

## Staff Senate Minutes

February 18, 2025 (2:00pm–3:30pm)

Online Via Zoom: <https://wou->

[edu.zoom.us/j/84978596671?pwd=XRbq8YLsKyNj5uCCRSdmUwPkue5czY.1](https://wou-<br/>edu.zoom.us/j/84978596671?pwd=XRbq8YLsKyNj5uCCRSdmUwPkue5czY.1)

### Start recording - Staff Senate follows Simplified Robert's Rules

- Meeting recordings are for the Secretary to complete minutes effectively; when minutes are approved, the recordings will be deleted

**In-Attendance:** Alexis Morrison, Ambre Plahn, Rip Horsey, Wendi Mars, Connor King-Goehring, Sandra Holland, Kristen Perry, Ellie Baker, Gregg Vineyard, Adrian Trujillo

**Absent:** Sam Morgan

**Guests:** Tom Litterer, Heather Brophy, Jessica Murfin, Michael Ellis

### Approval of minutes

- February 4th Minutes are approved

### Guest Speakers

- Thomas Litterer, Director of University Computing Solutions
  - Provided a presentation about the WOU Banner Optimization Project.
  - Presentation slides are available at the end of the minutes.

### Reports

- Committee Reports
  - Shared Governance
    - The meeting is scheduled this Thursday, February 20<sup>th</sup> so more to come next time
  - President's Cabinet
    - Institutional Policy on Student Account Balances and Holds. They are reviewing this policy to establish a set amount that students need to pay to register for the next term rather than a percentage which has been shown to be confusing to the students.
    - ASWOU updates:
      - They are working on lobby day which is scheduled for May 7<sup>th</sup> and they plan to attend. Question about how staff can support this, so Alexis will look into that and report back next time.
      - They are in the process of developing a student organization and clubs lounge in the WUC. They hope to open the space in the spring term.
      - They are looking for furniture and supplies
      - How can faculty/staff better support students? Attending group meetings

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is very meaningful to students. Also, following student groups on social media would mean a lot to them as well.

- Other - Administrative Equity, Staff Connections, etc.

### Unfinished Business

- UTAC Representation (Classified seat)
  - Been having difficulty getting the nominations sent out due to HR not getting our email approved and sent out to the classified staff listserv.
- Equity Assessment Team: Recommendations Forwarded to DEI office. We had 5 names that we passed along to Dominique and one of them being Jane Cameron was selected.

### New Business

#### Goals (SMART)

- Fund the Staff for Students Scholarship
  - Currently, we want to put the application on hold due to not having enough funding in our account right now. This is something that we can reopen at anytime once we are able to get \$1,000 in the fund.
  - We received an anonymous match donation of up to \$400 on giving day. We want to put our focus and effort on Giving Day right now. After Giving Day, we will put our focus on pushing the payroll deductions from staff.
- Build connections through consistent communication and guest speakers

### Announcements and Reminders

- Agenda item suggestions
- Important Training Reminders
  - [Title IX](#) – This is currently unavailable due to the regulations changing. Once the training modules are updated to reflect the current policy changes, we will be notified by HR.
  - Information Security Training (linked in Portal)
  - Business Office Campus-Wide Trainings - watch for emails from Cheri Darby
  - Check out the @WOU Newsletter for more optional events and training
- Kudos/Recognition
  - Huge shout out from the Sippery, they donated 3 \$20 gift cards to us that we can now add to our staff of the month award options.
  - February staff member of the month is Cheri Darby....YAY!!!
  - The Pastega Nominations for the staff awards have been open. If you know of a staff member that deserves this award, please fill out the form that HR sent out recently.
- Public Comments - Anything for the good of the order?
  - The Board of Trustees reception is next week, and Alexis is looking for one unclassified



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- staff member to join. If you are interested, please reach out to Alexis today as they need the RSVP's by tomorrow.
- Today is the last day to join the WOU General Scholarship Review committee. If you are interested please reach out to Financial Aid today!
  - Abby's House is co-hosting a documentary screening called No Place to Grow Old. It is based out of Portland focused on older folks that are homeless. It starts at 6pm in ITC211. It is open to the public, please join to support this documentary and the folks who are experiencing homelessness.

