The right choice
Providing the right insight & experience for Maricopa County Community College District

Our proposal to serve
Maricopa County Community College District
March 2010
March 2, 2010

Mr. Keith Killourie, Buyer III
Maricopa County Community College District
2411 West 14th Street,
Tempe, AZ 85281-6941

Dear Mr. Killourie

Deloitte is pleased to have the opportunity to submit our response to Maricopa County Community College District (“MCCCD”) to provide Oracle/PeopleSoft Enterprise Systems Consulting and Related Services.

We have a strong tradition of successful delivery of projects; we serve clients across the United States and globally, in both the private and public sector, and especially within higher education. Our response underscores each of the qualities and values that MCCCD is looking for in a systems integrator:

• **Higher Education Insight:** We are proud to have been engaged by various higher education institutions to provide Enterprise Systems Consulting. This work has allowed us to develop key insights into the challenges and opportunities with large system integration in the Higher Education sector, some of which we recently published in our Point of View – ‘Start to Finish navigating the course of technology enabled change in higher education’, included as Attachment G of this proposal.

• **Extensive Oracle/PeopleSoft Experience:** Deloitte is the largest Oracle/PeopleSoft Global Alliance Consulting Partner, with over 3,500 experienced, dedicated consultants worldwide. Our team’s quality and value continues to be recognized as a leader in the marketplace locally, nationally, and globally. We have more than 500 seasoned professionals across Canada and the United States who specialize in serving colleges and universities who have completed over 100 Oracle/PeopleSoft implementations for higher education clients.

• **Significant PeopleSoft Version 9.0 and Higher Education Experience:** Our Oracle-PeopleSoft practice is a leader in providing professional services to the public sector in the United States and internationally. Our enterprise systems consulting delivery experience includes version 9.0 projects recently completed or underway in the higher education industry:
  - Implementation of HCM version 9.0 at **Virginia Community College System**
  - Implementation of Campus Solutions version 9.0 at **University of North Carolina-Chapel Hill**
  - Recently completed upgrade to Campus Solutions, Human Resources and Finance version 9.0 at **Sheridan Institute of Technology and Advanced Learning**
  - Recently completed upgrade to Campus Solutions version 9.0 at **Ryerson University**

• **Focus on Process and Change Management:** Defining efficient processes and focusing on change management are the keys to successful projects. Our approach is differentiated by our process transformation and change specialization, both areas that need “equal billing” with technology. Although, there will be limited change management required on the engagement, we include our Change Management specialists to help us determine that this important aspect of a technology transformation is taken into account in our project estimates.

• "**Under one Tent**": Deloitte is the only organization that, “under one tent”, has the experience, integrated tools, and market recognition to fully integrate the human capital, internal controls, change management, PeopleSoft ERP, strategy, Oracle Financials and IT work necessary to realize this technology transformation project for MCCCD.
• **World Class Project Management:** An organization that has delivered large-scale business transformation projects by investing in the tools, techniques and training programs necessary to allow the effective delivery of these initiatives. Our world class project management skills will be critically important to drive quality and timely delivery of the project deliverables including an accurate estimate of project costs.

• **Focus on Testing and Training:** An organization that works with your staff to design, plan, and execute effective and efficient testing and user training.

• **Independent:** Deloitte is a partnership that has built hardware and software company alliances to help bring high value to our clients without breaking our ability to be solution independent.

• **A Focus on Making You Successful and Self Sustaining:** An organization that is dedicated to the goal of knowledge transfer and making sure that internal capacity is developed in order to reduce future reliance on consultants for upgrades, enhancements, and support.

As requested by your RFP, we have kept our core proposal response to 25 pages plus the pricing schedules, exhibits and attachments. As you assess our response and discuss our value with our references, we hope you garner the same confidence in our delivery quality as our clients and market analysts. If there are any questions regarding our proposal, please contact me at +1 917 741 2140.

Sincerely,

Kathy Karich
Principal
Deloitte Consulting LLP
Kkarich@deloitte.com
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Proposal Requirements

4.1 Minimum Requirements

Deloitte meets all minimum requirements stated in your RFP in this section.

4.2 Specific Requirements

4.2.1 Client References (minimum of three requested)

Deloitte has had the privilege to work with a broad range of higher education, public and private sector clients delivering projects consistent with MCCCD’s requirements, as indicated in our responses to Sections 4.2.2 and 4.2.3 which summarize relevant client work. Deloitte has demonstrated experience covering all of the scope items listed within Section 5 of your RFP. In this section, we are pleased to provide the following four (4) contract references to demonstrate a sample of our relevant capabilities. All four are projects where Deloitte served as the prime contractor.

1. Virginia Community College System
2. Ryerson University
3. Sheridan Institute of Technology and Advanced Learning
4. Hobart and William Smith Colleges

<table>
<thead>
<tr>
<th>Reference #1 - Virginia Community College System – PeopleSoft Financials v8.9</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Client Name</strong></td>
</tr>
<tr>
<td><strong>Address (Street)</strong></td>
</tr>
<tr>
<td><strong>Address (City, St, Zip)</strong></td>
</tr>
<tr>
<td><strong>Contact Name</strong></td>
</tr>
<tr>
<td><strong>Contact Title</strong></td>
</tr>
<tr>
<td><strong>Telephone/Fax</strong></td>
</tr>
<tr>
<td><strong>E-mail Address for Contact</strong></td>
</tr>
</tbody>
</table>
| **Types of Resources Provided** | • Project Manager  
• (GL) Module Functional Lead  
• (AP/PO) Module Functional Lead  
• (AM) Module Functional Lead  
Deloitte staff ranged from 10 to 17 during the project. Approximately 13 VCCS staff were involved in the project.  
• Portal Lead  
• Technical Developers - Interfaces, Conversions, Enhancements, Reports  
• Trainers  
• Documenters |
| **Description of Services** | The project was organized into three phases. During Phase 1, we implemented General Ledger, Accounts Payable, and Purchasing modules as well as the Payroll (CIPPS) and state financial activity (CARS) interfaces. During Phase 2, we implemented Asset Management, P Card, and a Query instance with custom views and reports. Phase 3 consisted of a two-way integration with the Commonwealth of Virginia’s electronic purchasing system, eVA. This is a real-time two way integration with vendors, requisitions, and purchase order sent from eVA to VCCS for validation and an approval or denial sent back from VCCS to eVA.  
Services included project management and planning, functional leadership and delivery for each module, technical leadership and delivery for enhancements, reports, conversions, interfaces, and security. |
| **Timeframe and current status** | 5/2006 – 12/2008, Live on Financials 8.9 |
### Reference #1 - Virginia Community College System – PeopleSoft Financials v8.9

| Project Covered the following Scope areas identified in RFP Section 5.1 | ✓ Project Leadership | ✓ Application Integration | ✓ Training | ✓ Software Development | ✓ Testing | ✓ Documentation | ✓ Reporting | ✓ Portal |
|---|---|---|---|---|---|---|---|---|---|

### Reference #2 - Ryerson University – PeopleSoft 9.0 HRMS and Student Projects

<table>
<thead>
<tr>
<th>Client Name</th>
<th>Ryerson University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address (Street)</td>
<td>350 Victoria Street</td>
</tr>
<tr>
<td>Address (City, St, Zip)</td>
<td>Toronto, Ontario M5B 2K3</td>
</tr>
<tr>
<td>Contact Name</td>
<td>Dr. Stephen Hawkins</td>
</tr>
<tr>
<td>Contact Title</td>
<td>Director</td>
</tr>
<tr>
<td>Telephone/Fax</td>
<td>(905) 979-5000 x 2596</td>
</tr>
<tr>
<td>E-mail Address for Contact</td>
<td><a href="mailto:stephen.hawkins@ryerson.ca">stephen.hawkins@ryerson.ca</a></td>
</tr>
</tbody>
</table>

**Types of Resources Provided**

Full range of resources, including:
- Project Manager
- Functional and Technical Leads
- Functional and Technical Consultants
- Change Management

Deloitte staff ranged from five to eight during the project. Approximately 12 Ryerson staff members were involved in the project.

**Description of Services**

Deloitte was engaged to lead Ryerson through a strategic systems renewal and upgrade project of their PeopleSoft system. Scope included the Implementation PeopleSoft Human Resources v9.0 and the upgrade of PeopleSoft Student Administrative Systems to PeopleSoft v9.0. Deloitte responsibilities included project management, functional leads, technical architecture and infrastructure design, business process redesign, change management, interface development, reporting, data conversion, and custom modification development.

**Timeframe and current status**

08/2007 – 08/2008, Live on PeopleSoft HRMS and Campus Solutions 9.1

| Project Covered the following Scope areas identified in RFP Section 5.1 | ✓ Project Leadership | ✓ Application Integration | ✓ Training | ✓ Software Development | ✓ Testing | ✓ Documentation | ✓ Reporting |
|---|---|---|---|---|---|---|---|---|

### Reference #3 - Sheridan Institute of Technology and Advanced Learning – HRMS, Finance and Student Projects

<table>
<thead>
<tr>
<th>Client Name</th>
<th>Sheridan Institute of Technology and Advanced Learning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address (Street)</td>
<td>1430 Trafalgar Road</td>
</tr>
<tr>
<td>Address (City, St, Zip)</td>
<td>Oakville, Ontario L6H 2L1</td>
</tr>
<tr>
<td>Contact Name</td>
<td>Mrs. Pat Burns</td>
</tr>
<tr>
<td>Contact Title</td>
<td>Director, Enterprise Systems</td>
</tr>
<tr>
<td>Telephone/Fax</td>
<td>(905) 845-9430 ext: 2451</td>
</tr>
<tr>
<td>E-mail Address for Contact</td>
<td><a href="mailto:pat.burns@sheridanc.on.ca">pat.burns@sheridanc.on.ca</a></td>
</tr>
</tbody>
</table>

**Types of Resources Provided**

Full range of resources, including:
- Project Manager
- Functional and Technical Leads

**Proposal Requirements**
Reference #3 - Sheridan Institute of Technology and Advanced Learning – HRMS, Finance and Student Projects

- Functional and Technical Consultants
- Change Management

Deloitte staff ranged from 15 to 20 during the project. Approximately 40-50 Sheridan staff were involved in the project.

Description of Services
Deloitte was engaged by Sheridan to provide implementation and project management experience for the implementation of a new, fully integrated ERP application. Deloitte converted Sheridan from Banner’s student administration and human resources/payroll modules and Oracle’s financial module to PeopleSoft. Total Campus was used as the implementation methodology. Sheridan College has worked with Deloitte for many years and had initially selected Deloitte as its full implementation partner during the implementation of PeopleSoft for Student, HR, and Finance. After these successful implementations, Sheridan continued to supplement future projects using Deloitte resources as needed to fill critical positions Sheridan was unable to fill.

Timeframe and current status
03/2004 – 08/2008, Live on PeopleSoft HRMS, Financials and Campus Solutions 9.1

Reference #4 - Hobart and William Smith Colleges – PeopleSoft 9.0 HRMS and Student Projects

Client Name
Hobart and William Smith Colleges

Address (Street)
300 Pulteney St.

Address (City, St, Zip)
Geneva, NY 14456

Contact Name
Fred Damiano

Contact Title
CIO

Telephone/Fax
+1 315 781 3955

E-mail Address for Contact
DAMIANO@hws.edu

Types of Resources Provided
Full range of resources, including:
- Project Manager
- Functional and Technical Leads
- Functional and Technical Consultants
- Change Management

Deloitte staff ranged from 5 to 15 during the project. Approximately 15 Hobart staff were involved in the project.

Description of Services
Deloitte was engaged to lead Hobart and William Smith through an implementation of PeopleSoft HCM v9.0 and Campus Solutions v9.0. Scope included the Implementation PeopleSoft Human Resources v9.0 and PeopleSoft Student Administrative Systems PeopleSoft v9.0. Enterprise Data Warehouse and Portal. Modules included:
- Campus Solutions – Campus Community, Recruitment/Admissions, Student Records, Student Financials and Campus Self-service.
- Enterprise Data Warehouse – CRM/Campus Solutions and OBIEE Reporting Tool.
- Portal – Enterprise, Financial, HRMS and Student.

Deloitte responsibilities included project management, functional leads, technical architecture and infrastructure design, business process redesign, change management, interface development, reporting, data conversion, and custom modification development.

Timeframe and current status
4.2.2 List of Higher Education Institutions Who Have Utilized Our Services

Deloitte’s National Higher Education Practice

We have served numerous higher education institutions across North America who can attest to our ability to work effectively with our clients so they achieve their objectives and realize positive results. We are dedicated to helping our clients excel.

Deloitte’s Higher Education practice includes more than 500 seasoned professionals across Canada and the United States who understand our clients’ challenges, and specializes in serving colleges and universities. While we provide a broad range of systems integration and management consulting services, a primary focus of our Higher Education practice is ERP projects, and in particular Oracle EBS and PeopleSoft applications.

Summary of relevant Higher Education qualifications

Our clients range in size from small colleges to state college systems and large comprehensive universities and university systems, in Canada and the United States. The following chart summarizes work we have done in Higher Education in North America over the last 10 years.

Our Higher Education Story

Reference #4 - Hobart and William Smith Colleges – PeopleSoft 9.0 HRMS and Student Projects

<table>
<thead>
<tr>
<th>Project Covered the following Scope areas identified in RFP Section 5.1</th>
<th>Project Leadership</th>
<th>Application Integration</th>
<th>Training</th>
<th>Software Development</th>
<th>Testing</th>
<th>Documentation</th>
<th>Reporting</th>
<th>Portal</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>
4.2.3 List of Oracle/PeopleSoft Implementations

Deloitte has significant experience implementing Oracle/PeopleSoft Campus Solutions, Oracle/PeopleSoft HCM, Oracle E-Business Suite Financials and ERP Portal applications. We have implemented Oracle/PeopleSoft in over 1,000 projects, over 100 of which were Oracle/PeopleSoft projects for higher education institutions. We understand the challenges of complex, large-scale ERP implementations. We have included a representative cross-industry list of Oracle/PeopleSoft clients as Attachment J. Some highlights of Deloitte’s Oracle/PeopleSoft practice include:

- Extensive experience operating teams across multiple locations to maximize benefits, increase efficiency, and manage risk
- Experience in all industries and global regions
- Deloitte is the largest Oracle/PeopleSoft Global Alliance Consulting Partner, with over 3,500 experienced, dedicated consultants worldwide
- Long-standing relationship with Oracle as a Global Certified Advantage Partner
- 1 of 3 PeopleSoft Platinum Partners, and 1 of 4 in PeopleSoft’s Global Alliance Program (since 1993)
- Co-authored “Journey to Employee and Manager Self-Service” white paper, Oracle’s most popular publication along with a robust Fusion POV with representation on the Fusion Beta Test Team and Fusion Early Adopter programs

We have also described our Oracle/PeopleSoft experience and resources throughout this proposal, where requested by your RFP. In Section 4.2.2, we have provided a timeline graphic that displays our list of educational institutions we have served. We have also included relevant client references in Sections 4.2.1 and 7.2.A and representative resumes in Attachment E. If you would like additional information regarding our PeopleSoft/Oracle experience and capabilities beyond that which is included in our response, please let us know and we would be happy to provide further details.

4.2.4 Services Lead to Assigned to Coordinate MCCCD Project(s)

Deloitte’s service approach is grounded in the concept of an empowered Lead Client Service Partner — a single point of contact who oversees all services we provide to MCCCD. Kathy Karich, our Higher Education Leader and Deloitte Consulting Principal with more than 20 years of experience helping public and private sectors clients improve performance through management consulting and technology projects, will serve MCCCD in this role. Kathy has the authority to commit the resources of Deloitte to serve MCCCD and to initiate our consultative process to meet your needs. Her hands-on approach to client service will provide MCCCD with access to the range of resources and intellectual capital that only Deloitte can provide.

4.2.5 Representative Resumes

Deloitte is the largest Oracle/PeopleSoft Global Alliance Consulting Partner, with over 3,500 experienced, dedicated consultants worldwide. Our team’s quality and value continues to be recognized as a leader in the marketplace locally, nationally, and globally. As indicated above, Deloitte’s Higher Education practice includes more than 500 seasoned professionals across Canada and the United States who understand our clients’ challenges, and specializes in serving colleges and universities. We have included representative resumes in Attachment E covering the range of services you identified in your Scope of Services (Section 5). These individuals are just a sub-set of the range of resources we have available to assist with the types of activities described within your RFP. We would be happy to provide additional resumes, upon request.

4.2.6 Subcontractor Requirements

Please note that all resumes included are Deloitte employees (not subcontractors).
4.2.7 Financial Information

Since Deloitte consists of privately-owned partnerships, we do not have audited financial statements nor do we file other corporate financial information, such as a 10-K.

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<tr>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues (US$, in billions)</td>
<td>$26.1</td>
<td>$27.4</td>
<td>$23.1</td>
<td>20.1</td>
<td>$18.2</td>
</tr>
<tr>
<td>People</td>
<td>169,000</td>
<td>165,000</td>
<td>150,000</td>
<td>135,000</td>
<td>121,283</td>
</tr>
<tr>
<td>Countries</td>
<td>140</td>
<td>140</td>
<td>142</td>
<td>136</td>
<td>NA</td>
</tr>
<tr>
<td>Cities</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
</tbody>
</table>

More information on our strong financial condition and stability can be confirmed by viewing our Deloitte Touche Tohmatsu Worldwide Member Firms 2009 Annual Review, which includes information on our financial status and stability. Our review can be found at the following link:


4.2.8 Organization Chart

4.2.9 Company Information

4.2.9.1 Criminal investigation, prosecution, or conviction

Deloitte Consulting LLP, as one of the leading providers of consulting services, is routinely involved in complex consulting projects, often involving large-scale systems implementations and multiple service providers. Although we are justifiably proud of our record of client satisfaction, such projects do occasionally give rise to disagreements over contract requirements, and we are occasionally, though rarely, involved in litigation with clients pertaining to our consulting services. We do not believe that such matters will affect our ability to provide consulting services, or that they will affect our ability to serve MCCCD in connection with this proposed engagement. In addition, there are no pending criminal actions concerning our professional practice.

4.2.9.2 Prior contract terminations

Deloitte Consulting LLP has many hundreds of engagements begun and ended in any particular year. Deloitte Consulting LLP is precluded by professional standards from discussing the specifics of matters relating to our clients without their express permission. We do, however, wish to be responsive to your request and, accordingly, we would be pleased to discuss further our commitment to quality.
4.2.9.3 Details of lawsuits
Please refer to our statement on 4.2.9.1 above.

4.2.10 Security, data access, and non-disclosure statements
Read and understood.

4.2.11 Pricing Guarantees
Read and understood.

4.2.12 MCCCD right to negotiate with any and all vendors on all aspects of this RFP
Read and understood.

4.3 Deviations from RFP
Deloitte Consulting LLP (Deloitte Consulting) has read the Request for Proposal (RFP), and accepts in principle the contract terms and conditions as set forth in the RFP as drafts of certain provisions of a contract, the final terms of which will be negotiated by MCCCD and Deloitte Consulting if we are chosen as the successful contractor.

As requested in RFP Section 4.3, we have identified and documented in Attachment K certain terms and conditions of the RFP that we propose to modify along with an approach to these issues that we believe will equitably serve the interests of both parties. We have also attached in Attachment K our General Business Terms to serve as a basis of discussion to address other terms that should be included in the contract to make it more complete (e.g., payment, ownership/IP, limitation of liability, warranty, duty to cooperate, etc.). We reserve the right, if chosen as the successful contractor, to negotiate clarifications, changes and additional provisions to cover the circumstances of the contract as finally awarded.

We have successfully negotiated contracts with Maricopa County in the past and are confident we can successfully reach mutual agreement on terms mutually acceptable to MCCCD and Deloitte. We look forward to discussing and negotiating these terms and conditions with you in the near future. We acknowledge and appreciate the RFP’s express statement that it has reserved the right to negotiate and modify terms as it deems appropriate and subject to mutual agreement.

4.4 Signature
Read and understood.
Scope of Work

5.1.1 Project Leadership

The Deloitte team brings strong project management capabilities. Our project managers have experience implementing ERP systems in a higher education environment. We understand and can anticipate risks and the unique issues faced by higher education institutions, including the unique challenges involved in implementing Student Administration applications. For example, Colleges require a go-live schedule that reduces the impact on your annual business cycles. Our experienced project managers bring the know-how to collaborate effectively with your leadership to orchestrate system roll-out plans that mitigate impact on your operations.

Our project managers are trained in multiple aspects of implementation, including guiding the overall direction and timing of the project; managing budget, timelines, and scope; to determine effective project communication; coordinating activities across teams to confirm integration; reporting project status and escalating issues in a timely manner to the Project Sponsor and Steering Committee; acquiring and monitoring project resources; reviewing strategies, methodologies and approaches for completion of deliverables by team members; providing project leadership, team building, strategy consultation, and advice in all aspects of the implementation; reviewing and signing-off on deliverables for the project; assessing risk associated with change factors; managing any scope changes and the change control processes; and managing risk and quality assurance activities.

Our project managers work closely with our clients’ project leadership to manage scope changes and resolve issues throughout the project. We define clear procedures and communicate these to all project stakeholders to make sure a “no surprise” project environment to provide the team with clear direction to keep the project on-schedule.

5.1.2 Application Implementation

Deloitte is recognized nationally and globally as a leader in large scale and complex system integrations including integrations of Oracle-PeopleSoft with other enterprise applications. We offer many lessons learned to our Higher Education and other public and private sector clients from past implementations of multimillion dollar engagements and large and diverse project teams. We have built reference architectures for the Oracle-PeopleSoft solution that include a broad number of the enterprise applications available from Oracle. Our know-how offers our clients the assurance that a project will be delivered with experience, professionalism, and success.

The requirements for a more extensive enterprise application landscape are best determined through a detailed requirements gathering process. MCCCD will be able to draw upon the wide range of specialization, experience and thought leadership throughout the Deloitte local practice and global organization to assist in aligning and refining those requirements to the core enterprise solutions being implemented. Our relationships with technology vendors like Oracle will assist MCCCP in analyzing industry best practices in Higher Education and in engaging the best resources to conduct a more broad enterprise landscape plan that could include new modules within PeopleSoft, enterprise management tools to monitor performance/tuning/change control, or new application suites to complement and integrate with your foundational solutions.

5.1.3 Hardware and Database Configuration

Deloitte has a strong partnership with Oracle and we have worked with various hardware and software vendors over the course of our implementation history. Our network of relationships is often very useful to a client
embarking on a technology landscape change similar to yours. We can help you choose and build a relationship with a hardware or software vendor and then help coordinate the services required to meet the needs of the project – be it budgetary, resource, or related to physical assets. For example, on many of our PeopleSoft implementations, we have provided services early in the project around sizing the hardware, negotiating with hardware vendors, installing the software, and getting the installation certified by Oracle.

Deloitte has an Application Management Services (AMS) practice to provide upgrade and support services to clients. We’ve also developed a **Deloitte Upgrade Planning Tool for Oracle** to help accelerate the PeopleSoft upgrade planning effort and better manage project uncertainties. This tool provides a framework to collect drivers of upgrade effort and complexity, including customizations, data volumes and adoption of new functionality, so that a PeopleSoft upgrade project can be more effectively planned and estimated.

The relationship established between MCCCD and Deloitte can continue beyond the project to help further define and map out future needs for the organization. Deloitte has access to emerging Oracle developments and actively participate in the planning for changes to future releases, combining our deep functional knowledge of our client's business processes and our technical experience with Oracle’s software development experience.

Deloitte will be well positioned through its market experience, strategic alliances, industry relationships, and inherent MCCCD knowledge to provide advice on the direction, process, and timeline for MCCCD’s future technology landscape needs.

### 5.1.4 Software Development

Deloitte has resources available for all aspects of Oracle-specific development that MCCCD might require for this project. We’ve provided services to clients ranging from hardware sizing to helpdesk optimization for Oracle implementations. We commonly provide assistance to clients in the areas of:

- Sizing the hardware and databases based on requirements (number and types of users, access volumes, access frequency, modules to implemented, availability needs, etc)
- Installation and administration of the PeopleSoft environment
- Planning the overall integration architecture
- Extending/enhancing the core application through development using Application Designer, XML Publisher, BPEL, Crystal Reports, SQR, Application Engine, Data Mover, JDeveloper, ADF, and other Oracle tools.
- Supporting the core application functionality (by the team members during the implementation, and after the implementation via our Application Management Services group)
- Transferring knowledge (code reviews, documentation, workshops) for the above

Team members will have experience in extending and supporting the application using PeopleTools. Specific procedures and guidelines are used to document all enhancements for easier tracking of development, knowledge transfer, and change control for all changed objects.

During the implementation, the level of MCCCD maturity with respect to the technology increases due to Deloitte’s knowledge transfer methodology. This process involves MCCCD resources being involved in the system development with Deloitte support. Consequently, this will help close any technology and/or skill gaps that exist in order for MCCCD to be self-sufficient once the product is deployed.

Deloitte’s experience in delivering technology implementations has helped us to develop an effective implementation approach tailored specifically for each client. Our solution provides assistance that is over-and-above the support and education provided by the software vendors and builds upon standard methodologies for system stabilization.
5.1.5 Related Products
As an unbiased systems integration firm, Deloitte is well-positioned to assist MCCCD in the addition of related products to your ERP environment. We are not affiliated with any specific hardware or software vendor, but rather maintain capabilities and relationships with multiple vendors that serve the needs of our diverse clients.

We have key alliances with hardware and software vendors as well as a breadth and depth of resources with skills and experience to implement their products. Examples of key alliances include: Oracle, IBM, HP, BEA, iRise, Mercury, Adobe, and TIBCO, among others. Through these relationships and the knowledge of our consultants, we are able to assist our clients in evaluating, selecting, procuring, implementing, and supporting related products to enhance the performance and value of their Oracle/PeopleSoft solutions.

5.1.6 Testing
Our team has extensive experience conducting thorough, organized testing in a Higher Education setting. We work collaboratively with our clients to complete the full testing cycle, from strategy and planning through Unit, Integration and User Acceptance Testing. We also have experience conducting performance and operational readiness testing, to validate that the system will meet our clients’ needs and that our clients are “ready” before going live with an implementation or upgrade.

Having been involved in a significant number of Higher Education projects, we have developed a large repository of Test scripts that can be leveraged during your implementation. We have included in Attachment F a sample test case and the table of contents for a typical test plan used on a Higher Education project. These are just two examples of the established, demonstrated tools and templates we can leverage to reduce risk and add value to MCCCD projects.

5.1.7 Documentation
Throughout past ERP implementations, Deloitte has created a number of artifacts that can be leveraged to add value to and accelerate the development of technical and end-user documentation. These artifacts were developed and continue to be refined through our work with Higher Education clients. We bring assets that cover the full project life cycle, including but not limited to configuration of the system, interfaces, conversions, reports and modifications. The documents are structured to provide a complete design that captures all important elements providing a functional review of the design, as well as becoming a document the technical analyst will use to create a complete design specification for programming. Data elements, page layouts, specific logic and unique requirements are documented and signed off before development takes place.

Our goal is that no deliverable will be started from a blank page of paper. Key deliverables will be seeded through pre-existing templates to build on lessons learned and knowledge from previous implementations. Each document will then be customized to reflect the unique needs of MCCCD and your specific project objectives, requirements, processes, and solution. Deloitte will work with MCCCD project team resources to update, expand and modify workbooks, technical design specifications, test scripts, security matrices, and other documentation needed to manage and sustain the system after implementation.

For further information on our tools and existing templates please refer to Attachments F and I as well as descriptions of our Total Campus Methodology and additional tools described in our responses to 7.3.A and 7.3.D, respectively.
5.1.8 Training

Our primary focus in training delivery is to support MCCCD project goals by teaching people how to apply new business processes and systems to perform their job more effectively.

To support this primary focus, we typically develop an end user training strategy with the following key objectives:

- Educate MCCCD employees on the benefits of using the PeopleSoft and Oracle systems and its role in enabling MCCCD to meet its business goals
- Teach end users how to execute new and/or revised business processes by combining business process training with MCCCD task training
- Train MCCCD employees on exactly what they need to know or be able to do to carry out their jobs in the new environments by matching the required learning to each job role
- Determine that MCCCD employees display competency in their areas of responsibility by meeting pre-defined learning and performance objectives
- Establish a foundation for continuous skills development and improvement

End users of the PeopleSoft and Oracle system will expect to promptly apply what they learn to their specific job responsibilities. We develop a tailored training plan so that the right people receive the right training — at the right time. Training must occur as close to implementation as possible to prevent skills degradation associated with inactivity. Initial training will focus on critical and essential training required for system startup. Advanced skills enhancement training can occur after implementation to avoid information overload and as required by project implementation guidelines (i.e., the “go-live” date).

5.1.9 Reporting

We have extensive experience in implementing Business Intelligence solutions. We have alliances with all the major Business Intelligence and Data Warehousing vendors. When it comes to business intelligence management, Deloitte is one of the largest and most experienced organizations in the market. For nearly 10 years, we have helped a number of organizations conduct assessments, develop strategies, architectures and implement solutions to gain business insights from the volumes of data collected by their systems. Our proposed multifunctional team comprises includes individuals with extensive experience in Business Intelligence.

5.1.10 Directory Integration

Our global Identity & Access Management practice has been helping clients solve their IAM problems for over ten years and has more than 800 dedicated specialists. The practice has implemented large scale IAM solutions of all of the leading vendor products around the world. Our largest practice is in North America and our clients rank among the Fortune 500 across all major industries.

Oracle and Deloitte maintain a strategic alliance partnership. Our executive management teams meet on a quarterly basis to review and support the commitment to the alliance by each organization including joint product development, testing, marketing, thought leadership, and project delivery.

Deloitte has a very mature Identity & Access Management (IAM) practice that has been helping clients plan and implement solutions for the past ten years. The practice grew from initial work integrating enterprise directories and ERP systems to supporting the planning and implementation of leading solutions from vendors such as Sun, IBM, CA, Oracle, Novell and Microsoft. In that time, Deloitte has developed a comprehensive methodology called IAMethods™ and has used it on many implementations around the world achieving the desired results.
We bring a very strong team with qualifications in business process design, architecture, internal controls and risk management, security and policy management and administration, single sign-on, provisioning, delegated administration, federation, and standards.

Our IAMethods™ approach has pioneered the industry in helping clients obtain the much needed capability for their enterprise identity and access management needs. A powerful business solution, IAMethods™ helps clients identify and integrate user identification, lifecycle management, authentication, authorization, and protection of applications. IAMethods™ helps companies integrate their IAM solution into their existing information technology infrastructure and processes, minimizing cost and inefficiencies. The results are improved security, heightened productivity, increased end user satisfaction and higher operational efficiency with lower costs.

IAMethods™ is an iterative, architecture-centric and use case-driven set of processes, procedures, and accelerators for transforming business requirements into delivered solutions. Emphasis is placed on collaborative definition and validation of stakeholder requirements via early delivery of working prototypes which are developed through iterative steps into the deployed IAM solution. The team will tailor the project approach to use some, or all of the threads as required accommodating the timelines and complexity of the project requirements.

5.1.11 Portal

Deloitte has experience implementing enterprise portal solutions at large public and private sector clients. We bring resources with these skills that can assist you in this area. Based on our prior experience, we have a well established methodology for implementing portal solutions that we can leverage to lower risk and support development of a high value portal to meet your needs. We also bring knowledge that can be leveraged to help promote project success. Based on past, relevant experience, we have documented major lessons learned that can be applied to mitigate risk and provide increased value to MCCCD. An overview of key lessons learned from past, relevant projects is provided below.

Key Lessons Learned from Implementing Enterprise Portal Solutions

<table>
<thead>
<tr>
<th>Area</th>
<th>Lessons Learned</th>
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| Portal Governance        | • Portal development impacts many parts of the organization – not just technology. Setup a governance committee that is representative of the various stakeholders (business and IT) to keep the portal relevant and useful to end users.  
  • Implement appropriate program mgmt processes (risk management, issue resolution, change control, project tracking, communication, etc.) to keep projects focused and on track. Use an appropriate mix of process – too much process can negatively impact progress.  
  • Establish accountability and a firm decision making process. |
| Business Process Enablement | • Develop a business case and, equally importantly, monitor and track ROI/results against business case. Use this info/feedback to continually refine business case and functionality for future releases.  
  • Portal is not a technical/IT issue – it is a business issue first and needs to have a business sponsor and a business requirement to fill.  
  • The biggest barrier to the broad adoption of a portal is actually getting people to use them. “If you build it, they will come” attitude is likely to fail.  
    – “Stickiness” is a key element. If people don’t use it, then you won’t meet your ROI.  
    – Personalization is also important – users don’t want to know where the information has to come from – they just need it on their desktop |
| Architecture and Standards | • Before engaging in iterative development (design, build, test), develop the architectural blueprint first  
  • Use business requirements to drive architectural guidelines and decisions.  
  • Portal vendor products have proprietary API’s – switching costs and exit barriers are high.  
  • Though many portal products have portlets or other plug-in components that give very good links to an enterprise application set like SAP or Siebel, consider building a more loosely-coupled architecture (using EAI layer or Web services layer) to insulate the portlets from back-end components. Otherwise, portlets will be brittle where changes to the back-end components may require corresponding redesign |
of the portlets.
• Consider a technical proof-of-concept activity to reduce overall project implementation risk – especially around integration issues.
• Develop and enforce standards – otherwise, maintenance will be difficult.

| Portal Development | While some companies claim that they have a “portal in a box”, enterprise portals are built not bought. Integration costs can be three to five times the software purchase costs.
• Limit the first implementation to “out-of-the-box” functionality. Freeze business requirements and police “scope creep”.
• Timeboxing each phase and iterating to solution is still a good approach if executed properly.
• Adopt a phased/iterative approach to implementation. Portal implementations are not finite projects with a beginning and an end-point, but tend to remain works in progress because business and user requirements from the portal are never static.

| Usability Engineering | Recent independent surveys have shown that most portals do not have adequate usability – invest the time to implement a rigorous UI/UX process to increase site usability and value.

| Content Management | Many Web sites produce poor search results because the content is not managed well (tagging, expiration, categorization, indexing), and managing the content has become very difficult.
• Engage in a process to define develop taxonomies – usually portals require multiple taxonomies for different user groups/business units.
• Integrate a content management system into a portal after it has been built is more difficult than integrating it from the very beginning.
• Separate content creation from content publication.

| Globalization | Globalization is not a last step in the process – the cost of globalization a solution after it has been deployed is 50 percent higher than implementing it with globalization in mind at the outset.
• Determine that technologies deployed support internationalization.
• Understand legal/regulatory requirements around personalization, storing of customer data, and content management.

5.1.12 Enterprise Management

Deloitte offers the full range of technology consulting services, including Enterprise Management (EM). We help our clients assess, select, and implement EM systems capable of managing devices, independent of vendors and protocols, across the technology landscape. We work with our clients to implement software solutions that allow systems administrators to manage a vast set of heterogeneous devices across their network and in their data centers. Our experienced consultants can help you solve the challenges that come from managing complex distributed network environments and mission critical applications.

5.2 Training Approach

It is our intention to build a collaborative project team during the project. This will include knowledge sharing/transfer – in both directions. The MCCCD resources will determine the entire team is sensitive to what is unique to MCCCD. The consultants will make sure that the team understands how to effectively complete the implementation using the implementation methodology. Knowledge transfer will regularly occur informally as consultant and MCCCD resources work together through a workshop, process design, issue resolution, etc.

During the implementation we regularly provide training sessions with the implementation team on project processes from the methodology including, issues management, change control, design, testing and training processes. This training on our methodology is a standard part of our approach.

Our experience has demonstrated that it is also important to measure knowledge transfer activities. It is imperative for MCCCD to be at a satisfactory level of knowledge, prior to project completion. To measure knowledge transfer, Deloitte works with MCCCD to define individual knowledge transfer plans and checklists. This considers each individual team member and the role they will play to clearly identify the important elements that must be learned prior to concluding the project.
5.3 Experience implementing major software applications for higher education clients

We have completed over 100 Oracle/PeopleSoft implementations for higher education clients. Please refer to our timeline in Section 4.2.2 for a summary of our higher education qualification as well as our references included in Sections 4.2.1 and 7.2.A.

5.4 Describe experience with products relevant to this RFP

Our role as a Systems Integrator has afforded us the experience and perspective of integrating and delivering multiple ERP’s and Technologies in support of our clients’ business transformations. Deloitte is dominant in the industry in that we are business consultants with very strong global Oracle EBS and PeopleSoft capabilities. Deloitte has been successfully implementing Oracle application solutions since 1992 and has in-depth expertise and proven success with over 1,500 implementations of Oracle and PeopleSoft, in which over 100 have been within the Higher Education market space. We offer full-service capabilities to support Oracle and PeopleSoft implementations globally including experienced Oracle practitioners, Oracle-specific technology and techniques, education and training, and dedicated software laboratory and solution centers. Combining PeopleSoft experience with our industry and technical expertise, we provide the most complete PeopleSoft implementation services available from designing detailed work plans to system design, development, implementation, and management of program offices.

Deloitte is the largest Oracle/PeopleSoft Global Alliance Consulting Partner, with over 3,500 experienced, dedicated consultants worldwide. Our team’s quality and value continues to be recognized as a leader in the marketplace locally, nationally, and globally. We have more than 500 seasoned professionals across Canada and the United States who specialize in serving colleges and universities. In addition, Deloitte has built a successful and vibrant onshore/offshore business that employs more than 4,300 highly skilled practitioners. We have successfully applied our onshore/offshore model on many ERP projects delivering the required software development components and high value to our clients. Our onshore locations are Tulsa, Oklahoma and Camp Hill, Pennsylvania and our offshore locations are in Mumbai and Hyderabad, India. Our onshore/offshore groups have built a skill-mix comprising a judicious blend of Technical, Functional, Training materials development and DBA capabilities as well as capacity to handle several projects concurrently.

