PeopleSoft Recruiting Project Kickoff Meeting

Prepared by the Recruiting Project Team

Reesa Fickett, Project Manager (SDCOE)
Diana Boswell, Project Manager (CherryRoad)

SEPTEMBER 30, 2021

AGENDA

Welcome!
- Introductions

What is this project about?
- Project Description (The 'Why')
- Project Cost
- Project Organization
- Roles & Responsibilities
- Success Criteria
- Project Schedule

What are our next steps?

INTRODUCTIONS

Project Role	Person in Role
Executive and Project Sponsors	• Terry Loftus – CIO SDCOE • Beckie Benson – Executive Director SDCOE
Executive Steering Committee	• Dr. Yolanda Rogers - Assistant Superintendent SDCOE • Rick Roberts - CAB President and CIO Grossmont Union High School District • Dr. Olga West - CAB Vice President and Assistant Superintendent San Dieguito Union High School District • Charan Kirpalani - Director HR Poway
Project Managers	• Reesa Fickett - SDCOE • Diana Boswell - CherryRoad
Functional Leads	• Lynne Ehrlich - SDCOE • Shekhar Kasarle - CherryRoad • Rufus Satarla - CherryRoad

Reesa Fickett

Project Management Professional (PMP)

Master's in Business Administration (MBA)

20 years of experience managing technology projects large and small

PM for Peoplesoft projects:
- Oracle Planning and Budgeting Cloud Service (PBCS)
- ACH for Vendors

Lynne Ehrlich

25 years PeopleSoft HCM Experience
- Applicant/Employee Life Cycle Expertise
- Analysis, Testing, Implementation & Support

Bachelor's in Computer Science (BS)

Master's in Counseling Psychology (MA)

Recruiting Experience:
- Implementations – USA and Canada
- Intuitive, Workflow, Onboarding, Data Integrity

Diana Boswell

22 years of PeopleSoft Consulting with CherryRoad Technologies, Inc, with various project roles:

- Project Director
- Project Manager
- Application Support Manager
- Testing Lead
- Module Lead

SDCOE Experience

- Project Manager – UX and PeopleTools Upgrade from 8.55 to 8.57 from May 2019-Jan 2020
- Project Manager/Module Lead – PS Financials and HCM Implementation from Jan 2014-Sept 2015

Bachelor of Science in Business Administration,
California Polytechnic State University
San Luis Obispo, CA

Shekhar Kasarle

24 years of PeopleSoft experience
(total 26 years of experience)

- PeopleSoft HCM and People Tools Certified
- Functional and Technical experience

PMI Certified for PMP

Bachelor of Engineering

Recruiting Experience:

- Worked in Recruiting since Ver 8.1
- Implemented Recruiting in English, Japanese, Traditional/simplified Chinese (multilingual)
- Implemented Talemetry

Rufus Satarla

21 years of Peoplesoft experience

Certified Peoplesoft HCM Functional Consultant

Bachelor of Engineering in Computer Science

Recruiting Experience:
- Implemented Recruiting Module for one of the large school districts
- Implemented Onboarding and Offboarding functionality on both public and private domain sectors
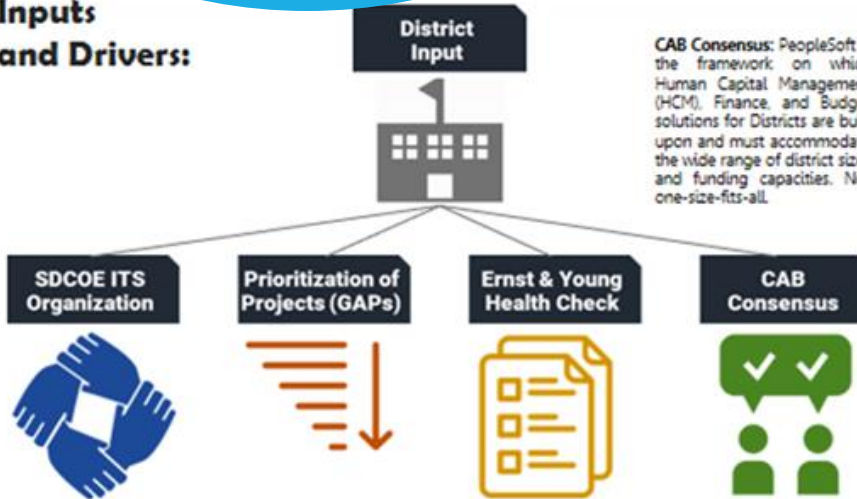
THE 'WHY'

Health Check Goals and Recommendations

- In our 2021 and beyond Roadmap plan, we Prioritized the Recruiting Solution work and project

PeopleSoft Customer Advisory Board (CAB)
Recommendations

1 Complete the already in-progress CAB-approved activities.

2 Invest in keeping the PeopleSoft environment current through maintenance and support.

3 Focus first on ensuring that people are in the system properly.

4 Actively promote the use by Districts of underutilized features through CAB participation and use of existing support material.

