Basis Programming	
Director of Tax Management - David Hyatt or Hire (permanent position)	Current
Human Resource Project/Program Manager	\$38,000.00
Project Program Manager/Computer Purchasing -	\$38,000.00
David Keith or Hire (permanent position)	
These are current position which would be vacated permanently by personnel moved to the Basis Project.	

Data Entry Operators- (Temporary Positions) \$66,000.00

- (2) Travel and Business Affairs
- (1) Accounts Payable
- (1) Documents Examiner/Budget Assistant
- (2) Human Resources

These people will take over data entry and routine duties to allow current trained personnel to attend functional area meetings, to perform testing, and to assist with duties previously carried by their supervisors.

Tax Researcher- \$20,000.00

- (1) This person would handle basic tax research and financial statement presentation issues to all current trained personnel to attend functional area meetings, to perform testing, and to assist with duties previously carried by their supervisors.

Other Personnel- Other members of Financial Affairs, Business Affairs, Human Resources, and Financial Management Analysis would be involved in development and testing on an intermittent basis. They would provide input through the Functional Area Leader and would only need to attend Basis meetings occasionally. The Functional Area Leader would determine who needs to attend Basis meetings and would invite them on an as needed basis.

Space requirements:

Two Basis testing/work stations in the third floor office currently occupied by Colleen and Joe.

Basis Nerve Center- Suggest taking back the large room in the basement and the Arboretum Office. All ten Basis employees would be located in one area to facilitate communication and planning.

Relocate Property tagging personnel and Surplus Management- suggest utilizing Travel Supervisor's Office and Dick's Current Office

Miscellaneous Needs

(9) Complete Workstations Needed- Desk, chair, computer, printer, calculators, phones, etc.

Drop additional mainframe lines into storage area.

- (1) Copier
- (1) chalk board
- (1) Bulletin board
- (1) Conference table
- 4 - 5 Additional chairs
- (4) 4 Drawer File cabinets
- Misc office supplies

Planned Process

Each Basis team (I & II) will meet with Computing Services at least twice weekly.
Basis Steering Committee will meet at least monthly.
Functional Area personnel will meet at least weekly.

Basis Project Coordinator will meet with other members of the Steering Committee weekly to provide progress report and receive feedback to take to Basis team.
Basis Project Coordinator will meet with VCFA weekly to provide progress reports.
Liaisons will meet with related Functional Area members of the Steering Committee weekly to provide progress reports and receive feedback to take to Basis team.
Liaisons will represent functional area concerns at Steering Committee meetings.
Area Leader will meet with related functional area personnel weekly to provide progress report and receive feedback to take to Basis team.
Area leader will summarize feedback and concerns at least weekly to the Basis list.

Basis Project Coordinator will plan and facilitate the Steering Committee Meetings.
Liaisons will plan Steering Committee presentations.
Area Leaders will plan and facilitate Basis team meetings and invite additional personnel from functional areas as needed.

Basis Project Leader will coordinate the overall Basis project schedule.
Liaisons will plan and coordinate modules within the Functional area schedules and priorities.
Area Leaders will plan and coordinate schedules at the module level.

Combined Efforts:

Liaisons will work with the Tech writer to ensure the accuracy of documentation.
Area Leaders and Liaisons would coordinate user groups to receive their input.
Tech writer will provide continuity to the Basis documentation.
Tech writer will work with Liaisons to document all Basis modules.
Area Leaders will plan module testing with input from the Liaisons.
Trainer will plan user training sessions.
Trainer will plan training materials.
Trainer will plan training schedule.

Results

- This structure would enhance communication to the Steering Committee. Steering Committee members would be more involved in the development process. All perspectives of an issues will be better represented to the Steering Committee and the Steering Committee members will be better informed when they make a decision.
- The number of comments on the Basis list will be reduced by having the Functional Leader accumulate them. This would help everyone stay better informed, as the sheer number of Basis emails can be overwhelming at times.
- User groups can be utilized earlier in the development process.
- Personnel in the functional areas would have a more structured avenue for providing input to the Basis project. They would spend less time on Basis meetings and their time spent would be more productively. There would be fewer people attending meetings "in case" something comes up that requires their input.
- Additional entry level positions will relieve some of the stress currently imposed on classified employees. This will avoid employee burn-out and costly employee turnover.
- Establishing clear responsibilities and leadership roles will add momentum to the project.
- There will be fewer problems with competing priorities and other distractions.
- Additional resources and personnel would effectively demonstrate campus administration's commitment to Basis.

Additional Suggestions:

1. The time between when an issue is formally presented to the Steering Committee, and when a decision or request for specific additional information is made should be limited. The Steering Committee should lead the way in giving the project a sense of priority and urgency. Timely responses would do a great deal to provide this.
2. Have the Basis Project Leader, Liaisons, Area Leaders, and Computing Services provide a list of all the currently known modules. Everyone needs a picture of the overall project to grasp it's enormity.
3. Some management planning tools (charts, timelines, critical path planning, etc.) may be helpful to give all personnel the big picture.
- 4.