Together our practices render services in areas such as:

- Implementation including Business modeling and Functional Configuration - Oracle eBusiness Suite, PeopleSoft Student Administration, and People Soft HCM
- Infrastructure and Architectural design
- Functional configuration – Remote Development for RICE (Reports, Interfaces, Customizations and Enhancements) objects including design and development using different reporting tools and EBI integration tools as follows:
- Customizations/Enhancements (Java, COBOL, PL/SQL)
- Reports
  - Support and maintain reports – Reports 6i, XML Publisher, Noetix Views, Optio, etc.,
  - Register new programs and reports
  - Data warehouse and EPM capabilities
- Interfaces – Using APIs, Integration Broker Component Interface, etc.,
  - Support Inbound and outbound Oracle Apps interfaces
- Conversions (Open items, Legacy data migration, etc.) – Using Application Engine and Component Interface Tools
- Enhancements – Bespoke development
  - Maintain scheduled programs and processes
  - Perform minor enhancements
• Forms
• Alerts and Workflow customizations
• Maintain Oracle applications workflow customizations & enhancements
  – Application Maintenance support covering functional, technical, and DBA & System administration activities including post production and extended production support
  – Remote DBA/Sys administration and CNC Services including the following:
  – Pro-active monitoring
    • Database / Apps process
    • Listeners
    • Alert Logs
    • Archive log trimming
    • Table spaces & Indexes (monitoring and re-orgs)
    • Coalescing table spaces
    • Scheduled jobs (Backups, Concurrent manager jobs)
    • Administration of concurrent managers
  – Patch Management
    • Application on test environments
    • First level Patch testing
    • Confirm UAT on Test environment & apply on production servers after Client UAT confirmation
  – Performance Testing/Tuning
    • Monitoring of database performance
    • Scheduling database Back-up and recovery processes
    • Periodic Database, Applications cloning/refreshes
  – Migrations and Upgrade services
  – Any other Oracle package related services

However, successfully implementing an Oracle solution requires more than just technical know-how; it also requires a deep understanding of unique industry-specific business processes and how they support your organization's business objectives. To maximize return on your Oracle investments, your implementation partner should be able to link the software’s capabilities to specific actions that drive growth, improve operating margins, enhance asset efficiency and promote effective corporate governance. That is the Deloitte difference: We’re the only professional services firm whose multi-disciplinary capabilities are broad enough to establish all of those links.

5.5 Describe the length of time the Proposer has been in business as the entity responding to this RFP.

Deloitte is one of the largest professional services organizations in the United States and has been doing business for more than 150 years. Founded in 1845, Deloitte is the brand under which 169,000 dedicated professionals in independent firms throughout the world collaborate to provide audit, consulting, financial advisory, risk management, and tax services to selected clients.

5.6 Describe Proposer’s staff dedicated to the PeopleSoft or eBusiness practice

Deloitte is the largest Oracle/PeopleSoft Global Alliance Consulting Partner, with over 3,500 experienced, dedicated consultants worldwide who have been involved in thousands of implementations of Oracle products. Our team’s quality and value continues to be recognized as a leader in the marketplace locally, nationally, and globally. With our size, we can provide the experience and resources necessary to complete any size project on time and without disruption. For MCCCD we will assign resources with deep experience in Oracle eBusiness, PeopleSoft HRMS and Student Systems. We have more than 500 seasoned professionals across Canada and
the United States who specialize in serving colleges and universities who have completed over 100 Oracle/PeopleSoft implementations for higher education clients.

We have included representative resumes in Attachment E covering the range of services you identified in your Scope of Services (Section 5). These individuals are just a sub-set of the range of resources we have available to assist with the types of activities described within your RFP. We would be happy to provide additional resumes, upon request.

5.7 Describe what facilities and staff, if any, are permanently located in the Phoenix, Arizona metropolitan area.

Deloitte has a permanent office in Phoenix Arizona with 27 partners and more than 225 professionals and has achieved a number of distinctions locally. These include:

- Ranked #1 management consulting firm in Arizona (by Ranking Arizona) for two consecutive years
- Ranked #1 accounting firm in Arizona (by Ranking Arizona) for 11 consecutive years
- Ranked #1 on the Arizona Business Journal’s list of Top Accounting Firms for five consecutive years.
- Largest tax practice in Arizona – serving the most public companies in Arizona

Our Arizona practice is part of Deloitte’s Pacific Southwest region, which includes 2,600 professionals in offices in Los Angeles, Orange County, San Diego, and Nevada. In addition to the above, Deloitte is committed to and invested in Arizona through community leadership in various business, civic and charitable organizations. Some of the local Organizations which Deloitte partners with are Boys & Girls Club of Metropolitan Phoenix, Desert Botanical Gardens, Hospice of the Valley Endowment Fund and Metro Phoenix Partnership for Arts and Culture among others.

Based on the needs of MCCCD and the particular project requirements, we would leverage our local office as much as possible, but also bring the right resource with the appropriate experience for the specific MCCCD project.

5.8 Products to enhance Oracle or PeopleSoft environments

Deloitte has tools available to provide insight into the technology environment during the implementation and/or upgrade which, depending upon the scope and nature of our services, we may make available for use by our clients:

- Deloitte’s **Configuration Audit Tool** is a SQL script generator that produces the code that reconciles application configuration across environments. (e.g. Development, Test, and Production).
- Deloitte’s **Performance Tuning Repository for PeopleSoft** is a knowledge repository that captures effective tuning solutions applied at client’s engagements.
- Deloitte’s **Upgrade Planning Tool for Oracle** is an assessment tool used by Deloitte Practitioners to better understand a current or potential client’s situation as it relates to any potential upgrades. As well, Deloitte’s Upgrade Reconciliation Procedure for PeopleSoft is an efficient and effective method to validate each upgrade cycle and make sure there were no data or tables accidentally dropped during the upgrade.

From a non-technical perspective, we can leverage our **Pre-Built UPK library** of scenarios and reusable Instructor Presentations as part of training material creation for MCCCD (Attachment C). These UPK test scenarios can also be used for the various activities including the Conference Room Pilot (CRP) and/or User Acceptance Testing (UAT).
5.9 Specify the process Proposer will use to communicate organizational changes

The main focus of Change Management is to optimize acceptance, maximize readiness, and assure success of any change initiative. The key is to inform and empower change leaders and those involved in change and to place them in a position where they are able to make informed judgments about change approaches rather than offering them ready-made solutions.

A recent book, “The Heart of Change”, coauthored by Deloitte and John Kotter summarizes the results of more than 200 interviews globally to understand the success factors and learnings from those organizations’ change programs. The results reinforced the importance of the eight steps of change, originally put forward by John Kotter. Kotter’s Eight Step Change Model (below) is integrated into our approach. Our approach recognizes the importance of completing all of these steps but also accommodates the need to be iterative at times.

The Eight Step Change Model

The Eight-Step Change Model of change is used to conceptualize the change process proposed for this Project:

Create a Climate for Change: Obtain the buy-in and involvement of all people impacted by the Project.

Engage and Enable the Whole Organization: Determine that impacted stakeholders have the knowledge and skills required to perform in the environment.

Implement and Sustain the Transformation: Establish a supportive ongoing environment to facilitate continued use of changed business processes and supporting system.

5.10 Provide the maximum percentage price increase for years two to five as compared to year one.

It is our standard approach to increase rates by 5 percent per year.

5.11 Workstations and administrative support for their own employees.

Read and understood.

5.12 Documentation and all deliverables resulting from this contract shall remain the property of MCCCD.

Deloitte Consulting acknowledges that all documentation and deliverables will “remain the property of MCCCD” but assumes that to the extent that any pre-existing Vendor Technology is incorporated into the documentation or deliverables, the Vendor Technology will remain the property of Deloitte Consulting and will be licensed to MCCCD.
**Respondent Questionnaire**

**7.1A Description of the Firm/Personnel**

Deloitte was established in 1845, when England’s Great Western Railway (GWR) turned to an independent public accountant, William Welch Deloitte, to audit the company. His effort was so valuable that GWR directors recommended compulsory independent oversight, which was gradually implemented in the United States. Since that initial effort 160 years ago, Deloitte has evolved into a powerhouse professional services organization with more than 168,000 employees worldwide.

Today, more than 40,000 employees comprise Deloitte LLP (our U.S. member firm of Deloitte Touche Tohmatsu) and its subsidiaries, which include Deloitte & Touche LLP, Deloitte Consulting LLP, Deloitte Financial Advisory Services LLP and Deloitte Tax LLP and subsidiaries. We offer clients a broad range of fully integrated services in areas that include accounting, assurance and advisory, risk, tax, management, financial, technology and human capital consulting. Deloitte client service teams, under the leadership of a lead client service partner or principal, work closely with clients to create powerful business solutions for organizations in the United States and around the world. Deloitte has more than 100 years of experience providing services and solutions to Public Sector, including Higher Education clients.

Neither Deloitte LLP nor its subsidiaries are corporations but rather limited liability partnerships and there are no dates or states of "incorporation." Deloitte LLP and most of its subsidiaries (including Deloitte & Touche LLP, Deloitte Consulting LLP, Deloitte Tax LLP, Deloitte Financial Advisory Services LLP, and Deloitte Services LP) are organized in the State of Delaware and have 1633 Broadway, New York, NY 10019 as their headquarters.

We have a successful history of leading systems integration implementations worldwide including more than 3,000 core ERP systems, Government, Commercial and Higher Education. Our experience and perspective as an Oracle (PeopleSoft) SI includes over 1,500 implementations, more than 100 of which were for higher education clients. These capabilities allow us to anticipate and understand the challenges and solutions and to draw upon lessons learned, bringing a proactive capability to identify problems, create value-added advice, and lower overall program risk for large-scale ERP implementations. We have included clients throughout this proposal, including a summary of higher education clients served over the past ten years in Section 4.2.2.

**7.1B Key staff, organization chart and additional information**

As indicated in Section 4.2.4, Kathy Karich will serve as the Account Manager for MCCCD. Kathy Karich is a Deloitte Principal with more than 20 years of consulting experience implementing large-scale business transformation projects and enterprise systems implementations for public sector organizations. Kathy joined Deloitte Consulting in 2009 via the acquisition by Deloitte of Bearing Point’s Public Sector Consulting practice. Prior to joining Deloitte, Kathy had over 15 years of experience with BearingPoint, where she led BearingPoint’s State and Local Government Practice for the Northern United States and Canada. Kathy has served over 25 state, local and education clients, and is currently leading Deloitte’s US Higher Education practice. In serving MCCCD, Kathy will work closely with Geoff Creaghan, a Senior Manager with Deloitte. Geoff is a leader has implementing PeopleSoft for 15 years for public and private sector clients. For the past 9 years, Geoff has been entirely focused on higher education institutions and has provided implementation and advisory services for clients such as the University of Nebraska, Queen’s University (Canada), Ryerson University (Canada), and the University of North Carolina at Chapel Hill, among others. Kathy and Geoff will draw upon the broad range of individuals within Deloitte Consulting who bring the relevant knowledge and experience needed to successfully deliver value for MCCCD. As evidenced by our qualifications, representative resumes and references included
within this proposal, our consultants bring the skills needed to meet all areas described within your Scope of Services. We have also described our Oracle/PeopleSoft experience and resources throughout this proposal, where requested by your RFP. In Section 4.2.2 and 4.2.3 (supported by Attachment J), we have provided information on our Oracle/PeopleSoft practice and the clients we have served. We have also included relevant client references in Sections 4.2.1 and 7.2.A and representative resumes in Attachment E. Sections 7.3.A and 7.3.E provide additional information on our capabilities. Given the size and depth of our organization, we are well-positioned to meet your needs. Given the size and depth of our organization, we are well-positioned to meet your needs. Please refer to Section 4.2.8 for the Deloitte organization chart. We would be happy to provide any additional information required if you have any questions regarding our capacity to perform the scope of duties defined within your RFP.

7.2A Client references currently under contract

In this section, we are pleased to provide the following three contract references currently have under contract.

| Reference #1 - Virginia Community College System – PeopleSoft Financials v8.9 |
|----------------------------------|---------------------------------|
| Client Name: Virginia Community College System (VCCS) | |
| Address (Street): 101 N. 14th Street, 15th Floor | |
| Address (City, St, Zip): Richmond, VA 23219 | |
| Contact Name: Valerie Adkins | |
| Telephone: (804) 819-4992 | |

<table>
<thead>
<tr>
<th>Reference #2 – University of North Carolina</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Name: University of North Carolina</td>
</tr>
<tr>
<td>Address (Street): 211 Manning Drive</td>
</tr>
<tr>
<td>Address (City, St, Zip): Chapel Hill, NC 27514</td>
</tr>
<tr>
<td>Contact Name: Jerri Bland</td>
</tr>
<tr>
<td>Telephone: (919) 962-5065</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reference #3 – Nova Scotia Community College</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Name: Nova Scotia Community College</td>
</tr>
<tr>
<td>Address (Street): 5685 Leeds Street, PO Box 1153</td>
</tr>
<tr>
<td>Address (City, St, Zip): Halifax, NS B3J 2X1, Canada</td>
</tr>
<tr>
<td>Contact Name: Monica Foster, Director of Finance</td>
</tr>
<tr>
<td>Telephone: (902) 491-6713</td>
</tr>
</tbody>
</table>

7.2B Comparable work in the past ten years

We have also described our Oracle/PeopleSoft experience and resources throughout this proposal. In Section 4.2.2 and 4.2.3 (supported by Attachment J), we have provided information on our Oracle/PeopleSoft practice and the clients we have served. We have also included relevant client references in Sections 4.2.1 and 7.2.A and representative resumes in Attachment E. Given the size and depth of our organization, we are well-positioned to meet your needs. Please refer to Section 4.2.8 for the Deloitte organization chart. We would be happy to provide any additional information required if you have any questions regarding our capacity to perform the scope of duties defined within your RFP.
7.2C Federal or State regulatory Agency Investigation and/or Inquiry
Deloitte has not been involved in or currently under formal investigations or informal inquiries from any federal or state regulatory agency in the past 5 years.

7.3A Justification for receiving contract award
We believe there are a number of factors that distinguish Deloitte from other competitors in responding to MCCCD’s RFP and why we feel Deloitte should be awarded the contract. The following section highlights these areas of differentiation including:

- Deloitte Experience and Investment in Higher Education
- Our Total Campus™ Methodology Developed for Higher Education Technology Projects
- Our Team Members and Strategic Partnership Arrangements
- Deloitte - Oracle’s Preferred Higher Education Partner
- Our PeopleSoft Version 9.0 Experience

Deloitte Experience in Higher Education
Deloitte has been advising Colleges and Universities across North America for many decades. We have provided those clients with business advice and consulting services and solutions that have changed the way these institutions manage their businesses. Through these experiences, Deloitte has gained valuable insight and powerful business improvement capabilities that we will bring to MCCCD. One specific example is The Pennsylvania State System of Higher Education. Deloitte was engaged to assist them in assessing and auditing the health of their SAP campus management implementation. Given Deloitte’s experience in implementing student systems, we were able to quickly analyze the project’s status and provide options and recommendations to their Board of Governors. As a follow on engagement the client requested Deloitte complete a cost assessment of the possible options for their consideration.

Our leadership is evident in the clients we serve, the expertise we offer, and the extent of our involvement in association affairs, such EDUCAUSE. We have delivered presentations at multiple conferences, and user groups.

Deloitte’s Oracle Practice has considerable implementation and upgrade experience in the North American higher education sector, having completed over 100 Oracle/PeopleSoft implementations for higher education clients. Our team acted as prime contractor and played a significant role in the effective delivery for a number of Fit-Gaps, implementations, and upgrades in the North American higher education sector including those identified in the table below. MCCCD will see direct benefit from these ‘lessons learned’ and extensive experiences across PeopleSoft Financials, Human Resources and Student Administration product suites.

In addition to the information and references provided within this proposal, we would be happy to arrange discussions with any of our numerous higher education clients.

Sheldon Levy
President, Ryerson University

Candace B. Davies
ITS Director, University of North Carolina at Chapel Hill

"I commend Deloitte to you as a firm with an outstanding record of knowledge, expertise, service and confidence, a focus on a positive and productive working relationship – and an exemplary commitment to the success of their clients."

"Deloitte's Total Campus™ methodology along with the estimation tools gave UNC a high degree of confidence that the overall estimates to setup the system were based on the complexities of setting up Campus Solutions. They are based on years of experience and take in to account our unique environment and how this will be setup in PeopleSoft."

Respondent Questionnaire
Our Total Campus™ Methodology - Developed for Higher Education Technology Projects

Over the past 10 plus years Deloitte has invested heavily in the development of a methodology tailored to the specific needs of higher education to assist with the review, planning and implementation of technology solutions.

Our experience in implementing Oracle/PeopleSoft solutions in the Higher Education sector indicates that customers want to make configuration decisions that are fundamentally based on three factors:

- Real life experience (knowledge from those that have gone before);
- Rigorous processes; and
- Industry Leading Practices.

Based on these three factors, Total Campus™ was designed specifically to help clients with their Oracle/PeopleSoft implementations. This higher education methodology is designed to help guide clients through complex decisions with a constant eye towards driving out business value.

Total Campus™ is an approach based on People, Process and Tools. Using specific approaches and techniques the Total Campus™ methodology guides clients from beginning to end of an implementation and is built on experience and effective practices.

Our newly released PeopleSoft v9.0 Total Campus™ accelerators (Configuration Workbooks, Testing Scripts, etc.) will be available for your use and will help get the team started more quickly and deliver faster results with your Fit-Gap and implementation. The Total Campus™ Estimation Tool v2.20 (TCET) is a proprietary tool from Deloitte that is built on the Total Campus™ Delivery methodology. It calculates the functional and technical effort required for an implementation and provides the input and calculation of the technical effort (reports, interfaces, conversions and enhancements). The tool is built on the business processes unique to an institution and the results of the Fit-Gap exercise. It accounts for and is catered to each institution as it accounts for drivers which may impact the implementation, such as the number of programs, transcript types, etc. The result is more precise estimates for implementation, especially important to MCCCD.

It is important to note that these tools encompass the experiences we have gathered across multiple industries and incorporate the practices which have demonstrated the best results to help customers make proper decisions on system set-up. The result is a MCCCD specific configured system poised to deliver greater value and significantly reduce the effort required for the implementation. For further information regarding these accelerators and other accelerators we can leverage for our Oracle/PeopleSoft clients, please refer to Attachments K and I.

Our Team Members and Strategic Partnership Arrangements

We have assembled a team of higher education leaders in Oracle/PeopleSoft planning and implementation skills to provide MCCCD with experience, approach, tools and people to help you achieve the desired results. As indicated by our representative resumes, we bring team members with version 9.0 experience across PeopleSoft in Financial, Human Resources and Student Administration as well as supporting technologies (database, directory integration, enterprise management, etc.).

Deloitte’s ability to bring top talent with the breadth and depth of specialization and experience in: industry effective practices; Oracle EBS and PeopleSoft solutions; project management; organization and change management; and Higher Education, is truly unique.
Deloitte - Oracle’s Preferred Higher Education Partner

Deloitte is extremely proud of our relationship with Oracle. Deloitte was awarded Global Systems Integrator of the Year in 2007, making us the only Global Systems Integrator to win any of the prestigious Oracle Partner Network Awards that year.

Deloitte is the largest Oracle/PeopleSoft Global Alliance Consulting Partner with over 3500 experienced, dedicated consultants worldwide.

Partnerships and Alliances – Deloitte’s Relationship with Oracle

Deloitte has maintained strong relationships with Oracle. The strength of our alliance relationship with Oracle enables Deloitte to gain insight into Oracle products and strategies, work collaboratively with Oracle to resolve issues and address client needs and work proactively to identify opportunities for improvement at both the industry and application tiers. Our strategic relationship with Oracle is highlighted by the numerous awards we have received and premier level participation in Oracle programs during the course of our relationship. Furthermore, our methodology incorporates the elements of our relationship to augment issue resolution and feedback from Oracle.

Some specific examples demonstrate the strength of our relationship:

- Direct ties to Oracle/PeopleSoft development
- Public Sector Advisory Council Participation (Canadian representation)
- Multiple Partnership Awards
- Pre-release beta testing participant
- Dedicated PeopleSoft laboratories
- Oracle and PeopleSoft certification
- Fusion Participation

Details on each example follows and benefits to MCCCD are summarized below.

Benefits from Deloitte’s Relationship with Oracle to MCCCD’s Project

Direct Ties to Oracle / PeopleSoft Development

Issues can be quickly escalated to the appropriate team/person for discussion and resolution. When issues require escalation, Deloitte can facilitate their resolution with the Oracle representative assigned to the project. Deloitte has been very effective in helping our clients manage this relationship with our client’s Oracle representative(s). Historically, Oracle is very responsive to our requests because of our strong alliance.

When new products (or significantly enhanced versions) are released, regardless of the ERP package, a track record of working with the vendor’s development team is important. Deloitte is currently working with Oracle PeopleSoft v9.0 at number of projects in Canada and the United States. As a result we have a direct line in working with Oracle development on issues and fixes.

Public Sector Advisory Council Role

Oracle asks key business partners to provide advice and counsel on product strategy and direction. To facilitate this in a formal way, Oracle has a Public Sector Partner Advisory Council. This is a small, exclusive group of
partners that focus in the Public Sector. The group convenes regularly to discuss issues and provide input to Oracle on product and market strategies. The Council provides guidance and feedback directly to a group of Oracle’s executive management team.

Deloitte participates in this Public Sector Advisory Council. Through participation on this council, Deloitte provides input and guidance to Oracle on behalf of public sector clients. Deloitte is your advocate to make sure that Oracle is aware of items deemed important to clients in the public sector.

**Pre-Release Beta Testing Participant**
Since 1995, Deloitte has been involved in pre-release beta testing of PeopleSoft. Our practitioners are engaged in the beta testing of new modules, gaining experience before these modules are generally released. This exposure to PeopleSoft applications early in their life cycles is indicative of our commitment to mastering leading-edge technology. For the release of version 9.0 Deloitte invested time and effort for our consultants to work side-by-side with Oracle/PeopleSoft development to test the functionality of the product.

**Dedicated PeopleSoft Laboratories**
Deloitte maintains dedicated labs running the latest releases of PeopleSoft software for use by our staff and to confirm application functionality.

**Oracle and PeopleSoft Certification**
Deloitte is designated by Oracle as a Global Certified Advantage Partner (CAP), the highest level of Oracle relationship. As a CAP member of Oracle’s PartnerNetwork, Deloitte is required to maintain the highest standards and reapply annually to maintain CAP status. Requirements include maintaining a highly skilled staff of Oracle Certified Professionals, Technical and Application Implementation Champions, and Sales Champions. Additionally, we are required to actively participate in at least two of Oracle’s product areas. In addition, Deloitte participates in product and service testing, and maintains demo systems and solution centers by product focus.

As part of our continuing commitment to the professional development of our consultants, we remain up-to-date on all product enhancements and changes by attending partner based training and reviewing all products as they are released.

**Fusion Participation**
As part of our ongoing partnership, Deloitte has access to emerging Oracle developments. We actively participate in the planning for changes to future releases, combining our deep functional knowledge of our client's business processes and our technical experience with Oracle’s software development experience.

For example, Deloitte is part of the Fusion development team. Deloitte is working closely with both the application strategy team and the Fusion middleware development teams as part of this effort.

Deloitte is also part of the core Oracle team that is building the Fusion upgrade path. During the Design phase of Implementation, MCCCD will benefit from Deloitte’s investment in Fusion. We bring real life experiences and lessons learned to determine optimal design.

**PeopleSoft Version 9.0 Experience**
Our team is dedicated to the Oracle PeopleSoft marketplace and we are currently engaged in several Oracle PeopleSoft v9.0 projects at other public sector institutions. We also were invited by Oracle to participate in the development and quality assurance testing of v9.0 prior to its general release. Our new v9.0 Total CampusTM
accelerators (Configuration Workbooks, Testing Scripts, etc.) will be used to support MCCCD’s PeopleSoft Fit-Gap and support our collective team’s ability to accelerate your PeopleSoft implementation.

7.3B Confirm or qualify your ability to provide elements of Section 5 Scope of Work

Our proposal describes our strength in ERP projects and depth in higher education to support the RFP requirements from MCCCD. We believe our proposal clearly demonstrates our abilities and we confirm our ability to provide each element of Section 5 scope of work.

7.3C Complete the Questionnaire

We have responded to this Section 7 Questionnaire, providing the requested information. We have described our Oracle/PeopleSoft experience and resources throughout this proposal, where requested by your RFP. In Section 4.2.2 and 4.2.3 (supported by Attachment J), we have provided information on our Oracle/PeopleSoft practice and the clients we have served. We have also included relevant client references in Sections 4.2.1 and 7.2.A and representative resumes in Attachment E. We would be happy to provide any additional information required if you have any questions regarding our capacity to perform the scope of duties defined within your RFP.

7.3D Describe technological resources that will support your services

Deloitte utilizes a number of tools that maximize value delivery and minimize project risks, thereby increasing the likelihood of success. Elements of these tools will be used as appropriate for the project. Given the breadth and depth of our experience with higher education clients, many of these tools have been tailored to their specific needs.

- Higher Education IndustryPrint™ is a solution for process improvement within the Oracle framework. Processes are mapped to Oracle screens.
- Deloitte Consulting Online (a.k.a. eRoom) is an online, collaborative tool that allows project team members to store and access important project documents. Deloitte Consulting Online can be accessed through a web browser across the internet.
- Oracle Solution Centers will assist in “jumpstarting” the project by providing quick access to an environment. Prior to MCCCD having their own environments available, resources could log onto this environment to expedite the fit-gap process by validating functionality and demonstrating to MCCCD how configuration data is captured and managed in order to support the Fit-Gap objectives.
- ValueLink relates Deloitte’s best knowledge resources to the Enterprise Value Map™ value drivers’ framework and shows our clients the full depth of what Deloitte Consulting brings to the table—all inside a rapid-response, drill-down application.
- Value Analytics™ — This tool provides access to historical financial data and other information used by business leaders and market analysts to help better understand how companies are performing and where they need to improve. It has powerful analysis capabilities that use the EVM as a framework.
- Enterprise Value Map — The EVM is used to help identify the specific actions an organization could take to increase the value of the solution being implemented and correlates these actions to the ERP functionality that can enable them. The map shows you how ways you can make practical links between organizational capability and operational performance; current and future performance; and thought and action.
- A cornerstone of our approach is the Configuration Workbook. These materials utilize the table sequencing provided by PeopleSoft and supplement this with visual and narrative support, along with possible configuration options. The Workbooks are used to facilitate the Configuration Workshops. The Workbooks create real value for clients by accelerating the process, while providing client resources with a better understanding of the configuration decisions they are being asked to make, and how each decision fits in the larger scheme.
- Having been involved in a significant number of Higher Education projects, we have developed a large repository of Test scripts to be leveraged during your implementation.
• Deloitte has developed a set of tools to automate, to the extent possible, the task of reconciling and comparing legacy systems to Oracle. This set of tools includes a repertoire of routines, procedures and processes to test for commonly encountered anomalies.

These tools compliment our implementation services, expediting the process overall, and mitigate risks during the implementation. For additional information on accelerators and tools, please refer to 7.3.A (description of our Higher Education Total Campus Solution) and Attachments K and I (additional description of tools and templates).

7.3E Additional information on qualifications to provide requested services

As evidenced by our qualifications, representative resumes and references included within this proposal, our consultants bring the skills needed to meet all areas in your Scope of Services. We have also described our Oracle/PeopleSoft experience and resources throughout this proposal, where requested by your RFP. In Section 4.2.2 and 4.2.3 (supported by Attachment J), we have provided information on our Oracle/PeopleSoft practice and the clients we have served. We have also included relevant client references in Sections 4.2.1 and 7.2.A. Representative resumes are included as Attachment E. Sections 7.3.A and 7.3.E provide additional information on our capabilities.

Given the size and depth of our organization, we are well-positioned to meet your needs. Provided below is some additional information regarding our qualifications.

Deloitte has been one of Oracle’s largest and most successful partners for many years, and one of the elite few Oracle “Certified Advantage Partners” (CAPs) for more than 10 years. This is the highest membership level that an organization can achieve in its alliance with Oracle. From Oracle’s perspective, CAPs consistently demonstrate their commitment to Oracle in terms of supporting the products, collectively going to market, and solving client business problems.

Deloitte is the only partner to win multiple Titan Awards (“Projects of the Year”) from Oracle Corporation in each of the past four years. In October 2009, Deloitte won three Oracle Titan awards. These awards recognize Deloitte for applying deep industry and technical know-how in developing effective services based on Oracle applications and technology. Highlights of our alliance with Oracle include:

• Oracle has named Deloitte their #1 Partner in North America in 2008 and 2009.
• Global Oracle Certified Advantage Partner.
• Strategic alliance relationship for the past 13 years.
• Eleven North America Oracle Titan Awards since 2006 which recognize the “Project of the Year” in various categories.
• Deloitte and clients have won numerous Oracle “Empower the Green Enterprise” awards.
• Deloitte operates a CMMI Level 3 certified Oracle Development Center in Hattiesburg, Mississippi.
• Placed in the Leader’s Wave of Oracle Service Providers by Forrester Research, 2009.
• Placed in the Leader’s Quadrant for North American ERP Service Providers by Gartner, 2009.
• Positioned as a leader for Business Intelligence and Performance Management Solutions by Gartner, 2009.

The 2009 Gartner Magic Quadrant for North American ERP Service Providers is provided in Attachment D, which shows Deloitte in the “Leaders” quadrant. Based on our experience working with all of the Oracle products which MCCCD currently has and implementing these products within many Higher Educational Institutions, Deloitte is well positioned to serve the MCCCD in the variety of services which will be required to upgrade each of the Oracle product sets.

Respondent Questionnaire
Pricing Schedule

As provided for in your RFP, we have elected to submit a more detailed pricing schedule in lieu of the sample provided in the RFP. Our pricing is varies based upon staff levels rather than “Type of Service.” Thus, we have organized the pricing schedule below accordingly. The hourly rates shown are inclusive of travel costs, as preferred by MCCCD. We have shown hourly rates only at this point. Going forward, as individual scopes of services are identified, the level of effort and resource mix can be defined and used as the basis for estimating the associated project costs.

We have shown rates for on-site, off-site and off-shore options. Within each level and option, we have provided a range (minimum to maximum) to account for the difference in travel costs and potential volume discounts. Since we don’t know at this time precisely which resources will be needed, how long they will needed and when they will be needed, it is not possible to determine what, if any, travel costs will be incurred and what volume discounts may apply. The ranges shown will allow flexibility so that we can provide required resources, depending upon project needs. Please note that the rates are based on the assumption that resources will be assigned to projects for 12 months or less. Should resources be extended on multi-year projects, additional long-term travel costs may need to be added to the rates shown below.

<table>
<thead>
<tr>
<th>DELOITTE CONSULTING STAFF</th>
<th>Low Range</th>
<th>High Range</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Level</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Principal/Director</td>
<td>$320</td>
<td>$390</td>
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<tr>
<td>Senior Manager/Specialist Leader</td>
<td>$284</td>
<td>$338</td>
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<tr>
<td>Manager/Specialist Master</td>
<td>$222</td>
<td>$267</td>
</tr>
<tr>
<td>Senior Consultant</td>
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<td>$190</td>
</tr>
<tr>
<td>Consultant</td>
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<td>$160</td>
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<tr>
<td>Analyst</td>
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<td>$145</td>
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<tr>
<td>Associate 7-On-site</td>
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<td>$169</td>
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<tr>
<td>Associate 6-On-site</td>
<td>$103</td>
<td>$143</td>
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<tr>
<td>Associate 5-On-site</td>
<td>$82</td>
<td>$121</td>
</tr>
<tr>
<td>Associate 4-On-site</td>
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<td>$104</td>
</tr>
<tr>
<td>Associate 7-Off-Site/On-Shore</td>
<td>$120</td>
<td>$129</td>
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<tr>
<td>Associate 6-Off-Site/On-Shore</td>
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<tr>
<td>Associate 5-Off-Site/On-Shore</td>
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<td>$77</td>
</tr>
<tr>
<td>Associate 4-Off-Site/On-Shore</td>
<td>$57</td>
<td>$62</td>
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<table>
<thead>
<tr>
<th>DELOITTE INDIA RESOURCES</th>
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<tr>
<td>Manager - Offshore Shore</td>
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<td>$48</td>
</tr>
<tr>
<td>Senior Consultant -Offshore</td>
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<td>Consultant - Offshore</td>
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<tr>
<td>Associate 7-Offshore</td>
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<td>$49</td>
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<tr>
<td>Associate 6 - Offshore</td>
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<td>$38</td>
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<tr>
<td>Associate 5 - Offshore</td>
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<td>$35</td>
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<tr>
<td>Associate 4 - Offshore</td>
<td>$19</td>
<td>$26</td>
</tr>
</tbody>
</table>
Pursuant to Arizona Revised Statutes 35-391.06 & 35.393.06, proposer certifies that it does not have a scrutinized business operation in either Sudan or Iran.

Is your firm a:

( ) Corporation* (✓) Partnership ( ) Individual ( ) Joint Venture

* If a corporation, answer the following:

(a) Where incorporated: N/A

(b) Date incorporated: N/A

(c) Have your Articles ever been suspended or revoked? ( ) Yes (✓) No

If yes, when, for what reason, and when were they reinstated:

Has your firm or its parent or subsidiaries ever been debarred or suspended from providing any goods or services to the Federal Government or other public entities? ( ) Yes (✓) No

If yes, when, for what reason, and when were they reinstated: N/A
THE FOLLOWING RATES APPLY TO EMPLOYEES TRAVELING ON OFFICIAL STATE BUSINESS:

- Personal Vehicle Mileage Reimbursement: **44.5 cents per mile effective 11/15/06**
- Privately–owned aircraft: 99.5 cents per mile. Requires prior GAO approval. Based on the shortest air routes from origin to destination. Landing and parking fees are allowed except at the location where the aircraft is normally based.
- In–State Lodging and Meal & Incidental Rates: **Effective 10/1/09**

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<tr>
<th>State</th>
<th>Primary Destination</th>
<th>County</th>
<th>Begin</th>
<th>End</th>
<th>M&amp;IE</th>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grand Canyon / Flagstaff</td>
<td>Coconino (Except The City Limits Of Sedona)</td>
<td>Oct 1  Oct 31</td>
<td>$44</td>
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<tr>
<td>Grand Canyon / Flagstaff</td>
<td>Coconino (Except The City Limits Of Sedona)</td>
<td>Nov 1  Feb 28</td>
<td>$44</td>
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<tr>
<td>Grand Canyon / Flagstaff</td>
<td>Coconino (Except The City Limits Of Sedona)</td>
<td>Mar 1  Sep 30</td>
<td>$44</td>
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<tr>
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<td>Navajo</td>
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<tr>
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<td>Maricopa</td>
<td>Oct 1  Dec 31</td>
<td>$59</td>
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<tr>
<td>Phoenix / Scottsdale</td>
<td>Maricopa</td>
<td>Jan 1  Mar 31</td>
<td>$59</td>
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<tr>
<td>Phoenix / Scottsdale</td>
<td>Maricopa</td>
<td>Apr 1  May 31</td>
<td>$59</td>
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<tr>
<td>Phoenix / Scottsdale</td>
<td>Maricopa</td>
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<tr>
<td>Phoenix / Scottsdale</td>
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<td>Sep 1  Sep 30</td>
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<tr>
<td>Sedona</td>
<td>City Of Sedona Which Falls Within Yavapai And Coconino Counties</td>
<td>Oct 1  Feb 28</td>
<td>$64</td>
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<td>Sedona</td>
<td>City Of Sedona Which Falls Within Yavapai And Coconino Counties</td>
<td>Mar 1  May 31</td>
<td>$64</td>
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</tr>
<tr>
<td>Sedona</td>
<td>City Of Sedona Which Falls Within Yavapai And Coconino Counties</td>
<td>Jun 1  Sep 30</td>
<td>$64</td>
<td></td>
<td></td>
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<td>Sierra Vista</td>
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<td>$39</td>
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<tr>
<td>Tucson</td>
<td>Pima</td>
<td>Oct 1  Dec 31</td>
<td>$49</td>
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<tr>
<td>Tucson</td>
<td>Pima</td>
<td>Jan 1  Mar 31</td>
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<td>Tucson</td>
<td>Pima</td>
<td>Apr 1  Sep 30</td>
<td>$49</td>
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<tr>
<td>Yuma</td>
<td>Yuma</td>
<td>$39</td>
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</tbody>
</table>
Interested Bidders are asked to review and provide, as completely and accurately as possible, a written response on each applicable section below:

**TYPE OF BUSINESS ORGANIZATION**

Please check the appropriate box(es).

The Bidder represents that it operates as:

- [ ] A CORPORATION incorporated under the laws of the State of ________________
- [ ] An INDIVIDUAL
- [X] A PARTNERSHIP
- [ ] A NON-PROFIT ORGANIZATION
- [ ] A JOINT VENTURE

Federal Employer Identification Number: 06-1454513

**PARENT COMPANY and IDENTIFYING DATA**

A "parent" company, for the purposes of this provision, is one that owns or controls the activities and basic business policies of the Bidder. To own the Bidding company means that the "parent" company must own more than 50 percent of the voting rights in that company. A company may control a Bidder as a "parent" even though not meeting the requirements for such ownership if the "parent" company is able to formulate, determine or veto basic policy decisions of the Bidder through the use of dominant minority voting rights, use of proxy voting or otherwise.

The Bidder:

- [X] IS _____ IS NOT owned or controlled by a "parent" company.

If the Bidder IS owned or controlled by a "parent" company, Bidder shall provide the name, address, phone and fax numbers, and Federal I.D. No.of the company.

Deloitte LLP
2 WORLD FINANCIAL CNTR
NEW YORK, NY 10281-1414
Phone Number: 212-436-2000
Fax Number: 212-436-5000
FEIN: 06-1454513
**BIDDER'S STATEMENT (continued)**

**BIDDER REFERENCES**

**Private Business Contracts**

MCCCD requires a **minimum of three (3) current and local references** for which you are providing same or similar products and services specified herein. Please indicate below the businesses for which you have provided such during the past two (2) years:

<table>
<thead>
<tr>
<th></th>
<th>Company Name:</th>
<th></th>
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<tbody>
<tr>
<td>1</td>
<td>Maricopa County</td>
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<tr>
<td></td>
<td>Address: 301 West Jefferson Street, Phoenix, Arizona</td>
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</tr>
<tr>
<td></td>
<td>Phone #: To be provided upon request, Fax #: To Be provided upon request</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contact Person: To be provided by Kathy Karich upon request</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contract Period: From: January 2009 To: Current</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Describe Services: Project Management Office services and enterprise management activities related to the outsourcing of Human Resources technology and selected processes. Services aligning County’s strategical and tactical business objectives, project governance, status reporting/milestone tracking, issue/risk identification and tracking of resolution and communication.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Company Name:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>US Airways</td>
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</tr>
<tr>
<td></td>
<td>Address: 4000 E. Sky Harbor Blvd, Tempe, Arizona</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Phone #: To be provided upon Request, Fax #: To be provided upon request</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contact Person: To be provided by Kathy Karich upon request</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contract Period: From: October 2007 To: April 2009</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Describe Services: Implementation of Oracle HCM for 36,000 employees including systems conversion and implementation, business process redesign and change management.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Company Name:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Central Arizona</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Address: 23636 North 7th Street, Phoenix, Arizona</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Phone #: 623-869-2385, Fax #: N/A</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contact Person: Carolyn Norder</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Describe Services: Implemented Oracle HR Advanced Benefits functionality and Self Service functionality for the Central Arizona Project. Services included system implementation, mid-year conversions, interfaces and enrollment and custom reporting.</td>
<td></td>
</tr>
</tbody>
</table>
MCCCD is also interested in speaking with public agencies or educational institutions for whom you have provided such products and services covered herein:

Deloitte has provided services to many public agencies and educational institutions that reflect the RFP requirements. In Section 4.2.2, we have provided a timeline graphic that displays our list of educational institutions we have served. Sections 7.3.A and 7.3.E provide additional information on our capabilities. Given the size and depth of our organization, we are well-positioned to meet your needs. We have also included relevant client references in Sections 4.2.1 and 7.2.A and a representative, cross-industry list of clients (including public agencies and educational institutions) in Attachment J. Should MCCCD need additional information or wish to speak with any of these organizations, we would be pleased to provide additional details and/or request a reference call and coordinate a mutually agreeable time for our clients to speak with MCCCD.
### Standard Business Hours

1. **Days of week available for services:** Monday-Friday, or as mutually agreed upon contract award
2. **Business hours of operation:** 8:30 AM - 5:30 PM, or as mutually agreed upon contract award
3. **On-call/Emergency service hours:** As mutually agreed upon contract award
   - **Phone Number(s):** 917-741-2140
   - **Web Address:** http://www.deloitte.com
   - **FAX Number:** 646-348-1335

### General Information

4. **Business License Number:** 06-1454513
5. **Number of years in business under current name:** 10 years
6. **Number of offices in the State of Arizona:** Deloitte has a permanent office in Phoenix Arizona with 27 partners and more than 225 professionals
7. **Business Classification (check applicable category)**
   - Minority Owned Business (MBE) N/A
   - Woman Owned Business (WBE) N/A

**Does your firm hold this certification from any other agencies or companies?**

- **No:** ✓
- **Yes:**

**With Whom?**
8. Name and address of office assigned to handle the MCCCD account:

Kathy Karich  
Deloitte Consulting LLP  
2901 N. Central Avenue, Suite 1200  
Phoenix, AZ 85012

9. Account Manager Information:

Name: Kathy Karich  
Phone: 917-741-2140  
Pager: Same as above

10. Contractor’s License Number(s):

<table>
<thead>
<tr>
<th>TYPE</th>
<th>NUMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td></td>
</tr>
</tbody>
</table>

11. Do you ever sub-contract any of your services?  

- [X] YES  
- [ ] NO  

If YES, which services?: On occasion, we may subcontract certain services, typically to provide specialized services. However, none of the representative resumes provided herein are subcontractors.