5 Districts and CAB/SDCOE actively review and improve their business processes and make the necessary changes to maximize the value of PeopleSoft to their organization.

6 Revisit this workplan every six months, including review of GAPs, the EY Health Check, and regulatory changes.

Inputs and Drivers:

District Input

CAB Consensus: PeopleSoft [ ] the framework on whic[ ] Human Capital Managemen[ ] (HCM), Finance, and Budge[ ] solutions for Districts are bui[ ] upon and must accommoda[ ] the wide range of district siz[ ] and funding capacities. No[ ] one-size-fits-all.

- **SDCOE ITS Organization**
- **Prioritization of Projects (GAPs)**
- **Ernst & Young Health Check**
- **CAB Consensus**

THE 'WHY'

The PeopleSoft Recruiting Project will eliminate the need for third-party recruiting systems and help ensure that personal information is included in the system properly and securely.

- Create a job opening
- Post a job to EDJOIN, the district website, and the SDCOE PeopleSoft job site
- Screen applicants
- Provide email notifications to applicants, hiring managers, interview team, etc.

- Provide interview questions, content, and appointments
- Automate the pre-employment process, extend job offers, and notify candidates
- Add a new employee into PeopleSoft once offered a position with a district

The PeopleSoft Recruiting Project encompasses **onboarding and offboarding**, plus the implementation of PeopleSoft modern user **interfaces**, **navigation**, and **fluid solutions** that support the districts' business processes.

The implementation will also enable functionality for job posting for both internal and external candidates on the SDCOE primary career site and each school district's career site page.

Our Customers:

1. Alpine
2. Cajon Valley
3. Encinitas
4. Escondido High
5. Grossmont
6. Lemon Grove
7. Mountain Empire
8. Poway
9. Ramona
10. SDCOE
11. Solana Beach
12. South Bay
13. Chula Vista
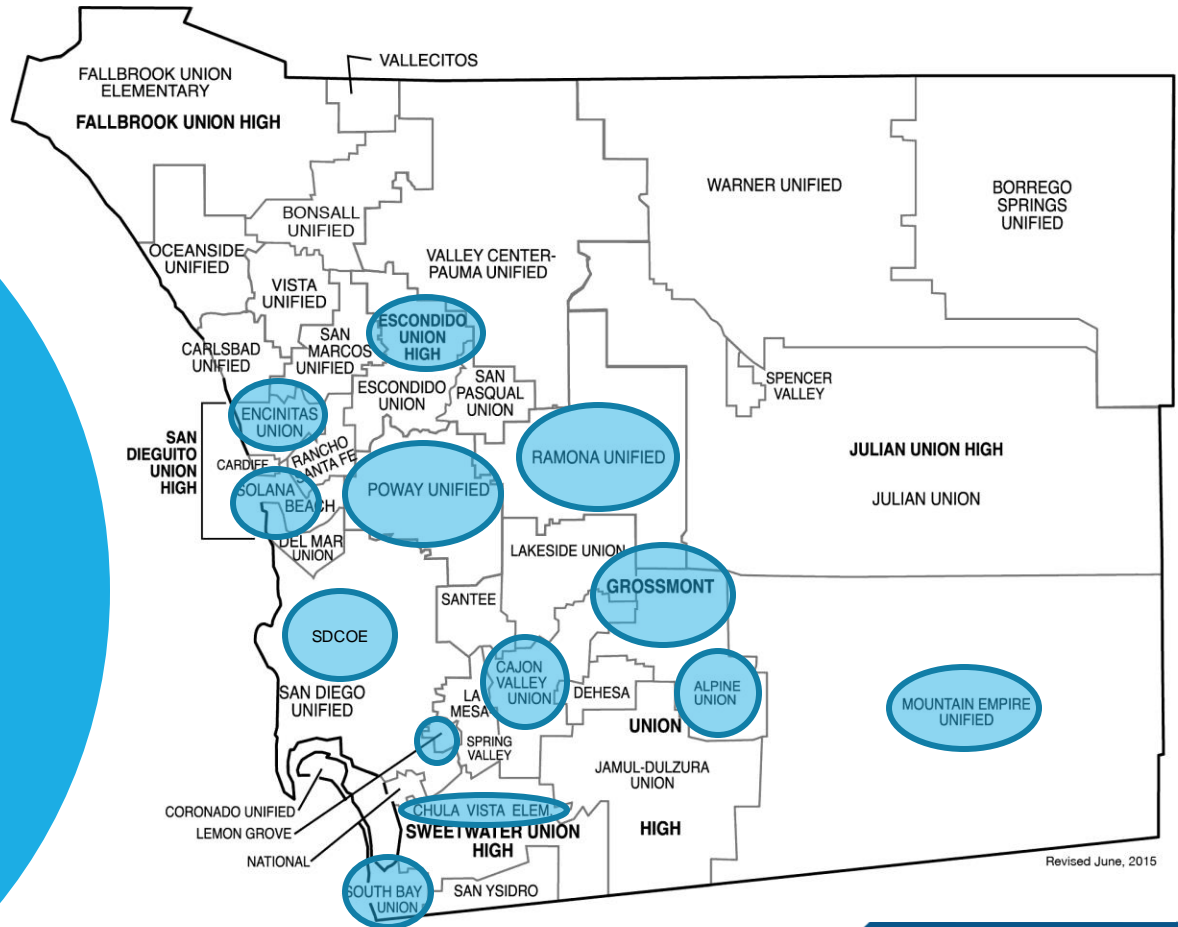
NO ADDITIONAL COST!

