

Cornerstone Forum



Before We Begin...



We are recording. Attendees have been placed on mute.



Submit questions for the presenters through the Q&A function.



We will address questions throughout the meeting.



Meeting materials will be available online for download.

On the Agenda

Program Overview

Concur Travel/Expense
Update



Michele Norin
Senior Vice President
and Chief Information Officer

On the Agenda

Scarlet Journey – CRM

Student Experience
Improvement Initiative

Human Resources /
Payroll Transformation
Initiative

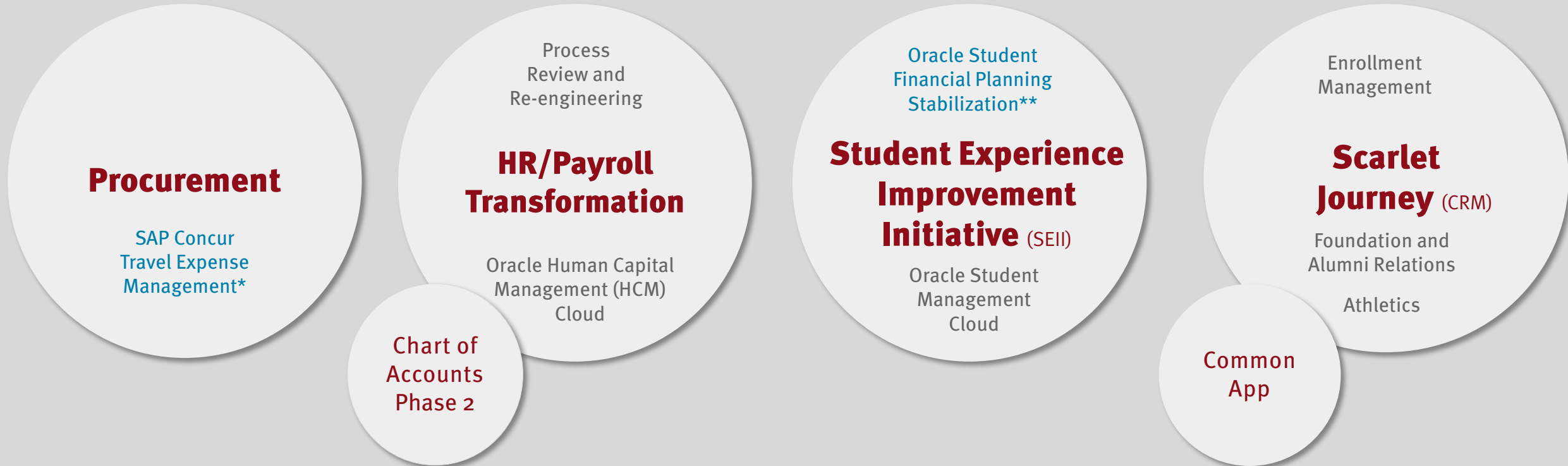


John V. Fahey

Vice President for UFA Operations
and Project Executive

Program Overview

Current Initiatives



* New system launched on July 1, 2024

** Oracle Student Financial Planning system implementation completed September 2021

SAP Concur Travel and Expense Management

Background

Enhanced travel and expense management in a single SAP Concur system providing a simple, all-inclusive, mobile-ready experience that meets policy and university traveler needs.

This includes:

- A consolidated travel and expense portal to book flights, hotels, and car rentals for domestic and international travel
- A complete credit card management system to support all credit card activities
- A process for pre-trip approval
- Cash advance requests

Current statistics



- # Expense reports, paid through September 13, 2024: **6,522**
- Expense reports totaling: **\$4,624,605.21**
- # Travel, booked since July 1, 2024: **3,332**
- Reservations totaling: **\$1,825,065.26**
(for air and Amtrak)

Constituent Relationship Management

(CRM): Scarlet Journey

Salesforce – Enrollment Management

Background

Currently, in the fourth academic year application cycle since the initial implementation of Scarlet Journey—a multi-year, universitywide Constituent Relationship Management (CRM) implementation built using Salesforce. The program has enabled Rutgers to create exceptional experiences and impactful relationships with its constituents through a connected understanding of needs, improved interactions, and tailored services.