### Adjourn

### Upcoming

- Next meeting: March 4, 2025
- Guest: WOU President, Dr. Jesse Peters



WOU Banner Project Staff Senate: 2/18/25

# Agenda

1. Problem Statement
2. What Are We Doing and Why
3. Optimization Areas
4. Overall Banner Plan
5. Timeline
6. Future State Examples
7. Project Governance
8. Recent Activities
9. Organizational Change Management Updates
10. Appendix



# Problem Statement

1. WOU Banner adoption 30 years ago.
2. WOU upgrades don't reflect current industry best practices.
3. 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 (in 3 years).
3. WOU campus operations, including Banner, are materially more efficient with significantly less risk.



# What are we doing in this project?

The WOU Banner Optimization project aims to **address some of the key themes that emerged from the UBAC (University Budget Advisory Committee) survey**, which gathered input on improving operations and systems, while adhering to legislative restrictions on the **use of the \$2.1M in Sustainability funds**.

Survey respondents pointed to the need to modernize systems and processes, reduce overall effort, remove customizations, make work enjoyable, and fully utilize all modules of the banner software suite.

The 11 main focus areas to be addressed by the WOU Banner Optimization project on the [Banner Optimization Site](#).

# Why are we doing the project?

Accomplishing this will allow functional staff to become more effective and agile.

Banner will be SaaS (Software as a Service) ready and the total cost of ownership for the institution's ERP (Enterprise Resource Planning) will be reduced.

Technologies and software that integrate with Banner will be more feasible. All changes will be managed to have minimal impact on the administration and students.