PROJECT COST

ESSER II funding will be used to cover the external costs of the Recruiting Project!

- Consulting cost for the design
- Configuration
- Programming
- Testing
- Training
- Tools/plug-in

- Project management
- Change management
- Support of implementing recruiting and post support for issues of the system
- Automating integration, user interfaces, and portal career sites

PROJECT ORGANIZATION

Executive and Project Sponsors	Project Manager	Executive Steering Committee	Core Project Team	District Extended Team Stakeholders
● **Terry Loftus** CIO SDCOE ● **Beckie Benson** Ex. Dir. SDCOE	● **Reesa Fickett** SDCOE ● **Diana Boswell** CherryRoad	● **Dr. Yolanda Rogers** Asst. Sup. SDCOE ● **Rick Roberts** CAB President and CIO Grossmont Union High School District ● **Dr. Olga West** CAB Vice President and Asst. Sup. San Dieguito Union High School District ● **Charan Kirpalani** Dir. HR Poway	● **Andy Esserman** Sr. Dir. SDCOE ● **Functional:** Lynne Ehrlich (SDCOE) and Shekhar Kasarle & Rufus Satarla (CherryRoad) ● **Technical:** Steve Clark & Tatiana Patton (SDCOE) and Saurabh Marathe (CherryRoad) ● **Testing:** Shauna Stark ● **Training:** Barbara Thiss ● **Support:** Matthew Swartout	● Alpine ● Cajon Valley ● Encinitas ● Escondido High ● Grossmont ● Lemon Grove ● Mountain Empire ● Poway ● Ramona ● SDCOE ● Solana Beach ● South Bay ● Chula Vista

ROLES & RESPONSIBILITIES

Project Role	Responsibilities
Executive Steering Committee	• Key people that assist the project manager in making decisions and moving the project forward • Provides leadership in support of the project on behalf of stakeholders • Resolves issues escalated by the project manager or project team
Project Manager	• Oversees the project work plan through management, review, and prioritization • Leads project team that is responsible for achieving the project objectives • Responsible for ensuring project goals, objectives and deliverables are accomplished on time, on budget • Creates project plan and deliverables with project leads • Schedules and facilitates project team meetings • Provides status and progress reviews to Executive Sponsor and Steering Committee • Manages and leads various team resources • Brings issues and recommends resource and policy changes to the Steering Committee as needed • Motivates and coaches team members • Coordinates to develop Communications, Risk Management, Training and Testing plans
Project Core Team & District Extended Team Stakeholders	• Assigned full or part time to project activities • Provides source information to the team • Provides business understanding of the organization • Represents the user area in identifying procedures • Reviews and confirms major products for the project • Participates in requirements gathering sessions, design and User Acceptance Testing (UAT) • Watches recordings for any sessions they are unable to attend

SUCCESS CRITERIA

Upon completion of this project, our Stakeholders will:

Reduce manual operation for setting up new employees

Receive direct system access for posting open positions and managing the hiring process

Utilize a more intuitive user interface

Utilize an automated and streamlined Recruiting process

Utilize a standard system process rather than manual or disconnected processes

NEXT STEPS…

Invitations will be sent for:
- Demonstration Workshops
- Requirements Gathering Sessions
- Biweekly Prototype Review Sessions
- UAT Preparation training
- Deployment "Train the Trainer" session

Let Reesa Fickett know if there are additional project team members from your District.

This project will be in conjunction with a general Tools upgrade as well as a selective PUM for recruiting which means more Fluid navigation across PeopleSoft