Accomplishments

- Residency updates including EOF review automations
- New fields added including preferred names, personal email, and New Brunswick Honors
- Additional field validations for state abbreviations and graduation date
- Integration of School of Dental Medicine applicant data
- Migration of Mason Gross School of Arts application data from SlideRoom to Slate

Current Status

- SRAR launch for transfer students
- Integration of Five 9
- Assessing possible replacement of current event management system
- Requirements gathering underway with Rutgers Law School to integrate data into Salesforce

Next Steps

- Mid-year admissions
- Prioritization and implementation of enhancements for AY 26-27 cycle to be launched in August 2025

Common App

Background

In August 2023, Rutgers launched the Common App—a hosted, online college application which allows students to apply to more than 1,000 member colleges and universities for first-year undergraduate applications—streamlining the data entry process for applicants.

Accomplishments	Current Status	Next Steps
<ul style="list-style-type: none">Completed integration of official high school transcripts into Rutgers systems	<ul style="list-style-type: none">Planning for implementation of “direct admits” for the next application cycle, which will launch in August 2025	<ul style="list-style-type: none">Complete AY 25-26 cycleImplement enhancements for AY 26-27

By the Numbers: Salesforce/Common App

Applications Submitted

	AY2022/23 *	AY2023/24 *	AY2024/25	AY2025/26 *
Camden	16,908	22,868	46,121	2,145
New Brunswick	105,982	113,860	155,820	8,942
Newark	24,388	29,815	52,037	2,044
Rutgers Health	2,383	3,590	5,197	1,246
Total	149,661	170,133	259,175	14,377

AY 22-23, AY 23-24 include SF only, AY 24-25 includes SF and Common App
 AY25-26 reflects total number of applications processed as of September 16, 2024

Data does not include information from the medical schools, Rutgers Law School, or the Rutgers School of Dental Medicine
 Number of applications by campus above are not “unique” applications and includes multiple school applications for single applicant

* Does not include undergraduate applications from the School of Health Professions (SHP)

Rutgers Foundation/Scarlet Journey

Foundation and Alumni Relations

Transforming systems to modernize and advance operations at the Rutgers Foundation allows work at scale.

Status	Next Steps
<ul style="list-style-type: none">• Launching phase II end of October 2024<ul style="list-style-type: none">• Campaigns• Gifts• Engagement• Reporting• Marketing Cloud connection	<ul style="list-style-type: none">• Begin sunseting legacy systems and will be fully live in the new Affinaquest system

Student Experience Improvement Initiative

Student Experience Improvement Initiative (SEII)

Background

The Student Experience Improvement Initiative (SEII) project advances the university's dedication to providing seamless, integrated, consistent, effective, and responsive services that meet student needs by focusing on improving student service levels, business processes, compliance risks, technology, and supporting organizational structures.

Accomplishments

- **2019:** Opened One Stop Shops on campuses in Camden, Newark, and New Brunswick
- **2021:** Launched Oracle Student financial Planning (OSFP)
- Enhanced OSFP reporting and analytics capabilities
- Completed FAFSA simplification related updates and changes in OSFP

Current Status

- 24-25 Aid Year processing in progress for packaging, disbursement, billing and refunds

Next Steps

- Kick off Student Management Cloud business process review (BPR)
- Redesigned aid process reconciliation processes and reporting
- Implementation of new case management process
- Continue working on system enhancements and updates

Oracle Student Financial Planning (OSFP) Update

Financial Aid Packaging

Fall 2022 and Spring 2023 Financial Aid Packaging

Students Provided with Financial Aid Packages

New Brunswick	33,442
Newark	9,661
Camden	5,645
RBHS	3,706
Total	52,454

Fall 2023 and Spring 2024 Financial Aid Packaging

Students Provided with Financial Aid Packages

New Brunswick	35,894
Newark	9,755
Camden	5,670
RBHS	4,164
Total	55,483

Fall 2024 Financial Aid Packaging

Students Provided with Financial Aid Packages

New Brunswick	31,271
Newark	8,885
Camden	4,867
RBHS	3,242
Total	48,265

- The total number of students packaged by OSFP increased by **3,029** from 2022-23 to 2023-24.
- *The total number of students packaged by OSFP for fall 2024 alone approached the total number of students packaged in fall and spring combined from the last two years.*

Oracle Student Financial Planning (OSFP) Update

Disbursed Financial Aid

Fall 2022 and Spring 2023 Disbursed Financial Aid

	Amount of Disbursed Financial Aid	Students with Disbursed Financial Aid
New Brunswick	\$405,774,258	25,774
Newark	\$128,779,327	8,151
Camden	\$84,900,654	5,314
RBHS	\$144,374,158	5,280
Total	\$763,828,397	44,519