ATTACH ADDITIONAL SHEETS IF NECESSARY TO FURTHER DESCRIBE THE EXPERIENCE AND QUALIFICATIONS OF YOUR FIRM FOR PROVIDING THE PRODUCTS/SERVICES UNDER THE CONTRACT.
Attachment C – Deloitte Pre-Built UPK R12 Library

The list of topics included in the Deloitte Pre-Built UPK R12 Library is provided here. The categories are as follows:

- Reporting and Technical Track
- Financials Track
- Project and Grant Accounting Track
- Procurement Track
- Human Capital Management Track

This prebuilt UPK content can be used as part of both testing activities such as CRP, Integration and User Acceptance testing and also as part of the creation of training materials. We have provided a sample of the Human Capital Management Track below.
<table>
<thead>
<tr>
<th>Lesson</th>
<th>Topic</th>
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</thead>
<tbody>
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Attachment D – Gartner Magic Quadrant for ERP Service Providers, North America 2009

- Gartner has positioned Deloitte in the leaders quadrant of its 2009 Magic Quadrant for ERP Service Providers, North America. The two axes in the MQ are “ability to execute” and “completeness of vision.”

- The relative positioning of vendors in this Magic Quadrant is based on factors determined by Gartner as relevant to this market.

- Gartner evaluates service providers on their ability to execute and their completeness of vision.

Source: Magic Quadrant for ERP Service Providers, North America

Disclaimer: This Magic Quadrant is copyrighted February 2009 by Gartner, Inc. and is reused with permission. Gartner’s permission to print its Magic Quadrant should not be deemed to be an endorsement of any company or product depicted in the quadrant. The Magic Quadrant is Gartner’s opinion and is an analytical representation of a marketplace at and for a specific time period. It measures vendors against Gartner-defined criteria for a marketplace. The positioning of vendors within a Magic Quadrant is based on the complex interplay of many factors. Well-informed vendor selection decisions should rely on more than a Magic Quadrant. Gartner Research is intended to be one of many information sources and the reader should not rely solely on the Magic Quadrant for decision-making. Gartner expressly disclaims all warranties, express or implied of fitness of this research for a particular purpose.
Within this attachment, we have provided representative resumes covering all areas identified within your RFP, Section 5 - Scope of Work. Below we have provided a summary table which indicates the relevant experience of each individual by scope area. As indicated within our proposal, there are a sub-set of the significant depth and breadth of skilled, experienced resources Deloitte can offer to meet your needs.

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Kathy Karich
Principal

Profile
Kathy Karich is a Deloitte Principal with more than 20 years of consulting experience implementing large-scale business transformation projects and enterprise systems implementations for public sector organizations. Kathy joined Deloitte Consulting in 2009 via the acquisition by Deloitte of Bearing Point’s Public Sector Consulting practice. Prior to joining Deloitte, Kathy had over 15 years of experience with BearingPoint, where she led BearingPoint’s State and Local Government Practice for the Northern United States and Canada. Kathy has served over 25 state, local and education clients, and is currently leading Deloitte’s US Higher Education practice.

Experience

New York City Housing Authority (NYCHA), Project BEST, Project Partner
Ms. Karich managed and served as Project Partner for an engagement to implement NYCHA’s Oracle Enterprise Resource Management (ERP) system. The initiative, known as Project BEST, was a major systems implementation that modernized NYCHA’s IT infrastructure. The Oracle EBS system now supports over 1,200 users across the Authority for a variety of business functions, including accounts receivable, accounts payable, general ledger, purchasing, inventory, budgeting, grants management, reporting, and other core financial areas. As part of the project, the team also provided policy development and technical assistance to increase the NYCHA’s network security and network management capabilities. This work included developing security polices, reviewing options for designing and implementing single sign-on authentication and authorization processes for the Oracle system, developing a business continuity program and plan, enhancing security through the use of RSA’s securID tokens to authenticate users accessing the system remotely, and implementing HP Openview functionality to monitor thresholds and provide performance metrics for network management.

Port Authority of New York and New Jersey (PANYNJ), Project Partner
Ms. Karich managed and served as Project Partner for an ERP implementation and support engagement for PANYNJ. Through the contract, which was initiated in February 2000, Ms. Karich and her team supported 1,200 users of the Port’s core ERP financial, purchasing, and inventory system. In addition, the team provided functional and technical support of the existing ERP application and assisted the Port in developing enhancements and upgrades to the system. The team received a contract renewal to continue providing this level of support through 2010.

City University of New York, Project Partner
Ms. Karich served as Project Partner for a project where Deloitte provided resources to support CUNY’s PeopleSoft implementation (as subcontractors to Oracle Consulting) in the areas of change management, organizational readiness, communications and training. Deloitte’s responsibilities included:

• Preparing and supporting implementation of PeopleSoft to 23 campuses serving 450,000 students and 37,000 faculty and staff, including HCM/TAM, Faculty Workload, Campus Solutions, General Ledger
• Designing and implementing Peer Network/Super User strategy that helped identify, train, deploy and connect key university SMES; listserv, SharePoint and WebEx meetings used to build community
• Developing a Comprehensive communications strategy working with communications liaisons at each campus; included project web site, SharePoint collaboration, listservs, town hall meetings, podcasts and project video
• Designing and leading innovative student marketing strategy; key elements include building student “ambassador” teams and the use of social networking tactics

• Designing and delivering train-the-trainer for numerous PeopleSoft modules, using UPK as part of training effort

Tranz Rail New Zealand, Project Leader

Ms. Karich served as Project Leader for a major ERP systems implementation and business process improvement project at Tranz Rail, New Zealand’s national transportation organization that was responsible for commuter rail, cross-country rail freight transportation and ferry services. Kathy assisted in the cost/benefit analysis and ERP system selection process. She managed the process changes and system design and implementation for the operations group. Her areas of responsibility spanned the full system development lifecycle. Representative tasks included:

• Developing the project plan

• Designing business processes to support the system and to coordinate with existing corporate functions

• Managing the functional design and implementation of interfaces with other applications

• Planning and overseeing testing and data conversion activities

• Managing user acceptance testing

• Developing training plans, training documentation and end-user documentation

• Delivering training

• Providing post-implementation support

Ms. Karich was involved in 18-month project from start-to-finish, which included helping develop the initial business case through to training, implementation, and post-go-live support of the live system.

Danish National Railway, Advisor

Ms. Karich served as an Advisor to the national railway of Denmark on its implementation of an ERP system to support Maintenance and Production functions. Ms. Karich identified and presented major benefits, opportunities, and risks associated with such an implementation at a maintenance conference held by the Danish Railway, a client of BearingPoint’s Copenhagen office.

Commonwealth of Pennsylvania, Comprehensive Workforce Development System (CWDS), Project Partner

Ms. Karich is serving as Project Partner for Pennsylvania’s Comprehensive Workforce Development System (CWDS) Project. Deloitte partnered with the Commonwealth to implement CWDS to provide a single, integrated approach to prepare Commonwealth citizens for long-term, productive employment. CWDS was developed leveraging the Commonwealth’s Microsoft .Net framework, and provides a web-based solution for meeting the workforce development needs of key Commonwealth Workforce Partnering Agencies: the Department of Labor & Industry’s Bureau of Workforce Development Partnership (BWDP), Office of Vocational Rehabilitation (OVR), and the Department of Public Welfare’s Bureau of Employment and Training Programs (BETP). As Project Principal, Ms. Karich is responsible for the day-to-day management and oversight of the project and the Deloitte delivery team as well as interfacing with Commonwealth Executives and senior project leadership to help determine the project continues to meet its objectives and move forward successfully.
Commonwealth of Massachusetts, Unemployment Insurance (UI), Project Executive
Ms. Karich is serving as Project Executive for an initiative to modernize the state-wide unemployment insurance (UI) system, using Deloitte’s UFACTS UI Solution. She serves on the Executive Steering Committee, working with the Commonwealth’s Secretary of Labor and other state executives to help determine the project is on track and meeting or exceeding client expectations.

Commonwealth of Massachusetts, CommPASS System, Project Partner
Ms. Karich is serving as Project Partner for the implementation and support of the Commonwealth’s CommPASS procurement system, which is the state’s central on-line system for managing vendor solicitations. Ms. Karich serves on the Executive Steering Committee, working with the senior leadership of the Commonwealth’s Operational Services Division (OSD). Ms. Karich also has overall responsible for the CommPASS project delivery team.

City of Toronto, 311 System, Project Executive
Ms. Karich served as Project Executive for an initiative to implement a world-class Citizen Call Center “311” System to transform how the City of Toronto interacts with and serves its citizens. She served on the Executive Steering Committee, working with the Toronto Deputy City Manager and other city executives to help determine the project progressed and aligned with the City’s goals and objectives. Ms. Karich also had overall responsibility for the Managing Director and delivery team.

New York City Housing Authority (NYCHA), Project Partner
Ms. Karich served as Project Executive for an initiative to re-engineer NYCHA’s procurement function and implement Oracle Advanced Procurement modules to support the enhanced business processes. Ms. Karich served on the Executive Steering Committee, working with the Deputy General Managers and other NYCHA city executives to help determine the project progressed and aligned with the NYCHA’s goals and objectives. Ms. Karich also had overall responsibility for the project delivery team.

Professional Background
Prior to her consulting career, Ms. Karich served as Associate Director of Planning and Government Liaison for the Children’s Health Fund (1992-1994). In this role, Ms. Karich coordinated programmatic and fiscal planning for this multi-million dollar health care program operated under the auspices of Montefiore Medical Center in New York City. She conducted a study to review access to health care in more than 100 facilities used by the city to house homeless families, the results of which were published in the *Journal of the New York Academy of Medicine*. Ms. Karich was also responsible for leading/developing major grant proposals for government agencies and serving as the government liaison for communications with key local, state and federal officials.

Prior to CHF, Ms. Karich served as Senior Financial Analyst for the New York City Office of Management and Budget (1989-1992). Ms. Karich was responsible for management and oversight of the capital and operating budget for housing and supportive services provided to homeless families. She developed forecasting models for caseload projections, budget preparation, program planning, debt service calculation, cost benefit analysis, and evaluation of program and policy options.

Ms. Karich also served as an Operations Auditor for a Fortune 100 manufacturing corporation (1984-1987), where she conducted onsite operational reviews of subsidiaries and manufacturing plants in the United States and overseas. The business areas she reviewed included purchasing, inventory, finance, accounts payable, asset management, maintenance, production, payroll, and human resources. She assessed business functions for efficiency, compliance with firm policies and procedures, and adequacy of internal controls. Assignments included locations in the United States, New Zealand, Australia, the United Kingdom, Japan, Korea, Brazil, and Argentina.
Onsite reviews involved documenting existing processes through flowcharts and narrative descriptions, analyzing expenditures, reviewing and testing internal controls, recommending improvements to current practices, and conducting exit interviews with senior management to present audit results.

**Education**
Columbia University, School of International and Public Affairs, Master of Public Administration (1990)
Boston College, School of Management, B.S. (1984)

**Presentations**
- ERPs in the City – Key to ERP Project Success, NYC Government Technology Forum
Louise Upton  
Associate Partner

Profile
Louise is an associate partner with Deloitte, who leads our North American higher education practice. Louise brings to Deloitte, eight years of direct experience in the public sector combined with eleven years of business process design, system's evaluation, selection and implementation experience.

Louise is currently the principal responsible for the Higher Education practice and the architect of our Total Campus methodology. As the leader of this practice Louise is responsible for resourcing and development of our higher education professionals along with continued growth of the practice.

Louise has participated in over forty higher education assignments in the last ten years in both English and French. She has played various roles on projects from engagement partner, business advisor, quality assurance manager, project manager, subject matter expert, testing lead and requirements lead.

Experience

University of North Carolina – Student Administration Business Process Design and System Implementation; Program Director

The University selected Deloitte to assist with the review of their current business processes and the implementation of student administration for their campus at Chapel Hill, North Carolina.

Role: Serving as program director. Overseeing project resources, timeline and budget. Working with executive sponsors and stakeholders to resolve issues. Providing strategic direction to determine the overall program and all of its components is successful.

Sheridan Institute of Technology – Engagement Partner, ERP Upgrade

Sheridan engaged Deloitte to assist in the upgrade to version 9.0 of their ERP Student and HR/Payroll solutions.

Role: Serving as the engagement partner the role included the reviewing and final approval of all deliverables for the project, ensuring resources were in place to deliver the services, participating in quality assurance reviews, monitoring project timeline and ensuring the project remained on budget.

Queen’s University – Engagement Partner, ERP Fit/Gap

Queen’s engaged Deloitte to assist in the fit/gap analysis of their current business processes against potential ERP products.

Role: Serving as the engagement partner the role included the reviewing and final approval of all deliverables for the project, participating and facilitating workshops, ensuring resources were in place to deliver the services, monitoring project timeline and ensuring the project remained on budget.

Ontario College of Art and Design – Engagement Partner

OCAD engaged Deloitte to assist in the review of their current strategic priorities relating to information technology.

Role: Serving as the engagement partner the role included the reviewing and final approval of all deliverables for the project, ensuring resources were in place to deliver the services, monitoring project timeline and ensuring the project remained on budget.

Attachment E – Representative Resumes
Mayo Clinic College of Medicine – Engagement Partner; Business Process Review
The Mayo Clinic engaged Deloitte to assist with the review of their existing admissions processes and recommend potential efficiencies.

Role: Serving as the engagement partner the role included the reviewing and final approval of all deliverables for the project, ensuring resources were in place to deliver the services, monitoring project timeline and ensuring the project remained on budget.

Ryerson University – PeopleSoft Student Administration Upgrade; Quality Assurance Partner
The University selected Deloitte to assist with the upgrade of their student administration product.

Role: Serving as quality assurance partner. Conducting formalized quality reviews every 4-6 weeks on the projects progress. Interviewing key stakeholders and project team members, reviewing project plan and project deliverables and making recommendations on improvements. Preparing and presenting final report to senior executives.

University of North Carolina – Student Administration Business Process Design and System Implementation; Quality Assurance Partner
The University selected Deloitte to assist with the review of their current business processes and the implementation of student administration for their campus at Chapel Hill, North Carolina.

Role: Serving as quality assurance partner. Conducting formalized quality reviews every 4-6 weeks on the projects progress. Interviewing key stakeholders and project team members, reviewing project plan and project deliverables and making recommendations on improvements. Preparing and presenting final report to senior executives.

Queen’s University – Requirements Definition Project; Project Manager
The University selected Deloitte to assist in the development of requirements for the selection of Human Resources, Payroll, Student and Financials systems. Deloitte documented stakeholder requirements and assessed current processes for administrative systems and recommended opportunities for improvement.

Role: Responsible for overall management of the engagement. Met with project steering committee and key stakeholders to determine expectations were being met. Validated key findings with relevant stakeholders once requirements were gathered. Prepared report and presented recommendations to senior executives.

Sheridan College – PeopleSoft Financials Upgrade; Project Advisor
Deloitte was engaged to assist with the upgrade of the financial system from version 8.0 to 8.9.

Role: As project advisor I was asked to consult on various aspects of the upgrade. Primary responsibility was to oversee the fit/gap analysis and quality of the deliverables. Met with team to review progress and identify risks to the implementation. Reviewed deliverables for accuracy and quality.

Pennsylvania State System of Higher Education – Independent Verification and Validation Project; Project Manager
The State System selected Deloitte to assist with an independent verification and validation project designed to examine their proposed implementation approach for their campus management project.
**Role:** Serving as project manager. Facilitating workshops, leading strategy sessions to determine priority of ongoing projects, reviewing project plans and documentation, assessing strategies for conversion, custom development and interfaces. Preparing and presenting final report to senior executives and board of governors.

**Nova Scotia Community College – PeopleSoft Systems Upgrade**

Deloitte was engaged to assist with the upgrade of the Student Administration and HRMS systems from version 8.0 to 8.9.

**Role:** As project advisor I was asked to consult on various aspects of student administration and HRMS upgrade. Primary responsibility was to oversee the fit/gap analysis and quality of the deliverables. Met with team to review progress and identify risks to the implementation. Reviewed deliverables for accuracy and quality.

**Red River College – IT/Governance Strategy; Project Advisor**

The college selected Deloitte to assist with defining their technology strategy for the next five years.

**Role:** Served as project advisor. Facilitated workshops, lead strategy sessions to determine priority of ongoing projects, assisted in defining an IT vision and provide insight on how other institutions were handling similar challenges. Documented current IT structure and processes. Documented current technology in use at the college (hardware and software) and within peer institutions and identified potential efficiencies to be gained through integration. Presented challenges faced by other similar institutions and how they were overcome. Presented final report to senior executives and steering committee.

**La Cité Collégiale – PeopleSoft System Implementation; Project Manager**

The college selected Deloitte to implement the French version of PeopleSoft’s student administration product v8.9 across its organization and integrate it with its existing legacy systems for scheduling, curriculum management, finance, human resources and online learning management.

**Role:** Responsible for the overall successful planning and implementation of the Student Administration modules in French. Day to day operations of the project include: issue resolution and escalation, general project management, project plan maintenance, resource management, timeline and budget management. Participated in requirements gathering workshops, ensuring follow up on outstanding items. Oversaw the development and delivery of custom components of the software to determine stakeholder requirements were being met. Determined integration with existing legacy systems and data integrity was maintained. Facilitated meetings with key executives and presented to executive steering committee on monthly basis the status of the project.

**Queen's University – IT Strategy; Project Manager**

The University selected Deloitte to review their existing administrative systems (HR, Payroll, Student and Financials). Deloitte assessed current end user requirements for administrative systems and recommending opportunities for improvement. This includes examining the challenges across multiple functions and departments. Deloitte also looked at how technology resources were being used across the University and surveyed peer schools to inquire if they were facing similar challenges.

**Role:** Responsible for overall management of the engagement. Conducted workshops with key stakeholders across the University including; faculty, administration, researchers, departments, staff and students. Gathered requirements on functionality and reporting not currently provided by the administrative systems. Analyzed data, conducted surveys of peer institutions and defined a list of a list of recommendations for moving forward. Validated key findings with relevant stakeholders to garner buy in for recommendations. Prepared report and presented recommendations to senior executives.
Nova Scotia Community College – PeopleSoft Self Service Strategy and Implementation; Project Manager
The College selected Deloitte to develop a self service strategy for their growing student population across fourteen campuses. Once the strategy was complete the College engaged Deloitte to assist in implementing the strategy.

Role: Responsible for overall project management. Facilitated workshops with key stakeholders across the College including; faculty, administration, departments, staff and students to understand their requirements for self service. Responsible for defining a list of recommendations for moving forward and presenting to the project steering committee. Managed the consulting resources responsible for deployment of the self service functionality. Responsibilities included project plan management, status reporting, issue resolution and budget/timeline management.

College of the North Atlantic (Newfoundland and Doha, Qatar) – PeopleSoft Systems Implementation; Project Manager
The institution engaged Deloitte to assist in the implementation and deployment of its ERP Human resources, payroll, Student Administration and Financials across 17 campuses geographically disbursed across the province of Newfoundland and one campus in the Middle East (Qatar). Integration of the new technology solution with legacy systems such as scheduling and learning management/curriculum development which were different in Newfoundland than Qatar.

Role: Responsible for the overall management of the project and successful planning and implementation of the Student Administration, HR/Payroll and Financials modules in both Canada and the Middle East simultaneously. Day to day operations of the project included: issue resolution, general project management, project plan maintenance, resource management, timeline and budget management, change management and project communications. Oversaw the creation of reporting, training and testing strategies to determine the successful deployment of the project.

Algonquin College - Business IT Strategy; Project Manager
The College selected Deloitte to review its current student information system and assess potential for process and/or technology improvements.

Role: Responsible for facilitating workshops with key system stakeholders. Gathered requirements, assessed opportunities, defined key integration points for systems not being replaced and proposed recommendations for moving forward. Managed work plan, provided status reporting and presented final report to the project steering committee.

Sheridan Institute of Technology and Advanced Learning – PeopleSoft Systems Implementation; Project Manager
The institution engaged Deloitte to lead a fit/gap analysis comparing packaged solutions for education institutions. Once a package was selected, Deloitte was engaged to implement and deploy the HRMS, Student Administration and Financials suite of products. This solution needed to be integrated to its existing CRM, learning management and scheduling solutions which were not being replaced.

Role: Responsible for the overall successful planning and implementation of the PeopleSoft Student Administration, HR/Payroll and Financials modules. Day to day operations of the project included: issue resolution, general project management, project plan maintenance, resource management, timeline and budget management and regular executive reporting to steering committee.
New Brunswick Community College – PeopleSoft Systems Implementation; Project Manager
The College engaged Deloitte to implement the PeopleSoft Student Administration solution across 11 separate colleges in both in English and French.

Role: Responsible for the overall project management of the project including; resource allocation, budget management, timeline and deliverable management. Travelled to various colleges to garner buy in for new processes and system. Facilitated change management workshops to determine colleges were prepared for the new processes and systems. Coordinated communication activities. Reported to steering committee on monthly basis and participated in a formal quality assurance process.

St. Lawrence College – PeopleSoft Systems Upgrade
Higher Education. Deloitte was engaged to complete the upgrade of the Student Administration system from version 7.6 to 8.0. Also as part of the engagement Deloitte assisted in the implementation of HRMS and Financials.

Role: As project advisor I was asked to consult on various aspects of student administration upgrade. Primary responsibility was to oversee the fit/gap analysis and quality of the deliverables. Met with team on a regular basis to review progress and identify risks to the implementation. Reviewed deliverables for accuracy and quality.

Nova Scotia Community College – PeopleSoft Systems Implementation; Student Administration Team Lead
Deloitte was selected to implement PeopleSoft’s suite of products; HRMS, Student Administration and Financials. Included in this engagement was the development of a reporting and outsourcing strategy. The college was previously made up of 14 separate colleges which were now going to be governed by a central body. Finding ways to streamline processes was a key component of the engagement.

Role: Responsible for the student administration component of the project. Facilitated workshops, oversaw the design of student structure, lead team meetings, interacted with client resources on design decisions and data validation. Worked with the College registrar to centralize the admissions processing from 14 campuses into one.

Nova Scotia Community College – Process Re-engineering; Student Administration Team Lead
Deloitte was asked to assist in identifying the benefits of centralizing its admission processes from fourteen campuses to one.

Role: Responsible for examining current process, identifying required changes in order to centralize the admission’s process. Assisted in the development of new business processes and the implementation of the new solution.

Niagara College – PeopleSoft Systems Implementation; Student Administration Advisor
Niagara College engaged Deloitte to assist in the deployment of PeopleSoft HRMS, Financials and Student Administration.

Role: Responsible for fit/gap analysis, scope definition and project planning for the student administration module. Once implementation was underway served as the overall student administration advisor.

Nova Scotia Community College – PeopleSoft Business Case Development; Project Lead
The College engaged Deloitte to help in the development of a business case to support the recommendation to proceed with the PeopleSoft solution to replace its aging legacy system.
**Role:** Responsible for conducting interview with key stakeholders. Assessing current business process against ERP solution and defining cost/benefit opportunities. Development of recommendations on how to implement the ERP solution and production of the final business case.

**Education**
Bachelor of Science
Dalhousie University
CMC

**Presentations**
Delivered at various conferences:
- The Merger - What's Next For Me? Examining the Options
- Holding It All Together Post Go Live
- Things I Wish I'd Known Before I Signed Up for This

**Publications**
- Point of View: State to Finish, Navigating the course of technology-enabled change in higher education

**Language**
English - Native
French - Proficient in Business
Nina Thanjan  
Director

Profile
Nina serves as director in Deloitte’s National Oracle Practice. Her focus is on public sector clients in the western part of the US, specifically State and Local Government, Higher Education and Federal clients. She brings more than 13 years of implementation leadership in Higher Education, Government and Private Sector, including multiple complex, Finance, HR and Payroll transformations with Oracle and PeopleSoft. She began her career in Higher Education as an employee at both Carnegie Mellon and Stanford Universities prior to her 17 year career in consulting.

Experience
• Yale University – Financials Lead, Payroll/HR Procedures Lead, and her last role was as the Payroll Production Cutover and Support Lead - for 26k employees, 6 pay types and several bargaining units

• Large Multi-National Financial Services Company – OHR Global Project Manager for an HR implementation for 90k employees in 35 countries, included repeatable roll outs. This complex implementation included a global data warehouse, multiple interfaces to payroll systems including ADP in the US. The project was executed using the Six Sigma Methodology and had a full time Master Black Belt assigned to the project for the duration. This project also included a onetime automated employee conversion of from a PeopleSoft HR system into Oracle HR. Approximately 35,000 employees were loaded into the system at one time. Responsibilities included creation of a conversion plan for data extraction from the legacy system, creation of the process for error identification and correction of extract programs.

• New York City Housing Authority - Project Manager for Oracle Financials implementation included significant organizational transformation and achieved substantial ROI. This Financials implementation included, GL, Projects and Grants, AR and other financial modules. Project included inbound Payroll information to support Position Budgeting. This project won the NYC Mayor ETAP award for achieving business improvements•

• County of San Diego – ERP Program Director – built a 35 person team to support the ERP applications for the County of San Diego, including Oracle Financials, PeopleSoft HR/Benefits/Payroll and Kronos for timekeeping. The County the 6th largest in population, spends over 5b a year and employees over 15,000 employees.

Nina has provided a variety of consulting services to Higher Educational clients such as Business Process Improvement studies, Grants Administration, Student Financial Aid Grant Reviews, Facilities Management and Indirect Cost Rate Development, including space and equipment inventories. The following list provides a representative sample of her Higher Education clients:

• Columbia University, Stanford University and Medical School, Yale University, Princeton, Cornell Medical School, New York University, University of California Los Angeles (UCLA), Carnegie Mellon University, Research Foundation of the City University of New York (RFCUNY), City University of New York (CUNY) - City College of New York, Teachers College and Rutgers University.

• Experience with Post Production Support for a variety of areas including financials, HR and payroll. Setup a 24X6 Global Help Desk.
Professional Affiliations/Certifications

- PMP Certified, Issued by the Project Management Institute
- Successfully led an Oracle ERP implementation achieving CCMI level 3
- Successfully led a Global HR project for over 90,000 employees in 35 countries which included a full time Six Sigma Master Blackbelt on the team

Education

Bachelor of Science, Managerial Economics, Carnegie Mellon University

Presentations

Geoff Creaghan  
Senior Manager  

Profile  
Geoff is currently working for Deloitte Inc. as a leader in the Oracle practice and has been a key contributor to the development of the very successful North American higher education practice focusing on Oracle implementations.  

Geoff brings a broad range of skills to clients facing technology issues related to managing large scale system implementation planning, ERP systems implementations and project management, review of administrative systems, business process review, business case development, system selections, and risk assessment.  

Geoff has been working with IT systems for over 19 years and has worked on over 22 projects across multiple industries including public sector (higher education, federal government, municipal government), manufacturing, financial services, utilities and health care. Geoff is a strong leader with exceptional communication and organization skills.  

Experience  

ERP Project Management Office; University of Nebraska, Lincoln & Omaha, Nebraska  
Role: Project Management Coach for a large PeopleSoft Campus Solutions implementation for the university. The university converted from legacy applications to PeopleSoft version 9.0 to replace core applications for Student Administration. The role included providing guidance in establishing Project Management Office processes and methodology for the implementation. Responsibilities included providing guidance to senior management, and core program managers on initial go-live activities.  

Independent Verification & Validation; University of Nebraska, Lincoln & Omaha, Nebraska  
Role: Lead for the independent review of a PeopleSoft Campus Solutions version 9.0 implementation project. The scope for the project included the review of the project management office and quality management processes related to a multi-institution ERP implementation. Final recommendations were submitted to the executive leadership team.  

Enterprise System Implementation; University of North Carolina at Chapel Hill, North Carolina  
Role: Project Manager for a large PeopleSoft Campus Solutions implementation for the university. The university converted from legacy applications to PeopleSoft version 9.0 to replace core applications for Student Administration. Providing direction to the project team of over 90 consulting and client resources on the implementation approach and methodology. Active member of the project steering committee.  

ERP Planning and Scoping; University of North Carolina at Chapel Hill, North Carolina  
Role: Project Manager for the detailed planning and scoping assignment for UNC’s PeopleSoft Campus Solutions version 9.0 implementation. The six month assignment included a complete analysis of UNC’s business requirements to plan for the implementation, develop the detailed project plan and project charter as well as define the project team for the multi-year system implementation.
Enterprise System Review and Business Case; Ryerson University, Toronto Ontario

Role: Project manager for the assessment and review of Ryerson’s PeopleSoft Campus Solutions product to evaluate the feasibility for the upgrade from version 8.0 to 9.0. Facilitated the review, provided in depth analysis of the Ryerson environment and provided recommendations for the upgrade.

Enterprise System Upgrade; Algonquin College, Ottawa Ontario

Role: Project manager for the upgrade of PeopleSoft Financials version 8.4 to version 8.9. The role included providing the overall upgrade approach, project planning and team management activities. The scope of the upgrade included, GL, CC, PO, AR/BI, IN, AM and workflow. eProcurement was also implemented during the upgrade.

Enterprise System Upgrade; Upper Canada School Board, Kingston Ontario

Role: Provided project advisory services to Upper Canada’s project manager during the upgrade of PeopleSoft Financials 8.4 to version 8.9. Provided direction on the upgrade approach, project and risk management and input in to team staffing options.

Enterprise System Implementation; Fleming College, Peterborough Ontario

Role: Project manager for the implementation of a college-wide ERP solution at Fleming College. The college converted from legacy applications to PeopleSoft version 8.9 to replace core applications for Student Administration, Human Resources and Finance including Purchasing.

Providing direction to the project team of over 30 consulting and client resources on the implementation approach and methodology. Active member of the project steering committee. The project was delivered on time in a rapid 9 month timeline.

HRMS Risk Assessment; Ryerson University, Toronto Ontario

Role: Led the risk assessment of the HRMS system selection at Ryerson. Tasks included facilitating the review of the HRMS ERP systems, providing insight into the products being evaluated and development of the final report to deliver to the executive steering committee.

Administrative Systems Review; Queen’s University, Kingston Ontario

Role: Participated in the review of Queen’s administrative systems. Involved in workshops to gather information from the key business owners including faculties, departments, the Registrar’s Office and ITS. Developed the analysis of the interface connectivity between the legacy systems.

ERP System Selection; Fleming College, Peterborough Ontario

Role: Led the system evaluation and selection of administrative systems to replace Flemings’ Student Administration, Finance and Human Resource applications.

Led the consulting and Fleming team to develop criteria for the systems selection and developed selection requirements through review of strategic and operational plans and interviews with key business users and IT staff. The outcome was the RFP which was developed and released to three key ERP vendors for response. Assisted Fleming with the preparation and development of vendor demonstration scripts, product demonstrations, site visits, reference checks and cost analysis.

Attachment E – Representative Resumes
Strategic Solution; Ontario Colleges Application Services (OCAS), Guelph Ontario

Role: Led the development of the review and design of a strategic conceptual model for the online confirmation process for Ontario Colleges. Worked with Registrar’s from 28 colleges across the province to provide direction to the solution and facilitate the overall decision reporting to OCAS and the executive Registrar’s counsel (CRALO Exec). Achieved close to unanimous consensus on the approach which has been adopted and is currently in implementation by OCAS.

Enterprise Implementation, Business Case; La Cite Collegial, Ottawa Ontario

Role: Project managed the business case and planning/scoping for La Cite. Developed the implementation strategy and approach, project budget and staffing models and led the team through the development of the project scope.

Provided insights to La Cite during the development of the business case for the ERP implementation.

Enterprise System Implementation, Business Case; Algonquin College, Ottawa Ontario

Role: Student Administration System Evaluation – Project managed the development of the project charter for the evaluation of a replacement student information system.

Worked with Algonquin staff at all levels to assess their current student administration system environment provided direction for the development of the project charter and work plan and led the team during the development of the project scoping. Worked with the Registrar's Office to determine the fit/gap of the proposed ERP solution based on the college's business processes. Worked with the Information Technology Department to determine scope and complexity of the college’s interfaces to external systems, student self-service functionality, data conversion and reports.

Developed and proposed an ERP implementation solution to accommodate Algonquin's direction. Helped facilitate the decision making process with senior college executive.

Enterprise System Implementation; Algonquin College, Ottawa Ontario

Role: Project managed the implementation and conversion from ROSS Financials to PeopleSoft Financials 8.0. Developed the overall project charter, work plan, project scope and budget.

Provided direction to the project team on the implementation approach and methodology, managed project resources, provided guidance on issue resolution and decision making. Active member of the project steering committee.

Project was delivered on time and under budget.

ERP Upgrade; St Lawrence College, Kingston Ontario

Role: Project managed the PeopleSoft Student Administration Upgrade (7.6 to 8.0) and the PeopleSoft HRMS and Financials (including Purchasing) Implementation. The three PeopleSoft modules were delivered in parallel to the college over the 8 month implementation time frame and 4 month upgrade planning phase. Led the project team of 35 client and consulting resources providing direction on methodology, timeline management, budget management, resourcing, and participation on the project steering committee.
**HRMS ERP Implementation**; Sheridan College, Oakville Ontario

**Role:** Provided implementation support to the project team during the initial planning phase of the PeopleSoft HRMS implementation.

**Presentations**
Delivered at various conferences:
- Managing large scale ERP projects

**Publications**
- Point of View: State to Finish, Navigating the course of technology-enabled change in higher education

**Professional Affiliations/Certifications**
- Active member of the PMI (Project Management Institute)

**Education**
- Diploma in Marketing and International Business, Saint Mary’s University
- Bachelor of Science in Computer Science, major in hardware systems, University of New Brunswick (Co-op)
Dwaine X. Austin, PMP
Senior Manager

Profile
Mr. Dwaine Austin is a Senior Manager in the Federal Enterprise Applications practice of Deloitte Consulting. He is responsible for and involved in a wide range of consulting assignments covering business and IS strategies, effectiveness and efficiency studies, outsourcing studies, development methods, and service management. Mr. Austin has extensive experience in overseeing and managing multiple PeopleSoft projects including several implementations and upgrades.

Experience

State Community College System
Prepared all project communications for PeopleSoft HRMS implementation.


Large Children’s Hospital.
Security Assessment of the PeopleSoft 8.8 Financial and 8.9 HCM Systems.

Role: Instrumental in selling the assessment, providing resources and managing the assessment.

Large Telecommunication company.
PeopleSoft 9.0 Financials Re-deployment

Role: Assisted client with development of corporate wide Chart of Accounts re-engineering. Led process design workshops and configured the General Ledger system. Lead integration sessions across all modules.

Community College System in the State of Virginia.
PeopleSoft Financials Implementation

Role: Assisted with development of training materials. Administered training to several of the colleges across the State of Virginia.

Large State with over 38 agencies.
PeopleSoft Financials Statewide Implementation.

Role: Supervised a team of 8 individuals tasked with development of functional specifications, testing, configuration and knowledge transfer for PeopleSoft Accounts Payable, Commitment Control and PeopleSoft Purchasing. Managed and worked with a third party vendor on the integration of PeopleSoft Purchasing with Ariba. Managed the Procure to Pay piece of the large project work plan and was in charge of all staffing related to the Procure to pay area.

Large university which specializes in medical research.
PeopleSoft Financials Upgrade.
Role: Supervised 7 module leads and provided technology architecture support for a PeopleSoft Financials 8.8 upgrade. Lead on the PeopleSoft Travel and Expense module and was the backup on the PeopleSoft General Ledger module, which encompassed PeopleSoft Commitment Control across all modules. In addition, developed and managed the project work plan, provided consolidated status reports to the steering committee members and managed the budget from estimation to completion.

Large outpatient cancer treatment center.
PeopleSoft Financials Upgrade from 8.4 to 8.8.

Role: Led delta JAD sessions. Configured General Ledger Delta’s. Developed and administered delta training.

Large manufacturing client with major defense contracts.
PeopleSoft Financials 8.4 Upgrade.

Role: Provided knowledge on several financial modules and managed a team of 25 resources which included clients and consultants. Managed all aspects of the upgrade project from the development of the budget to creation of the project work plan, status reports, and configuration documents, testing strategy and execution and sign off of system and post production support.

Large Children’s Hospital
PeopleSoft Financials Enhancement and Budget Implementation.

Role: Managed the budget for a $10 million enhancement project. Developed and managed the project work plan and all deliverables also acquired additional work after the enhancement project. Managed a $2 million implementation of PeopleSoft Budgets which included developing and managing the project budget, developing and managing the project work plan and all deliverables.

