

CMU 2811
Colorado Mesa University HR & Finance Software and System
Integration Services
REQUEST FOR PROPOSAL:
3.2) Key Personnel

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1.0 Key Personnel

This section describes the role of each Key Personnel – individuals that CMU and the SI agree are key to the success of the engagement. The Systems Integrator (“SI” or “Supplier”) may decide that an individual will fulfill multiple roles. Prior to finalizing the contract between both parties, these Key Personnel shall be named by the SI and approved by CMU in accordance with the executed Master Services Agreement (MSA). This document outlines the Key Personnel that is required from the SI. We recognize that you may have other dedicated/near-dedicated sub-team leads to fill roles that require deep functional or technical expertise in some focused areas of complexity and/or risk. For the purposes of this RFP, these sub-team leads should be included in your staffing plan and pricing but will not be classified as Key Personnel.

The following guidelines shall apply to Key Personnel:

- It will be to the SI’s advantage to include Key Personnel as part of your Orals presentation team
- CMU reserves the right, at any time during the evaluation process or implementation activities, to request a change in a Key Personnel associate if sufficient performance / value vs. cost is not being achieved
- Ideally, all Key Personnel are assigned to the CMU implementation throughout the program life cycle, as per the agreed staffing plan. If a Key Personnel associate needs to be replaced prior to their planned roll-off date, and the circumstances are driven by the needs of the SI or the Key Personnel associate, CMU would require 30 days’ notice.
 - CMU reserves the right to interview and approve the replacement resource
 - Such an event would require at least 2 weeks (or another mutually agreeable duration) of knowledge transfer from the departing associate to the replacement resource. CMU will be billed only for the time of one resource during the overlap period.

1.1 SI Key Personnel Retention

It is important to the success of the program to establish a capable, retained group of key personnel who are fully knowledgeable about CMU culture, resources, processes, and technology. The Supplier should describe and commit to a key personnel retention approach to encourage maximum retention throughout the course of the project.

CMU may intend to include a penalty clause in the final MSA and Scope of Work documents to further incentivize maximum retention. If attrition of key personnel surpasses a determined level (e.g., 5% or another amount to be mutually determined), the Supplier shall incur a financial penalty or holdback of payment.

1.2 Listing of SI Key Personnel

Titles / Positions
1. Program Lead / Executive
2. Project Manager
3. Enterprise Architect
4. Business Process Architect
5. Process Leads

Titles / Positions
6. Technical Development Lead
7. Testing Lead
8. Organizational Change Management & Training Lead
9. Reporting & Analytics Lead
10. Data Migration Lead

Note: Process lead roles can be combined or adjusted as appropriate.

2.0 SI Key Personnel Role Descriptions

2.1 Program Lead / Executive

Has successful experience with Higher Education organizations and has experience leading large-scale ERP-enabled transformations. The Program Lead or Program Executive has ultimate accountability for the success of the CMU-SI relationship and the successful execution of contractual obligations.

The general responsibilities include:

- Overall sponsor of CMU-SI relationship.
- Attend all Steering Committee Sessions.
- Focal point for escalation.
- Represent the interest of CMU regarding gaining access to resources, collateral, etc. in internal SI conversations.
- Provide industry thought leadership.

2.2 Project Manager

Has successfully deployed ERP for Higher Education organizations (or similar industry) in the past 3 years.

The general responsibilities include:

- Provides dedicated, daily project leadership and assistance to CMU Executive Sponsors and PMO.
- Navigates dependencies on related enterprise applications, processes, and information in dependent functional areas.
- Ensures timely and high-quality completion of all work products and deliverables for which the SI is accountable.
- Facilitates SI team collaboration with their CMU counterparts for all applicable activities; responsible for cross-team coordination of all resources and activities managed by respective teams. This includes resources, activities, and milestone dates associated with any 3rd party (i.e., chosen software vendor, other 3rd party software product vendors, other 3rd party services) resources that are part of the project team.
- Communicates proactively regarding issues and risk mitigation; ensures transparency and facilitates timely resolution.
- Provides consistent leadership and best practices advice regarding all project management and governance processes.
- Ensures scope, schedule, and budget are managed well; any changes proposed are managed tightly through governance for approval or denial.
- Manages interactions up, down, and across the CMU business and IT organizations.
- Key member of change control, review board discussions regarding potential design changes.