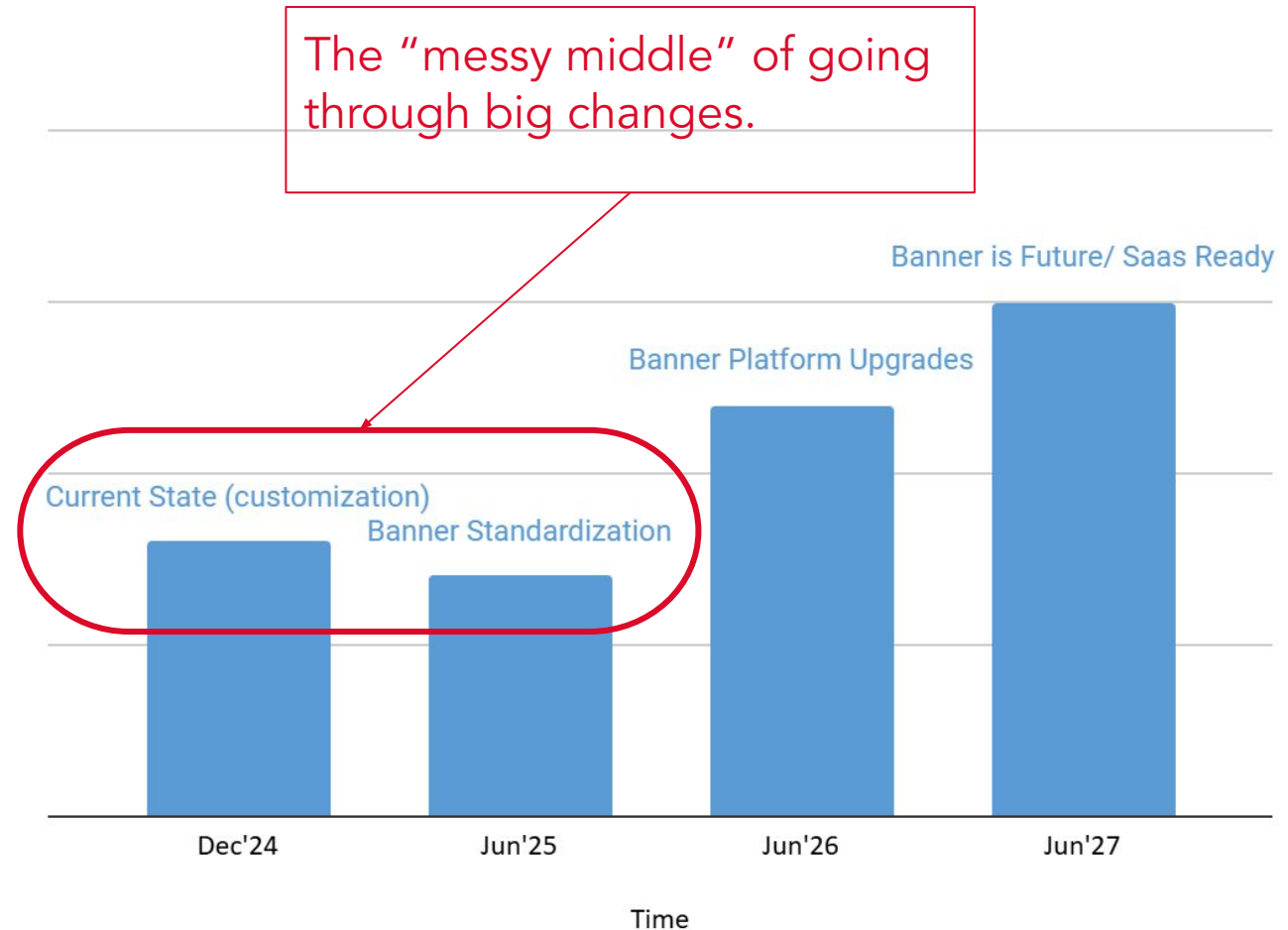
# Overall Banner Plan

Overall scheme:

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

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

Banner Efficiency





# Banner Optimization Areas (FY25)

1. Modernize Web Access to Banner: *Banner 9 Self Service*
2. Deploy unused payroll features: *Web Time Entry*
3. Finish deploying all features of Banner Financial Aid
4. Implement a computer/software inventory and approval management system: KACE

# Banner Optimization Areas (FY26 & FY 27)

## **Fiscal Year 2026**

1. Improve Banner Student processes, including utilizing online forms
2. Deploy a new Identity and Access Management system
3. Align Portal to match Banner's new web interface
4. Remove Banner Finance modifications by utilizing baseline Banner

## **Fiscal Year 2027**

1. Document and update Banner Accounts Receivable processes
2. Add the Banner Grants module for TRI
3. Expand Portal into an Intranet for WOU

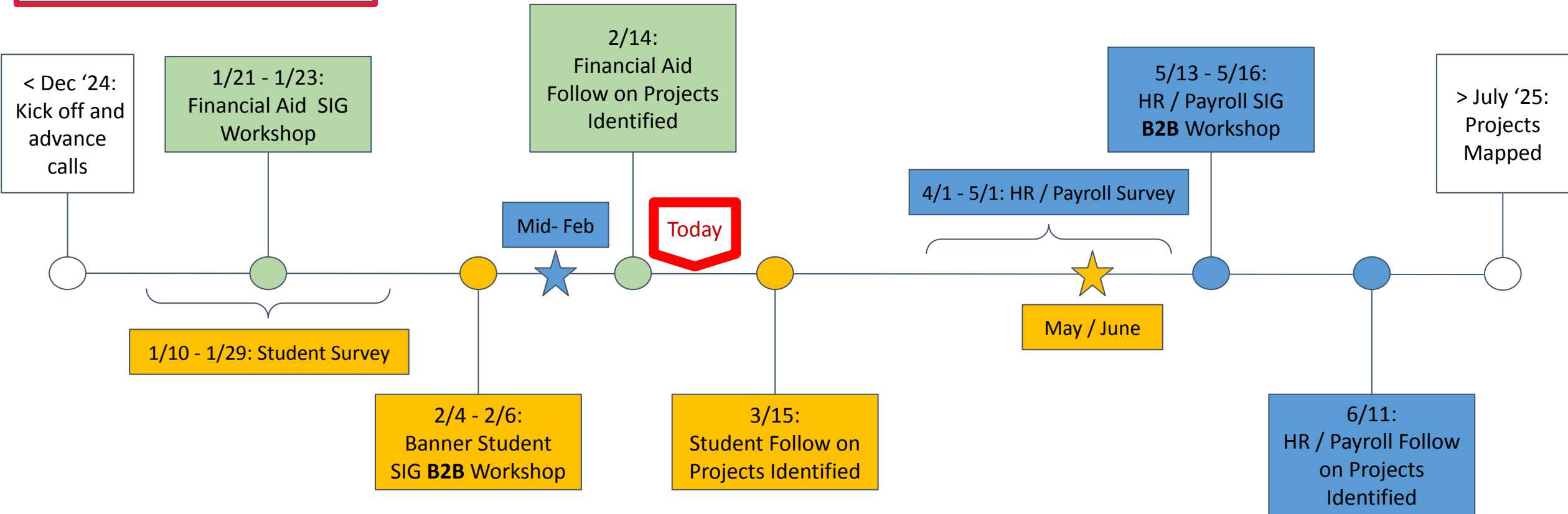


### Legend

Financial Aid Related
Student Related
HR / Payroll Related
Limited Duration Employee - ★

# Phase 1 Timeline

(no change since 01/31/25)



# Future State Example - B9 Self Service

Litterer, Thomas E.