System Experience

Software / Products:
PeopleSoft General Ledger – expert
PeopleSoft Accounts Payable – expert
PeopleSoft Purchasing – expert
PeopleSoft Expenses – expert
PeopleSoft Global Payroll – project experience
PeopleSoft HRMS – project experience
PeopleSoft Commitment Control – project experience
PeopleSoft Budgets – project experience
PeopleSoft Projects – project experience

Development Tools / Languages:
Query – expert
PeopleTools – project experience
PeopleCode – project experience
PS/nVision – project experience
SQL – project experience
SQR – project experience
Crystal – project experience

**Hardware / Operating Systems:**
Microsoft SQL Server – project experience
DB2 – project experience
Oracle – project experience

**General Tools:**
Microsoft Word – expert
Microsoft PowerPoint – expert
Microsoft Excel – project experience
Microsoft Project – project experience
Microsoft Access – project experience

**Education**
Bachelor of Science, Accounting
University of Arkansas, Pine Bluff Arkansas

**Professional Affiliations / Certifications**
PMP – Project Management Professional

**Training**
- PeopleSoft General Ledger
- PeopleSoft Accounts Payable
- PeopleSoft Purchasing
- PeopleSoft Expenses
- PeopleSoft Treasury

**Presentations**
- “Customer Case Study: University of Texas Medical Branch: Upgrading to PeopleSoft Financials Management 8.8,” Oracle Open World Conference October 2006.
**Anita Chu**  
**Senior Manager**

**Profile**  
Anita Chu is a manager in the consulting function in Toronto. She has done extensive work in PeopleSoft implementations (Student Administration, Financials and Supply Chain), business process redesign, IT assessments, systems selection, independent validation & verification assessments, change management, risk consulting, and internal audit. Anita’s broad range of experience has allowed her to gain exposure to a number of ERP packages outside of PeopleSoft, including: Oracle, Banner, and SAP.

Anita’s primary focus is in PeopleSoft implementations. She has primarily been involved in implementations focused on the higher education and public sector. Anita has taken on a variety of roles within implementations including: team lead, functional module lead, functional team member, change management, and business process redesign. Anita’s core modules for PeopleSoft Campus Solutions include: Student Financials, Financial Aid, and Self Service. For PeopleSoft Enterprise, Anita primarily focuses on Accounts Receivable and Billing. Building upon her experience with PeopleSoft Financials and PeopleSoft Campus Solutions, Anita also focuses heavily on the integration of the PeopleSoft Campus Solutions product with PeopleSoft Enterprise Financials and with PeopleSoft Enterprise HCM.

Building upon her experience in implementations, Anita has been heavily involved in a number of IT assessments, systems selections, and risk assessments. She has been involved in providing guidance to clients related to IT implementations and upgrades. This has given her exposure to a number of different ERP packages, vendors, and CIO concerns.

Outside of implementations, Anita has been involved in a number of projects related to business process redesign, change management, risk consulting, and internal audit. Anita has worked on a number of projects focused on reviewing risk, and internal controls. Building upon this knowledge, she has focused on designing business processes with the knowledge of the internal controls necessary for audit compliance. Anita has extensive experience in business process redesign and has been involved in a number of projects where she has developed processes and rolled this out to the organization.

Anita has consulted on companies in higher education, public sector, oil & energy resource, public broadcasting, several companies in manufacturing and technology. Additionally, she has extensive experience in the financial services industry through working for a leading Canadian financial institution.

**Experience**

**Public Sector - PeopleSoft Enterprise; Functional Lead**  
US Higher Education Institution. The client selected Deloitte to assist in their planning and scoping of a large scale implementation of PeopleSoft. They additionally hired us on to implement the solution.

**Role:** Responsible for leading a team of resources across all Campus Solutions modules. Responsibilities included: managing a team, defining requirements, configuring, testing, deploying the system, and designing supporting conversions, reports and enhancements. The client rolled out Campus Community, Admissions, Student Records, Student Financials, and Self Service.

**Public Sector - PeopleSoft Enterprise; Functional Team Lead**  
Higher Education; State. The client selected Deloitte to complete a fit/gap and plan for the implementation of a large scale implementation to replace their aging legacy systems.

Attachment E – Representative Resumes
**Role:** Responsible for leading a team of consultants and client members in the review of business processes.

**Higher Education – Technology/Business IT Strategy; Engagement Team**

Pennsylvania State System for Higher Education (PASSHE). Deloitte was engaged to review the scope and develop a budget for the implementation of SAP campus management and CRM for the 14 PASSHE Universities. For the statewide implementation of SAP, Deloitte was also asked to evaluate different ERP packages available and to devise a budget to complete an implementation of this size using alternate ERP packages. The alternate ERP packages included: Banner and PeopleSoft Student Administration. Deloitte will review feasibility of the scope, soundness of the project plan, and different ERP packages. Deloitte will also devise budgets for the completion of a statewide implementation and provide recommendations for next steps.

**Role:** Responsible for working as part of the engagement team to complete the assessment and review. Anita’s was brought onto the engagement due to her prior experience with PASSHE and her deep industry and subject matter expertise on student related business processes. Responsibilities included: participating in and facilitating workshops with University stakeholders, interviewing different Universities, analyzing existing documentation, reviewing and assessing the scope of work, assisting in devising a budget for different options, developing recommendations, and assisting in the preparation of a final report.

**Higher Education – Technology/Business IT Strategy; Engagement Team**

Ryerson University. The University selected Deloitte to complete a preliminary review of the approach to the upgrade of their PeopleSoft Student Administration system. As part of the review, the team was asked to review the drivers that are critical in determining the timeline, scope and costs of the upgrade.

**Role:** Responsible for working as part of the engagement team to complete the preliminary review with a focus on the student related modules and business processes. Responsibilities included: reviewing existing documentation around interfaces, reports, bolt-ons and customizations, review and analyze business process decisions related to the student administration system, looking for variations and opportunities to improve processes during the upgrade, and analyzing the resource requirements and timeline options for the upgrade.

**Higher Education – Technology/Business IT Strategy; Engagement Team**

Pennsylvania State System for Higher Education (PASSHE). Deloitte was engaged to provide independent verification and validation services for an ongoing implementation of SAP campus management and CRM for the 14 PASSHE Universities. Deloitte will review feasibility of the implementation plan, soundness of the project plan, appropriateness of the resource levels, budget levels, risk factors and effectiveness of governance structure.

**Role:** Responsible for working as part of the engagement team to complete the independent review. Anita’s key responsibility was to provide subject matter expertise on student related business processes in the area of student financials, records, admissions, and financial aid. Responsibilities included: participating in and facilitating workshops with University stakeholders, analyzing existing documentation, and assisting in the preparation of a final report.

**Higher Education - Peoplesoft; Team Lead; Fleming College**

The College selected Deloitte as their partner to assist with the replacement of their existing enterprise systems with PeopleSoft Financials, Human Resources, Student Administration and Portal.

**Role:** Responsible for leading the Student team in implementing their PeopleSoft ERP system. She also took on the task of implementing Student Financials and Self Service for the College. Responsibilities included: managing a team, defining requirements, configuring, testing, deploying the system, and designing supporting conversions.
reports and enhancements. The client rolled out Campus Community, Admissions, Student Records, Student Financials, and Self Service. In addition to leading the student portion of the implementation, responsibilities also included working on the integration between PeopleSoft Financials, Human Resources, and Student Administration.

**Higher Education - Change Leadership/HR Operations & Technology/Business IT Strategy; Engagement Team**

Ryerson University. The University selected Deloitte to complete a HRMS Risk Assessment Analysis. We were engaged to review the three decision paths for replacement of the Human Resources Management Systems – do nothing, acquire the Oracle HRMS system, or acquire the PeopleSoft HRMS system.

**Role:** Responsible for working as part of the engagement team. Responsibilities include: analysis, market research, and deliverable development. Provided value to the project by identifying and understanding the integration elements between Human Resources with Financials and Student Administration.

**Higher Education – IT Transformation; Project Manager/Team Lead**

Ontario Colleges Application Service. The application services firm selected Deloitte to build on a conceptual model and develop a technology concept paper.

**Role:** Responsible for managing the project through the development of a technology concept paper. Responsibilities include: defining requirements, business analysis, and deliverable development. Delivered value to the project through deep industry knowledge.

**Higher Education – Peoplesoft/JD Edwards; Student Team Lead**

College of the North Atlantic. The College selected Deloitte as their partner to assist with the replacement of their existing enterprise systems with PeopleSoft Financials, Human Resources, Student Administration and Portal.

**Role:** Responsible for leading the Student team in implementing their PeopleSoft ERP system. She implemented Student Financials while she was on the engagement. Responsibilities included: defining requirements, configuring, testing, deploying the system, and designing supporting conversions, reports and enhancements. Focused on the integration between PeopleSoft Student Administration, Financials, and Human Resources.

**Higher Education - Peoplesoft/JD Edwards; Consultant**

New Brunswick Community College. The College selected Deloitte to complete a training session on PeopleSoft Student Financials and to complete a readiness assessment.

**Role:** Responsible for conducting Student Financials training sessions. Conducted readiness assessment workshops.

**Higher Education - Technology/Business IT Strategy; Consultant**

Algonquin College. The College selected Deloitte to estimate cost and effort to replace their existing Student Administration system.

**Role:** Responsible for leading the Student Financials and Financial Aid scoping sessions, meeting with staff to gather requirements, identifying potential gaps and devising solutions.

**Higher Education - Peoplesoft/JD Edwards; Student Financials and Financial Aid**

Sheridan College. The College selected Deloitte as their partner to assist with the replacement of their existing enterprise systems with PeopleSoft Financials, Human Resources, Student Administration and Portal.
**Role:** Responsible for leading the Student Financials and Financial Aid teams in defining requirements, configuring, testing, deploying the system, and designing supporting conversions, reports and enhancements.

**Higher Education - Peoplesoft/JD Edwards; Student Financials Consultant**

St Lawrence College. The College selected Deloitte as their partner to assist with the upgrade of their existing PS Student Administration system.

**Role:** Responsible for working on the Student Financials team in defining requirements, configuring, testing, and deploying the system. Key responsibility was to work on the integration of Student Financials with their Financial system. Worked extensively on Integration Broker.

**System Experience**

**Software / Products:**
PeopleSoft (Campus Solutions/Student Administration), PeopleSoft (Financials)

**Hardware / Operating Systems:**
WindowsXP, Windows95/NT

**Education**
Bachelor of Commerce and Finance, University of Toronto

**Training**
PeopleSoft Student Financials,
PeopleSoft Financial Aid,
PeopleSoft General Ledger,
PeopleSoft Accounts Receivable,
PeopleSoft Billing,
PeopleTools I,
PeopleTools II

**Language Skills**
English - Native
Chinese (Cantonese) - Advanced Conversation
Troy W. Kay  
Senior Manager

Profile
Troy is recognized nationally as an integral part of the consulting team with a focus on enterprise technology products and specifically complex technology implementations and upgrades. His focus is on understanding business process and technology objectives and then managing the effort to realize those objectives with an enterprise application solution.

He has been a team lead and team member on both commercial and public sector projects. He has participated on all aspects of technology projects including system selection, scoping and planning, business process fit gap, leading design workshops, managing development teams, executing conversion, application testing, technical team training, coordinating cutover plans, and post-implementation support. Troy has been working with IT systems for over 12 years and has worked on over 15 projects across multiple industries with the majority of his experience being in the public sector and higher education industries.

Troy is considered among his peers to be a highly innovative, effective leader, strong coach and a valuable professional with extensive training and broad practical experience.

Experience
Public Sector - Oracle; Project Lead

Provincial Government. The client selected Deloitte to assist with the implementation of enhancements to their enterprise financials solution.

Role: Troy was the primary project lead responsible for the overall management of the tasks, resources, and budget.

Environment: Oracle EBS 10g

Public Sector/Higher Education - PeopleSoft Enterprise; Technical Project Manager

A University engaged Deloitte to assist and advise management in relation to an implementation of PeopleSoft Campus Solutions version 9.0. Mr. Kay worked with the higher educational institution’s personnel through design phases, development phases, testing phases, and deployment phases as per Deloitte’s Total Campus methodology for ERP implementations. Deloitte is managing, alongside the client resource, the tasks associated to completing this work. Resolution of issues, scope management, and consultation on approach are the key activities of the engagement.

Role: Responsible for the overall day-to-day management and direction of all technical aspects of the PeopleSoft Student Administration implementation and integration. Accordingly, his responsibilities were as follows:

- Responsible for the successful delivery of development for PeopleSoft Campus solutions bringing experience of the implementation from several implementations of the type;
- Lead the technical team through the implementation based on Deloitte’s Total Campus implementation methodology;
- Responsible for project status and issue escalation to the project management;
- Participation on the Student Stakeholder Committee and ERP Management Team groups;

Attachment E – Representative Resumes
• Successful delivery of the project development scope within budget and timelines;
• Overall technical planning, direction, and guidance;
• Resolution of project issues;
• Acquisition and monitoring of technical resources and budgets;
• Review of strategies, methodologies and approaches for completion of technical deliverables by team members;
• Team leadership, team building, strategy consultation, and advice in all technical aspects of the implementation;
• Review and sign-off of all major technical deliverables for the project;
• Assessment of risk associated with change factors;
• Management of technical scope changes and change control processes;
• Determine updates on related projects are provided to the team.

Environment: PeopleSoft 9.0, PeopleTools 8.49, Oracle 10g, Sun Solaris, Oracle Fusion Middleware

Public Sector/Higher Education – Peoplesoft HRMS Scoping and Planning

The University chose Deloitte to assist with determining the scope of work to implement PeopleSoft HRMS.

Role: Lead the scope definition work for all development, integration, and infrastructure aspects of the project. Helped the university determine the strategic direction for integration/middleware and identity management. Determined the effort needed for all PeopleSoft HRMS development items in scope. Facilitated workshops for the full project team to determine the 'to be' business flows and the development effort associated to enabling those business flows in PeopleSoft.

Environment: PeopleSoft 9.0, Oracle

Public Sector/Higher Education - SAP; Technical Lead;University State System

University engaged Deloitte to perform an Independent Verification and Validation (IV&V) of their SAP implementation.

Role: Reviewed all technical aspects of the university's implementation plan for the SAP Campus Management project across 4 of its state-wide sites. Interviewed key team members regarding components of the implementation including infrastructure, development methodology, testing plan, cutover plan, and available skills. Worked with a team to assess the overall feasibility of the implementation project and created a final report documenting our findings.

Environment: SAP

Public Sector/Higher Education – PeopleSoft Financials Upgrade; Technical Team Lead

The client recalled Deloitte to assist with upgrading their PeopleSoft Financials application which was originally implemented with Deloitte’s assistance.

Role: Managed the upgrade of PeopleSoft Financials. Developed the plan for upgrade passes and re-development effort. Managed the team workload and helped resolve issues.
Public Sector/Higher Education – PeopleSoft Student Administration/HRMS and Financials Implementation; Team Lead

The client purchased PeopleSoft Student Administration/HRMS 8.9 and Financials 8.9 and asked Deloitte to assist with the implementation.

Role: Created and maintained the technical task plan for PeopleSoft SA/HRMS and Financials application implementation. Determined timely delivery and continued integration of the applications during the implementation. Managed end-to-end the cutover plan and execution. Delivered knowledge transfer sessions and training to client technical resources. Supported the troubleshooting team by providing insight and experience for issues encountered. Created, evaluated and offered estimates on the technical impact of project Change Requests/modifications that were presented.

Environment: SQL server, Windows 2000

Public Sector/Higher Education – Implementation & Post Implementation Support Contract; Technical Team Lead

The client selected Deloitte to help position the College for future flexibility of additional applications and functionality. Lack of integration between the college’s HR systems and the Financial systems across its 17 campuses was making this process a challenge. As well, a long-term support agreement was made to determine that the college can continue to leverage the expertise that Deloitte brings while focusing their own resources to critical operations internally.

Role: Lead the Technical team from Deloitte and client side. Created and maintained the Technical stream plan. Determined timely delivery of Technical tasks across two implementations – one local and the other in the Middle East. Delivered knowledge transfer sessions and training to client Technical resources. Initially involved in the PeopleSoft infrastructure support and installation. Supported the troubleshooting team by providing insight and experience for issues encountered. Created, evaluated and offered estimates on the technical impact of project Change Requests/modifications that were presented. Assisted with defining and managing the long-term remote support agreement with both client sites.

Environment: PeopleTools 8.4x, SQL Server 2000

Public Sector/Municipality - PeopleSoft HRMS Module Deployment and Upgrade, EPM/Budgets Implementation; Technical Team Lead

Role: Planned and managed the execution of a significant portion of the Technical Stream activities – inclusive of cutover to production, HRMS Service Pack 1, and general development activities. Provided leadership and direction to the team and the client counterpart. Managed the overall technical plan and reported deviations, impact assessment and optional solutions to management in a timely manner. Supported the troubleshooting team by providing insight and experience for issues encountered. Evaluated and offered estimates on the technical impact of project Change Requests/modifications that were presented.

Environment: Oracle, Windows 2000
Public Sector/Higher Education – PeopleSoft Student Administration/HRMS Upgrade; Technical Team Lead

**Role:** Managed the upgrade of PeopleSoft SA and HRMS with a contracted firm doing the infrastructure support. Developed the plan for upgrade passes and re-development effort. Managed the team workload and helped resolve issues.

**Environment:** SQL Server 2000, Windows 2000

Public Sector/Higher Education – PeopleSoft Student Administration Upgrade/HRMS and Financials Implementation; Technical Team Lead

**Role:** Managed a significant conversion effort of taking the entire data content of PeopleSoft SA 7.6 and migrated it into PeopleSoft SA 8.0 SP1, as no upgrade path was available at the time. Lead the technical team through the conversion, design and development of key interfaces, migration of existing development into the new version of the system, and software enhancements to meet the specific business needs of the college and its 3 campuses. Managed the technical aspects of the implementation and integration of PeopleSoft HRMS and Financials with the upgraded Student Administration application.

**Environment:** SQL Server 2000, Windows 2000

Public Sector/Higher Education – PeopleSoft Student Administration Implementation; Technical Team Lead

**Role:** Managed the changes to the technical architecture components resulting from taking a custom built system and transitioning to PeopleSoft Student Administration. Educated the college to prepare them for the shift from a dispersed network across 11 campuses to a future architecture that is centralized both physically and from a support perspective. Lead the conversion team in the process of extraction, validation and loading of legacy data into the new system. Accountable for the technical project plan, development and change request effort estimates for tasks, and resource allocation.

**Environment:** SQL server, Windows 2000

Public Sector/Higher Education – PeopleSoft SA/HRMS and Financials Implementation; Team Member

**Role:** Responsible for leading the conversion of legacy data and development of key interfaces for PeopleSoft Student Administration and Human Resources implementation at a Community College with 13 campuses. Also managed the infrastructure support, workstation deployment, and database management for the implementation at a non-client lab location.

**Environment:** SQL Server, Windows 2000

**System Experience**

**Software / Products:**
PeopleSoft, SQL Server 2003, Oracle 10g

**Development Tools / Languages:**
PeopleCode, SQL, Application Engine, SQR, Crystal Reports
Hardware / Operating Systems:
OSX 10.6, Windows NT/2000/XP/Advanced Server

General Tools:
Microsoft Office 2003, Microsoft Project 2003

Education
Bachelors of Computer Science (Information Technology Major), University of New Brunswick

Training
PMP Certification – in progress
Intro to Project Management – Harvard e-Learning
Oracle PeopleSoft Enterprise Development tools (PeopleCode, PeopleTools, Integration Tools, Crystal Reports)
Essential Project Management Tools (Deloitte internal)
Leadership Transition – Harvard eLearning

Language Skills
English - Native
French - Basic Conversation
André Romanovskiy  
Senior Manager  

Profile  
Mr. Romanovskiy is a senior manager with the Security Services Group in Deloitte's Enterprise Risk Services Practice. He leads Deloitte’s Identity and Access Management implementation practice in the Greater Toronto Area. Mr. Romanovskiy has over 18 years of information technology experience, including IT strategy, systems architecture and design, systems management and large technology integration projects. He has a deep expertise in security, networking, mid-range systems and application development. Mr. Romanovskiy has helped clients with enterprise architectures, application security, network security, systems security, intrusion testing, security policies and compliance. His current focus is on identity and access management, enterprise security architecture and application security, including secure application design and deployment.  

Before joining Deloitte & Touche, Mr. Romanovskiy was a managing consultant for IBM Security and Privacy Services, focusing on security integration and security architecture. He was also a leader of the IBM Penetration Testing team.  

Experience  
Transportation - Identity Management integration with Physical Access Control Systems and Card Management systems, Project Manager and Lead Architect  
- The client selected Deloitte to transform a physical security system, which consisted of siloed databases and applications that share common or related information, to an integrated management system enabling automation for a number of key business processes for the Public Safety business unit and Pass/Permit Control Office (PPCO). This new pass / permit control system included employee and employer profile management, pass / permit management, key card management, and interfaces with external physical access control systems (Software House C-CURE and GE Picture Perfect) and external card management system (CATSA system for production and management of contactless smart cards with biometric authentication).  
- The Deloitte team performed a complete end-to-end implementation of the Restricted Area Pass System based on Quantum Secure SAFE product and integration with six external physical security systems, including requirements gathering, design, development, testing, migration to production, training and post-production support.  

Public Sector – Extranet Portal Integration and Access Management solution; Lead Architect.  
Mr. Romanovskiy has recently completed an external-facing web access management and portal integration (WAMPI) project for a provincial government agency  
- The agency is launching a series of eService applications to interact with over 200,000 external users across the province. This required the agency to put in place a new portal, as well as enhanced Web Access Management services which are tightly integrated with this portal, having the following business functions: (1) user and access provisioning; (2) authentication; (3) authorization; and (4) audit controls.  
- The Deloitte team completed an end-to-end solution implementation that involved Oracle/BEA Aqualogic Portal, Sun Identity Manager, Sun Access Manager and Sun Directory Server.  

Retail – IBM Tivoli Identity Management and Access Management Implementation (multiple releases); Project Manager and Lead Architect  
Mr. Romanovskiy led a multi-phased implementation project for a large retail company in Ontario. The retail company selected IBM Tivoli Identity Manager (ITIM) and IBM Tivoli Access Manager (ITAM) as their key
platforms and engaged Deloitte as an integration partner to assist with implementation of the ITIM and ITAM solution in three releases (18 months elapsed time).

- **Release 1 – Core IdM services.** The objective of this release was to build a foundational infrastructure that would automate employee on-boarding processes and IT “back office” administration processes on the company’s major platforms (Windows and AIX). The Deloitte team performed a complete end-to-end implementation of the Identity Management solution based on IBM Tivoli products, including requirements gathering, design, development, testing, migration to production, training and post-production support.

  The implemented solution allowed the company to realize the following benefits:
  - The automation of account life cycle management for internal users;
  - Enforcement of access policies;
  - Increased security and resource protection; and
  - Robust reporting and auditing of user access.

- **Release 2 – Extranet Directory and External User Provisioning.** The objective of this release was to build an Extranet User Authentication service and automate provisioning of external identities for extranet applications by extending core Identity Management services from Release 1.

  The Deloitte team performed a complete end-to-end implementation of the Extranet Identity Management solution based on IBM Tivoli products (IBM Tivoli Directory Server and ITIM), including requirements gathering, design, development, testing, migration to production, training and post-production support.

- **Release 3 – Single Sign-On and Web Access Control for internal applications.** The objective of this release was to build a web access control and Single Sign-On solution (access management service) for internal applications; extending the core IdM services for role-based access provisioning with automated workflows; and Common Auditing and Reporting service.

  The Deloitte team performed a complete end-to-end implementation of the Access Management solution based on IBM Tivoli products (IBM Tivoli Directory Server, ITAM and ITIM), including requirements gathering, design, development, testing, migration to production, training and post-production support.

**Energy Distribution – Extranet Access Management Requirements and Architecture; Engagement Leader.**

Mr. Romanovskiy led an Extranet Access Management Requirements and Architecture engagement for a large Canadian oil & gas company. The company engaged Deloitte to help them define an Identity and Access Management solution for the Extranet Portal. The Deloitte team gathered Identity and Access Management requirements across multiple business units. Based on the synthesized requirements candidate architecture for the Extranet Identity and Access Management solution was developed. The architecture was used to develop evaluation criteria and analyze solution alternatives.

The deliverables of this engagement provided a significant input to the Extranet Portal project and allowed the company to move forward with a clearly defined architecture for the Extranet Identity and Access Management services.
Financial Services - Enterprise Identity and Access Management Architecture, Strategy and Roadmap; Engagement Leader

Mr. Romanovskiy completed an Enterprise Identity and Access Management Strategy engagement for a large Canadian financial institution. The bank engaged Deloitte to define strategy, architecture and roadmap for Enterprise Identity and Access Management services for internal users. The Deloitte team developed an Enterprise Identity and Access Management (EIAM) strategy and helped the bank to define their end-state architecture. Based on the analysis of business needs and in-flight projects, Deloitte developed the implementation roadmap that allowed the bank to map their existing project needs to the EIAM strategy. The Deloitte team also developed a high level business case that defined several groups of business benefits and cost savings.

The output of the engagement allowed the bank to formulate a multi-year EIAM program, provide consistent guidance to application projects and proceed towards the end-state architecture.

IBM Tivoli Identity Manager Implementation Roadmap and Business Case; Engagement Leader

Mr. Romanovskiy led an Identity Management Implementation Strategy engagement for a large insurance company. The company selected IBM Tivoli Identity Manager (ITIM) as their Identity Management solution and engaged Deloitte to assist with defining an implementation roadmap, end-state architecture and business case.

The Deloitte team analysed the current state of user management, security administration and business needs associated with the identity management solution. Based on the needs analysis Deloitte concluded that the company can achieve its vision and get the most benefits if it executes the project through incremental releases aligned to specific user communities. The resulting implementation roadmap was well aligned with strategic objectives and business benefits.

As part of the cost and benefits analysis, the Deloitte team developed a business case that included the solution cost estimates and both annual and one-time savings.

Enterprise Identity Management Strategy, Architecture and Roadmap; Engagement Leader

Mr. Romanovskiy completed an Identity Management Strategy engagement for a leading North American financial institution. The bank engaged Deloitte to conduct a study to evaluate the feasibility of implementing an enterprise-wide single sign on and identity management solution for internal users, namely, employees and contractors who use internal applications and systems. The Deloitte team developed an Enterprise Identity Management (EIDM) strategy and helped the bank to define their end-state vision and critical factors for the successful approach. Based on the analysis of current needs, Deloitte developed the implementation roadmap that allowed the bank to map their existing project needs to the EIDM strategy. Therefore, the bank was able to realize that it can achieve its vision through a series of managed deployments of technology and process change within a well managed strategic roadmap.

Deloitte conducted a comprehensive vendor analysis based on the “end-state” functional architecture and enterprise-wide technical requirement. The recommendations provide in this area helped the bank to narrow their vendor scope down to the three viable alternatives.

As part of the cost and benefits analysis, the Deloitte team developed a high level business case that included cost estimates, one-time savings and annual savings for all participating lines of business.

Mr. Romanovskiy was responsible for developing strategy, enterprise architecture and building the business case. Led all project activities.
Identity Management Strategy and Roadmap; Engagement Leader

Mr. Romanovskiy led an Identity Management Strategy engagement for a financial services company. The company engaged Deloitte to define an overall strategy, implementation roadmap and business case for the Enterprise Identity Management. The engagement included the following activities: current state assessment, analysis of requirements, issues and needs, defining the strategy, developing the business case, defining implementation roadmap and planning future phases of the Identity Management Program. The strategy was defined based on the current state, future vision and various business drivers in the organization. It allowed the company to properly plan this strategic initiative focusing on key success factors and strategic IT alignment. The business case helped the management to understand their return on investment and actual savings that can be realized. The Implementation Roadmap provided them with a detailed plan and estimated budget for next phases of the Identity Management initiative. The engagement deliverables provided the executive management with very clear answers on the vision, business drivers, benefits, costs and timeline.

System Experience

- **Software / Products:** IBM Tivoli Access Manager, IBM Tivoli Identity Manager, IBM Tivoli Directory Server, IBM Tivoli Directory Integrator, CA SiteMinder, Sun Directory Server, Sun Access Manager, Sun Identity Manager
- **Development Tools / Languages:** C/C++, Perl, SQL
- **Hardware / Operating Systems:** Microsoft Windows NT/2000/2003, UNIX/Linux (various flavours), AS/400, S/390
- **Middleware / Databases:** Microsoft SQL, J2EE, IBM WebSphere, BEA Web Logic

Education

**Master of Science, Electronic Engineering and Computer Science**

Bauman Moscow State Technical University

Professional Affiliations / Certifications

CISSP

Publications

- ComputerWorld Canada, “Getting value from your IdM project” (2005)

Presentations and Media Interviews

- Central Bank Security Conference of Caribbean countries (Trinidad)
- Supply Chain and Logistics Management Conference (Toronto)
- CTV WebMania
- Computer Dealer News
- Facts Canada
- The Internet Trust Institute

Attachment E – Representative Resumes
David Brassor  
Senior Manager  

Profile  
David Brassor is a Sr. Manager in the Technology practice of the Toronto office of Deloitte Consulting. David has been with Deloitte Consulting over 13 years, with 19 total years experience in global client server computing architectures. David’s focus has been on all aspects of program management, assessments, systems selection, integration, testing, disaster recovery planning, and data centre design. David has also played a lead role in the development of the Server/Storage Consolidation, and Business Continuity Planning service lines in Canada.

David is also the current lead in defining the Next Generation Data Centre and Green IT strategy for the Canadian consulting practice and has presented on these subjects to clients and vendors across North America.

Experience  

Technology Integration  
- **Higher Education**: Technology lead to assess the clients technology infrastructure and provide a detailed analysis and recommendations in regards to their strategies for voice networks (VOIP), wireless, data networks (LAN-E to MPLS), video conferencing, virtualization, servers, storage, HA, DR, and network security.

- **Energy**: Risk based assessment of the clients current data centre infrastructure. Provided recommendations on remediation activities based on the assessment findings. Client leveraged the findings to save them in excess of $20M in move costs as recommended by their outsource provider.

- **Government**: Assessment of a government agencies voice, data and video convergence strategy. Assessed proposed architecture and provided analysis and recommendations in regards to technology maturity, alignment with business requirements, implementation strategy and risk mitigation approach.

- **Consumer Business**: Assessment and design of a data centre site selection and strategy. Included all aspects of technology design including recommendations on servers, storage, virtualization, HA, DR, networks (MPLS WAN and LAN), convergence, consolidation and rationalization.

- **Oil and Gas**: Engaged by a large Oil and Gas client to assist them in defining their strategy for high availability and disaster recovery for their data centre environment. Worked closely with the business and IT team to identify the requirements for availability and recovery requirements which led to the development of flexible, robust recovery architecture for the enterprise leveraging the clients MPLS/frame relay environment. One of the key components of the architecture was server consolidation and virtualization through VMWare.

- **Hospitality and Tourism**: Led the assessment of an organizations data centre site selection process. Led the team to review the business requirements and the selection of the proposed facility for expansion of the current data centre.

- **Healthcare**: Led the IT assessment of a long-term care facilities IT strategy and data centre architecture. Worked with the leadership team to define an IT strategy that supports the hospitals core values of enhancing patient care.

- **Financial Services**: Engaged by a large financial services organization to assist in the assessment, design and planning of a data centre site selection and consolidation roadmap.

- **Government**: Engaged by the client to lead the Technical Stream of a large systems replacement program. Overall program is 2.5 years in length and $23.5M in costs. Lead a team of 18 Deloitte, client, and vendor
resources which will grow to 70+ resources at peak. Responsible for all aspects of the technical solution including development, conversions, architecture, infrastructure, security, vendor management, program management etc.

Core technology components include Oracle Applications, Stellent Document Management, iLog Rules Engine.

- **Government**: Engaged by the Mexican Government’s taxation division to assist them with implementing a Testing strategy supporting the world’s largest implementation of PeopleSoft Financials and CRM. Led a team responsible for all aspects of the testing strategy from Unit Testing through to Stress/Load and go-live data conversion testing. Recognized for my expertise in this area and the client has requested additional work from my team in the area of Enterprise Systems Management.

- **Insurance**: Engaged at a Canadian Insurance organization to lead the technical team to assess a cost optimization opportunity within their IT organization. Revised and restructured recommendations based on previous work completed. Recommendations accepted by management team and programs have been implemented. Client requested me to come back and run phase II of the program identifying and implementing additional IT cost optimization opportunities.

- **Consumer Goods**: Brought into a large Consumer Goods client to become their “interim CIO”. Actually played a role in their organization running their IT team. Key focus was to determine their readiness for the implementation of a 27 module Oracle Applications project. Managed the IT and business streams to determine the infrastructure, testing, and go-live strategies were properly implemented. Identified and structured the models for ongoing support and hosting of the to-be production environments working with the US arm of the client. Net result was that the infrastructure was stable and supportable at go-live.

- **High Tech Manufacturing**: Project Manager leading a team to perform an ITIL/ITSM assessment of the clients IT operations environment. Focus of the initiative is to define the long term operations vision while identifying and implementing quick-hits to provide the client with immediate resolution to known issues. This initiative also had other streams of assessment in regards to Tools & Automation, Testing, and Knowledge & Skills.

- **Financial Services**: Project Manager for an initiative which assisted a leading financial services organization is defining their strategic vision for the desktop platform and tools currently supporting their Telephone Banking environment. Identified strengths and weaknesses in the current environment which lead to an overall direction strategy and roadmap for the client.

- **Manufacturing**: Worked with a large technology manufacturer to assist them in refining their vision and strategy for their Real-Time Enterprise solution set.

- **Manufacturing**: Initiative to assist a client in rationalizing their server infrastructure. Designed a solution allowing the client to consolidate over 700 servers down to 21 using Sun eSeries class hardware. Integrated into this design was the concept of “utility computing” allowing the client to allocate capacity on demand. ESM was also an integral part of this design using HP OpenView and other tools.

- **Insurance**: Project lead to perform an analysis of a client mainframe legacy application environment. Focus was to recommend the enhancements required to the application environment to support their long term business goals and objectives including the overview and recommendations on their proposed EAI environment.

- **Manufacturing**: Project manager and lead architect to assist the client in re-designing their technology infrastructure
Development initiative in phase I to define requirements for a tool together application and technology information to support an application and technology consolidation initiative.

Phase II involved the analysis of their data and applications environment leading to a re-design of their EAI environment leveraging IBM MQ and Oracle to create a Service Oriented Application Integration environment.

- **Energy:** Requirements definition and technology architecture for an oil sands start-up. Work included the design of this organization business infrastructure including ERP selection and analysis (SAP, PeopleSoft, JDE) and all aspects of the business processes and technology architecture.

- **Manufacturing:** SAP technology replacement initiative to assist the client in defining the to-be SAP technology infrastructure. The lease on the SAP hardware was expiring and the client needed to procure a new infrastructure for the SAP platform that will support the projected growth of the systems as new lines of business are added to the SAP environment.

Created a Technology Infrastructure Strategic Vision defining the key IT Infrastructure projects that the client will undertake over the next 1 to 1 ½ years. Initiatives in this area may include server consolidation, SAN/NAS, BCM/DRP, SAP Portal, and others to be defined during the engagement.

- **Insurance:** Performed an analysis of the clients PeopleSoft implementation to determine gaps in functionality, design, testing, and implementation strategy. Reported directly to the CIO with recommended changes to the project structure to determine delivery of the required functionality and associated benefits.

- **Energy:** Lead architect for SAP R/3 implementation for 2000 users across 70 physical locations. Involves end-to-end project management of the IT implementation from planning to delivery including DRP planning. Included all aspects of systems integration and design including the design of their EAI platform (IBM MQ) and overall testing strategy.

- **Manufacturing:** Data warehouse requirements and EAI definition and design to support a client’s need to create an operational data store to integrate their CRM solutions ensuring a consistent view of the customer across the organization.

- **Financial:** Performed an analysis of a financial institutions retail banking platform implementation which includes Siebel, Win2K, and custom Java and C++ applications. Analysis was performed on the applications design and implementation plans to determine the success of the application rollout. Leveraged my knowledge of retail banking processes and systems to provide a detailed analysis of the plans and key factors for success.

- **Energy:** Technology architecture and disaster recovery analysis and recommendations for a natural gas distribution client.

- **Communications:** Lead architect to design and implement a large scale Siebel Contact Centre including the integration of CTI components and complex technical infrastructure design including middleware integration (ActiveWebMethods), high availability, significant testing strategy, and disaster recovery planning.

Played a role within this organization as the Director of Customer Engineering responsible for the technical design and implementation of the integrated call centre management solutions for this client including multimedia contact centre management solutions.

- **Retail:** Technology architect and technology team lead for a PeopleSoft client server implementation. This implementation will support 2500 users across 120 sites. Involved systems selection, network architecture, sizing, and many other aspects. Also performed a detailed analysis around platform selection focusing on S/390 vs UNIX.
• **Pharmaceutical**: Technology architect and technology team lead for a global SAP R/3 client server implementation. This implementation will support 12,000 users across 155 sites. Involved systems selection, network architecture, sizing, project management and many other aspects. Assisted client in analyzing regulatory needs (DRP, testing, planning etc.) Pharmaceutical, TI, IT Architect, 2 months
Technology team lead to architect technology solutions for a large SAP R/3 implementation.

• **Government**: Architected NT client server solution and network architecture to support the rollout of an accounting package for the UK Ministry of Defense supporting 90 servers and 2500 users across the UK.

• **Insurance**: Managed the various technology teams in designing and implementing an NT platform to support the growth of a large Insurance provider. This work included systems management architecture, network architecture, and NT systems design.

• **Manufacturing**: Managed the IT architecture review and recommendation to support an SAP R/3 implementation at Mine Safety Appliances using the new Framework for Technology Architecture methodology.

• **Insurance**: Managed the technical architecture project for Prudential Insurance including development and production environments for a large NT implementation

• **Insurance**: Worked in the development of a technical architecture for Sun Life Insurance client using the Framework for Computing Solutions methodology. This assignment involved the assessment and recommendation of an enterprise 4/GL development platform

• **Manufacturing**: Developed, managed, and implemented the technology platform to support the rollout of a 1200 user SAP: R/3 platform including LAN/WAN, software, and hardware for Corn Products/Canada Starch. Team member for the rollout of the DRP solution to Comdisco.

• **Manufacturing**: Led a team to define the application architecture supporting a large high tech manufacturing organization. Engagement lead to the client re-defining their go-forward application strategy based on the complexity of the to-be environment.

• **Financial Services**: Project lead to assess and define the application strategy supporting the contact centre environment for one of the largest bank in Canada. Lead a team to document the current environment and define the go-forward application strategy supporting the defined business strategy.

• **Retail, TI, Technology Strategy**: Technology stream lead to assist a client in defining their IT strategy and architecture supporting a re-design of their retail management systems (Retek) supporting over 500 stores. Included the design of the integration approach with their current EAI platform to support data movement across the client landscape.