2.3 Enterprise Architect

Has successfully designed Enterprise Solutions for Higher Education organizations (Finance, HR, and Payroll)

The general responsibilities include:

- Understands overall application, integration, and data eco-systems within typical Higher Education organizations.
- Provides full life-cycle architecture expertise, working in collaboration with the CMU PMO and IT Operations Team, to deploy an optimized ERP solution that delivers the following characteristics in addition to those set forth elsewhere in the contract:
 - Leverages as many standard capabilities offered by the software as possible.
 - Is interoperable with all core Higher Education industry specific solutions (e.g., retained legacy and edge applications).
 - Conforms with existing IT standards.
 - Optimizes architecture to maximize technical performance and scalability.
 - Is compliant with the security policies.
 - Is flexible to incorporate solution changes and extensions that are upgrade compatible.
 - Is aligned with desired future state back-office and field operations capabilities.
 - Is designed with KPIs (Key Performance Indicators) / OKRs (Objective and Key Results) in mind to identify necessary points of data capture across systems and domains to ensure full metric tracking and value realization.
- Is experienced with the inherent architecture capabilities of the chosen software solutions as well as the overall integration and data architecture in hybrid environments (e.g., cloud-to-cloud, cloud-to-ground, third party bolt-on solutions, legacy integration, analytics/data warehouse integration, etc.).
- Helps ensure that the overall implemented solution integrates within CMU's application ecosystem, including legacy applications (custom and third party purchased applications) that are retained.
- Provides consistent architecture leadership and best practices advice regarding all architecture planning and execution activities.
- Assists appropriate CMU leads with infrastructure, test, integration, and data/analytics strategy and planning.
- Ensures that application architecture supports end-to-end process architecture requirements.
- Key member of change, control review board discussions and decisions regarding potential design changes.
- Has direct access to and knowledge of pre-built interfaces, integration frameworks and other re-useable objects relevant to CMU.
- Experience with Objectives and Key Results (OKRs), journey maps, and other frameworks, and can work with external teams to align objectives and facilitate journey objectives through design best practices.

2.4 Business Process Architect

Has worked with business stakeholders and technology SMEs to develop an enterprise view of business processes using standards and frameworks that help align technical solutions with end-to-end business requirements.

The general responsibilities include:

- Has demonstrated experience in Higher Education.
- Develops a business architecture strategy based on various end-to-end business scenarios that typically cut across modules or even different application vendor solutions.

- Applies a structured approach and methodology for capturing the key views of the enterprise as it relates to prioritized business outcomes and improved business performance metrics.
- Well-versed in business improvement root cause analysis and driving process changes/re-engineering aligned with the new technology enablers.
- Captures tactical and strategic enterprise goals that provide traceability through the organization and are mapped to metrics that provide ongoing governance to drive priorities, change, and adoption.
- Defines processes across functional and organizational boundaries; describes interactions with business partners such as customers and suppliers; identifies dependencies with other external systems that interact with the business.
- Defines data shared across the enterprise and the relationships between critical data needed for decision-making.
- Understands and helps align relationships, interactions, and information among different roles, department, business units, and business capabilities.
- Provides leadership to help define end-to-end testing scenarios.

2.5 Business Process Leads

Industry Subject Matter Experts of respective functional domains with experience implementing the chosen ERP solution. Process Leads are expected to apply Higher Education industry-specific knowledge and Intellectual Property such as pre-configured solutions/templates being brought in.

The general responsibilities include:

- Co-manages (with the CMU counterpart) the functional work streams including CMU and software vendor representatives. This would include any 3rd party (i.e., software vendor or additional services firms/contractors). Works in collaboration with the CMU SMEs to manage all activities and resources in their domain.
- Coordinates across teams to ensure proactive inputs into cross-functional issues; design/build/test activities so that end-to-end process and data flows and outcomes are achieved.
- Well-versed in business process improvement root cause analysis and in driving process changes / re-engineering aligned with the new technology enablers.
- Helps define data shared across the enterprise and the relationships between critical data needed for decision-making.
- Ensures timely and high-quality completion of all function-focused work products and deliverables, within their process domain, for which the SI is accountable.
- Works in collaboration with the CMU SMEs to complete knowledge transfer in a timely manner of all planning, design, configuration, testing, cutover, and go-live approaches, tools, methods, and documentation.
- Provides business process expertise and process specific best practices, advice regarding all business process design, incorporating customer journey mapping, configuration, end-to-end testing, process change communications/execution, and “train-the-trainer” activities.
- Understands industry practices and applicable labor regulations that need to be considered in the implemented solution.