[My Profile](#)

[My Team](#)

### Leave Balances as of 02/17/2025

Sick Leave in hours	182.01	Vacation Leave in hours	118.96	Special Day Leave in hours	8.00
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[Full Leave Balance Information](#)

### Pay Information

Latest Pay Stub: 01/31/2025      [All Pay Stubs](#)      [Deductions History](#)

### Earnings

### Benefits

### Taxes

### Job Summary

Chief Information Officer E99778-00, UCS Computing Services, Green, Michael J.      [Job Information](#)

### Employee Summary

**Status:** Active  
**Full Time Part Time Indicator:** Full-Time  
**Home Department:** UCS Computing Services  
**Check Distribution:** Earnings Stmt-Opt Out

### My Activities

[Enter Time](#)

[Approve Time](#)

[Approve Leave Request](#)


[Human Resources Website](#)

[Human Resources Forms](#)

[Print Credits](#)

# Future State Example - WolfWeb


### Finance Self-Service



[OPEN FINANCE DASHBOARD](#)


Quick access to financial information.

### Degree Progress



Contact Degree Department  
You have no Degree Progress data.


### General Self-Service



[OPEN GENERAL DASHBOARD](#)

Quick access to general information.





### Employee Self-Service



[OPEN EMPLOYEE DASHBOARD](#)

Quick access to HR and Payroll information.

### Google Apps

-  Gmail  
Access your WOU email
-  Drive  
Access your cloud storage
-  Calendar  
Manage your schedule
-  Docs  
Create and edit documents

[DISCOVER MORE](#)

# Future State Example - Okta Login

https://wou-test.okta.com/oauth2/v1/authorize?client\_id=okta.2b1959c8-bcc0-56eb-a589-cfcfb7422f26&code\_challenge=7\_0NarFHm8zCToPdNXf9R

Connecting to 

Sign in with your account to access Okta Dashboard



Sign In

Username

ellism@wou.edu

Keep me signed in

Next

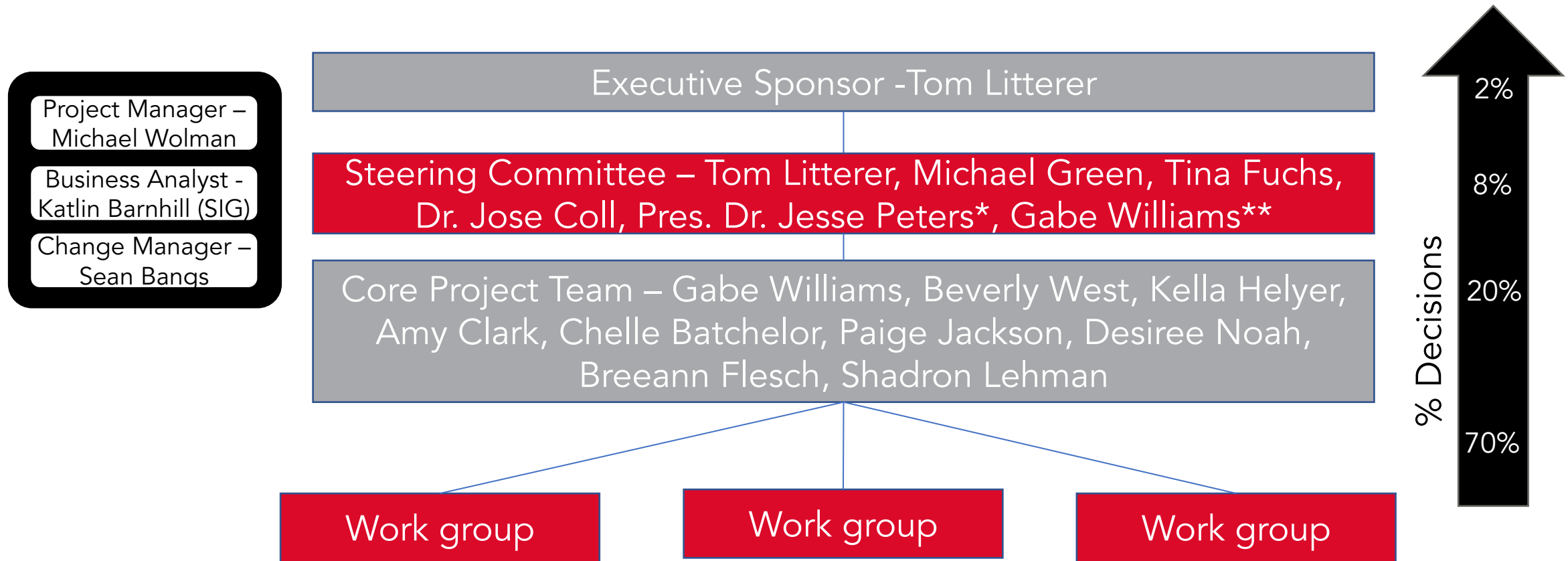
[Help](#)