**Presentations**

• Green IT – Government of New Brunswick IT Conference, March 2008

• VMWorld 2004 – San Diego – Deloitte’s POV on Server Virtualization - November 2004

• IT DR Conference – IT DR Strategies - NYC – November 2002

• Disaster Recovery Planning Considerations – Jan 2002

• Large Scale NT Architecture – Database Magazine conference

• Insurance Accountants of Canada – NT Suite of Tools – May 1998
Teresa Wong  
Senior Manager  

Profile  
Teresa is a Senior Manager in Deloitte Consulting's Information Management practice, specializing in Data Warehouse, Data Architecture, and Business Intelligence solutions. She has successfully managed and delivered numerous enterprise DW and BI systems to support the long-term business vision of our clients. These systems, which include enterprise data warehouses, reporting applications, and executive dashboards, enabled timely access to critical information to support management decision making.

Teresa has served clients across multiple industries including high-tech manufacturing, semiconductor, entertainment & media, telecommunication, and life sciences. Leveraging her Business Intelligence expertise, Teresa provides valuable insights and end-to-end solutions that help clients transform their current information management processes and technologies to efficiently accomplish their business objectives.

Teresa presents regularly at national conferences to share BI best practices and methodologies. These conferences include SAP BI 2009, Oracle Open World 2008-2009, and Business Intelligence & Warehouse Analytics 2008.

Experience  
Intuit is a leading personal financial and small business company. Its products include turbo tax, quicken, QuickBooks, etc.

Role - BI Project Manager  
Managed the implementation plan and activities to support existing reporting solutions and introduce new reporting technology - OBIEE to the current environment. A significant number of reports were required to be redesigned and redeveloped due to source systems and warehouse changes. BI tools utilized include BusinessObjects XI-R3, Hyperion Essbases, SAS, and OBIEE. Key accomplishments include:

- Engaged key stakeholders, technical and functional teams to work together effectively with clear objectives and responsibilities laid out
- Developed BI roadmap and detailed work plan to drive the project
- Provided BI subject matter expertise, best practices, and guidance
- Managed project scope and risks effectively

Sun Microsystems, known for its leading hardware technologies, provides network computing infrastructure solutions worldwide. Faced with a complex and large scale Oracle-based business intelligence system implementation, Sun called upon Deloitte for the advisory and leadership support it needed within its Business Intelligence project delivery team.

Role - Overall BI Project Manager  
Led the BI team to help client manage the entire OBIEE implementation lifecycle. The team was charged to drive the main workstreams and addressed the following critical areas leveraging Oracle BI applications and AIM methodology:

- Requirements gathering and review process
• Solutioning and architecture design process
• Security and access control design
• Change control and code release management
• Overall program and communication management

**Technical Environment:** Discoverer; Oracle Business Intelligence; OBIEE

**Countrywide Financial Corporation** was the market leader in the mortgage industry. All business units conducted their budgeting and planning activities separate systems which made it difficult for the corporate planning division to consolidate and report on budgeting and planning information. The project was designed to streamline the budgeting and planning process with a common system platform that provides both flexible planning and reporting capabilities.

**Role - Project Manager**
Managed a large project team to deliver an enterprise reporting system for the budgeting and planning analysis. The system provided both standard and flexible reporting capabilities to satisfy complex planning and variance reporting requirements. Over 120+ Business Objects reports were developed and the key project activities are listed below:

• Effectively managed the project that involved many complex system components and challenging business requirements to deliver on time
• Completed a comprehensive BI tool analysis based on requirements and technical environment fit. The analysis highlighted short-term and long-term options with associated risk. The analysis was often referenced by both IT and BU departments.
• Developed a high-level execution roadmap to guide the reporting system implementation
• Built a highly effective and experienced team to deliver over 100 complex Business Objects reports for budgeting and forecasting analysis

**Directors Guild America (DGA)** is a non-profit organization which serves directors in the media and entertainment industry. The primary purpose of this organization is to ensure the rights and benefits of DGA members are protected.

DGA Take-2 system was a custom developed system to replace their legacy HP system. Because of DGA's unique business requirements, Take-2 system was specially designed to handle DGA's residuals checks processing, signatory companies management, and other complex information tracking.

**Role – Data Architect and PM**
Led the data team to design data architecture and perform data migration. Led the design of overall BI strategy and assisted client with the BI tool selection process. Main tasks accomplished included:

• Assessed current data flows and data dependencies across all applications within the legacy HP system
• Analyzed current database architecture and its relationship with the additional 44 stand-alone Access databases
• Designed a new database architecture that integrated data elements from various legacy sources to support complex reporting requirements; the database architecture contained more than 150 tables

Attachment E – Representative Resumes
• Outlined the overall BI strategy by analyzing reporting requirements across all departments and conducted a comprehensive BI tool selection process
• Developed POC projects to evaluate Cognos BI and Crystal reports
• Outlined data migration and data cleansing approach
• Monitored on-going data migration and data cleansing progress

Technical Environment: MS .Net Platform; MS SQL; Crystal reports; Cognos

Telmar Network Technologies is a mid-size telecommunication equipments manufacturer and seller who conducted business with leading players in telecom industry.

This was an Oracle Apps 11i implementation.

Role – Reporting Lead
Managed a development team to deliver complex financial and operational reports for the entire company in an Oracle ERP 11i implementation, using Oracle Discoverer, which empowered end users with the ability to generate various complex and ad-hoc reports. Major accomplishments included:

• Conducted gap analysis between over 300 user requirements and predefined reports supplied by Oracle Apps 11i
• Designed the metadata layer (EUL – end user layer) to support complex reporting requirements for sales, procurement, operations, and finance departments
• Defined security roles and responsibilities for each functional user group
• Provided comprehensive training to administrators and end users

Technical Environment: Oracle ERP 11i; Oracle database; Oracle Discoverer.

Gateway Computers
This was a Siebel CRM implementation.

Role – BI Functional Lead
Led the design and development effort in delivering marketing web analytics in Siebel CRM environment. Responsibilities included:

• Conducted JAD sessions to gather requirements from business leads
• Proposed best practice solutions based on client’s long-term strategic goals and business vision
• Analyzed existing reporting solutions (Cognos and Microstrategy) and current reporting challenges
• Designed and implemented metadata layer and reports for each identified functional area using Business Objects
• Developed rollout strategy and training materials

The final deliverables enabled the client to have detail visibility to customers’ purchasing patterns and activities over the web and through traditional channels. This information allowed the client to design more targeted and effective marketing campaigns to promote sales and revenues.

Technical Environment: Siebel CRM; JDE; Cognos; MicroStrategy.
**Toshiba America Electronics Components (TAEC)** was one of the largest semi-conductor manufacturers and distributors in the world. It carries over 70,000 different items and hence the ability to have sufficient "intelligence" to its daily operations was critical.

Oracle R11 Implementation; OLAP Implementation

**Role – Functional Analyst**

Managed a team to deliver an online reporting solution using Oracle RDMS and Business Objects in Oracle Apps R11 environment. The final system allowed over 2000 users to remotely access 300+ reports on enterprise-wide information. Led the functional and technical teams to work with business users from various departments and achieved the following milestones:

- Analyzed over three hundred report requirements used in legacy system to determine the requirements for the new reporting system
- Developed data marts and ETL routines for OLAP accessing purposes
- Designed metadata structure in reporting tool to shield technical logic from business users
- Designed canned reports, KPIs, and executive dashboard to support business decision and daily operation at all levels
- Conducted performance fine-tuning to improve response time and system performance

**Technical Environment:** Oracle R11; Business Objects.

**System Experience**

**ERP Applications**
- SAP
- Oracle

**BI Applications**
- SAP BOBJ/Crystal Reports/Xcelsius
- Cognos BI
- Informatica
- Oracle BI (OBIEE, OBI Apps)
- MicroStrategy

**Middleware / Databases**
- MS SQL Server
- Oracle Database

**Education**

**MBA - Information Technology Focus**
University of California, Irvine

**B.S., Information and Computer Science**
University of California, Irvine

Attachment E – Representative Resumes
Susan Lee
Specialist Lead

Profile
Susan is a senior member of our Halifax consulting practice and she has over 10 years experience implementing Oracle/PeopleSoft, in Higher Education and the Public Sector. She also has direct HR operations and business transformation experience in the public sector. She brings deep ERP project management together with deep functional experience in human resource, benefits and payroll.

As a functional team leader, Susan has been responsible to plan, monitor, and report on HR/Benefits/Payroll implementation projects. This included managing and coordinating activities of both functional and technical resources, business process gathering, developing work plans, as well as managing project scope, expectations, issues, and risks using Deloitte’s ERP implementation methodologies.

Experience


Role: Assist the Client in the following capacity: Coordinate, design, test and implement Human Resources, Partial Position Management and Base Benefits.


Role: Assisted the Client in the following capacity: Coordinate, test and implement the Upgrade.

Higher Education – Functional Lead – Oracle/PeopleSoft - Deloitte was selected to apply Fixes and Patches to Release 8.9 – Human Resources, Base Benefits and Payroll.

Role: Coordinate, test and implement the Fixes and Patches for the Client.

Higher Education – Functional Lead – Oracle/PeopleSoft - Deloitte was selected to implement Release 9.0 – Human Resources, Base Benefits, Benefits Administration, Payroll, Time and Labor.

Role: Coordinated and held the configuration workshops for Human Resources.

Public Sector – Functional Lead – Deloitte was selected to provide Transformation Assistance for the client regarding current state applications and future state visioning.

Role: Provided data gathering workshops regarding current state of existing applications for Human Resources, Benefits, Time Capture and Payroll.

Higher Education - Team Leader – Oracle/PeopleSoft Version 8.9 Upgrade - A provincial Community College system, which includes 13 campuses provincially, selected Deloitte to Upgrade PeopleSoft from Version 8.3 to 8.9 Human Resources and Payroll as well as Student Administration.

Role: Managed the upgrade from Version 8.3 to 8.9 in Administer Workforce, Benefits, and Payroll
Higher Education - Team Leader – Oracle/PeopleSoft - Deloitte was selected to implement an ERP suite of products of HRMS, Student and Financials for a Province-wide Community College system.

**Role:** Managed and coordinated HR/Payroll team including planning, monitoring and reporting on team activities, leading team meetings and workshops, interacting with client resources on design decisions and data validation, identifying, escalating (when required) and resolving issues, and implementing and supporting Human Resources, Benefits, Partial Position Management and Payroll through Go Live.

**Education**
Bachelor of Commerce, Human Resources, Dalhousie University

**Training**
PeopleSoft Security Release 8.48
Delta Human Resources 8.9
Human Resources
Payroll
Base Benefits
Position Management

**Language Skills**
English – Native
Dan Dunlap  
Specialist Master  

Profile  
During my 20 year tenure as an IT professional, I have held roles in all phases of the IT systems life-cycle including application development, systems programming, server administration, and database administration. Over the last 10 years, I have worked in consulting, focusing on IT infrastructure and Oracle ERP Applications. The bulk of my consulting engagements have focused on Oracle E-Business Suite (EBS) and in supporting Oracle technology products.

My consulting activities have ranged from interviewing perspective consultants, responses to proposals, system assessments, performance assessments, and point upgrades to large ERP implementation and upgrade projects. I have designed and implemented system architectures for E-Business Suite, Business Intelligence, Single Sign-On, SOA, External Access, Disaster Recovery, and High Availability.

My levels of responsibility have increased from individual contributory to technical lead, managing small client and consulting teams. I am adept at defining project specifications, developing system diagrams and documentation, preparing presentations, and presenting to senior executives.

Experience  

Client: Land O'Lakes  
Description: Land O'Lakes is a member-owned cooperative offering an extensive line of agricultural supplies, dairy-based food products for consumers, foodservice professionals and food manufacturers, as well as state-of-the-art production and business services. Land O'Lakes is the third-largest cooperative in the nation with approximately 9,000 employees, 3,200 direct producer-members and 1,000 member-cooperatives serving more than 300,000 agricultural producers.

Role: Infrastructure effort guiding the client in the installation of the 11g Fusion Middleware product WebCenter. Installed Oracle WebLogic Server in addition to WebCenter, integrated with existing Active Directory installation and installed/configured Oracle Internet Directory for use with WebLogic Server. Installation was done to create a development environment for the creation of an internet facing custom order entry application.

Technical Environment: Oracle Fusion Middleware 11g, Oracle RedHat Linux 2.5.

Client: St. Louis Metro Sewer District  
Description: The Metropolitan St. Louis Sewer District (MSD) was formed on February 9, 1954. MSD's responsibilities include the interception, collection and treatment of wastewater, as well as storm water management. MSD serves a population of approximately 1.4 million and has approximately 519,000 single-family residential, multi-family residential and commercial/industrial accounts. Of these accounts, approximately 87,000 are for storm water service only.

Role: Infrastructure Architect for the Oracle EBS R12 implementation. In addition to EBS, Hyperion, Oracle Business Intelligence Applications, and the IBM Maximo Enterprise Adapter were also implemented. Developed the system landscape, managed a small team of consulting and client resources, developed client presentations, and lead all client meetings related to system architecture.
**Technical Environment:** Oracle E-Business Suite R12, Oracle RDBMS 11g, Oracle Application Server AS10g/11g, Oracle Business Intelligence Applications 7.9.6, Hyperion Performance Measurement 11.1.1, IBM AIX 6.1

**Client:** Orange County Government, New York  
**Description:** Orange County was established in 1683 as one of the original counties of the Province of New York. The county name is derived from King William III of England who was a Prince of the House of Orange.  
**Role:** Lead Applications DBA for the Oracle EBS R12 implementation. Developed the system landscape, managed a small team of consulting and client resources. Integrated EBS with AS10g Discoverer, Oracle Grid Control, Oracle Recovery Manager (RMAN), and created an external (Internet) facing EBS server for the iSupplier/Sourcing modules. Created processes for electronic file transfers to banks using SSL & PGP encryption. This project utilized VMware with Linux Red Hat virtual machines.

**Technical Environment:** Oracle E-Business Suite R12, Oracle RDBMS 10g, Oracle Application Server AS10g, Linux RedHat E

**Client:** Santa Anna School District, California  
**Description:** Santa Anna School District is the 7th largest school district in California, and the largest in Orange County.  
**Role:** Led the installation effort for two OBIEE (Oracle Business Intelligence/Siebel Analytics) environments. Performed all requisite O/S work (accounts, storage, and patches), configured server data sources, and performed critical pre go-live troubleshooting. Documented administration procedures for customer.  
**Technical Environment:** OBIEE 10.1.3.3.2, AS10g 10.1.3. Linux Red Hat Release 4. Two installations, one single node (Test), one multi-node (Production), with OBIEE Server and Presentation services split across two different servers.

**Client:** New York State Thruway Authority  
**Description:** The New York State Thruway Authority manages the Governor Thomas E. Dewey Thruway, a 641-mile superhighway crossing New York State, and is the longest toll superhighway system in the United States.  
**Role:** Lead DBA for the 11.5.10.2 EBS implementation. Developed the system landscape, and managed a small team of consulting and client resources. Integrated EBS with Oracle AS10g Single Sign-On (SSO), Oracle Internet Directory (OID), Oracle Service Oriented Architecture (SOA) Suite, Oracle Portal and Oracle Discoverer. SSO and OID were integrated with Microsoft Active Directory (AD) for user provisioning and authentication. Created an external (Internet) facing EBS server for the iSupplier/Sourcing modules. Also, configured Loftware print server and handheld barcode scanning devices for Mobile Supply Chain.  
**Technical Environment:** Oracle E-Business Suite 11i, Oracle RDBMS 10g, Oracle Application Server AS10g, AIX 5.4 using Logical Partitioning (LPAR)

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Attachment E – Representative Resumes
Client: Spectranetics

Description: Spectranetics manufactures and markets the Excimer Laser Systems used for cardiovascular surgery.

Role: Project scope was to upgrade Oracle Applications Upgrade from 10.7 to 11i while simultaneously transferring system ownership from the client to Oracle On Demand (ASP Hosting Service). Served as lead DBA for the upgrade. The upgrade was done in an Oracle On Demand environment, using hosted hardware, and was one of the first upgrades to be performed using On Demand. Platform conversions from AIX to Linux, and two separate database upgrades, were required for this effort.

Technical Environment: Oracle E-Business Suite 11i/10.7 Smart Client, Oracle RDBMS 9i/7.3.4, AIX 4.3 Linux 2.3, Oracle On Demand ASP Hosting Service.

Client: Escambia County Government, Florida

Description: Escambia County was created on July 21, 1821. As of the year 2000 census, there were 294,410 people, 111,049 households, and 74,180 families residing in the county.

Role: Lead DBA for Escambia County’s Oracle 11.5.10.2 implementation. The environment utilized AIX servers using IBM’s Logical Partitioning (LPAR) technology. Also led the implementation of virtual hosting on the servers to facilitate failover.

Technical Environment: Oracle E-Business Suite 11i, Oracle RDBMS 9i, AIX 5.3

Client: Texas Parks and Wildlife, State Agency of Texas

Description: The mission of Texas Parks and Wildlife is to manage and conserve the natural and cultural resources of Texas and to provide hunting, fishing and outdoor recreation opportunities for the use and enjoyment of present and future generations.

Role: Performed a technical Post-Implementation Evaluation Review (PIER) of the EBS implementation. The technical review encompassed the hardware design, Oracle EBS and RDBMS configuration, technical considerations for implementing Multi Fund Accounts Receivables (MFAR), and database partitioning.

Technical Environment: Oracle E-Business Suite 11i, Oracle RDBMS 9i, Solaris 2.9

Client: Nevada Cancer Institute

Description: Nevada Cancer Institute (NVCI) is the official cancer institute for the State of Nevada. A nonprofit organization, NVCI is committed to reducing the burden of cancer by pursuing the development of a comprehensive cancer center, as defined by the National Cancer Institute.

Role: Performed multiple engagements at NVCI. Initially filled the lead Oracle Applications DBA role for the EBS 11.5.9 implementation. Subsequently was requested for two additional assignments, to change the domain name for the EBS installation, and to provide an assessment of the EBS environment.

**Client:** Quovadx

**Description:** Quovadx is a global software company that helps organizations develop, extend and integrate customizable applications with the flexibility of open standards. The company's products and services have been proven to optimize business processes and deliver lasting customer value to over 20,000 organizations around the world.

**Role:** Performed two separate EBS point upgrades at Quovadx. Lead Oracle Applications DBA for the 11.5.6 to 11.5.8 production upgrade. Performed initial applications and database upgrades, created recommendations for additional disk storage, cloned the Production instance to Test, and mentored the client DBA. Subsequent to this upgrade, installed the full 9iAS Technology Stack.

For the 11.5.8 to 11.5.10 upgrade, was responsible for documenting and testing the procedures to permit the client DBA to perform the production upgrade. This project also included upgrading the Oracle RDBMS from 8.1.7.4 to 9.2.0.6.

**Technical Environment:** Oracle E-Business Suite 11i, Oracle RDBMS 9i, Solaris 2.5.

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**Client:** Tucson Arizona Airport Authority

**Description:** Tucson opened the first municipally owned airport in the United States in 1919. Commercial air service began in Tucson with Standard Airlines (later American Airlines) in 1928. Regular airmail service started two years later. In 1948, the Tucson Airport Authority was created as a non-profit corporation to operate the airport.

**Role:** Lead DBA for Oracle EBS implementation. Wrote the hardware architecture specifications used for the project and provided guidance to TAA during their hardware negotiations. Installed all Oracle-related software and was responsible for upgrading the base install to 11.5.10. Additional responsibilities included an instance management plan, a backup and recovery plan, patching and cloning.

**Technical Environment**

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**Additional Engagement History**
Available Upon Request

**Software / Products:**
- Oracle E-Business Suite System Administration (Expert)
- Oracle E-Business Suite System Applications Manager (Expert)
- Oracle Business Intelligence Enterprise Edition (OBIEE) (Project Experience)
- Oracle SOA Suite (Project Experience)
- Oracle Single Sign-On (Project Experience)
- Oracle Discoverer (Project Experience)
- Oracle Enterprise Manager (Project Experience)
• Oracle Recovery Manager (Project Experience)
• Oracle User Productivity Kit (UPK) (Project Experience)
• Applications Service Provider (ASP) Hosting (Project Experience)

Development Tools / Languages:
• Unix Shell Scripting (Expert)
• Export/Import (Expert)
• PL/SQL (Project Experience)
• SQL*Loader (Project Experience)
• NT Shell Scripting (Expert)
• SQL*Plus (Expert)
• SQL Server T-SQL (Project Experience)
• COBOL (Expert)

Hardware / Operating Systems:
• Solaris (Expert)
• AIX (Expert)
• Windows Server (Expert)
• Linux (Expert)
• HP/UX (Expert)

Middleware / Databases:
• Oracle Database (Expert)
• Oracle Application Server 10g (Expert)
• Sybase Database (Expert)

General Tools:
• Microsoft Excel (Expert)
• Microsoft PowerPoint (Expert)
• Microsoft Word (Expert)
• Microsoft Visio (Expert)
**Education**

**Master of Science, Management Information Systems**
Leeds School of Business, University of Colorado at Boulder, Minor Telecommunications, School of Engineering

**Bachelor of Arts**
Grinnell College, Economics/Computer Studies

**Professional Affiliations / Certifications**

- Oracle Certified Professional (OCP), for Database Administration
- Oracle Implementation Champion – On Demand, 9i Technical, 9i Linux

**Training**

- Oracle Database Administration Masters
- Sybase Database Administration Masters
Manivannan Selvanayakam
Specialist Master

Profile
A Systems Analyst / techno-functional ERP (PeopleSoft) consultant with exposure to OBIEE toolset and Deloitte (Yellow Belt) certified in Lean Six Sigma, has extensive experience primarily in a client server environment, including implementation experience in PeopleSoft Distribution (Inventory, Purchasing, Order Management, Manufacturing), Financials (Accounts Payable, Accounts Receivable, Billing, Asset Management, General Ledger), Human Resources (HR, Payroll, Benefits Administration, Time & Labor) & CRM (HR Help Desk). Was part of the product release team, testing the PeopleSoft Inventory Application (version 8.0 and SP 1), at PeopleSoft Inc. Very strong in design and development of systems and software applications, experienced in various phases of the System Development Life Cycle (SDLC), including Reports, Interfaces / Integrations , Conversions, Enhancements / Extensions, Forms / On-line pages, WorkFlow (RICEFW).

Experience

Hobart & William Smith Colleges.
PeopleSoft Implementation.

Role: Involved in the development of Strategy documents.

Role included the following:

- Preparation of Strategy document for Conversions.
- Preparation of Strategy document for Interfaces.


Florida State Department of Financial Services.
PeopleSoft Implementation.

Role: Was part of the design, development and testing team of PeopleSoft Financials, through BearingPoint.

Role included the following:

- Custom Interface program development to extract Position data from PeopleSoft to PeopleFirst (HR system).
- Custom program to perform edits on incoming data prior to creating the budget load file.
- Custom program to perform Labor re-distribution.

Technical Environment: IBM PCs, PeopleSoft Financials 8.8, Oracle.
**Forest Services.**
Supporting the PeopleSoft CRM application.

**Role:** Analyze Business Requirements, Provide Technical Analysis & Development of enhancements / customizations to suit the Business needs, all of which required the need for several / multiple interactions with the client representatives. In addition, supported the Production environment by addressing issues. As a Technical Lead, managed the activities pertaining to the CRM Technical team, which included an external consultant / contractor. In supporting the client requirements, was involved in various phases of the System Development Life Cycle (SDLC), including Reports, Interfaces / Integrations, Conversions, Enhancements / Extensions, (RICE) and On-line pages.

Role included the following:

- Developed a number of custom data migration scripts.
- Modified the configuration for the search to be case insensitive.
- Modified PeopleCode to customize the HRHD Worker 360 degree view (irrespective of the navigation being ‘Workforce – Search Worker OR HRHD Worker 360 degree view).
- PeopleSoft Administrative tasks (Bouncing the Application Server / Process Scheduler).
- Developed a number of custom report programs.
- Developed a number of batch processing programs.
- Developed an Application Engine Program to close cases in 10 days after a Solution has been applied.
- Developed an Application Engine Program to delete the Contact Method Headers for orphaned records.
- Developed custom on-line pages to maintain Citation details.
- Modified the Solution Maintenance pages to include Solution Level, Library ID, and Citations.
- Modified the Business Project Maintenance page to include Library ID. Also, modified the Activity (Phase) & Task maintenance pages to include a flag for ESS usage.
- Modified the Agent facing Case maintenance pages to include Citations and Solution Level.
- Modified the Business Project Task page to include Instructions & attachments. Also, modified the Business Project Status page (viewed via the Client Facing Case’s Related Actions) to reflect the same.

**Technical Environment:** PeopleSoft CRM 8.9 (PeopleTools 8.49), MS SQL Server.

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**Hawaiian Telecom.**
Report Development.

**Role:** Was part of the implementation team of Route Expert, developing custom reports, through BearingPoint.

Role included the following:

- Custom Report development pertaining to maintenance of phones installations.

**Technical Environment:** PCs, Route Expert 2.6, Crystal Reports XI, Sybase.

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**Attachment E – Representative Resumes**
**FedEx - Kinkos.**  
PeopleSoft Implementation

**Role:** Was part of the implementation team of PeopleSoft Financials, developing custom reports, through BearingPoint.

Role included the following:
- Custom Report development pertaining to Accounts Receivables.

**Technical Environment:** IBM PCs, PeopleSoft Financials 8.8, SQR, Oracle (TOAD).

**BearingPoint (Internal).**  
Support the Internal Financials System.

**Role:** Was part of the team supporting the production issues/ enhancements related to Financials and Expenses of the internal implementation of PeopleSoft 8.4 Financials.

Role included the following:
- Troubleshooting help desk tickets related to Financials and Time & Expenses.
- Enhancements related to PeopleSoft Financials.
- Assist in security set-up / modifications.

**Technical Environment:** IBM PCs, PeopleSoft Financials / T & E 8.4, PeopleTools 8.43.10, SQR, Crystal Reports 9, PVCS, HP Service Desk 4.5, Oracle (TOAD).

**National Western Life Insurance.**  
PeopleSoft Implementation

**Role:** Was part of the team implementing PeopleSoft 8.8 Financials, involved in the development, customization, testing and documentation of AP, AM, GL modules. Was involved in the various phases of the System Development Life Cycle (SDLC), including Reports, Interfaces / Integrations, Conversions, Enhancements / Extensions, Forms / On-line pages, and designing custom WorkFlow (RICEFW).

Role included the following:
- Developed customized programs / pages for the following:
  - Asset Management Conversion, to load Asset data into INTFC_PHY_A, INTFC_PHY_B, INTFC_FIN.
  - As part of GL configuration, developed custom data conversion programs for GL Accounts, Departments, State Codes, Restrict Codes, Agent Numbers, Plan Codes, Policy Numbers, Investment Numbers, and Budget Codes.
- Assist in Data mapping to load Agents and Policies as Vendors, using the vanilla VNDR_IMPORT (Application Engine) process.
- Modify PeopleCode to rename the Positive Pay file, for Archival purposes.
- Develop a custom program to extract the check details in order to print the checks using a non-PS utility.
- Data mapping to load the GL Journal entries from external systems into PeopleSoft, using the vanilla GL_JRNL_IMP (Application Engine) process.
- Data mapping to load the Vouchers from external systems into PeopleSoft, using the vanilla EDI Inbound map, VCHRDEFN.
- Develop a framework for security setup.
- Assisted in loading the Chartfields and Ledger details from Financials database to the EPM database.

**Technical Environment:** IBM PCs, PeopleSoft Financials 8.8, PeopleTools 8.44, SQR, Crystal Reports 9, MS SQL Server.

**Career Education Corporation.**
PeopleSoft Implementation

**Role:** Was part of the team implementing PeopleSoft 8.4 Financials, involved in development, customization, testing and documentation of Accounts Payable, Asset Management, General Ledger, Purchasing and Inventory modules. Was involved in the various phases of the System Development Life Cycle (SDLC), including Reports, Interfaces / Integrations, Conversions, Enhancements / Extensions, Forms / On-line pages, and designing, configuring & development of custom WorkFlow (RICEFW).

Role included the following:

- Developed customized programs / pages for the following:
  - To load Asset Management Conversion related interface tables, Asset Management Distribution Template Header table, Asset Management Distribution Template Line table, Asset Management Depreciation History Table as part of AM data conversion.
  - To load conversion data related to foreign entities into the Asset Management interface tables, as part of conversion.
  - To load GL Accounts, Departments, Ledger, Ledgers for a BU, Business Unit Operator ID Security data, Ledger Authorization table, as part of GL configuration.
  - An interface program to extract data from Ledgers in PeopleSoft to COGNOS.
  - A report on inventory transaction values, based on a customized view.
  - Online pages used to
    - Undo transactions (Issues / Putaway), and update quantities. Also, maintain the history of the transactions that have been undone, for audit purposes.
    - View the transactions that were undone.
• Perform the Adjustment period mass, to enable a mass update of the open adjustment periods across all business units.

• Copy Business Unit security from one user to another.

• Copy Ledger Authorizations from one user to another.

• Copy Report Requests.
  – An on-line application, consisting of several pages, to maintain / track enhancement requests.
  – A report on enhancement requests based on user input selection criteria.
  – A Trial Balance report, similar to GL Activity report, with changes to report layout and run control page.
  – A crystal report, to generate a Summary report on Purchase Orders by Department and Account.
  – A custom program to update the PROFILE_ID in ITM_CAT_TBL, from flat file.
  – A custom crystal report to generate a Posted Voucher List with / without Purchase Orders, by Department, Account and Accounting / PO Date.
  – A custom report program to compare the posted amounts in two (user-specified) ledgers, by Business Unit, Account and Department.
  – A custom program to load the Item’s Manufacturer details and Item’s Vendor details from flat file.

• Modified / Customized the following:
  – AMSEC101.SQR - Commented the code that UPDATEs the PS_OPEN_TRANS table to set the value of CALC_DEPR_STATUS to ‘P’.
  – Mass Change Template, BKS - Additional criteria set in assigning a default value for CALCULATION_TYPE = 'L', as part of AM configuration.
  – AMPROCBB.SQC – Modified the dynamically built SQL criteria, which appeared to have a mismatch in the opening and closing brackets.
  – AMTX3500.SQR, Tax Depreciation Report - Added the ORDER BY clause to the Main selection of the report, in 'Select-Cost-Balance' procedure.
  – AMTX4000, Tax Minimum Alternative Tax Report - Removed the 'if' condition in assigning the Depreciation value to a local variable.
  – Modified the Check layout / format to suit requirements. As well, include the functionality to print the MICR line, and the signature from the microchip. Also generated the File Copy and the Positive Pay File associated with the Check.
  – Modified Peoplecode to rename the Positive pay file.
  – Modified GL Journal Entry Header and Line pages
  – Modified the GL Summary report, to suit the requirements from CEC-UK.
  – Modified the Issue History Report to fix / correct the SQL, and to change the report layout.
  – Modified the Inventory Value Report to fix / correct the program to include Actual costed Items for 'All Costed Items' option.
  – Modified the PO Dispatch program to customize both, the header and details on the Purchase Order when printed.
− Modified the File layout of the On-base interface (Application Engine) program, to change the field separator / delimiters from comma (,) to a pipe (|) character. In addition, modified Peoplecode to correct an error.
− Modified the columns / column title positions, thus modifying the report layout for Account Entry Detail - Depreciation Report, Asset Transfers detail by Chart Field Report and Retirement Daily by Chart Field Report.
− Developed customized program to generate a flat file containing Electronic Fund Transfer information to be sent to the Bank via FTP after being encrypted using PGP.
− Configured the Voucher Approval Workflow to suit requirements.
− Configured the Requisition Approval Workflow to suit requirements.
− Customized the Inter-Unit Transfer Mass Change in Asset Management to suit requirements.
− Customized the Inbound EDI mapping for Vouchers from an external system, FoodTrak.
• Assisted in creating Inventory Transactions.
• Involved in processing the converted Assets through Transaction Edit, Transaction Loader and Depreciation Calculation. In addition, processed US Assets for Section 101.
• Involved in setting up FTP to transfer the Positive Pay file to the Bank.
• Involved in setting up security for the production environment.
• Was part of the Go-Live support team.
• Performed tuning of SQL statements for optimal performance.

Technical Environment: IBM PCs, PeopleSoft Financials 8.4 (PeopleTools 8.42), SQR, Crystal Reports (Ver. 8.5), MS/SQL server 2000.

Order of St Francis (OSF) Healthcare.

PeopleSoft Implementation

Role: Was involved in development and testing HR, Payroll, Benefits and Time & Labor related Interface/Conversion programs, using PeopleSoft 8 SP1.

• Developed a customized PeopleSoft Page / (interface/conversion) SQR program (each) to load the conversion data into: Savings Plan Enrollment tables, FSA Benefit Enrollment tables, Direct Deposit tables, Time and Labor Pay Transaction details, 401K Enrollment update details, RSP Enrollment update details into the PeopleSoft Database.
• Developed a customized PeopleSoft Page / (interface/conversion) SQR program (each) to load the conversion data into: Savings Plan Enrollment tables, FSA Benefit Enrollment tables, Direct Deposit tables, Time and Labor Pay Transaction details, 401K Enrollment update details, RSP Enrollment update details into the PeopleSoft Database.
• Developed a customized PeopleSoft Page / (interface/conversion) SQR program (each) to extract: the Time and Labor Demographics, Job Code details, Section 125 details, 401K Demographic changes, RSP Demographic changes, 401K - EE/ER contributions, RSP - EE/ER contributions, Section 125 - PALS, RSP Notification details, Health Plan Participation details, New Hire details from the PeopleSoft Database.
• Developed a customized PeopleSoft Page / (interface/conversion) SQR program (each) to generate a flat file of: Monthly Account Reconciliation details received from National City Bank (in the form of a flat file in a different layout), Monthly Account Reconciliation details received from Bank Of America (in the form of a flat file in a different layout), 401 K Census / Vesting File, Section 89 details, Pension Demographic details, Pension Earnings and Hours details, PeopleSoft Employee Ids (along with the Employee Name to be loaded as a reference table in GEAC).

• Developed a customized SQR program to insert a header row in the ACH Transaction file generated by PeopleSoft, prior to being sent to the Vendor.

• Performed tuning of SQL statements for optimal performance.

**Technical Environment:** PeopleSoft 8 (SP 1), IBM PC, DB2 (UDB 7.1 on OS390)

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**Rain Bird International.**

**PeopleSoft Implementation**

**Role:** Was involved in development, customization, testing, documentation and implementation of Inventory, Purchasing, Order Management and Billing related programs, using PeopleSoft 8 SP1.

• Developed / modified the PeopleSoft page / SQR program (each) for: Manpower Planning Detail Report, Sales Order Register Report, RMA Adjustments, Load AR pending Items process, downloading PeopleSoft Order Number to EXTRA, Outstanding Orders By Market Report, Creating Sales Order Acknowledgements, Order Summary by Operator Report, Duplicate Sales Orders by PO Report, Manpower Planning Summary Report, the report for all orders/lines that are due within a defined time frame.

• Developed / modified the PeopleSoft page / SQR program (each) for: Manpower Planning Detail Report, Sales Order Register Report, RMA Adjustments, Load AR pending Items process, downloading PeopleSoft Order Number to EXTRA, Outstanding Orders By Market Report, Creating Sales Order Acknowledgements, Order Summary by Operator Report, Duplicate Sales Orders by PO Report, Manpower Planning Summary Report, the report for all orders/lines that are due within a defined time frame.

• Developed customized Application Engine programs, Weekly / Monthly Information to DSS

• Modified the label on LOAD_CONS_INV page (used in Manage Loads) for the field SCHED_DATE to ‘Sch Ship Dt’.

• Performed tuning of SQL statements for optimal performance.

**Technical Environment:** PeopleSoft 8 (SP 1), MS-SQL server

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**Emplifi (Internal Support / Training).**

**PeopleSoft Support**

**Role:** Involved in internal support activities for PeopleSoft Inventory / Purchasing / Order Management, related to Fulfillment, Physical Accounting, Requisitions sourced from Inventory / Purchasing, and Sales Order processing.

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*Attachment E – Representative Resumes*
Pennsylvania Transit Authority
PeopleSoft Implementation

Role: Was involved in production support, issue resolution, and documentation, of PeopleSoft Release 7.50 Inventory/Purchasing (Public Sector)

Role included the following:

- Analysis and resolution of some production issues related to fulfillment of orders.
- Documentation of the currently existing inventory process flow, at the Warehouse, Garages and the Rail Center, intended to be used as a reference for the Business Process Improvement.
- Modified the customized ‘Pick List’ printing SQR program to correctly reflect the storage locations (source/destination).
- Performed tuning of SQL statements for optimal performance.

This involved interaction with key personnel, in order to understand the process at various stages.

Technical Environment: PeopleSoft Public Sector 7.50, MS/SQL Server

PeopleSoft Inc.
PeopleSoft Application Software Release Testing

Role: Was a member of the PeopleSoft 8.0 Testing Team, involved in system and platform testing of PeopleSoft Inventory, Purchasing and Order Management.

Involved in testing the following areas of PeopleSoft 8, using PeopleSoft Internet Architecture (PIA).

- Familiarized the use of Vantive's Genesis, used to log in Change Requests, to record bugs.
- Interaction with the developers, related to the bug list.
- Fair Share Allocation, a new feature that allows prioritization of Orders to preferred customers.
- Un-reserve Stock Requests.
- Fulfillment (Stock Request creation through Depletion).
- Available to Promise, which includes the modified Item/Product Availability page that could be used to analyze 'what if' scenarios.
- Stock Request Maintenance.
- Return Material Authorization.
- Planning Messages

Technical Environment: PeopleSoft 8 (& SP 1), Oracle 8, Informix, Sybase, MS/SQL Server, DB2, Vantive's Genesis
System Experience

Software / Products:
- PeopleSoft Application Version 8.x, 7.x, 6.0 – Project Experience
  - Inventory, Purchasing, Financials – Project Experience (High)
  - Customer Relationship Management (HR Helpdesk) – Project Experience (High)
  - Order Management, Manufacturing, Human Resources – Project Experience (Low)
  - Security (Access Privileges) – Project Experience (Medium)
- MANMAN (MRP II) – Project Experience

Development Tools / Languages:
- PeopleSoft
  - PeopleTools 8.x, 7.x, 6.0 – Expert
  - PeopleCode, Application Engine, WorkFlow – Expert
  - Structured Query Reports (SQR), Crystal Reports – Expert
  - WorkFlow – Project Experience
- PowerBuilder, SQA Robot - Project Experience
- OBIEE (Undergone Training)

Hardware / Operating Systems:
- Microsoft Windows 2000 / XP / Vista - User
- IBM Compatible Personal Computers / Laptops - User

Middleware / Databases:
- Oracle, Informix, Sybase, DB2 (UDB 7.1), MS-SQL Server – Project Experience

Education
- Bachelor of Engineering (Mechanical Engineering), Bangalore University, Bangalore, India

Professional Affiliations / Certifications
- Certified in PeopleSoft Technology
- Lean Six Sigma – Yellow Belt (Certified by Deloitte)

Foreign Language Skills
- English - Fluent
- Tamil – Native (Fluent)
- Hindi, Telugu, Kannada – Basic (Conversation)
Glenn Webb
Manager

Profile
Glenn Webb, has 14 year technology and database administration background specializing in Oracle E-Business Suite, Oracle database, and application architecture. Glenn has led DBA and architecture delivery on E-Business Suite implementations and upgrades including 11i (11.5.1 through 11.5.10.2), R12, and database upgrades including 8i, 9i, 10g and RAC. Glenn has experience with advanced topologies including E-Business on RAC, Load Balanced Application Tiers, Shared APPL_TOP, and Parallel Concurrent Processing. Glenn has implemented secure external access for external facing modules (e.g., iRecruitment, iSupplier, iReceivables) utilizing external/internal middle tiers, reverse proxy, firewalls, and load balancers. Glenn has experience with implementations and upgrade of Oracle E-Business Suite modules including Financials, Cash Management, Oracle Learning Management, Human Resources, Payroll, Oracle Time Management, Oracle Time & Labor including Self-Service Time, iRecruitment, Project Costing, Project Billing, Fixed Assets, Purchasing, iProcurement, Order Management, Inventory, Enterprise Asset Management, XML Gateway, and Role Based Access Control with User Management. Glenn has leveraged his applications database administration expertise on a variety of projects spanning the private and public sector including 11i and Release 12 implementations and upgrades, managing a Remote DBA service, and DBA Practice Management.