2.6 Technical Development Lead

Has successfully led integration, interface development, data migration, and extensions of the chosen software in the past 3 years.

The general responsibilities include:

- Works with the software vendor(s) to ensure early (i.e., at beginning of Planning & Design phase) and stable creation of an instance to support a design and development environment.
- Ensures timely and high-quality completion of technical documentation and development objects in scope.
- Ensures adherence to all security (especially data security) requirements.
- Ensures that technical performance testing meets required processing requirements, including anticipated scalability to handle expected growth.
- Collaboration with the CMU IT Team and SI Development Team to complete knowledge transfer in a timely manner for all development / maintenance / testing approaches, tools, and methods. Provides best practices advice regarding all development and testing activities.
- Ensures proper configuration and coding standards are always followed and all code is compliant with the software vendor and CMU standards and does not jeopardize software vendor's ability to offer support and to perform updates/product releases.
- Has direct access to and knowledge of available pre-built interfaces, integration and data architectures/tools, or other re-usable objects relevant to CMU.
- Ensures technical knowledge transfer strategy is adhered to throughout the life of the project ensuring a smooth hand-off of support and development to CMU IT Team.
- Has a thorough understanding of available out-of-the-box software capabilities to ensure there are no unnecessary customizations or inefficient configuration leading to higher costs to implement and support. This is to include, but not be limited to, all industry accelerators/templates the SI and software vendor has at their disposal.
- Ensures integration with any and all technical resources provided by the software vendor or other key 3rd party partners that CMU may choose to have as part of the implementation team.
- Key member of change control review board discussions and decisions regarding potential design changes.

2.7 Testing Lead

Verifies and validates whether the implemented solution meets the specified functional and non-functional requirements. Works with the development team and applicable 3rd party vendors (software or services) to successfully integrate testing into each development phase.

The general responsibilities include:

- Implements quality assurance objectives and processes, monitors and evaluates testing results against the predetermined objectives, and applies recommended actions for improvements.
- In collaboration with CMU, establishes acceptance metrics for beginning and exiting all test cycles, including process testing, end-to-end testing, user acceptance testing, and performance testing.
- Provides support for application testing such as setting up test environment, identifying and developing test scripts, automating test processes, defects management and resolution.

- Provides responsive support for escalated problems.
- Conforms to data integrity policies and enterprise IT standards across systems security.
- Collaborate with CMU Testing Lead to adhere to testing documentation requirements and to deliver automated test execution capabilities for applicable test cases. This would include providing advice regarding appropriate test documentation and automation tools.

2.8 Organizational Change Management Lead

The OCM Lead should be:

- Experienced with effective management methods, tools, and techniques that the SI will apply to the CMU implementation.
- The OCM Lead should have experience with change impacting central/corporate resources as well as field resources.
- Familiar with and able to work within leading change management methodologies

The general responsibilities include:

- Provides dedicated, daily change leadership and assistance to CMU OCM Lead and Project Management Team.
- Facilitates SI Process Lead and Business Process Architect collaboration with their CMU counterparts for all change management activities, which include:
 - Stakeholder engagement, especially in areas of site-specific, leadership, or department resistance.
 - Early identification and clarification of high impact process change areas to impacted stakeholders; develops mitigation actions such as training, job aids, developing alternative approaches etc.
 - Assists with communications, planning, and execution of activities at corporate, project team, and BU/departmental levels.
 - Provides QA and oversight for training planning, development, and execution.
- Assists with Value Realization activities to leverage business benefits as change levers to drive optimal adoption.
- Assists with measuring the effectiveness of OCM activities, reporting on metrics, and adjusting plans based on assessments.
- Assists with sponsor and key stakeholder coaching.
- Conducts and documents change impact analysis.
- Identifies areas of resistance and assists with developing and executing plans to manage resistance.
- Provides focused direction and leadership, within the OCM team, to drive training planning, development, and delivery across business and IT domains.
- Provides thought leadership in planning and executing leading practices and training methods that are effective with a mix of traditional and digital learners.
- Helps CMU proactively plan for and deliver high adoption of the implemented solution.