Fall 2023 and Spring 2024 Disbursed Financial Aid

	Amount of Disbursed Financial Aid	Students with Disbursed Financial Aid
New Brunswick	\$428,220,095	26,610
Newark	\$136,155,537	8,242
Camden	\$90,389,264	5,244
RBHS	\$136,371,083	5,106
Total	\$791,135,979	45,202

Fall 2024 Disbursed Financial Aid

	Amount of Disbursed Financial Aid	Students with Disbursed Financial Aid
New Brunswick	\$199,136,336	22,014
Newark	\$62,840,840	7,236
Camden	\$37,922,055	4,155
RBHS	\$62,114,141	2,209
Total	\$362,013,372	35,614

- The total amount of financial aid disbursed increased by approximately **\$27.3MM** between 2022-23 and 2023-24
- The total amount of financial aid disbursed in fall 2024 represents an increase of approximately **\$45.6MM** over the same period last year

Student Management Cloud (SMC) Business Process Review (BPR)

Background

- An extensive business process review is needed across the university, its campuses, and functional areas to complete design for future state implementation of the Oracle Student Management module and overarching Oracle Student Cloud.
- Common, efficient, and less complex processes across the university's campuses are necessary for the implementation to succeed. Reengineered processes will allow staff to focus on higher value-add work and spend more time working directly with students to support their success.

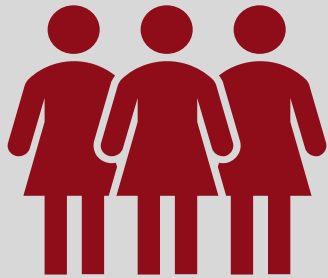
Current Status

- Project Planning
 - Completed draft Project Charter and Project Management Plan defining the vision, mission, and guiding principles of the project and how we will work together to accomplish project goals
 - Planning activities are underway for engagement and buildout of project governance committees
(Executive, Steering, Advisory)
 - Preparing to review Project Charter with Executive Committee

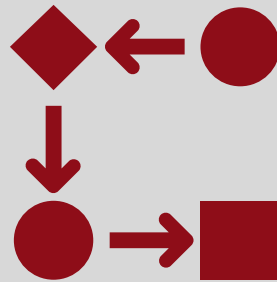
HR/Payroll Transformation Initiative

HR/Payroll Transformation Initiative

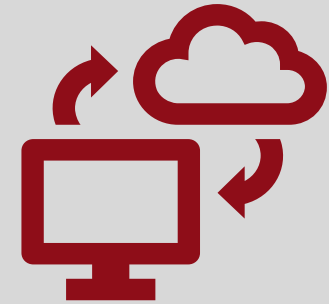
- Transforming how Rutgers works, individually and collectively
- Three elements: People. Process. Systems. The three MUST go hand-in-hand.
- The work we've done—with engagement across Rutgers—has led us to this point.



People



Process



Systems

HR/Payroll Transformation Initiative

Given the many complex requirements that require in depth analysis and configuration, new business processes and continual assessment, a decision was made to **extend the go-live date for Oracle HCM by six months, to July 1, 2025.**

- Allows us to spend the necessary time designing the solutions, socializing the new business processes and thoroughly testing the system.
- Ultimately, we also want to ensure we provide ample time and opportunity for testing, and for everyone in the Rutgers community to complete training before the new system is launched.

HR/Payroll Transformation Initiative

- ✓ Completed **Systems Business Process Review (BPR)**
Technical requirements gathering
- ✓ Completed **Current State Assessments for Functional Business Processes**
39 weeks, 150+ meetings, 500+ hours, 200+ participants
- ✓ Completed **Interactive Design and Prototype sessions**
Core Team + Design Review Board (80+ members from all four CLUs and central administration offices)
- ✓ Completed **Configuration Sprints**
11 weeks - detailed requirements review and design / build of system configurations
- ✓ Completed **Design Confirmation**
- ✓ Completed **Phase One system configuration**
- ✓ Completed **First two rounds of systems integration testing**