Experience

Oracle Order to Cash Implementation Analysis and Review
Client was a leading manufacturer of Police, Medical, and Fire uniforms and accessories

Assessment of Order to Cash System Implementation

Role: Glenn provided project management and led a team in an assessment of recently completed implementation of Order to Cash system including highly customized Customer Service Portal, Inventory, Fulfillment, and Warehouse Management components. The assessment included detailed process, documentation, and code review analysis and recommendations.

Technical Environment: E-Business Suite 11.5.9 with Sun Solaris SPARC based hardware, Business Objects and MKS.

Oracle EBS SME/Architecture Assistance with DW
Client was a leading developer/manufacturer of test and measurement equipment.

BI and Data Warehouse Initiative for Oracle E-Business Suite R12 Upgrade

Role: Glenn provided Oracle E-Business Suite knowledge and expertise as well as technical architecture assistance planning the BI and Data Warehouse approach in response to an ERP upgrade from 11i to R12.

Technical Environment: E-Business Suite 11.5.10.2 and R12, OBIEE, Hyperion ESSBASE, and Brio.

Applications DBA
Client was a leading software developer and hardware manufacturer.
Oracle E-Business Suite Upgrade and Integration – Supplier Interfaces

Role: Glenn managed US testing activity of EDI/XML inbound Sales Order and outbound Sales Order Acknowledgement interfaces. Glenn also managed regression testing, issue resolution, and development of price tolerance components of the interfaces.

Technical Environment: E-Business Suite 11.5.10.2 with Sun Solaris SPARC based hardware using GXS V.A.N., Sun B2B and JCAPS, and XML/UBL

Applications DBA

Client was a leading entertainment software and game developer.

Oracle E-Business Suite Global Integration Project

Role: Glenn managed client project to upgrade database from 9i RAC to 10g RAC and upgrade applications to baseline for Global Integration project. Glenn developed and presented recommendations for Performance management and Disaster Recovery.

Technical Environment: E-Business Suite 11.5.10.2 with database 10.2.0.4 Real Application Cluster (RAC) running split configuration of HP-UX Itanium DB tier and HP-UX PA-RISC middle tier in a 4 tier deployment

Applications DBA

Client was a large non-profit energy sector corporation.

Oracle E-Business Suite iRecruitment and DMZ Configuration

Role: Glenn supported the configuration of E-Business Suite in a DMZ solution including the use of Reverse Proxy server and shared application top.

Technical Environment: E-Business Suite 11.5.10.2 with database 10.2.0.2 running on Red Hat Linux.

Applications DBA

Client was a large and diverse State of California agency.

Oracle E-Business Suite upgrade from 11i (11.5.7) to R12 (12.0.3)

Role: Glenn worked as the Solbourne Applications Database Administrator. The project included an assessment of the current environment, project planning, DBA assistance and mentoring, performance analysis and improvements, and four upgrade iterations of E-Business Suite 11i (11.5.7) on 9.2.0.8 database to Release 12 (12.0.3) running on 10.2.0.3 database. The upgrade also included Discover 3i to Discoverer 10g.

Technical Environment: All environments are on Sun Solaris Unix with a mix of Solaris 8, 9, and 10 running SPARC processors. The production environment is hosted by another State of California agency at a remote location. The Production environment included multiple application servers running in a load balanced and SSL enabled mode.
Applications DBA
Client was a large State of California agency.

New implementation of Oracle E-Business Suite 11i (11.5.10.2) including Fixed Assets and Human Resources

Role: Glenn worked as the Solbourne Applications Database Administrator for the implementation of HR and Fixed Assets where his responsibilities included database and application installation; database upgrade from 9.2.0.5 to 10gR2 10.2.0.2; technology stack, application, and security patching; application cloning; and technical training. He also provided configuration and validation of multiple middle tier nodes and Veritas database clustering, and implemented AS 10g and Discover 10g with E-Business Suite, User Management, and Role Based Security

Technical Environment: All environments are on Sun Solaris Unix with a mix of Solaris 10 running SPARC processors. The implementation included multiple application servers running in a load balanced mode.

Applications DBA and Manager of Remote DBA Service
Client was a large City of Los Angeles agency.

Production support of E-Business Suite 11.5.10.2

Role: Glenn provided post upgrade support and issue resolution for HACLA’s upgrade to 11.5.10 and served as a Remote DBA where his responsibilities include monitoring the database backup, logs, and storage; capacity planning; performance monitoring; patch application; troubleshooting and issue resolution; and instance cloning. He also worked on the migration to Oracle Applications Tablespace Model (OATM) and Storage Area Network Reallocation and provided DBA services for the implementation of Grants.

As manager of the Remote DBA Service, Glenn coordinated application support and project activities, conducted planning and review meetings with clients, and managed service delivery.

Technical Environment: Oracle E-Business Suite 11i 11.5.10.2 running on IBM p Series with AIX Unix 5.1.

Applications DBA and Manager of Remote DBA Service
Client was a county government agency in Colorado.

Production support of E-Business Suite 11.5.10.2

Role: In his role as the virtual, Glenn’s responsibilities included monitoring the database backup, logs, and storage; capacity planning, performance monitoring, patch application; troubleshooting and issue resolution; and instance cloning. Glenn provided a custom solution for the County that would retain synchronization to their production instance using a combination of Oracle, Windows, and UNIX shell scripting. The implementation included RMAN, shell scripting, and failover server configuration of standby server. Glenn provided implementation documentation and user procedures to perform failover.

As manager of the Remote DBA Service, Glenn coordinated application support and project activities, conducted planning and review meetings with clients, and managed service delivery.

Technical Environment: Oracle E-Business Suite 11i 11.5.10.2 running 9.2.0.7 on Microsoft Windows Server.
Applications DBA and Manager of Remote DBA Service

Client was an Airport Authority in Arizona.

Production support of E-Business Suite 11.5.10.2

Role: Glenn performed as a virtual DBA where his responsibilities included monitoring the database backup, logs, and storage; capacity planning, performance monitoring, patch application; troubleshooting and issue resolution; and instance cloning. He also provided key expertise for critical patch updates and the entire critical patch update process.

As manager of the Remote DBA Service, Glenn coordinated application support and project activities, conducted planning and review meetings with clients, and managed service delivery.

Technical Environment: Oracle E-Business Suite 11i 11.5.9 running Oracle RDBMS 9.2.0.7 on Microsoft Windows Server.

Applications DBA and Manager of Remote DBA Service

Client was a nonprofit life sciences organization in Nevada.

Production support of E-Business Suite 11.5.10.2

Role: Glenn performed as a virtual DBA where his responsibilities included monitoring the database backup, logs, and storage; capacity planning, performance monitoring, patch application; troubleshooting and issue resolution; and instance cloning.

As manager of the Remote DBA Service, Glenn coordinated application support and project activities, conducted planning and review meetings with clients, and managed service delivery.

Technical Environment: Oracle E-Business Suite 11i 11.5.9 running Oracle RDBMS 9.2.0.5 on Microsoft Windows Server.

Applications DBA and Manager of Remote DBA Service

Client was a non-profit life sciences organization in Arizona.

Production support of E-Business Suite 11.5.10.2 and support implementation of Oracle Grants Proposal and iRecruitment.

As manager of the Remote DBA Service, Glenn coordinated application support and project activities, conducted planning and review meetings with clients, and managed service delivery.

Role: For Phase 1 of Solbourne’s work, Glenn was the virtual DBA for Financials, Procurement, Grants Proposal, iRecruitment, Daily Business Intelligence, Oracle Time & Labor. He provided expertise including database monitoring, patch applications, instance cloning, and issue resolution. In Phase 2 of the project, Glenn provided DBA services for the implementation of Daily Business Intelligence, Grants Proposals, and iRecruitment.
**Technical Environment:** Oracle E-Business Suite 11i 11.5.10.2 running split configuration including IBM AIX Unix and Oracle 10gR2 database for database tier and Redhat Linux for middle tier.

**Applications DBA Performance Tuning and Assistance**

Client was a manufacturer of fishing tackle and in Colorado.

Oracle E-Business Suite 11.5.10.2 performance tuning.

**Role:** As an applications lead, Glenn provided diagnostics and performance tuning services to resolve performance issues with Oracle seeded and custom processes

**Technical Environment:** E-Business Suite 11.5.10.2 running on Hewlett Packard HP-UX Unix.

**System Experience**

**Software / Products:**

Software Product experience includes Oracle e-Business Suite 11.0, 11i, and R12 (expert), EiS Payroll Automation and Reporting (project experience), Noetix Views for Oracle Applications (expert), Noetix Query Server (expert), and Noetix Web Query(expert).

**Development Tools / Languages:**

Developer Tools experience includes Oracle Report Developer (project experience), JDeveloper (project experience), Oracle XML Publisher (project experience), Discoverer/BI Publisher (project experience), and Oracle Workflow (project experience).

Programming language experience includes PL/SQL (expert), HTML (project experience), XML (project experience), Java (project experience), Perl (project experience), Lotus Script (project experience), ADO (project experience), CDO (project experience), and COM/DCOM (project experience).

**Hardware / Operating Systems:**

Operating Systems experience includes HP-UX Unix (project experience), Sun Solaris Unix (project experience), IBM AIX Unix (project experience), Redhat Linux (project experience), SuSE Linux (project experience), MS Windows Server NT, 2000, and 2003 (project experience), and MS Windows Client 3.1, 95, 2000, ME, XP, Vista (project experience).

Hardware experience includes architecture, planning, and procurement for HP, IBM, Sun, and Intel based hardware platforms.

**Middleware / Databases:**

Database and middleware experience includes Oracle RDBMS 8.0, 8i, 9i, and 10g (expert), Oracle Applications Server 9i and 10g (expert), Microsoft SQL Server (project experience), Lotus Domino / Notes (project experience), and Microsoft Internet Information Server (project experience).

Experience with 9i to 10g Real Application Cluster (RAC) Upgrade
General Tools:

DBA tools experience includes Oracle Enterprise Manager (project experience), Oracle SQL Navigator (project experience), Quest TOAD (expert), Embarcadero DB Artisan (expert), and Embarcadero SQL Developer (project experience).

Performance monitoring and reporting tools experience includes Oracle Enterprise Manager, Database Control, and Application Control (project experience), Quest Central Performance Analysis (project experience), Quest Central Spotlight on Oracle (project experience), and Quest Central Spotlight on E-Business Suite (project experience).

Desktop applications experience includes MS Access (project experience), MS Excel (expert), MS Word (expert), MS Project (project experience), MS PowerPoint (project experience), MS Visio (project experience), MS Projects (project experience), and Lotus Notes (expert).

Education

Associates of Applied Science in Computer Information Systems
Portland Community College

Associates of Science
Portland Community College

Training

- Oracle Database Server 8i (Full DBA Curriculum)
- Oracle Database 9i and 10g New Features
- Oracle Application Server 10g Administration I and II
- Oracle Enterprise Security
- Oracle Internet Reporting
- Oracle 9iAS Discoverer 4i Administrator and User
- Oracle Workflow Administrator and User
- Oracle E-Business Suite System Administration

Presentations

- Oracle Applications User Group Denver, CO April 2008 – Considering an Upgrade to E-Business Suite 11.5.10.2 or R12? Learn From a Recent R12 Upgrade.
Srinivas Parsi
Manager

Profile
Srinivas has over 14 years of professional experience as a Technology Architect, Infrastructure Lead and Oracle Apps DBA Manager. Srinivas has been involved in a wide range of consulting assignments relating to implementation and administration of various releases of Oracle eBusiness Suite on 11i and R12. Srinivas designed and sized hardware to implement Oracle eBusiness Suite applications. Srinivas has experience with advanced topologies including RAC, Single Sign-On for eBusiness Suite, Hardware Load Balancer for Application tiers high availability, secure external application servers. Srinivas has extensive experience with Oracle Applications installations, upgrades, cloning, security administration, Mobile Devices configuration, Application patching etc. Srinivas has successfully managed infrastructure and DBA teams at many implementations.

Experience

Client Name: Metropolitan Sewer District
Large State Government Agency.
- Oracle eBusiness Suite R12.1, OBIEE and Hyperion Implementation
- Role: Srinivas functioned as an Architect and Apps DBA to develop a strategy for Performance Testing of Oracle eBusiness Suite. Lead the efforts for performing a manual stress testing of Oracle eBusiness Suite and provided recommendations and fine tuned all layers of the application to support production load after go-live. Worked with Project Management and designed a Failover Strategy for Oracle eBusiness Suite applications. Demonstrated various failover scenarios to the client and implemented the best option that is cost effective for the client. Designed architecture for External Application tier to implement iSupplier and access the application over the internet.
- Technical Environment: Oracle eBusiness Suite R12.1.1, IBM AIX 6, OBIEE, Hyperion, Oracle Grid Control

Client Name: Presidio Trust
Large Federal Agency.
- Single Sign-On Implementation
- Role: Srinivas functioned as an Architect and Lead Apps DBA to design and implement Single Sign-On using Oracle Internet Directory for Oracle eBusiness Suite and Business Intelligence. Srinivas installed, upgraded and configured Oracle Application Server Infrastructure which includes Oracle Internet Directory, Single Sign-On, middle tier which includes Portal and Discoverer. Integrated Oracle Internet Directory and Portal with Oracle eBusiness Suite and enabled single Sign-On functionality for Oracle eBusiness Suite. With Single Sign-On functionality users are able to login to Portal and view their Discoverer reports, Oracle eBusiness Suite responsibilities other useful company related information on a well designed portal page.
- Technical Environment: Oracle Application Server 10g, Oracle eBusiness Suite 11.5.10.2, Linux Rel 4.

Client Name: State of Texas
Large State Government Agency.
- Implement Procurement System using Oracle eBusiness Suite

Attachment E – Representative Resumes
• **Role:** Mr. Parsi worked as Lead Architect/DBA to implement Oracle eBusiness Suite 11i. Mr. Parsi designed and configured a multi-tier environment for hosting Oracle Applications and also to deploy the application on the internet. Mr. Parsi configured multiple application tiers using hardware load balancer and also for additional security configured Oracle eBusiness Suite to use reverse proxy server. Mr. Parsi worked closely with network team, Unix Administration team, Functional and Technical teams.

• **Technical Environment:** Oracle Applications 11i, Oracle Database 10g Rel 2, Sun Solaris, Vinamaya

**Client Name: Presidio Trust**  
**Large Federal Government Agency.**

• **Oracle eBusiness Suite migration from Sun Solaris to Linux**

• **Role:** Mr. Parsi functioned as a Technology Architect to migrate Oracle eBusiness Suite instance from Sun Solaris to Linux platform and also from Single Node to Multi-Node. Mr. Parsi was responsible for sizing the production hardware, preparing the detailed project plan for performing the migration. Mr. Parsi worked with the client team and successfully migrate the instance to Linux Platform with no issues reported after the cutover. Minimized the downtime of the application to the end users by planning the activities meticulously and keeping the project steering committee updated on the progress of the project. After platform migration project, Mr. Parsi implemented Oracle Business Intelligence (Discoverer 10g) system for the client.

• **Technical Environment:** Oracle eBusiness Suite, Oracle Database, Sun Solaris, Linux

**Client Name: County of San Diego**  
**Large State Government Agency.**

• **Evaluate Single Sign-On and Archiving Tools**

• **Role:** Mr. Parsi is working as technical architect for migrating Oracle eBusiness Suite from 11.5.8 to 11i10 R2 and to evaluate Single Sign-On and Archiving Solutions. Mr. Parsi is involved in designing and sizing the hardware for migrating Oracle eBusiness Suite.

• **Technical Environment:** Oracle Internet Directory, Sun ONE, Siteminder, Applimation

**Client Name: Fusion Internal Lab**  
**Large Public Sector Agency.**

• **Evaluate Fusion Middleware and HTB Products**

• **Role:** Mr. Parsi lead the dba team for installing and evaluating Oracle eBusiness Suite with Healthcare Transaction Base (11i10R2), Oracle Internet Directory, Single Sign-On, Portal and Beehive on Linux Platform. Mr. Parsi also got experience in installing and configuring SOA (Service Oriented Architecture) components like BPEL, BAM (Business Activity Manager), ESB (Enterprise Service Bus), WSM (Web Service Manager) and Business Rules.

• **Technical Environment:** BPEL, BAM, ESB, WSM

**Client Name: County of San Diego**  
**Large Public Sector Agency.**

• **Datacenter Migration**

• **Role:** Mr. Parsi led the technical team to migrate the data center from San Diego-CA to Plano-TX. Mr. Parsi was responsible to co-ordinate the tasks for migrating ERP applications which includes Oracle eBusiness...
Suite, PeopleSoft and Kronos. Mr. Parsi prepared the project plan and cutover plan for migrating the applications with over 300 interfaces, numerous firewall rules, custom objects. As part of migration there were over 70 servers involved and over 1TB of data.

- **Technical Environment**: Oracle eBusiness Suite, Oracle Database, Sun Solaris

**Client Name: National Institute of Health**
Large Federal Government Agency.
- Implement Oracle eBusiness Suite
- **Role**: Managed the DBA Team and was responsible for implementing Oracle eBusiness Suite using RAC (Real Application Clusters) and Load Balancers on Sun E25K Servers. As part of the implementation migrated Oracle eBusiness Suite from single node HP-Tru64 to multi-node Sun Solaris OS. Mr. Parsi managed the DBA team to implement Single Sign-On using Netegrity Site Minder. Mr. Parsi designed and implemented Wireless Handheld devices for Mobile Supply Chain Applications. Mr. Parsi evaluated and negotiated licenses for Ringmaster, AppWorx and Markview tools.

**Client Name: New York City Housing Authority (NYCHA)**
Large Public Sector Agency.
- Implement Oracle eBusiness Suite
- **Role**: Mr. Parsi functioned as Lead Oracle Applications DBA for implementing Oracle Applications Rel 11i on a multi-tier architecture. Managed 5-person team. Both Core Application and Self-Service Applications (iProcurement) were implemented. Mr. Parsi played a key role in finalizing hardware architecture for Oracle Applications. Mr. Parsi was responsible to manage the team for configuring base instances and to create development instances with a copy of base instances, for installing and configuring Discoverer 4i. Mr. Parsi managed the team for installing and configuring Kintana Change management tool. Mr. Parsi was responsible for managing over 18 instances of Oracle eBusiness Suite.
- **Technical Environment**: Oracle eBusiness Suite, Oracle Database, Kintana, Sun E15K

**Client Name: OnSemiconductor**
Large Commercial Company.
- Implement Oracle eBusiness Suite
- **Role**: Mr. Parsi led Oracle Applications DBA team for global implementation of Oracle Applications 11i on a multi-tier architecture. Managed DBA group and supported 24X7 systems. Developed instance strategy for applying patches, data loads from legacy systems before moving them to production, User Acceptance Test, Training. Mr. Parsi coordinated database production activities including implementation of backup and recovery, patch application and instance development activities. Implemented Internet Procurement for accessing by internal users and also by external users through internet using SSL, installed and configured digital certificate on application servers. Implemented Load Balancing on application Servers using Cisco hardware.
- **Technical Environment**: Oracle eBusiness Suite, Oracle Database, Sun Solaris
System Experience

- **Software / Products:** Oracle eBusiness Suite 11i and R12, Oracle Database, Oracle Application Server 10g, Oracle Internet Directory, Oracle Single Sign-On, Portal, Oracle RAC, Application Load Balancing, System Administration.
- **Development Tools / Languages:** Oracle Developer 200, PL/SQL
- **Hardware / Operating Systems:** Sun Solaris, Sun E15K, Sun E25K, Linux, HP-UX, AIX, Windows
- **Middleware / Databases:** Oracle Database, Oracle Fusion Middleware
- **General Tools:** Ringmaster, Kintana, Foglight, Spotlight, TOAD, Markview

Education

- **Masters in Computer Applications**
  Mysore University
- **Bachelor of Commerce**
  Osmanis University

Training

- Leadership training at Yale University

Presentations

- Presented paper on "Economize: Move Your E-Business Suite to Linux" at Collaborate '09 of OAUG in Orlando-FL.
- Presented paper on “Economize: Move Your E-Business Suite to Linux” at Oracle Open World 2009 in San Francisco-CA.

Foreign Language Skills

- Telugu – Native
Sumit Saha
Manager

Profile
Sumit Saha is a Manager in our Oracle practice with over eleven years of HR Implementations, HR Transformation, HR service delivery and HR advisory experience.

He specializes in HR Implementation and Human Resource Transformation initiatives ranging from overall HR Strategy, Implementation, Upgrade, business case development, business process redesign, HRIT strategy, as well as HR self-service and unique Public Sector solution design.

Sumit is our HCM subject matter expert in delivering PeopleSoft HCM services (i.e. Implementations, upgrades, advisory, strategy and project management) to our Public Sector client base. He has worked on over 17 HCM PeopleSoft implementations across industries (Higher Education, Municipal Govt Financial Services). In his HR Technology roles, he specializes in Oracle/PeopleSoft HR/PAY implementations and has a broad knowledge across HR, Payroll, Time & Labour, Benefits, Financials and Project Management.

Experience

Public Sector - Higher Education – Georgian College; PeopleSoft HCM Implementation Version 9.0
Georgian College selected Deloitte to assist them with PeopleSoft HCM 9.0 Implementation HRMS (HR, Benefits, Payroll, Financials Integration, Encumbrance, Time & Labour, Portal Integration, Identity Management Integration, and decentralized hiring bolt-on)

Role: Project Manager

• Established Project Governance Framework to engage various stakeholders during the implementation phase and post production; Presentations to Steering Committee and Executive Group.

• Assisted them in putting together a framework to manage and deploy decentralization of HR services.

• Responsible for preparing the detailed project work plan, scheduling resources, identifying areas of risk and mitigation strategies, scheduling tasks, managing the project budget, and project charter development.

• Oversight over change management, security, external audit, technical and functional teams.

• Provide subject matter expertise and guide the functional and technical team members; QA of configuration, interdependencies, testing, functional and technical designs of solutions.

• Assist and participate in key design discussions and provide subject matter expertise and past project experience in resolving similar issues.

Public Sector - Higher Education – Georgian College; PeopleSoft HCM Planning & Scoping(FIT/GAP) Version 9.0
Georgian College selected Deloitte to assist them with HCM 9.0 Planning & Scoping to effectively determine the Implementation Scope, Gaps in business processes and rollout strategy.

Role: Project Manager

• Led the Project Team to conduct workshop and gather business requirements ; Led Release Management Visioning Workshops with key stakeholders.
• Developed Release Management Strategy and Implementation Work plan
• Final presentation to the Executive Steering Committee; Developed and presented the Implementation Budget, Scope, Timelines and Project Charter

Public Sector - Higher Education – Ryerson University; PeopleSoft HCM Implementation Version 9.0
Ryerson University selected Deloitte to assist them with HCM 9.0 Implementation. The engagement involved the following modules – Base HR, Talent Acquisition Mgmt, Base Benefits, Payroll for NA, Time & Labor, Self Service and Payroll GL Integration.

Role: Overall Functional Team Lead
• Assisted multiple module leads (PAY, Payroll GL and Time & Labor) with configurations decisions; design and thinking out of the box on resolving critical business process issues.
• Assisting PMO with creating project plan, resource management, status reporting, task allocation, coordinating test schedules and managing overall HR Team deliverables scope and budget.
• Conduct Configuration and Conversion Workshops.
• Provide Insights about the new Design of Payroll GL Configuration to ease manual labor intensive maintenance going forward. Enabling client team to understand the efficiencies that can be achieved with new 9.0 functionality.
• Assisted with Design Activities like Writing Functional Specification & Test Script; Assisted with Integration of Oracle Government Financial with Payroll.
• Provide Walk through of Testing Approach and Parallel Strategy for Go-Live.
• Ensuring and reviewing quality of deliverables for the entire team; participate and enable new business process discussions.
• Assisted with Designing a Custom Encumbrance Bolt-on solution.

Public Sector – City of Winnipeg; HR Team Lead; PeopleSoft HR Upgrade Version 8.9
City of Winnipeg has engaged Deloitte to assist them with HCM 8.9 Upgrade from Version 8.3. The engagement involved the following modules – Base HR, Talent Acquisition Mgmt, Base Benefits, Payroll for NA, Time & Labor, Self Service and Payroll GL Integration.

Role: HR Team Lead
• Managing and coaching multiple stream/module leads (PAY, HR, Recruitment, Self Service & Security).
• Assisting PMO with creating project plan, resource management, status reporting, task allocation, coordinating test schedules and managing overall HR Team deliverables scope and budget.
• Identify and develop Fit / Gap Analysis of New Vs Existing Functionality for Base Benefits.
• Provide Insights about the new Design of Payroll GL Configuration to ease manual labor intensive maintenance going forward. Enabling client team to understand the efficiencies that can be achieved with new 8.9 functionality.
• Assisted with New Functionality that could potentially decrease the Actuals distribution Configuration; provided the client and our team with strategic directions on resolving issues and coordinating work across streams.

Attachment E – Representative Resumes
- Enable the client to follow a structured approach in maintaining a repository of Modifications/Bolts/Reports/Queries and other custom objects.


- Ensuring and reviewing quality of deliverables for the entire team; participate and enable new business process discussions.

**Higher Education – Ryerson University; Payroll, Time & Labour, Absence Management & Integration Lead; HCM FIT/GAP and TO BE Business Process Design**

Ryerson University has engaged Deloitte to assist them with HCM FIT/Gap and Process Design. The engagement involved the following modules - HR, Base Benefits, and Payroll for NA, Time and Labor Rules and Payroll GL Integration.

**Role:** Functional Lead

- Identify and document AS IS Processes design; Design and Review TO BE Process design; Gather business requirements and conduct functional workshops.

- Identify and conduct Fit / Gap Analysis; Conducted Product Workshop; Document Gaps and provide solutions to meet them.

- Provide Implementation Recommendations based on Fit/ Gap Analysis and implementation approach; Provide resource, plan & phase approach in Project Charter.

- Participate and enable new business process discussions internally with 8.9 & 9.0; Configured 8.9 & 9.0 HCM Product to demonstrate functionality that’s new and usable out of the box.

- Advised the Client on the recommended approach for feasibility; Identified process constrains and advised on solutions; Managed team members and coached them on new functionality and upgrade lessons learned.

**Higher Education – Queens University; Payroll Strategy Lead; ERP Evaluation**

Queens University has engaged Deloitte to assist them with putting together an Overall ERP Strategy and detailed business requirement gathering for their need of an ERP. The engagement involved all modules that various ERP vendors offer in the marketplace and gathering requirement that can facilitate demonstrating the need of ERP to better manage Queens’s business needs.

**Role:** HR/ Pay Advisory

- Conduct Workshop to gather business requirements for Payroll and Non-Fulltime Hiring.

- Provide Insights to business users about what Vendors Offer.

- Identify and document Existing Functionality.

- Develop requirement that can facilitate ERP Vendor evaluation.

**Higher Education – Niagara College; HCM Upgrade Lead**

HCM 8.9 Upgrade
Niagara College has engaged Deloitte to assist them with HCM 8.9 Upgrade from Version 8.0. The engagement involved the following modules - HR, Base Benefits, and Payroll for NA, Time and Labor Rules and Payroll GL Integration.

**Role:** HR/Pay Functional Lead

- Identify and develop Fit / Gap Analysis of New Vs Existing Functionality.
- Provide Training to Functional Users on enhancements.
- Troubleshoot Issues with the Version 8.9.
- Participate and enable new business process discussions internally with 8.9.
- Provide shared model approach between SA and HR on Person Model.

**Public Sector – Region of York; PeopleSoft 8.9 Time and Labor & Pay GL Upgrade Training**

Region of York has engaged Deloitte to provide training on new features in Peoplesoft 8.9 to its Functional Upgrade Team. The training modules involve Time and Labor 8.9, Time and Labor Rules and Payroll GL Integration.

**Role:** TL Functional Lead

- Identify and develop key content for Training Manual
- Provide Training to Functional Users
- Enable users to identify and use new features in day to day business needs

**Higher Education – Fleming College; PeopleSoft 8.9 Time & Labour & Payroll to GL Lead**

Fleming College has engaged Deloitte to implement an HCM suite of products including HR, Benefits, Position Management, Time & Labour, Payroll, Payroll GL Interface, Portal and employee self-service.

**Role:** Payroll and PayGL Lead

- Gather business requirements
- Define Scope of functionality to be implemented and enable future enhance possibilities.
- Lead TL Configuration, Testing and Training activities
- Cut-Over and Go-live strategy planning
- Assist with troubleshooting of functional issues and provide alternative solutions where necessary
- GL Integration configuration and testing
- Functional and Integration testing of Bolt-ons.
- Create roadmaps for Year End and annual exercises

**Public Sector-Higher Education–PeopleSoft Enterprise 8.0; St. Clair College Windsor   Human Resource Implementation**

**Role:** Payroll Lead
• Primary responsibilities included functional Configuration of Payroll, requirements gathering.
• Implemented Employee and Manager Self Service.
• Training End users and power users for New functionality and features
• Also helped the client with feasibility analysis, new business process design and designing bolt-on solutions.
• Developed HRMS conversion strategy and test cases.
• Designed bolt-on solution for Union Contract system
• Transitioned Customer from ADP to PeopleSoft Payroll system.
• Troubleshoot and resolve HCM functional and technical issues
• Designed Reporting solution in Actuate and created specification for over 70 reports.

Higher Education – PeopleSoft Enterprise
Ryerson University Student Admin Implementation

Role: Student Financials Lead

• Gather business and technical requirements for PeopleSoft Interface.
• Performed Fit / Gap Analysis for technical requirements for Student Financials module and Key Gap Interfaces.
• Knowledge transfer to PeopleSoft support team.
• Designed Key Interfaces specifications like Credit Card Interface Specs for Student Financials for online credit card transactions for Celadon, Refunding functionality to merge online and batch transaction for Continuing Education Student payments using Credit Card and Third Party Student Financials Integration from Salepoint to PeopleSoft Student Financials using Application Engine and customized Group Line and Post process to suit the client needs.
• Developed various other customizations in Student Records and Financials.

System Experience

Software / Products:
PeopleSoft Time & Labour, Payroll, HRMS, PeopleSoft Student Admin, PeopleSoft Financials, PeopleTools, Oracle 6x-10G, Microsoft SQL Server, IBM DB2 UDB, SQL - Microsoft and Oracle, Actuate, J2EE Architecture

Professional Affiliations/Certifications
• Canadian Payroll Association 2002
• PMI Member, Southern Ontario Chapter 2006
• Deloitte Project Management Certification 2008

Education
Bachelor of Engineering, Mumbai 1998
**Training**
- Sales Force Automation (CRM)
- Project Management
- PeopleSoft Payroll 6.1/7.5 /8.0 /8.9/9.0
- Oracle eBusiness Financials (GL)– 10.X/11.X
- PeopleSoft Time & Labour 8.0/8.9 /9.0

**Presentations**
- eCRUG 2008 – Simplifying Hire to Pay process using Decentralized Hiring Tool in Higher Education Institutions and Public Sector
Aaron Williams
Senior Consultant

Profile
Aaron is a skilled technical resource for full suite PeopleSoft implementations for Higher Education, which includes the Student Administration, Financials, and Human Resources modules. Most recently, he has had an important lead role in both the fit/gap and the implementation of a new PeopleSoft Campus Solutions system at a major US University. In addition, he provides remote support for similar systems at other institutions, and has detailed knowledge of applying Fixes and Patches to PeopleSoft systems. He has also been involved with the improvement of Deloitte’s Total Campus implementation methodology, which involved creating a set of document and code deliverables for future Student Administration ERP implementations.

Experience

Higher Education - System Integration; Interfaces and Conversions Lead
University. The University of North Carolina selected Deloitte to assist in the implementation of the replacement of its ageing IDMS Student Information System with PeopleSoft Campus Solutions. UNC tasked Deloitte with assisting in the fit gap analysis, high-level requirements gathering, and effort estimation.

Role: As Interface and Conversion lead on the project, Aaron was responsible for the following:

- Along with a UNC co-lead, managing the conversion and interface tasks of the overall project plan, including design, build, test and go-live.
- Manage conversion and interface status reporting to the technical team lead
- Leading and completing the design of all of the conversions required to migrate data from UNC’s legacy system to their new PeopleSoft Campus Solutions environment
- Manage a team of developers through the development and testing of the above conversions
- Liaise with the relevant functional teams and PMO through the design, development and testing phases of the conversions

Environment: PeopleSoft v9.0, PeopleTools 8.49, Oracle DB, Citrix

Higher Education - System Integration; Interfaces and Conversions Lead
University. The University of North Carolina selected Deloitte to assist in the implementation of the replacement of its ageing IDMS Student Information System with PeopleSoft Campus Solutions. UNC tasked Deloitte with assisting in the implementation phase of the project, including assisting and advising in the design, development, testing and deployment of the new system.

Role: As Interface and Conversion lead on the project, Aaron was responsible for the following:

- Creating and maintaining a development catalogue for all the interfaces and conversions required between Legacy systems and PeopleSoft
- Using his prior PeopleSoft expertise to create effort estimates for the design, development, and testing of each item in the development catalogues.
- Creating Interface and Conversion strategy documents describing how each will be designed, developed, tested and managed during the PeopleSoft Campus Solutions implementation

Attachment E – Representative Resumes
• Along with his UNC co-lead, lead a team of UNC and Deloitte resources who assisted in the creation of the development catalogues.

**Environment:** PeopleSoft v9.0, PeopleTools 8.49, Oracle DB

**Higher Education - Peoplesoft/Development Services; Technical Consultant**
College. The Nova Scotia Community College asked Deloitte for assistance in the technical development of an interface between TPHi and PeopleSoft.

**Role:** Aaron's role on the project was to develop and test the PeopleSoft objects required to interface with NSCC’s TPHi scheduling system. As well, Aaron was tasked with providing knowledge transfer to peer-level client resources during the entire project, such that they would be able to support the interface going forward

**Environment:** PeopleSoft, PeopleTools, Microsoft SQL Server

**Higher Education - Peoplesoft/Enterprise Systems Management & Security/IT Transformation; Technical Consultant**
College. The College of the North Atlantic chose Deloitte to assist in its application of Fixes and Patches to its PeopleSoft system at both of its campuses in Canada and Qatar. For both systems, Deloitte was tasked with identifying applicable patches, creating test scripts, working with the client on testing and issue resolution, and knowledge transfer.

**Role:** Aaron's role on the project was to catalog and download the patch files from Oracle; disseminate documentation to Deloitte functional resources for test script creation; work with CNA technical staff to ready PeopleSoft environments; apply patches to Demo and Test databases; work with Client tech resources on issue resolution; and knowledge transfer to peer-level client tech resources.

**Environment:** PeopleSoft PeopleTools, Microsoft SQL Server

**Higher Education - IT Transformation; Systems Analyst**
Community College. The client chose Deloitte as an engagement partner for the implementation of a new PeopleSoft system.

**Role:** For this engagement Aaron was responsible for developing conversion programs and other significant pieces of customized development. Aaron was also responsible for working with the client to help resolve issues with the product and with development. Aaron worked with the college to implement a Novell Identity Management driver to the PeopleSoft system, which allows new users to be added and updated dynamically between PeopleSoft and Novell eDirectory.

**Environment:** PeopleSoft, UNIX, Oracle, VMWare, Novell Identity Manager

**Higher Education - Development Services; Systems Analyst**
Community College. The client chose Deloitte to implement PeopleSoft Student Administration 8.0 and Financials 8.0 at their campuses in Newfoundland and Qatar.

**Role:** Aaron was responsible for remotely supporting the PeopleSoft system post go-live. When technical issues were escalated to Deloitte, Aaron worked closely with the client to find a resolution.

**Environment:** PeopleSoft PeopleTools

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**Attachment E – Representative Resumes**
System Experience

Software / Products: PeopleSoft PeopleTools 8.20 – 8.49, SQL Server, Oracle, VMWare, Novell Identity Manager

Development Tools / Languages: C, Java, SQR, SQL, PeopleCode

Hardware / Operating Systems: Windows XP, Mac OSX

General Tools: Microsoft Office (Word, Excel, PowerPoint, Project, Visio), Application Designer, Golden32 (SQL Editor)

Education

Bachelor of Computer Science with Honors
Dalhousie University

Language Skills

English - Native
French – not applicable
William Eschmann
Senior Consultant

Profile
Certified Project Management Professional (PMP) and Senior Consultant responsible for and involved in a wide range of consulting assignments covering business and IS strategies, effectiveness and efficiency studies, outsourcing studies, development methods, and service management.

I have successfully completed two full-cycle PeopleSoft HCM implementations, four major PeopleSoft upgrades and one PeopleSoft data migration. Supported customization and post-implementation support of HCM and Financial modules. I have served and performed as a project manager, senior project consultant, and project lead. My technical experience includes extensive gap-fit analysis, application analysis, system design, application configuration, development and life-cycle management. I have performed significant business analysis between HR/Benefits/Payroll/Time & Labor and legacy information systems.

Experience

Hobart and William Smith Colleges.
PeopleSoft HCM 9.0 Implementation


County of San Diego.
PeopleSoft 8.8 Data Migration

Role: Functional PeopleSoft lead on transition team analyzing the documentation status of a County government Peoplesoft production environment HR, Payroll and Benefits V8.8. Analysis of the integration of new Peoplesoft applications ELM, with the current applications. Analyzed an IVR solution versus a web-based solution for the clients Benefits and Open Enrollment needs.

State of Florida.
PeopleSoft Finance 8.9 Implementation

Role: Functional PeopleSoft General Ledger consultant on Financial Services implementation for a statewide Financials ERP. Responsibilities included, requirements gathering and documentation of functional specifications related to payroll and labor distribution interfaces.