Western  
UNIVERSITY

Where *You* Belong

# Banner Project Governance Structure



\*Optional

\*\*Non-voting member, also the Product Owner

# Recent Activities

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Key Activities				
Activity	Date	Owner	Status	Comments
SIG / Fin Aid Workshop	1/21-23/25	Gabe/Kella	Complete	High Engagement
Email with website link	1/23/25	Tom	Complete	Good traffic to the page
1st Steering Committee meeting	1/27/25	Tom/Mike W.	Complete	Good 1st session. Good sharing of risks and potential actions.
Purchased IAM software, Okta	1/31/25	Ellis/Tom	Complete	Selected Okta from 3 evaluated solutions for IAM
Banner Student Workshop	2/4-6/25	Gabe/Amy	Complete	Excellent participation
Engage SIG re staff augmentation	2/07/25	Gabe/Sean	Complete	Agreement on SIG's ability to support; Next steps: Engage our teams to find the augmentation opportunities (02/13/25)
Fin Aid recommendations from SIG delivered	2/11/25	Gabe	Complete	This is the "To Do" list for work in this area
Staff Senate presentation	2/18/25	Tom	On Track	NOW
2nd Steering Committee meeting	3/05/25	Tom/Mike W.	Not Started	





# Organizational Change Management Updates

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Raising our Banner Activities	Date	Audience
President Peters pre-kickoff email	11/20/24	Project leadership
Kickoff with readahead materials	11/25/24	Project Leadership
Briefing to University Council	12/11/24	University Council
Pres. Peters Jan'25 Campus Update	01/06/25	WOU
Spring 2025 response to Spring 2023 Ad Hoc report	01/20/25	Northwest Commission on Colleges and Universities (NWCCU)
Sponsor & VP F&A public announcement emails	01/23/25	WOU
WOU project website launch	01/23/25	WOU
1st Steering Committee Meeting	1/27/25	WOU Leadership



# Appendix

# 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.



# Action Plan for FY25

Milestone	Duration	Actual / Predicted Timeframe
Back to Basics Preparation (Financial Aid*, HR**, & Student)	2 months	Dec'24 - Feb'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

\* Financial Aid will have customized workshop, not B2B standard

\*\*HR current scheduled for May

[External Copy: HECC - Banner Optimization detail 2024](#)

# Risks & Issues

Category	Activity	Date Identified	Additional Information
Issue	HR / Payroll B2B pushed to May 13th pushing deliverables to the end of Phase 1	12/19/24	<p>Due to scheduling conflicts with payroll and regulatory reporting, the HR / Payroll B2B is scheduled for May, past the initial time frame of Feb/March. It is expected that the output of the B2B engagement will complete by the end of phase 1.</p> <p>Another SIG advanced call will occur in April to re-engage. Additionally, to help mitigate impact of the delayed scheduling, HR is proactively working on already known needed changes. This should lessen the backlog that comes out of their May session.</p>
Risk	Risk of low engagement from extended team which could lead to reduced input for B2B and workshop sessions	12/19/24	<p>Without extended team engagement in onsite activities and surveys SIG may not have enough information to determine future opportunities.</p> <p>The initial financial aid workshop had high participation and survey results for the Student group has a response rate of 59% (19/32) as of January 24th. Additional OCM activities are ongoing to mitigate the risk of low engagement.</p>
Risk	Limited Duration Employee hiring may take longer than anticipated	12/16/24	<p>Areas designated for receiving a limited duration employee may take longer to fill the roles than planned. There is a risk the hiring could fall outside of funded time period. The impact could see the teams engaged in Banner Optimization over capacity with operations and project activities.</p> <p>Currently exploring options with SIG resources backfilling operations while continuing to work with team leads in the hiring process.</p>