Next steps

2024

October 1 Systems integration testing continues with SIT 3

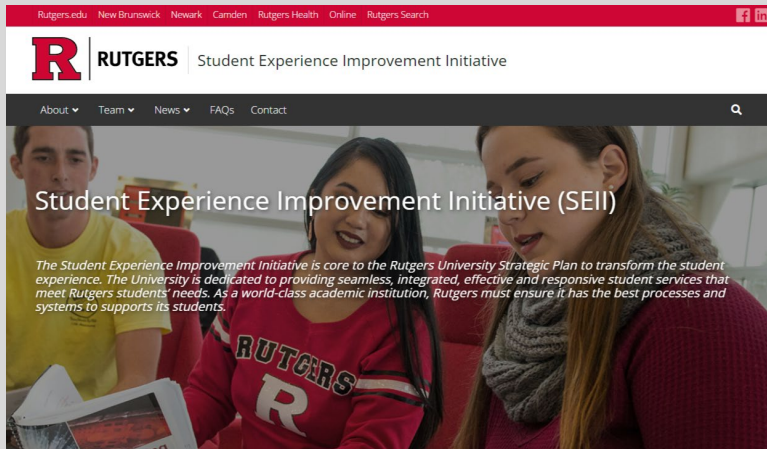
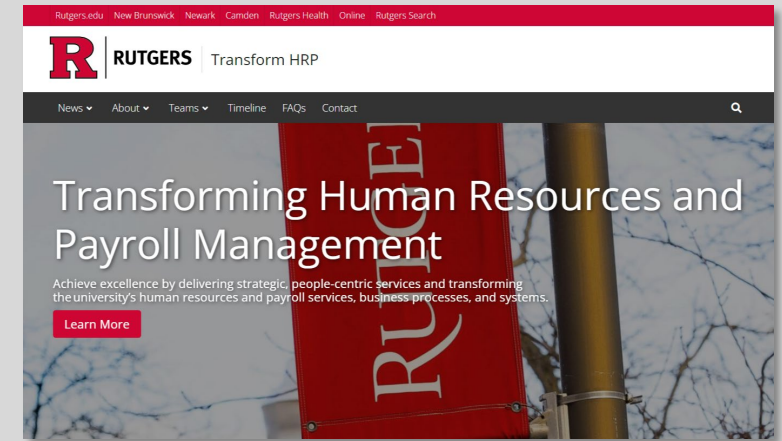
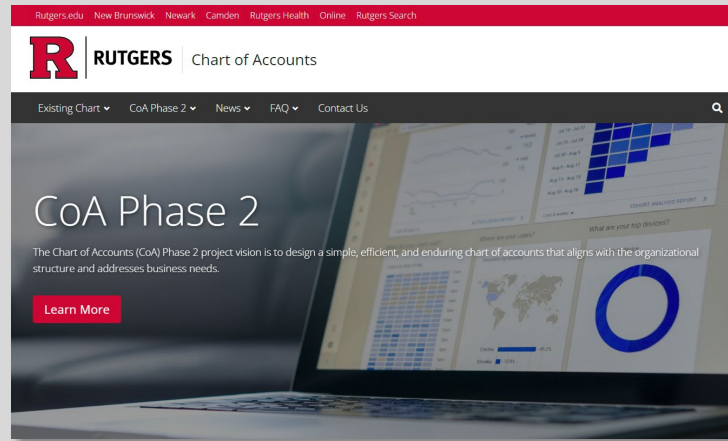
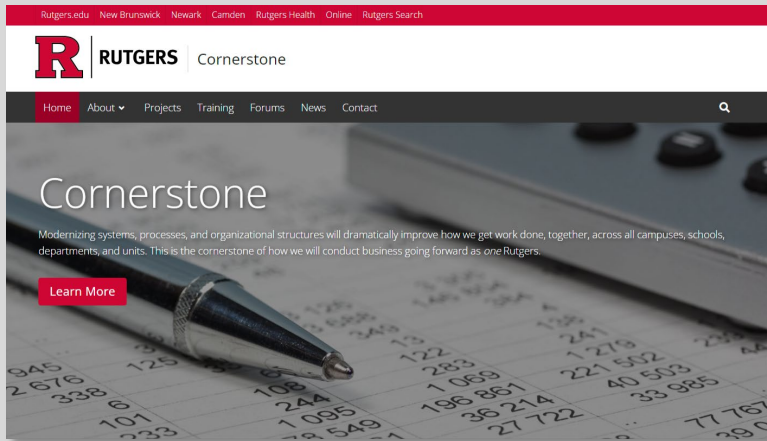
October 7 Kick off future state process review begins