U.S. Military - DIMHRS.
PeopleSoft HCM 8.8/8.9 Implementation

Role: Functional PeopleSoft Global Payroll Team consultant on a PeopleSoft v8.8 HR/Global Payroll project for the United States Military. Responsibilities included requirements gathering, detail design and development of Global Payroll configuration. This implementation supported over 3.1 million members.
Massachusetts Turnpike Authority.
PeopleSoft 8.8 HCM Upgrade

Role: Functional HCM Team Manager on a PeopleSoft HR/Payroll and Benefits 8.8 upgrade for Massachusetts State Turnpike Authority. Responsibilities included managing a team of twelve client and consulting resources, providing functional support including requirements gathering, design documents, process scripts, business process flow, table setup, testing scripts and data conversion.

Citigroup.
PeopleSoft 8.3 HCM Upgrade

Role: Functional HR/Benefits/Payroll Team consultant for HR team upgrading PeopleSoft Human Resources, Payroll and Benefits from version 7.5 to 8.3. Responsibilities included, requirements gathering, design documentation, testing, data conversion and cutover activities.

System Experience

Software / Products:
PeopleSoft HCM - Expert
PeopleSoft GL - Project experience
Development Tools / Languages:
PeopleSoft Application Designer - Project experience
PeopleSoft Query Manager (SQL) - Expert
PeopleSoft PeopleTools - Training

General Tools:
Microsoft Word - Expert
Microsoft Excel - Expert
Microsoft Access - Project Experience
Microsoft PowerPoint - Expert

Education
Associate Criminal Justice
McIntosh College

Professional Affiliations / Certifications
APA - American Payroll Association
PMI - Project Management Institute
PMP Certified 2009

Training
Peoplesoft Training – Introduction to HRMS, Global Payroll, Peopletools I and II, Absence Management, General Ledger and Time & Labor

Attachment E – Representative Resumes
Michael Eastwood
Senior Consultant

Profile
Michael is a senior consultant in the Enterprise Applications group of Deloitte’s consulting function in Halifax. He is focused on PeopleSoft Campus Solutions and has extensive experience supporting PeopleSoft applications, implementations and upgrades. Within PeopleSoft Campus Solutions, Michael is focused on Student Records, Academic Advising, Admissions and Recruiting, and Campus Community.

Michael has over 8 years experience supporting student information systems at higher education institutions including over 5 years experience with PeopleSoft Campus Solutions. Michael brings experience in functional support of Student Records, Campus Community/Admissions lead for an implementation of Campus Solutions 9.0, module lead for an upgrade from Campus Solutions 8.0 to 8.9, functional lead implementing Academic Advisement; as well, he brings a talent for user support and troubleshooting.

Experience

Higher Education - Support - Student Records
Nova Scotia Community College. The client contracted Deloitte to perform testing and analysis of functionality in the student records module.

Role: Tested how a system-wide change to course units would affect schedule of classes and student enrollment. Investigated and provided documentation on attendance rosters and gradebook, functionality NSCC is considering implementing. This included a change request to make attendance rosters available to instructors through self service. Performed analysis and created a change request for a solution to handle the delivery of cost recovery programs in PS. Documented and delivered a session on best practice for updating PS queries to use the standardized outer join syntax.

Environment: PeopleSoft v8.9

Higher Education - Stream Lead - Admissions and Campus Community
Implementation of PeopleSoft Campus Solutions at University of North Carolina.

Role: Responsible for leading the Admissions team in configuration and testing phases of PeopleSoft v9.0 implementation. Supporting configuration decision making process and assisting with entry of configuration. Advising and assisting with configuration of PeopleSoft 3C’s and development of population selection queries. Leading the client through the functional validation of conversion data. Providing the client with testing plans and templates to track testing results. Troubleshooting issues that arise throughout the testing phases. Utilized knowledge of the Student Records module to advise the client on the impact of admission’s configuration decisions.

Environment: PeopleSoft v9.0
Higher Education – Functional Analyst, Student Administration

Functional support of PeopleSoft Admissions and 3Cs modules. The institution had implemented PeopleSoft v8.9 with the following modules: Advisement, Campus Community, Recruiting and Admissions, Student Records, Self Service, Student Financials and Contributor Relations.

Role: Module lead during PeopleSoft patches and fixes project. Project responsibilities included testing fixes, making keep/no keep decisions for customizations, coordinating user testing and resolving issues.

Implemented email communications for admissions. Created and updated mass changes, including custom mass change types and templates.

Redesigned admissions reports, which make use of Crystal Reports 9.0.

Supported online application hosted by ApplyYourself. Created change request for and tested modifications to custom interface between PeopleSoft and ApplyYourself.

Higher Education – Functional Analyst, Student Administration

Functional support of PeopleSoft Academic Advisement module. The institution was taking part in an upgrade of PeopleSoft Student Administration v8.0 to PeopleSoft Campus Solutions v8.9. This included the upgrade of the following modules: Advisement, Campus Community, Recruiting and Admissions, Student Records, Self Service, Student Financials and Contributor Relations.

Role: Module lead for academic advisement during upgrade of Campus Solutions 8.0 to 8.9. Also assisted with Student Records self service testing during upgrade project.

Functional lead on advisement implementation projects. As part of these projects, held configuration workshops, entered and tested configuration, performed user acceptance testing and provided end user training. Wrote change request, liaised with technical staff to develop solution and tested modifications to the advisement transcript report.

Higher Education – Functional Analyst, Student Administration

Functional support of PeopleSoft Campus Solutions. The institution had implemented PeopleSoft Student Administration v8.0 which included the following modules: Advisement, Campus Community, Recruiting and Admissions, Student Records and Student Financials

Role: Configured and ran PeopleSoft processes related to Student Records to generate ESIS reports for Statistics Canada.

Supported users of the Recruiting and Admissions, Campus Community and Student Records and Enrollment modules. Troubleshoot production issues such as configuration errors, system slowdowns or processing errors; liaised with technical staff to develop solutions and submitted cases to Oracle/PeopleSoft. Created/updated training documents and provided training sessions for staff.

Higher Education – Systems Support Analyst

Supporting SCT Banner in the registrar's office at a university. The institution had implemented Banner Student and Banner Advancement.

Role: Supported Banner Student including: Recruiting and Admissions, Student Records, Enrollment and Student Self Serve. Developed and maintained a web-based reporting suite. Analyzed business processes to determine
best use of Banner and reporting suite. Performed ad hoc reporting. Developed and executed database procedures. Reported to external organizations, including MacLean’s and Statistics Canada (ESIS).

**System Experience**

**Software / Products:**

PeopleSoft
- Academic Advisement
- Campus Community
- Recruiting and Admissions
- Student Records
- Mass Change
- Query
- Security

**Development Tools / Languages:**

SQL, Oracle SQL Developer, Crystal Reports 9.0, SQL Server Query Analyzer

**Hardware / Operating Systems:**

Windows XP/Vista

**Middleware / Databases:**

Microsoft SQL Server, Oracle

**Education**

Bachelor of Information Systems
St. Francis Xavier University

**Training**

Oracle University - PeopleTools I / PeopleTools II 8.48 Accelerated
Oracle University - Admissions Fundamentals
PeopleSoft Education - Student Enrolment, Intro to Student Admin

**Presentations**

Alliance Conference 2006 – Modifying the Advisement Report. Presented an approach to modifying the advisement report to make it easier to read and understand as well as provide an additional piece of information deemed necessary by users.

Alliance Conference 2005 – Preparing ESIS Reports in PeopleSoft. Presentation covered tips and tricks for making effective use of the functionality delivered by PeopleSoft for preparing the ESIS reports for Statistics Canada.
Glenn Van Agten  
Senior Consultant

Profile
Specializing in providing project management services for PeopleSoft Campus Solutions implementations for Higher Education, specifically the Student Records module. Core competencies include business process reengineering, fit/gap analysis, and Student Records advisory services based on industry best practices and Deloitte’s Total Campus methodology.

Experience

Public Sector - PeopleSoft; Student Records Consultant
Higher Education Institution. Deloitte was contracted to assist the University of North Carolina with the implementation of PeopleSoft Campus Solutions v9.0. The scope included Admissions, Student Records, Student Financials, Financial Aid, and Academic Advisement.

Role: As the Student Records consultant; I prepared and facilitated all Student Records configuration workshops, and provided subject matter expertise for the design of all conversions, interfaces, and enhancements; as well as scenario test plan development, and business process refinement for all SR areas including Class Scheduling, Transfer Credit, Enrollment, and Grading.

Public Sector - PeopleSoft; Student Records Consultant
Higher Education Institution. Deloitte was contracted to assist the University of North Carolina with planning and scoping of a PeopleSoft Campus Solutions implementation. Key deliverables included a detailed fit/gap analysis; “To-Be” business process maps, and a detailed project charter.

Role: As the Student Records consultant; facilitated “As-Is” business process workshops; developed all SR “To-Be” business processes based on fit/gap analysis of As-Is state and PeopleSoft functionality; prepared SR section of project charter.

Public Sector - PeopleSoft; Student Lead
Higher Education institution. As part of a long term support contract with the College of the North Atlantic, Deloitte provided technical and functional support as they implemented several PeopleSoft 8.0 fixes/patches bundles for Finance, HR, and Student Administration (SA).

Role: As Student Lead, provided client with testing scenarios for all fixes, developed and managed SA testing timeline, managed client testing of Admissions, Student Records, and Student Financials. First point of contact for issues; investigated and resolved/escalated.

Public Sector - PeopleSoft; Functional Analyst
Nova Scotia Community College selected Deloitte to provide ad-hoc support on a long term basis.

Role: As a Student Records specialist, I requested by the College to take responsibility for completing a number of outstanding tasks including Academic structure changes, data issues, and testing of new customizations.
Public Sector - PeopleSoft; Functional Analyst
Higher Education Institution. As part of a long term support contract with the College of the North Atlantic, Deloitte provided technical and functional support as they implemented several PeopleSoft 8.0 fixes/patches bundles for Finance, HR, and Student Administration (SA).

Role: Lead functional analyst for SA and primary SA contact for client. Provided client with testing scenarios for all fixes, managed testing timeline, and assisted with testing in Admissions and Student Records.

Public Sector - PeopleSoft; Functional Analyst
Nova Scotia Community College selected Deloitte to provide ad-hoc support. For this engagement, additional functional support that was needed to assist with the application of PeopleSoft Campus Solutions 8.9 bundles 3,4,5,6.

Role: Responsible for assessing the impact of the fixes and patches on Students Records. Created a comprehensive set test scripts based on impacted functionality and identified training material in needed of updating. Responsible for executing test scripts on patched environment and providing initial troubleshooting into errors.

Technology - Peoplesoft; QA Analyst
ERP Vendor. Deloitte was invited to provide resources for the system testing of Oracle Campus Solutions v9.0

Role: As a QA analyst, I had the opportunity to test new functionality that will be available in v9.0. I was responsible for executing specific test scripts on multiple database platforms, as well as updating the test scripts as necessary to facilitate future automation. I worked closely with the Oracle functional analyst that had developed the new functionality; reporting any issues and offering suggestions for potential improvements.

Public Sector - PeopleSoft; Student Records analyst
La Cité Collégiale selected Deloitte to implement PeopleSoft Campus Solutions 8.9. The scope covered legacy systems conversions, configuration, and development of several modifications and interfaces. The project was delivered in French using a remote delivery model.

Role: Student Records functional analyst. I assisted in the delivery of the Student Records workshops to client, had joint-responsibility for system configuration of Academic Structure and Students records, provided functional support for conversions, aided in design and development of modifications, and provided knowledge transfer to clients. Took ownership of configuration of a required Statistics Canada report interface. Lead contact for post go-live support.

Public Sector - PeopleSoft; Analyst
College of the North Atlantic selected Deloitte to implement a PeopleSoft ERP solution including Finance, HR and Student Administration.

Role: Responsible for the management of post Go-live support. Initial Deloitte contact for all issues escalated by client. Responsible for ensuring support commitments are met by timely assigning Deloitte subject matter experts to specific client issues.

Internal – Methodology Upgrade; Functional Analyst
Total Campus is a Deloitte implementation methodology which uses a set of deliverables leveraged from our past PeopleSoft implementations. For instance, major modifications which we have performed on prior

Attachment E – Representative Resumes
implementations are thoroughly documented and packaged and can therefore serve as a template for a similar deliverable on new implementations.

**Role:** Responsible for updating numerous functional documents to PeopleSoft 8.9 standards, including the implementation workbook for Academic Structure and Student Records, test scripts, and training guides. Also responsible for translating the deliverables to French for use in French project environments.

**System Experience**

**Software / Products:**
PeopleSoft 9.0 Campus Solutions, PeopleTools 8.49

**Hardware / Operating Systems:**
Windows 2000/XP/Vista

**General Tools:**
Microsoft Office 2007 suite, Microsoft Excel Expert Certification

**Education**
Bachelor of Business Administration, Major in German
Acadia University
Terri Oltman  
Senior Consultant  

Profile  
Terri has over a decade of experience in higher education, online course development and instructor led training delivery. She has instructed college level courses, developed curricula, built and managed online courses, managed learning management systems, and administered high-growth learning programs. On her most recent projects, Terri was responsible for curriculum development and training delivery for a global Oracle implementation and curriculum development for an SAP SRM implementation.  

A manager as well as an educator, Terri was previously responsible for managing a staff charged with the development of online courses and the creation of new technologies, processes and workflows. Terri provides consulting and training for Oracle's User Productivity Kit (UPK) and other curriculum and training initiatives.  

Experience  

SCE  
Regional Distributor of Electricity.  
• Developed SAP SRM instructor led and online training content. Worked with SMEs to design curriculum and capture business processes. Used RWD Infopak to capture business processes.  
• Role: Training Developer.  
• Technical Environment: SAP SRM 7.0, SRM-MDM 3.0, RWD Infopak 5.70.0  

Energy Solutions  
Regional Energy Waste Disposal Dompany.  
• Provided training strategy consulting and technical consulting on the UPK training tool. Trained client on the UPK tool.  
• Role: Consulting on Training Strategy, Technical implementation of UPK, Training on UPK.  
• Technical Environment: Oracle R12, UPK 3.5.1  

Alticor  
Global Distributor of Consumer Products.  
• Developed Oracle R12 Procurement, Shipping, Inventory, Warehouse Management, Mobile Supply Chain, Work In Process, Bills of Material, and Distribution Resource Planning documentation and training content using UPK. Worked with SMEs to design curriculum and capture business processes. Performed UPK installation, content development and content deployment for Oracle Help File Integration. Delivered Oracle training in an international market.  
• Role: Training Track Lead, Software Installation and Management, Content Developer, and Global Training Deployment (Online and Instructor Led).  
• Technical Environment: Oracle R12, UPK 3.1.5
Salesforce.com  
Large Software Application Service provider in the Pacific Northwest.  
- Developed Oracle Financials documentation and training content using UPK. Performed UPK installation, content development and content deployment for Oracle Help File Integration and Plataeu LMS.  
- **Role:** UPK Project Management, Software Installation and Management, Content Developer, and Training Deployment (Online and via LMS).  
- **Technical Environment:** Oracle 11.5.9, UPK 3.1.5, Microsoft Windows 2003 Server, SQL Server 2005, IIS 6.0

Comex Group – PPI  
International Paint Manufacturer.  
- Developed Oracle Financials, Oracle Process Manufacturing and Oracle Discrete Manufacturing documentation and training content using UPK. Performed UPK installation, content development and content deployment for Oracle Help File Integration and created an online training environment for multiple geographically dispersed locations. In addition, facilitated training discussions for end users leveraging UPK and Client Super Users.  
- **Role:** UPK Project Management, Software Installation and Management, Content Developer, and Training Deployment (online).  
- **Technical Environment:** Oracle 11.5.10, UPK 3.1.5, Microsoft Windows 2003 Server, SQL Server 2000, IIS 6.0

Emerson Climate Technologies, Henrico Country, VA, Genband, Chicago Public Schools, Goodman Networks, CA Dept of General Services, St, Louis Metro, Southwest Gas, Goodman Networks  
A variety of Commercial and Public Sector clients.  
- UPK Developer Jumpstart training facilitation. Provided training and strategy consultation to clients on UPK. Jumpstart training also includes hands on workshops.  
- **Role:** Provided UPK Training and Strategy Consultation to a variety of Commercial and Public Sector clients.  
- **Technical Environment:** Oracle 11.5.10, Oracle R12, UPK 2.7.5

Westwood College Online  
- Was responsible for all online course development and administration for Westwood College of Technology Online campus. Defined and implemented online course development processes, managed and coordinated instructional design, course development and multimedia teams. Analyzed and implemented student retention and assessment strategies.  
- **Role:** Assistant Director of Education

Illinois State University, Iowa State University, Westwood College  
- Adjunct Instructor for Illinois State University, Iowa State University, and Westwood Colleges. Developed curriculum and facilitated instructor led and online courses in General Education, Communication, Business & e-Business.  
- **Role:** Instructor
System Experience


Education

**Masters of Science, Organizational and Interpersonal Communication**
Illinois State University

**Bachelor of Arts, Communication**
Western Illinois University

Professional Affiliations / Certifications

eLearning Guild

Presentations

- OAUG 2008 Conference- “Adapting to Diverse Audience Needs Quickly with UPK” (Co-presented with Henrico County, VA)
- OAUG 2008 Conference- “UPK on Location – Roadmap to UPK 3.1”
- NorCal OAUG 2008 Conference- “Leveraging UPK 3.1 Content Management & Guided Rerecord Features”
Jeffrey Yazdi  
Senior Consultant  

Profile  
Senior Consultant with seven years of experience implementing comprehensive business solutions focusing on the needs of institutions of higher learning. Areas of experience include: project planning, integration, implementation, end-user training, and identify new business opportunities and unmet client needs.

Experience  
Public Sector - PeopleSoft Enterprise; Functional Consultant  
University - Higher Education. The University of Carolina at Chapel Hill selected Deloitte to implement PeopleSoft Campus Solutions 9.0. The current scope of the project includes: fit/gap analysis, scoping and planning, business process mapping, legacy systems conversions, configuration, and development of several bolt-ons, modifications and interfaces.

Role: As a Student Records functional consultant I assisted in the delivery of the Student Records workshops to client, had joint-responsibility for the system configuration, provided functional support for conversions, interfaces aided in design and development of modifications, and provided knowledge transfer to clients. Played an active role in the planning and configuration of the Academic Structure. Took ownership of Campus Solutions' Self-Service module and coordinated several cross-functional efforts in this regard. Have taken a lead functional role in the design of several complex modifications including a Course Request Approval system, an NCAA Athletics bolt-on and a class scheduling interface.

Previous Experience  
Public Sector - Project Manager - Scheduling Software  
Higher Education. McMaster University selected Infosilem Inc. to migrate & upgrade their legacy DOS exam scheduling system to Infosilem's Windows-based exam scheduling solution.

Role: Managed technical staff (database administrators & programmer analysts) to gather necessary data requirements, trained staff to efficiently use the software's new features/functionality. Also planned various simulation exercises, establish timelines & requirements for 1st production run. Implemented new version of the scheduling solution while planning for workarounds & gaps.

Public Sector - Project Manager  
Scheduling Software; Higher Education. Nova Scotia Community College selected Infosilem Inc. to implement their automated scheduling solution and replace a competitor's existing scheduling solution that was no addressing all of the institutions needs.

Role: Responsible for implementing automated course scheduling solutions & web-based data collection tool. Planned, implemented, supported & monitored all aspects of the project. Activities managed include: installation, user training, scheduling support & timetable review.

Public Sector - Project Manager  
Scheduling Software; Higher Education. The College of the North Atlantic - Qatar selected Infosilem Inc. to implement their automated course & student scheduling solutions along with a web-based data collection tool.
Role: Planned, implemented, supported & monitored all aspects of the project. Activities managed include: installation, user training, workshops for department coordinators, scheduling support & timetable review.

Public Sector - Project Manager
Scheduling Software; Higher Education. The University of the West Indies selected Infosilem Inc. to assist in the automation of the room assignment process for the course timetable.

Role: Responsible for planning, organizing, implementing, monitoring and controlled the implementation of Infosilem's scheduling solutions. Also planned, executed and reviewed pilot project based on historical data. Successfully implemented room assignment solution in a production environment, for the Fall 2007 course timetable.

System Experience

Software / Products:
PeopleSoft Student Administration: Student Records version 9.0, Academic Advisement version 9.0, Self Service 9.0, Academic Structure version 7 8.9, TPHi Timetabler, TPHi Exam, TPHi Sectioner, TPH Event, Event Web, SQL Server, ChangePoint, Seapine, PcAnywhere, UltraVNC, LogMeIn

Development Tools / Languages:
Cold Fusion, HTML, DHTML, SQL

Hardware / Operating Systems:
Windows 95/98/2000/XP

Middleware / Databases:
SQL, MS Access - ODBC

General Tools:
Microsoft Office, Microsoft Project, Visio,

Education
Bachelor of Commerce, Management Information Systems
Concordia University

Training
PeopleSoft Student Enrollment version 9.0
PeopleSoft Academic Structure version 8.9
Chad MacDonald
Consultant

Profile
Chad is an honest and enthusiastic quick-learner, willing to tackle any challenge; competent, reliable and self-motivated with excellent organizational and interpersonal skills. Over 3 years of marketing experience to the Public Sector - Higher Education, as well as almost 3 years of systems development to the Public Sector - Higher Education.

Chad is a skilled technical resource for PeopleSoft implementations for Higher Education. Currently Chad has taken complete ownership of all Financial Aid conversions and took ownership of some very large scale Student Records conversions for a major US University. He also has updated and maintained Campus methodology technical documentation, as well as reviewed and maintained technical conversion specifications. Along with writing the technical conversion programs, Chad has also played a large role in Bug Fixes and Bundle Reviews.

Experience

Higher Education - Peoplesoft/Development Services; Technical Consultant
Higher Education. The University of North Carolina selected Deloitte to assist in the implementation of the replacement of its legacy Student Information System with PeopleSoft Campus Solutions. UNC tasked Deloitte with assisting in the implementation phase of the project, including assisting and advising in the design, development, testing and deployment of the new system and converting legacy data.

Role: Chad's role on the project was to develop and test the PeopleSoft objects required to convert legacy data. His major tasks include completing the conversion programs required to migrate data from UNC's legacy system to their new PeopleSoft Campus Solutions environment. Chad was also required to validate legacy extraction data, and manage the successful completions of iterations by running conversions start to finish, analyze metrics and obtaining relevant sign-offs from the client and team.

Chad was a lead on all Financial Aid conversions as well as a major contributor to Student Records conversions throughout the project. Chad also created technical specification deliverables for review. Chad was required to peer-review code, test and fix bugs, and create summary spreadsheets for all conversion iterations and go-lives.

Chad took initiative to create improvements to deliverables and also created a Wiki to keep track of conversion progress, conversion deliverables and resource information.

Environment: PeopleSoft v9.0, PeopleTools 8.49, Oracle DB, Citrix

Previous Experience

Public Sector - Systems Developer
Role: Worked individually, within a team, and leading teams from initiation to execution on campus-wide projects, provided technical, project and implementation documentation to stakeholders. Developed, implemented and maintained web based applications and various network administration tools.

Environment: Extensive use of Mac OS X, Unix, Linux and Windows to develop in PHP, Perl, JavaScript, MySQL and PSQL.
Public Sector - Marketing Coordinator

Role: Coordinated all marketing materials, budgets, and vendor funding, tested a new Point-of-Sale and ERP Inventory System for future implementation. Trained part-time staff. Developed and maintained retail web site. Planned and implemented Dalhousie’s laptop rental program, developed and maintained customer relationships through product recommendations.

Environment: MySQL, PHP, Point-of-Sale, Photoshop, Dreamweaver, HTML

System Experience

Software / Products:
Photoshop, Dreamweaver

Development Tools / Languages:
Java, PHP, Perl, JavaScript, HTML, XML

Hardware / Operating Systems:
Windows 95-Vista, UNIX, Linux, Mac OS 7-X

Middleware / Databases:
MySQL, PostgreSQL, Open Source ERP, Point-of-Sale

General Tools:
Microsoft Office, Microsoft Project

Education
Bachelor of Commerce - Major in Marketing Management, focus in Computer Science
Dalhousie University

Training
PeopleTools I / PeopleTools II - Accelerated Rel 8.48
Testing management

The testing strategy outlines the processes and procedures to perform all of the required testing to help determine quality, stability and performance objectives. The strategy defines the purpose, scope and objectives of testing, the roles and responsibilities of team members as well as how the testing will be managed.

A test management process is used to manage all testing activities and for tracking progress.

Test Planning — Identify test cases and assign resources and dates for executing the tests.

Before starting each testing stage a test plan should be developed that will:

- Define test scenarios.
- Tie test cases back to business requirements.
- Define schedules and resources for test cycles.
- Define environmental needs for the testing.
- Define testing team roles and responsibilities.

Test Execution — Execute test cases and manage environments and code migrations.

Prior to execution of the test plan, the testing coordinator must determine that:

- Test plan, defect tracking and test status reporting are agreed to by project management, functional leads, and technical leads.
- All test scenarios and test cases are documented.
- Sign-off of the test plan has been obtained from the stakeholders.
- Logistics for testing have been coordinated.
- Test environment is ready.
- Development objects necessary for test execution have been migrated.
- Security has been migrated.
- Communication mechanism and approach with technical team for defect tracking has been finalized.

The deliverable from testing, for each event, comes from the results of the tests performed by the testing team. For each testing stage it is expected that:

- The script will be executed as documented.
- Any differences from expected results will be documented.
- All scripts that pass will be signed off.
- Any failed scripts will have the reason for failure documented and will be re-tested if necessary.

Defect Tracking — Track issues and manage fixes and escalation process.
Defects identified during testing need to be tracked and assigned a severity level in order to prioritize defect resolution and to determine testing is on target with respect to project timelines.

**Reporting** — Report daily execution status and defect tracking.

**Testing success**
Before testing begins there must be an agreed upon criteria for the success of each testing stage. For example:

- All test cases have been tested.
- Test cases achieved desired results and business processes perform as expected.

**Test scripts**
Test scripts are documented steps for the testing of processes within the applications and the desired results produced from the testing using a variety of scenarios. These scripts will be used in configuration/unit testing, integration testing, user acceptance testing (UAT) and as exercises for end-user training.

**Example test script**

<table>
<thead>
<tr>
<th>Make a Payment</th>
<th>SS-016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test ID:</td>
<td>SS-016</td>
</tr>
<tr>
<td>Test Dependencies:</td>
<td></td>
</tr>
<tr>
<td>Purpose:</td>
<td>Make a payment via self service.</td>
</tr>
<tr>
<td>Navigation: Self Service &gt; Student Center</td>
<td></td>
</tr>
</tbody>
</table>

**Test Procedure:**

<table>
<thead>
<tr>
<th>Page/Field Reference</th>
<th>Data Input</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click the ‘Make a Payment’ hyperlink</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presented with Select Payment Method Page</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay By</td>
<td>Select Credit Card in the drop down</td>
<td></td>
</tr>
<tr>
<td>Click ‘Next’ button</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presented with Specify Payment Details Page</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create New Profile</td>
<td>Select radio button</td>
<td></td>
</tr>
<tr>
<td>Payment Profile</td>
<td>Accept default</td>
<td></td>
</tr>
<tr>
<td>First name</td>
<td>Enter the first name on the credit card</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>Enter the last name on the credit card</td>
<td></td>
</tr>
<tr>
<td>Credit Card Type</td>
<td>Select a credit card type from the drop down</td>
<td></td>
</tr>
<tr>
<td>Card Number</td>
<td>Enter the credit card number</td>
<td></td>
</tr>
<tr>
<td>Expiration Date</td>
<td>Select month and year of expiration on the credit card</td>
<td></td>
</tr>
<tr>
<td>Telephone</td>
<td>Enter a telephone number</td>
<td></td>
</tr>
<tr>
<td>Click ‘Next’ button</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presented with Specify Payment Amount Page</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Depending on your setup on your Institution Set, you will be presented with different views. Enter the amount to pay

Click ‘Next’ button

Presented with Confirm Payment Page Review the amount that you are paying

Click ‘Submit’ button

Presented with Payment Results Page Review results of your payment

**Expected Results:**
A successful payment has been made.

**Comments:**
Please indicate if the test script Passed or Failed by placing a P or F in the designated area.

<table>
<thead>
<tr>
<th>Tested by:</th>
<th>Signature:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Date:</td>
<td>Pass/Fail (P/F):</td>
</tr>
</tbody>
</table>

### Unit Testing

Unit testing validates specific functionality within a module such as Campus Community, Admissions, Student Records, etc. It covers both delivered and customized functionality and focuses on the validity of individual functions of the application.

### Configuration testing

Using the test scripts, this testing validates aspects of the delivered application as it has been configured for the institutions proposed use. For example, test that the correct values appear when using prompts and dropdowns and that data can be saved without error.

### Prerequisites

- Completion of module configuration according to specifications (valid values, parameters etc.).
- Signoff of installation test of the testing environment (a technical process).
- Appropriate database instances created and populated.
- Sample data loaded or keyed into appropriate database.

### Objectives

- Validation that the defined settings work as expected.
- Delivered module functionality works as expected.
- Application pages operate to specification.

### Development testing

Testing required for all BRICE development objects (bolt-ons, reports, interfaces, conversions and enhancements) by the technical and functional teams to determine the objects have been developed in accordance with the design requirements and are acceptable for deployment.

### Prerequisites

- Customization objects have been built.
• Modules related to the customization have been configured and configuration tested.

Objectives

• Customizations are working as designed.

Below is an example document for tracking the status of configuration testing.

### Conversion testing

Conversion iterations are required to determine the conversion programs execute successfully and provide opportunity to test the data prior to cut-over. Conversion tests help determine that transactional data has been properly loaded into the PeopleSoft tables from legacy systems.

### Prerequisites

- Metrics concerning number of rows to be converted
- Design and/or mapping documents include details on field definitions (e.g., required fields, field length, valid lookup values)
- Conversion files have been created and run through the conversion process

### Objectives

- Data exists in PeopleSoft tables in the correct format
- Data is converted completely and accurately
Scenario testing

Scenario testing begins after a component has been unit tested and is designed to test the specific component functionality as it integrates with corresponding business processes. Its purpose is to uncover errors introduced by combining individually unit-tested components with business processes.

What it is

- Scenario testing focuses on the functionality of individual modules using various sets of data/scenarios that are likely to occur during regular business activities
- While unit testing focuses on the functionality of individual components, scenario testing is an opportunity to test the system against business requirements

What it is not

- A test of all possible business conditions that the institution may ever encounter. There are simply too many possible scenarios to test. Scenario testing focuses on the critical, likely to occur and/or sensitive scenarios.
- A verification of the overall interaction between the modules; this is done through integration testing
- A test of volume, network configurations, security, controls or back-up and recovery

Below is an example of a scenario testing plan document.
Below is an example of a scenario testing tracking document.

### Integration testing

Integration testing validates the end-to-end flow of data through the modules as part of business processes to determine the system meets the expected requirements. Integration tests involve interfaces to external systems, customizations and delivered functionality. It represents entire business processes.

**What it is**

- A test of go-live preparedness
- A test of hand-offs between departments (functional areas)
- A way to determine the system solution supports business processes
- A way to determine if all development work operates as designed as part of the larger business process
- Validation of business processes
- Confirmation of system functionality and the underlying technical solution
- Validation of the integration and data flow within and across processes
- A way to further validate data
- Validation of major development objects such as reports and queries, interfaces, bolt-ons and modifications

**What it is not**

- Verification that all security profiles for all users are operating correctly
- Unit testing
- A retest of every report and query
- Testing in module silos
- Testing of nightly batch jobs
Security testing

Security testing examines the presence and appropriate functioning of the application's security to determine integrity and confidentiality of data.

Prerequisites

• Security matrix defining security by role and user has been completed
• Hardware, database and software security has been configured

Objectives

• Determine valid passwords are required to access the application
• Determine users have access to only those pages that have been defined for their role
• Determine users can only perform actions that have been defined appropriate for their role (e.g. add, update, view, correct)
• Determine users can only access data as specified for their role, i.e. row-level security

Performance testing

Performance testing and tuning are used to observe how the production hardware and software configuration will perform under a predetermined set of test scenarios.

There are three types of system performance testing:

Prognostic performance testing is tactically focused, aimed at uncovering "hot spots" and dealing with them in advance of the formal load testing cycles. Typically these hot spots are determined as customization and development work is completed.

Load testing measures application scalability, evaluating the end-to-end processing time and utilization of available computing resources. Load testing is a simulation where the expected workload is applied to a system to enable:

• Checking of the performance metrics of the system environment: CPU, memory, disk, network and database
• Verification of the technical system configuration
• Verification of the robustness of the applications in a multi-user, high transactional throughput environment
• A better understanding of the response time/throughput distribution in different workload scenarios

Stress testing uses the same type of simulation approach but seeks to identify the “breaking point” in terms of system resources being able to handle a workload.

User Acceptance Testing (UAT)

This testing is performed to obtain user sign-off. A select number of users are employed to help verify that all system components operate together to satisfy the requirements outlined in the “To-Be” process models. Testing is designed to simulate the users’ regular use of the system to validate that it fits into the real-world environment in which it will be used and that it is acceptable to those who will be using it to perform their jobs.
What it is

- A systematic and documented process with pre-established test scripts to test business processes in a controlled manner
- An overview of the system and business processes by walking through representative business scenarios
- An opportunity for participants to have hands-on experience and exposure to the new system and business processes, allowing participants to establish confidence and identify potential issues

What it is not

- An opportunity for participants to experiment with the system or alter the agreed design
- A replacement for training or a chance to provide new users with training

UAT takes place once the system has been fully configured, developed and integrated. Unit, scenario and integration testing already took place and therefore, most of the technical problems have already been identified and fixed. User Acceptance Testing (UAT) is the final step before the overall end-user training and solution roll-out to the entire end-user community.

Sample UAT testing plan

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Planning Activity</th>
<th>Accountability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved the UAT Plan</td>
<td>• Test Manager will present the UAT Plan and obtain authorization from Project Management Team to execute the planned activities.</td>
<td>• Test Manager (lead)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Project Management Team</td>
</tr>
<tr>
<td>Test scenarios completed</td>
<td>• Test Manager will build test scenarios to be executed by Testers. Details around the test data will be built later by the test team.</td>
<td>• Test Manager (lead)</td>
</tr>
<tr>
<td>Test data defined</td>
<td>• Test Manager will have defined the test data required for UAT. Test Team will be responsible for gathering the necessary test data prior to commencement of UAT.</td>
<td>• Test Manager (lead)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Test Team (core)</td>
</tr>
<tr>
<td>Issue management tool configured</td>
<td>• Project Management Team will configure the issue management tool.</td>
<td>• Project Management Team</td>
</tr>
<tr>
<td>UAT environment ready</td>
<td>• Development Team and Test Team will configure (prepare) the UAT environment according to the specifications in the Plan.</td>
<td>• Development Team</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Test Team (core)</td>
</tr>
<tr>
<td>UAT training delivered</td>
<td>• Test Manager will deliver UAT training to Tester, and Test Team will support testing, and the issue resolution process.</td>
<td>• Test Manager (lead)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Test Team (core)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Tester</td>
</tr>
</tbody>
</table>
Attachment G – Point of View

Please refer to the document on the following page.
Start to finish

Navigating the course of technology-enabled change in higher education
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Foreword

Deloitte is pleased to present our point of view on technology-enabled change in higher education. Our perspective is based on many years of helping clients execute and support their change initiatives at institutions throughout North America and around the world.

This report discusses the rationale for change – and provides a detailed look at the primary causes of failure, including:

• Inadequate sponsorship and leadership
• Limited involvement from key stakeholders
• Improperly structured governance
• Funding limitations
• Improper staffing

The analysis offers practical insights to help schools overcome these challenges and achieve their objectives for change and growth. In particular, it is designed to help executives of higher education institutions self-assess their organization so they can identify and avoid the most common pitfalls.

If your organization is struggling to keep up with the demands of today’s tech-savvy students, please read on. We hope the insights in this report will spark a healthy debate and inspire your organization to tackle whatever challenges it might face.

Bruce Laco
National Technology Partner
Deloitte

Louise Upton
National Higher Education Leader
Deloitte

Brian McKenna
Senior Manager
Deloitte
Introduction
Over the past decade, a sea of change has been occurring within higher education. Competition for students is high, as students are becoming more discerning about the schools to which they apply. Institutions accustomed to top choice status can no longer feel secure in their market position, while schools that have struggled for recognition in the past have an unprecedented opportunity to improve their standing.

Schools now compete in a global market for faculty, students and staff and must expand their programs and service levels accordingly. For most institutions, simply attracting local or regional students is no longer enough. Enrolling students from across the country and around the world can improve a school’s brand and provide the entire student base with a more diverse and fulfilling experience.

To attract students in this new environment, schools must become more student focused. This transformation typically requires significant improvements to processes, technologies and organizational culture. For many years, higher education institutions have lagged behind in their adoption of technology. Although many have made significant investments in technologies that enhance the academic experience, investments in administrative systems have generally not kept pace.

Today’s students are tech-savvy and demanding. They have grown up in the age of technology and they expect fast and easy access to information and services. As a group, they have little patience for excuses or standing in line, and will not tolerate systems and processes that are inefficient, inflexible or incapable of providing timely and accurate information. Students, faculty and staff want to be on-line, not ‘in-line’. To compete effectively, schools must rise to meet this challenge. And they must do so while operating in a fiscal environment of cost pressure and reduced funding.

Technology-enabled change
A school’s administrative systems are often the first – and most frequent – touch point for interacting with students and prospective applicants. Upgrading and integrating these systems can improve the student’s experience, increasing a school’s appeal in the marketplace. It can also make life easier for administrators and faculty and serve as a catalyst for continuous improvement across the institution.

Implementation of an Enterprise Resource Planning (ERP) system is often a key driver for technology-enabled change throughout the organization. However, other institution-wide technology projects also can have a significant impact.

The potential for organization-wide technology-enabled change is huge. In many cases, it can establish new processes to replace those that have grown old and inefficient. Also, it can help accelerate cultural change, which can give organizations that execute well a competitive advantage in the marketplace to attract high quality students, faculty and staff – as well as increased funding.

“Having experienced rapid academic growth at Ryerson, we need technology platforms that enable us to meet and exceed our goals.”

Dr. Alan Shepard
Provost and Vice President Academic, Ryerson University
Why change?

Students are beginning to view ease of electronic access as a criteria in selecting their school. Although they still primarily choose a school for its programs and reputation, today’s students also expect schools to use technology to enhance the experience and education for which they are paying. Yet, in spite of these rising demands, many institutions continue to scrape by with outdated technology solutions that are often older than the students themselves, while others struggle to leverage the technology investments they have already made.