2.9 Training Lead

The Training Lead should be:

- Experienced with industry-leading training development and delivery, tools, and techniques that the SI will apply to the CMU implementation.
- Experienced in training, facilitation, and coaching practices.

The general responsibilities include:

- Provides focused direction and leadership, within the OCM team, to drive training planning, development, and delivery across business and IT domains.
- Provides training assistance to support OCM activities and the specific training needs for each Business Process Team Lead and their associated sub-capabilities.
- Conducts training needs assessments and gap analyses for each impacted stakeholder group and customizes training plans accordingly.
- Measures the effectiveness of the Training Plan and adjusts as necessary.
- Facilitates SI Business Process Lead collaboration with their CMU counterparts for all change training planning, development, and delivery.
- Facilitates CMU Training Lead and Trainer stakeholder engagement, especially in areas requiring significant change and/or high adoption.
- With their CMU counterpart, develops interactive training sessions/modules that encourage engagement and provide immediate feedback to learners.
- Provides thought leadership in planning and executing leading practices and training methods that are effective with a mix of traditional and digital learners.
- Helps CMU proactively plan for and deliver high adoption of the implemented solution.

2.10 Reporting & Analytics Lead

Has in-depth knowledge of the ERP solution being implemented, including any pre-configured reporting templates, dashboards, and embedded analytics inherent in the chosen solution. Ideally, has Higher Education Industry experience. The Reporting & Analytics Lead will work closely with Enterprise Architect, Business Process Architect, Business Process Lead, Functional Leads, Technical Development Architect CMU team members to design, build and test reports.

The general responsibilities include:

- Partner with CMU to develop the Reporting & Analytics strategy.
- Manages CMU requirements to drive consistent and efficient reporting capabilities across processes to create reusable and cross functional reports.
- Provides best practices regarding user experience to fully leverage data and analytics in ERP solutions.
- Works with CMU SMEs to proactively ensure that information access and analytics are embedded in the process design to deliver real-time decision-making capabilities at all levels of the company.
- Provides design leadership regarding the need for and use of inherent (i.e., within the chosen software solution) and other existing (i.e., within the CMU ecosystem) data warehouse capabilities to drive cross-application reporting.
- Ensures timely and high-quality completion of all reporting and analytics work products and deliverables across the project.
- Works in collaboration with the CMU SMEs and the OCM team to complete knowledge transfer in a timely

manner.

- Helps ensure one source of truth and standardized data definitions to ensure consistency across reports and dashboards.
- Ensures reporting and analytics is Sarbanes-Oxley compliant along and partners with audit to define requirements.
- Understands how to translate OKRs and journey maps into solution design.
- Leads workshops to understand the current reporting process, process, owners, integrations and their specific challenges and pain points.
- Documents outputs and run play back sessions with the business teams.
- Runs detailed requirement reporting workshops with the functional teams.
- Creates and manages a workstream project plan.
- Manages the team's Issues & Risks.
- Provides weekly workstream status updates to the rest of the team.
- Works closely with the Functional / data and solution architect to identify any cross workstream gaps.
- Works with the solution architect to identify the potential products that would meet the reporting requirements.
- Completes design of the future "to be" reporting solution, analyzing business, functional and costs considerations.

2.11 MDM / Data Migration Lead

Has successfully managed Master Data Management (MDM) / data migration from legacy solutions to modern applications.

The general responsibilities include:

- Catalogs existing data sources and MDM Domains/attributes.
- Leads Design blueprinting sessions for MDM including MD design across key domains, workflows withing ERP and integration of MDM with ancillary applications.
- Assists with initial data exploration activities across MDM and Historical data/operational reporting.
- Assists CMU with cleansing and transforming data and moving data into the respective environments (development, testing, production, training/quality).
- Documents outputs and run play back sessions with the business teams.
- Creates and manages a workstream project plan.
- Manages the team's Issues & Risks.
- Provides weekly workstream status updates to the rest of the team.
- Works closely with the Functional / data and solution architect to identify any cross workstream gaps.
- Designs intuitive data translation mechanisms and fit to ERP template/bolt on solutions.
- Manages data migration activities required to start any new test cycle. Helps ensure the quality of data going into each cycle. Identifies and advises CMU regarding data issues that might limit some test cases from being executed.
- Provides knowledge transfer to allow CMU to run data migration in later test cycles or deployment waves.
- Analyzes data migration results and exceptions and helps resolve issues in collaboration with the CMU data team.