2025

January Parallel payroll testing begins

Spring Preparations and planning for User Acceptance Testing & Training begin

Project Management Office Websites



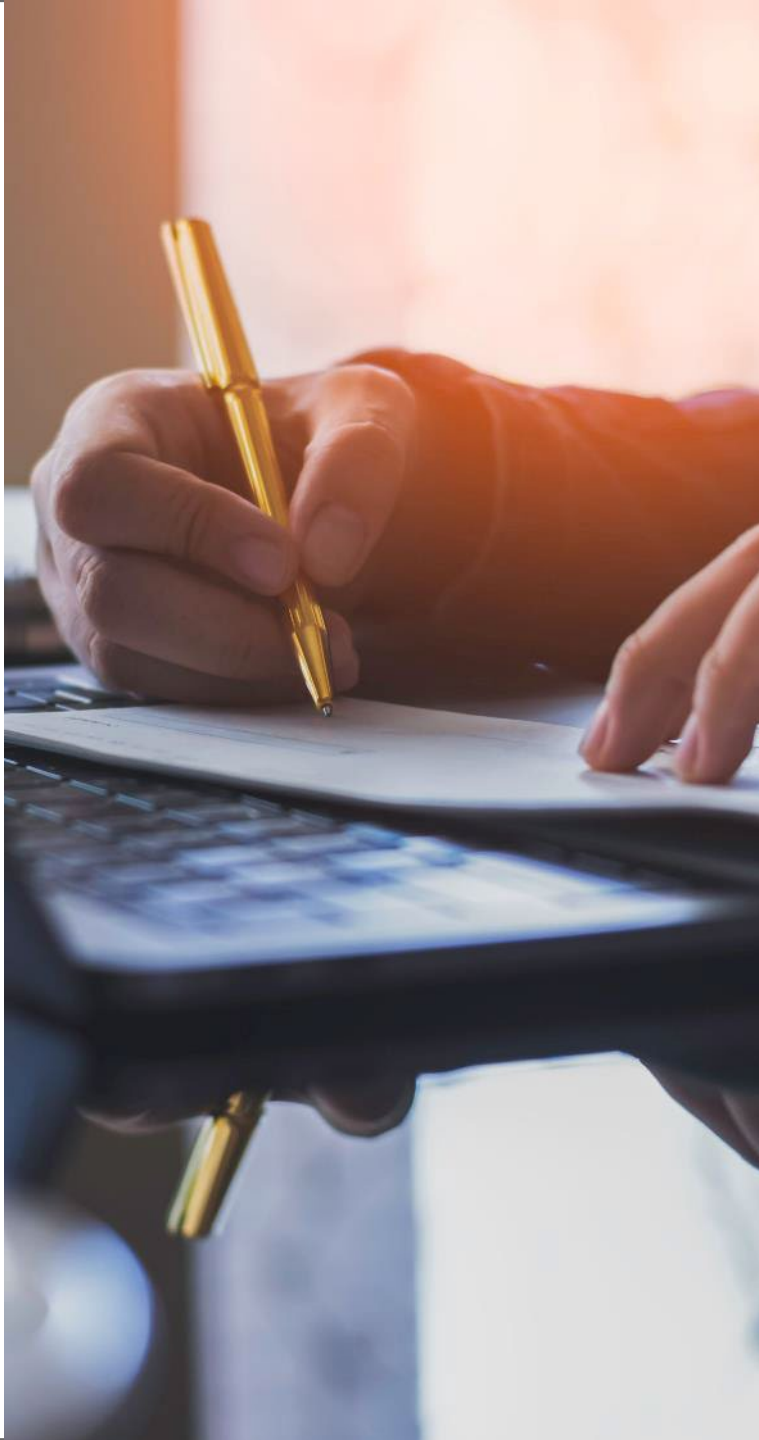
For more information on the UFA Project Management Office, visit the [UFA website!](#)

Note: Images contain hyperlinks that can be clicked to access featured project websites.



What to expect going forward

- ✓ Collaboration. Communication. Engagement.
- ✓ Universitywide Cornerstone newsletter and forums
- ✓ Regular website updates
- ✓ Change agent networks



Questions

Cornerstone Forum



Thank you!