Administrators also require top technologies to do their jobs more effectively. In order to advise students and manage curricula in a complex environment, technologies such as email, self service portals and other communication tools are essential. Such technologies should be seamless and fully integrated, providing users with convenient one-stop access to critical information. These integrated solutions can trigger a fundamental shift in the way that administrators think about and use technology.

To be a top tier school you need top tier technology; however, many institutions have been frustrated by their past efforts to change. They need a new approach. This report looks at the most common barriers to technology-enabled change, and offers practical insights to help institutions overcome them.
Common pitfalls

Every institution has a distinct character and tradition. This uniqueness has tremendous value, helping a school distinguish itself in the marketplace. But when it comes to technology-enabled change, schools don’t really distinguish themselves at all, in that they tend to make the same kinds of mistakes.

1. **Inadequate sponsorship and leadership.** Inadequate or invisible support from the top undermines a project’s credibility. Insufficient authority results in an inability to resolve disputes across organizational silos.

2. **Limited involvement from key stakeholders.** The IT group develops solutions and plans without actively involving key stakeholder groups (faculty, administrators and students). Stakeholders reject the improvements because they don’t feel a sense of ownership.

3. **Improperly structured governance.** The institution fails to define how decisions will be made or who will make them. The result is a consensus-driven approach that can lead to endless debates and ineffective solutions.

4. **Funding limitations.** There is not enough money to complete the project or sustain the improvements. Administrative systems often face additional funding challenges because they do not contribute directly to the classroom. Some groups may use funding to exert an unfair amount of influence.

5. **Improper staffing.** The institution cannot afford to assign its most talented people to the project. Often there are simply not enough people to staff the project adequately or to backfill for people assigned to the project.


**The consensus trap**

Many of the problems encountered during a technology-enabled change are natural by-products of the way that universities, colleges and other academic institutions are structured. Typically, each department operates in autonomous silos that make their own decisions. Moreover, higher education institutions often pride themselves on being inclusive but cautious when it comes to making decisions, giving each department veto power over the final outcome. The result is often a long, expensive change initiative and a solution that doesn’t work well for anyone.

To be effective at technology-enabled change, institutions must establish and follow appropriate decision-making mechanisms and processes – including empowering team members to make decisions. A new technology is a chance for the institution to improve service to its constituents (students, faculty, staff and alumni). But without the right decision-making processes, an institution is likely to find itself doing things the ‘same old way’.

“Universities strive to achieve cross-campus consensus around system implementations to avoid fallout from any one group. However, the goal of achieving 100% support may prove unrealistic, in which case it is essential that a robust decision making framework be in place.”

Andrew Simpson
Vice Principal, Finance and Administration, Queen’s University
Avoiding the pitfalls

“Never underestimate the power of a few committed people to change the world. Indeed, it is the only thing that ever has.” Margaret Meade.

Change is possible. It has been done and it can be done. However, it isn’t always easy – especially when many of the challenges are institutionalized within existing organizational structures and processes.

Our analysis of effective and ineffective technology-enabled change initiatives yielded insight into how institutions can execute such initiatives more effectively – helping to deliver more value for the organization and increasing the chances for achieving their desired results. These insights apply to technology-enabled change in higher education, regardless of the specific technology being deployed or the sponsoring function within the institution.

Although these insights are essential for achieving desired results, they do not guarantee it. Every change initiative involves a certain amount of risk and requires tough questions to be asked. Achieving desired results stems from answering the tough questions and effectively managing the risks.

No one starts out intending to fail, particularly on initiatives they have fought long and hard to get underway. This report offers practical tips to help institutions avoid the most common project pitfalls and increase their chances for a positive outcome.
Sponsorship

Leading from the top
Effective change begins at the top. Visible and sustained support from leaders sets the right tone and gives the initiative credibility. It also communicates to faculty, students and staff the importance of the change, and is a key way to break down silos and get people from different departments working together. Without the right sponsorship, an initiative can easily lose direction or run into organizational and political obstacles that stop the effort dead in its tracks. After all, if the leaders of the institution don’t actively support the change initiative, why would anyone else?

Deloitte perspective
Every change initiative needs a primary sponsor – someone who can champion the cause and make tough decisions. This person’s role includes removing organizational and political barriers, making sure that the appropriate executive oversight is in place, requiring that the effort be tied to at least one strategic initiative and acting as a beacon for change.

In addition to the primary sponsor, other leaders within the institution can also provide important sponsorship by serving on the steering committee or by championing the initiative within their departments.

At a pre-eminent US university, accountability for the change initiative at the highest levels within the institution was not clear. As a result, the program essentially stalled due to lack of understanding of roles, responsibilities and decision-making processes. Developing an accountability framework, identifying a new sponsorship team, and clearly communicating to the institution about the new team’s roles and responsibilities helped restore the project’s momentum.

Keys to success
Choose the right sponsor. A good project sponsor is well respected within the organization and is seen as a visionary. Ideally, the sponsor also has formal authority across all of the affected areas. For a major institution-wide initiative, the project sponsor is often the leader of the institution (e.g. President, Chancellor) or someone the leader personally designates to guide the initiative on his or her behalf.

Make the case for change. In order to secure the right sponsorship, prospective sponsors need to be convinced that there is a compelling case for change. They also need to understand how the change relates to things they care about or are responsible for. Finally, they need to believe that change is possible and that a team can be built to make the vision a reality.

Assign clear responsibility. The project team and institution must clearly understand who has final responsibility and accountability for the initiative. Without this clarity, it is difficult or impossible to resolve contentious issues. This is especially true in cases where co-sponsors exist.
“The result of key university leaders not being part of the planning for a major system implementation, can be disastrous. It is therefore important to achieve widespread understanding and commitment to the project.”

Andrew Simpson
Vice Principal, Finance and Administration, Queen’s University
Involvement

Getting key stakeholders involved

Although technology-enabled change starts at the top, it can’t be achieved simply by executive edict. Achieving desired results requires active involvement and support from many parts of the organization.

Technology-enabled change initiatives often overlook the human element, focusing the bulk of their attention on systems and technology. But, from our experience, people issues, such as organizational politics and resistance to change, are the main reasons so many technology projects fail.

Most institution-wide initiatives require involvement and support from three main stakeholder groups:

- Faculty
- Students
- Administration (including the IT function)

Within each of these factions, important sub-groups must also be considered. For example, the faculty typically comprises a wide range of academic departments with varying needs and opinions. Similarly, the administration may include a variety of isolated organizations such as finance, HR, IT and the registrar’s office. All of these affected groups must be actively engaged. At most institutions, these departments are accustomed to operating autonomously, which means that getting them to collaborate – and establishing a sense of involvement and ownership – requires a conscious effort.

Deloitte perspective

Actively engaging key stakeholder groups is crucial for effective change. It can also provide a strong foundation for sustained performance and continuous improvement. So how do you do it?

Within higher education institutions, a comprehensive and structured approach to managing change is a required (and demonstrated) way to overcome resistance and increase the chances of a positive outcome. Rallying a diverse group of key decision makers around a specific call to action is of huge importance to effect and sustain the change.

Dan Cohen, a Principal in Deloitte Consulting LLP’s Change Leadership service line, collaborated with John Kotter of Harvard Business School to write The Heart of Change. The book (and related field guides) are based on Kotter’s theoretical model and Deloitte’s real-world experience implementing thousands of institution-wide change programs.

According to Dan and John, people change their behaviour because they are shown a truth that influences their feelings. This is particularly true for large-scale organizational change that combines new organizational behaviours with new operating processes and new technologies. In their book, they describe an eight-step process for effective change:

1. Create a sense of urgency so that people start telling each other “Let’s go, we need to change things!”
2. Pull together a guiding team powerful enough to guide a big change, which could include the lead academic resource (Provost), the head of IT and the Chief Financial Officer
3. Create clear, simple, uplifting visions and sets of strategies
4. Communicate the vision through simple messages sent through multiple channels so that people begin to buy into the change
5. Empower people by removing obstacles to the vision
6. Create short-term wins that provide early momentum
7. Maintain momentum so that wave after wave of change is possible
8. Make change stick by nurturing a new culture
“Both staff and administrators were more willing to participate as they saw the direct benefits of being actively involved in the process. At times, overcoming territoriality and getting people to work together was a challenge. In the end, encouraging the team to keep their university hat on and not just represent their specific departments was key to the project’s success.”

Steve Hewgley
Associate Provost, Pepperdine University
Keys to success
Focus on people, not just technology. Resistance to change and other people-related issues are the most frequent causes of project failure. People should be the top priority, not just an afterthought.

Get key stakeholders actively involved. People are much more receptive to change if they are part of the process. Getting key stakeholders actively involved early and often can produce better, more informed solutions. Even more important, it can create a sense of ownership that makes changes more likely to stick. This early involvement can include helping set strategic priorities, identifying requirements and developing a program delivery framework.

Cast a wide net. According to Dan and John in The Heart of Change, “In successful change efforts, the visions and change strategies can’t stay locked in a room with your team. They must be communicated with as many people as possible, who in turn must buy in. The goal: to get as many people as possible acting to make the vision a reality.”

Establish a credible steering committee. To work together effectively, the key stakeholder groups of faculty, student and administration must be represented on the steering committee, and must focus on what’s most appropriate for the institution, not just their own area.

On a change initiative at the University of North Carolina - Chapel Hill (UNC-CH), several sub-groups with direct influence on the project have been established. These include an academic subcommittee, reporting sub-committee, school coordinators (project working group with representatives from UNC-CH’s undergrad, graduate and professional schools), change management advisory board and a group representing the students. Involvement and support from these diverse groups is critical to achieving their desired results because it reinforces the project’s positioning as a university-wide initiative, not just an IT project.

Case study: learning from the past
The following two projects demonstrate the value of actively managing change. Both were conducted at the same institution but with very different approaches – and very different results.

The first was a Student Administration Systems implementation. The organization put a steering committee together, identified requirements and went about implementing the software. Problems included:

- Lack of organization-wide engagement in creating the vision and case for change
- Lack of organization-wide engagement in developing requirements
- Uninformed assumptions about the most effective way to train and support end users

The initiative received poor press, both at the time of the implementation and for years afterward. The product didn’t live up to the expectations of the end user community, the support levels were less than desirable, and users – including faculty, students and staff – felt they were poorly prepared to deal with the technology that was now at their fingertips.

On the second project, which is an upgrade to the system implemented by the first project, the institution has clearly learned from its past. Specific focus areas this time around include:

- Demonstrable senior executive commitment
- Active organizational engagement and buy in
- Development and execution of a detailed backfill plan
- An improved collaboration with the systems implementer
- A clearly articulated scope of work and anticipated benefits

This initiative was much more effective because the institution’s leaders clearly acknowledged the failings of the past and matched words with deeds through improved organizational engagement. They clearly understood the case for change, the benefits the technology would deliver and the support mechanisms that would be needed when the upgraded system was deployed. They also had strong support from the end user community.
Technology-enabled change must align with the current and future needs of the institution. It should not be developed in a vacuum. One key decision that hinges on the direction of the institution is whether to centralize or decentralize the technology.

Many departments doubt that a centralized IT organization can meet their individual needs. They believe IT is ill-equipped to drive large-scale change initiatives, and as a result tend to be skeptical or resistant to any efforts at technology-enabled change. This has led some institutions to move away from centralized technology implementations.

However, amidst growing concerns about security, identity management and institutional branding, many schools are being forced to reconsider the decentralization issue.

It’s not just a question of centralizing or decentralizing IT activities such as system design, implementation and support. Technology choices also have a direct impact on operational activities such as decision-making, data entry, data processing and reporting.

Centralization can take many forms. Three specific points on the continuum include:

- Completely centralized – the head office or a central function such as Human Resources, has total control. They set the standards, own the process and execute against it. Local units have little or no involvement.
- Completely decentralized – local units own the processes and operate autonomously. They set their own standards and execute against their process from within their own unit.
- Center-led – in a centrally led organization, the central function sets the standards and owns the process; however, they give local units the capability of executing against that process within the pre-defined framework.

When pursuing technology-enabled change, it is important to understand the organization’s past, present and future direction with respect to centralization. New technologies and processes must align with and support where the institution is headed.

“To achieve the highest levels of student engagement and success during times of rapid growth and technology change, we must protect our core values of having a diverse, respectful and student-centered environment and to do this, we must ensure that faculty, students and staff are actively committed to the technology changes required to support growth.”

Dr. Alan Shepard
Provost and Vice President Academic, Ryerson University
Governance

Defining how decisions are made – and who makes them

Broad involvement should not be confused with consensus decision-making. As noted earlier, initiatives that try to achieve a consensus by pleasing everyone generally end up producing watered-down solutions that don’t really work well for anyone. This is a common problem at many institutions.

What’s the difference between involvement and consensus? With consensus, every group participates in the decision and has the power to veto things they don’t like. With involvement, groups provide input – and their needs and opinions receive careful consideration – but they don’t make the final decision. This might seem like a small distinction, but it has big implications.

For institution-wide change initiatives in higher education, a consensus-driven approach seems to be the norm. Because individual departments are used to operating autonomously, there’s often an unspoken threat that they will “take their marbles and go home” if they encounter something they don’t like. The result can be an endless stream of compromises that cause a project to run over time and over budget, while delivering a solution targeted at the lowest common denominator.

Deloitte perspective

A key way to overcome this natural tendency toward consensus is to clearly define an alternative approach to decision-making. That’s where “governance” comes in. Governance clearly defines how decisions are made and who makes them.

Although the name might suggest that Governance only applies to those at the top of the organization, good governance has a place for all levels within a project – and at all stages of the project lifecycle, from strategy formulation through execution and into sustainment.

Governance is traditionally defined by the project management office, guided by the steering committee and confirmed by the project sponsor.

Objectives of governance:

- Define roles and responsibilities for decision-making
- Establish clear reporting relationships
- Define a process for managing and mitigating project risks
- Identify standards for managing software configuration decisions and changes
- Establish a process for tracking and reporting project costs against budget
- Define status reporting and steering committee deliverables
- Define a process to identify, escalate and resolve critical issues
- Establish a regular schedule, agenda and objectives for meetings
- Develop a simple process for managing project scope, schedule and resources
- Plan and execute project communications
- Define the process for bringing the project team on board
Good project governance seeks to replace an ineffective and disorganized consensus-driven approach with a clear framework for making tough decisions and keeping a project on track. It focuses on doing what’s better for the institution as a whole (the greater good). Also, it gives project leaders such as the Project Management Officer (PMO) and steering committee the authority to break logjams and keep things moving forward.

Effective governance defines clear accountability and decision-making rules, giving the right individuals the authority and tools to make decisions on a timely basis. At the same time, it can provide a safe haven for new (or even radical) ideas, encouraging people to take risks and push the envelope.

When establishing the team, project executives should seek out individuals who have demonstrated the ability to think outside the box and take risks. Too often in higher education, individuals are concerned about making the wrong decision and as a result are either slow to make a decision or don’t make a decision at all.

Without good governance, a project is likely to be ill-defined and poorly executed. Benefits won’t be clearly articulated, and therefore will probably not be achieved or sustained. Instead, the organization will likely fall back into the old way of doing things. Never underestimate the power of the status quo.
Start to finish
Navigating the course of technology-enabled change in higher education

Keys to success
Establish governance at the outset. Laying down the law at the beginning of the project helps to avoid conflict down the road. Make critical and high-impact decisions up front. Provide a clear framework that people must follow when making decisions and executing project activities (e.g. requiring the use of strategy documents to drive detailed design and software configuration).

Create a safe environment for innovation. Concerns about organizational politics and avoiding conflict can slow things down and compromise the quality of the solution. One way to tackle this problem is to fill the steering committee with leaders who can set aside their personal agendas and focus on what is most appropriate for the institution as a whole.

Provide easy access to decision-makers. Put decision makers on the team or provide mechanisms so that the project team can quickly obtain necessary decisions.

Communicate. Clear communication is necessary to articulate the reasons for change, the status of the project, the importance of good governance, and the roles and responsibilities at each layer within the governance structure. Poor communication undermines the credibility of the project (and everyone involved with it). It also leaves the door open to rumours and innuendo, which can have a devastating impact on morale and productivity.

Test it before you need it. The governance structure needs to be more than words on a page. Putting it to use in the early stages of a project can help determine whether it is functioning effectively, so that when tough decisions arise, a trusted governance structure is already in place. A governance structure that has been used to dealing with ‘easy’ challenges will typically fold when confronted with a tough ‘game-changing’ decision.

Case study: improved governance
Governance can be an extremely powerful tool in enabling change. However, a number of key elements must be planned for and carefully communicated to facilitate achieving desired results.

A university in the United States was in the process of planning for a large system replacement project and had formed a steering committee that was both eager and engaged. This group had helped select the new technology solutions and implementation advisor, and was charging forward with the work. Unfortunately, there were a couple of major problems. First, very few of the steering committee members had any experience with a large-scale technology initiative. Second, the committee’s roles and responsibilities changed significantly as the project moved into the implementation phase, and many members were not sure what they were supposed to be doing.

To address these problems, each person’s role was clearly defined, and the roles were reiterated at every steering committee meeting. Also, each member of the committee was assigned responsibility for a specific set of tasks.
An effective governance structure enables clear and rapid decisions. Figure 1 shows a typical structure for making critical decisions and escalating critical issues. Accountability initially resides with the team leads and stream leads. If an issue cannot be resolved or a decision cannot be made at this level, then an escalation process is initiated.

**Team and stream leads** have responsibility for participating in project planning, making key decisions and providing a framework for lower level decision-making within the defined scope of the project. Decisions or actions that affect scope, timelines, budget and risk must be escalated to the project manager level.

**Project managers** make decisions associated with oversight and monitoring of the project. They also participate in project planning and decision-making related to key decisions, such as changing project resource requirements, project tools, project administration and any issues escalated to project sponsors.

**Project sponsors** can make changes to the project scope and/or timeline, within certain limits, as long as the decisions are budget neutral. Decisions that affect the budget must be escalated to the steering committee.

**The steering committee** can approve and make changes to scope, timelines and budget.

This structure enables most decisions to be made at the team level, while providing a fast and efficient mechanism for escalating and resolving major issues and conflicts. As such, it enables the institution to keep a tight rein on the project schedule, budget and scope.

### A structure for effective governance

<table>
<thead>
<tr>
<th>Role</th>
<th>Decision making responsibility related to escalated issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steering committee</td>
<td>Provide resolution or guidance on issues/decisions escalated to the committee, in keeping with project goals and in the best interest of the university</td>
</tr>
<tr>
<td>Project sponsors</td>
<td>Manage issues/decisions escalated from the project team and consult with the steering committee on direction if necessary</td>
</tr>
<tr>
<td>Project managers</td>
<td>Manage and resolve escalated issues/decisions and work with the project sponsors for further clarification if required</td>
</tr>
<tr>
<td>Team leads and stream leads</td>
<td>Deliver against defined scope, timelines and budget and bring issues to project management meetings for resolution or escalation, when appropriate</td>
</tr>
</tbody>
</table>

*Figure 1 A time-tested governance structure*
Funding

Finding the money to achieve and sustain large-scale change
Without funding, an institution-wide change initiative may never get off the ground. Funding enables resources to be dedicated to a project and backfilled as appropriate, equipment and software to be purchased/leased, consultants to be engaged, working space to be secured and fixtures and fittings to be put in place. Funding also demonstrates commitment (and often board support) for the initiative. In essence, the organization is putting its money where its mouth is. Without adequate funding, there is no evidence of such a commitment. There will be no project, no momentum and no change.

Of course, finding the money to achieve and sustain large-scale change isn’t easy. In most cases, funds must be gathered from a variety of sources. And often, the required investment must make up for a lack of investment in the past, which increases the size of the immediate funding hit.

“Our VP, Finance and Administration, has observed that the main problem isn’t lack of funding – it’s lack of planning. The essential point is that university funding is very tight, which makes it especially important to plan and articulate funding needs with great care. For example, we are currently implementing a new system for cooperative education and career services. To ensure adequate funding for this 3-year effort, we drew up the budget more than a year ago.”

Dr. Alan George
Associate Provost for Information and Technology,
University of Waterloo

Deloitte perspective
Funding is critical for projects of every shape and size. In fact, small projects can run into trouble just as easily as big projects. Projects require funding and governance appropriate to their size, impact, complexity and risk.

The source of funding is an important consideration for organization-wide initiatives. The details must be carefully considered and articulated before being accepted. Those that hold the purse strings may be perceived as having undue influence on the direction of the initiative. Using multiple funding sources helps counteract this perception by facilitating a funding model in which a variety of stakeholders have ‘skin’ in the game. In certain instances it might even make sense for the institution to hire services providers (such as systems integrators) on a contingency basis, further spreading the responsibility and risk.

Funding plans must also consider ‘life beyond the project’ to facilitate ongoing upgrades, sustained performance and continuous improvement after the project is complete.

Our practitioners have seen institutions use a variety of different funding mechanisms, from complex ‘sinking funds’ to a simple ‘tax’ on student fees that was both highly effective and highly unpopular.

Sinking funds can be used to sustain funding for a significant technology initiative. These funds provide a voluntary, internally administered source from which to fund 100 percent of the initial project cost, along with ongoing support for a defined period of time. Participating departments commit to making specific contributions to the fund on a regular basis, so the project sponsor and team don’t have to keep going back and asking for more money. This helps maintain sufficient funds for the project, and helps the institution sustain acceptable investment earnings over the time horizon of the project and life of the fund.
**Keys to success**

**Get the funding right the first time.** Too often, project leaders don’t ask for enough money in the beginning and have to go back for more. This can undermine their credibility, and often leads to sacrifices in quality and service. Planning is of fundamental importance in securing the right funding. Project leadership must perform due diligence to determine that funding requests are well substantiated and broad enough to account for unforeseen circumstances.

**Follow the rules.** At most institutions, there are clearly defined processes for securing money, authorizing spending and reporting against spend. These processes should be strictly adhered to unless project-specific changes are approved by project leadership.

**Manage the fund appropriately.** Securing the money is only the beginning. A project can expect to have many people looking over its shoulder while the money is being spent. Plan carefully and keep track of spending.

**Be creative.** Sinking funds and other innovations can make it easier to sustain funding.

**Use funding as both a carrot and a stick.** Funding can be used as a governance tool to help determine that the goals, timelines and scope of the project are adhered to. This might take the form of a shared contingency that gives all parties (including the system integrator) a financial incentive to come in at or below budget while delivering the expected scope and benefits.
Talent

Achieving the right results requires the right people. But how do you get them?
The results of a project are closely tied to the quality of people on the team. The stronger the talent, the better the results. No surprise there. So why is it that so many project teams are filled with people who have nothing better to do? The answer, of course, is that the most appropriate people for the project are also the ones who are most likely to be indispensable to daily operations.

Many projects fail because the team isn’t staffed with qualified, dedicated people. In some cases, the people simply don’t have the right skills or backgrounds. In other cases, the people have the right capabilities, but are expected to contribute to the project while continuing to fulfill their normal, day-to-day responsibilities. Forcing people to do two jobs is not a sustainable approach – particularly in the current environment, where top talent is a precious resource that needs to be carefully managed.

Deloitte perspective
Getting key people from the organization involved in the project creates a greater sense of ownership, helping to overcome resistance to change. Hands-on involvement in design, development, configuration and testing also makes the results more sustainable by giving people in the organization valuable experience, and promoting knowledge transfer from outside knowledge sources.

On the other hand, a project staffed with the wrong people is in trouble before it even begins.

What can institutions do to avoid the problem?
One demonstrated technique is to develop a broad resource plan that covers the project from start to finish. The resource plan provides a detailed picture of the types of skills and quantities of resources needed in every phase of the project. This gives the organization time to prepare for the temporary reassignment of critical employees. With enough advance warning, it is usually possible to train one or more people to “backfill” for a key resource.

Another effective technique is to avoid making other changes to the affected parts of the operation until the project is complete. Hitting an organization with a shotgun blast of change initiatives can increase stress and undermine productivity, making it hard to maintain day-to-day operations – particularly in the absence of key staff.

An organization is off to the right start if the following elements are in place:

- The right number of resources assigned to the project
- The right resources assigned to the project
- Appropriate backfill for assigned project staff
- A staffing plan that recognizes the inevitable peaks and valleys that occur during and after a project (parallel systems, additional support at go live, legacy system retirement, etc.)

“When assembling the core implementation team, our message to the dean was: ‘If you can afford to lose the person, you aren’t giving us the right person.’ Talent is definitely a challenge as you attempt to provide the best staff for implementation, while maintaining service levels and quality of work in individual departments. For delivery success you need to budget for enough resources, and give individual departments flexibility in using backfill dollars to hire and provide incentives to get the right people in place.”

Steve Hewgley
Associate Provost, Pepperdine University
**Keys to success**

**Assign highly talented people to the project.** A major change initiative can determine your operational effectiveness for years to come. Allocating some of your highly talented people to the effort is a smart long-term investment.

**Don’t expect people to do two jobs.** Backfilling for project resources accomplishes two things. First, it helps to maintain the quality of daily operations. Second, and even more important, it reduces the chance of burning out these highly talented people.

**Make a resource plan.** A broad resource plan gives the organization more time to train or recruit replacements or to make other staffing arrangements to fill critical gaps.

**Plan for the obvious.** Take vacations and statutory holidays into account. Expect normal absences due to illness.

**Create a separate workspace.** Providing the project team with its own dedicated workspace promotes camaraderie, communication and collaboration. Getting team members away from their regular offices also helps prevent them from getting sucked back into their daily responsibilities.
The identity issue

Identity management is a major challenge for institutions of higher learning. The problem has two dimensions. The first is validating a person’s identity (knowing if they are who they say they are) to prevent unauthorized access to sensitive information. The second is creating a single, accurate data view of each person so the school can serve that individual more effectively and efficiently.

Many institutions still struggle with both of these dimensions. Meanwhile, the pressure to solve the problem continues to mount. Proliferation of network applications and web-based content is increasing the risk of unauthorized access. Access methods and access points are becoming more complex and varied. Privacy laws and other regulations are raising the bar for compliance. And tech-savvy students have ever-increasing expectations for convenience and privacy.

The potential consequences are also rising. Loss of customer data can tarnish a school’s reputation and expose it to significant liability. Moreover, recent events such as the Virginia Tech shootings and Hurricane Katrina have shown how important it is for an institution to know where its people are – and how to reach them in a hurry.

Understanding the problem

Today, most institutions operate their systems as isolated islands that make it difficult or impossible to standardize and control information access – or to create an accurate and consistent view of an individual. This silo approach might have been good enough in the past, but not anymore. Top priorities now include:

- Raising security requirements for new content and services (often to levels not currently available within the institution)
- Improving the speed and efficiency of adding and removing users
- Maintaining the control and confidentiality of users
- Controlling costs while dealing with a growing number of users, systems and passwords

At the University of Waterloo, identity management is a high priority. The school is currently in the process of replacing its current homegrown system with a commercial solution that will provide control and differentiated access for different types of users. The next big step will be to create an integrated view of each user by combining information from a number of different systems.
The solution
An integrated approach to identity management can help address these challenges by providing consistent access control and consolidating multiple instances of a user’s identity into a single, virtual identity. This makes it easier to manage multiple identities across the organization, and enables processes, policies, and applications to use identities in a consistent way.

Achieving world-class identity management is a multi-step process that requires a broad set of solutions.

Each of these solutions creates tangible value for the institution. However, the most value can only be achieved when all of the elements are implemented.

Bottom-line benefits
Improved identity management can deliver a wide range of benefits. For students, it can improve their overall experience and reduce the risk that their data security will be compromised. For faculty, it can improve productivity and reduce their need to call the help desk.

On the administrative side, there are even more possible benefits. These include: reduced costs for everything from technology and help desk to general administration and HR, greater compliance with privacy and security laws, improved management capabilities, consistent policy enforcement and increased focus on customer service.

Identity and access management roadmap
The value of identity management solutions is dependent upon each individual institution and the strategies, systems and processes they have adopted.

Value
Vision
Identity repository
Integrated authoritative source
Access management
Identity roles
User provisioning
Compliance and privacy
Strong authentication
Portals
Federated identity
Service oriented architecture
Change is possible
But the first step is to change your perspective

Change can be done, it has been done, but it isn’t easy. Technology-enabled change affects an institution in ways that bear little resemblance to the day-to-day activities to which people have become accustomed. Instead of revolving around individual schools, classrooms and students, these initiatives demand a horizontally integrated effort that cuts across organizational boundaries. This requires different capabilities and a new approach.

By acknowledging the challenges and applying time-tested techniques to tackle them head on, any institution can dramatically improve its chances for effectively implementing technology-enabled change. The result? A clear advantage in the marketplace – and in the classroom.
About our services to Higher Education

Deloitte’s Higher Education professionals offer a full range of technology-related consulting services to schools, colleges and universities around the world.

Our services span the entire project lifecycle: advise, build, deliver and manage. Specific offerings include services related to: long-term planning; technology cost reduction; implementation, upgrade and improvement; and application management. Proprietary tools such as our Total Campus methodology and Enterprise Value Map for Higher Education enable us to help our clients to plan and execute projects efficiently and effectively, allowing a school to focus on serving its students and faculty.

In addition, more and more Higher Education clients are asking us to help them make change possible. Schools reach out to us because of our reputation in the industry, the strength of our people and the unmatched value we deliver through executable advisory services. We help these institutions in their efforts to develop an institution-wide blueprint for technology-enabled change – or establish a new roadmap to capture more value from their existing technology investments.

Acknowledgements

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- Application Management: A formula for success
- It’s 2008: Do you know where your talent is? Connecting people to what matters
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- Global Financial Services Offshoring report 2007: Optimizing offshore operations
- Global Shared Services Survey, 2007
- Why settle for less? Deloitte Consulting 2008 outsourcing report
- Look closer, look further: How to build a better business case for improving information capabilities
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Attachment H – Total Campus brochure

Please refer to the document on the following page.
Total Campus
for Higher Education

How ERP can create more value for students, faculty and staff
Taking higher education even higher

Colleges and universities have their work cut out for them. They must be as efficient and effective as any business, yet they must also keep pace with the increasing demands of a rapidly changing educational market.

Today’s students, for example, are more sophisticated and tech-savvy than ever before, and expect service far beyond what the IT infrastructure at most colleges and universities can provide.

To tackle these kinds of challenges, many schools are turning to Enterprise Resource Planning (ERP). ERP is a comprehensive and fully integrated technology application that helps a school improve its operations. Streamlining systems and processes. Eliminating messy interfaces and duplication. Consolidating and reconciling data. And generating management reports that improve planning and decision-making.

ERP can literally transform the way a school operates. But it takes experience and expertise to do the job right.

This book shares our experiences – and those of our clients – implementing ERP solutions at colleges and universities across Canada and around the world. We hope these lessons learned prove valuable as you begin your own ERP journey.
Go with your ‘A Team’

For the most part we picked the best staff we had to fill the internal roles on our implementation team, the exception being activities such as data entry that weren’t critical to the process.

Monica Foster
Director of Finance
Nova Scotia Community College

You need top-notch players for your ERP project. Not just technical stars, but excellent performers from the business side as well. If you have to trade off in terms of quality in one area, never skimp on business talent.

‘A’ players should range from program managers all the way down to the most junior team members.

Avoid dragging people onto the project just because they don’t have anything better to do. To ensure the very best results, you must free up some of your very best people.
Choose vanilla

Understand that most ERP packages are developed based on best practices. Take the opportunity to scrutinize and review your organization’s processes and make changes if the ERP solution is better – even if it’s different.

Tracy Corrigan
Student Team
St. Lawrence College

One sure way to slow things down and make yourself miserable for the next ten years is to build extensive customization into your ERP solution. That approach drives implementation and maintenance costs through the roof, and makes software upgrades a major hassle.

Better to stick with the core ‘vanilla’ ERP package – at least during the initial phase – using workarounds to address special needs. Limiting the number of customizations allows you to move forward quickly. It also gives your organization a chance to become familiar with the new ERP system first-hand – putting you in a much better position to decide what customizations are truly necessary.

This is an area where intimate knowledge of both higher education and ERP is critical. With carefully crafted workarounds and a phased approach, you can get all the functionality you need – without unnecessary delay and risk.
Don’t overlook oversight

“You need somebody that sits at the executive table to sponsor these things. Somebody that will champion this stuff and won’t fold under pressure. Somebody that sees the vision and is willing to put his or her job on the line.

Robert Shedden
Vice President Administration
Nova Scotia Community College

An ERP project affects everything from systems and processes to roles and responsibilities, operating standards, data definitions, and more. Sweeping changes like these can’t be driven from the bottom up. They require an effective governing council — a steering group — as well as a single executive to champion the effort.

This kind of work often triggers difficult internal issues. A senior executive with accountability and clout can make the necessary decisions and see that the steering group understands and accepts them.

Your steering council can meet as little as once a month for a few hours, or can be more actively involved in guiding the project and making key decisions. Choose the approach that best fits your own resources and needs.
**Winging it is for the birds**

“The Deloitte team utilizes an implementation plan that ensures you hit the ground running... Our implementation would not have been successful without the tools and expertise provided by our partners at Deloitte.”

Tracy Corrigan
Student Team
St. Lawrence College

ERP implementations are extraordinarily complicated – with literally thousands of potential pitfalls and risks. Jumping in without a disciplined plan for success is a formula for disaster.

That’s why our Total Campus methodology is so central to our work with colleges and universities across Canada. It provides a proven approach to ERP deployment that delivers better results in less time, for less money, and with less risk.

Of course, success requires more than methodology. It also requires a team of experienced individuals who have worked together on similar projects in the past – experts who know how to go beyond the technology to deliver real business value. A mission-critical ERP deployment is not the place to break in new consultants who are working together for the first time.
Button down the business case

It typically takes 10 - 18 months to deploy a full-blown ERP system – and even longer to achieve sustainable returns. Stamina is essential. Which means you must be absolutely certain why you’re doing this work. Without a rock-solid business case, you may not get the top-to-bottom commitment you need to make the project successful.

We’ve helped other institutions develop living, breathing business cases that demonstrate how they’ll achieve the expected performance benefits – and we can help you do the same.
Put reports first

Many ERP deployments get off to a rocky start by not giving decision-makers the reports they need to manage the business effectively. The result? A tarnished image for the new system – and a lot of last-minute scrambling.

Every ERP package provides a set of standard reports, but those are really just a starting point. Institutions must develop their own customized reports and formats for invoices, cheques, transcripts and other unique operating requirements.

Reports are usually a low priority during the development process. But they quickly become a major issue the moment executives and managers stop receiving their favourite reports. To avoid such a crisis, identify your reporting requirements early in the project, and assign specific people to ensure those needs are met – before the system goes live.
Plan for the ‘dip.’

ERP projects replace a significant chunk of your existing technology backbone, supplanting most or all of your current back-office systems – and possibly a few front-office systems, too.

That’s why there is almost always a dip in performance after the system goes live. Even projects that have gone smooth as silk can suffer a performance hit when the new ERP system launches. Transactional efficiency, for instance, might fall from 98 percent to 90 percent for a short period.

The project team can minimize this effect through careful planning, testing, education, and risk analysis. But there’s always going to be a dip. The best you can do is try to make it as small as possible.
Get ahead of the data mess

It’s easy to understand why most educational institutions avoid diving into the data morass for as long as possible. But dive you must. It takes time to establish new data standards, and to cleanse and transfer all your existing data. Yet, that’s the only way to unlock the full potential of ERP.

For example, a new ERP system can literally transform the way you attract, retain, and manage students over their entire life cycle – giving registrars and other staff immediate access to a student’s complete background and transaction history. However, that transformation can’t occur without reliable and consistent data.

Your system is only as good as the data you feed it. The sooner you start getting that data in order, the sooner you can capture the full benefits of ERP.
Strive for quick wins

Every educational institution is under pressure to deliver results now – not a year from now. That can be a real challenge, especially since some ERP projects take years to deliver their full value.

The key to success is scoping and sequencing the implementation for rapid payback, accelerating programs that deliver benefits early. A good integration partner can help you structure your project to achieve quick wins, without sacrificing the long-term benefits of ERP integration.
Don’t fall in love with the technology

ERP technology must work – and it must work well. But technology is only 30 percent of the challenge. The remaining 70 percent involves people and processes.

Every ERP deployment brings lots of change. New applications to learn. New policies and procedures. New performance measures.

But those improvements only create value when accompanied by new ways of thinking and working. And that means focusing significant attention on people issues and resistance to change. Technology alone is not enough.
Remember:
The work doesn’t end at ‘go live’

The life expectancy of your ERP solution could be twenty years or more, so don’t plan to disband your implementation team as soon as the project goes live. That would be like spending three years building a winning ball club, then trading all the players the day after the team wins its first championship. You’ll never get your money’s worth that way.

By keeping the team’s core technical and business people in place, they’ll be able to enhance the ERP application, handle bottlenecks, tweak and improve the system, and uncover continual productivity gains.

Treat ‘go live’ as the start of the next phase of work, not the end.
“Deloitte brought a team of specialists to the project who were highly skilled and knowledgeable. Our people were able to start learning from day one.”

Robert Shedden
Vice President Administration
Nova Scotia Community College

To maximize the value of your new ERP solution, the people in your organization must know exactly how it works – both inside and out. Which means choosing an implementation partner that is deeply committed to collaboration and knowledge transfer.

When all is said and done, your people should be fully capable of supporting the system on their own. That’s the only way to get the full value you expect.
After many successful ERP implementations for educational institutions across Canada and around the world, we’ve learned what works – and what doesn’t. This booklet highlights a few of those lessons, but there are many more we would be happy to share with you. Just give us a call.

Deloitte is the professional services firm of choice for higher education. Our clients include:

- University of Ottawa School of Management
- Simon Fraser University
- Concordia University
- Carleton University
- University of Windsor
- McGill University
- Dalhousie University
- University of Ottawa
- University of Ottawa Heart Institute
- St. Francis Xavier University
- Technical University of Nova Scotia
- Université du Québec à Hull
- Université Laval
- Université du Québec à Montréal
- Université du Québec à Rimouski
- Université du Québec à Trois-Rivières
- University of Calgary
- University of New Brunswick
- Sheridan College
- Niagara College
- Nova Scotia Community College
- New Brunswick Community College
- Durham College
- Alberta College
- Centennial College
- Cite Collegiale College d’Arts
- Appliques et de Technologie
- George Brown College
- Grant MacEwan Community College
- Fanshawe College
- Mount Royal College
- Seneca College
- Algonquin College
- St. Lawrence College
- Sir Sanford Fleming College
- Clemson University
- College of New Caledonia
- Columbia University
- Harvard University
- Lamonton College
- Northwestern University
- Ohio State University
- Oregon State System of Higher Education
- Princeton University
- Carnegie Mellon University
- University of California System
- University of Chicago
- University of Hawaii System
- University of Iowa
- University of Kentucky
- University of Massachusetts
- University of Michigan
- University of Miami
- University of Minnesota
- University of Missouri
- University of Nebraska
- University of Pittsburgh
- Vanderbilt University
- Wright State
- Sabanci University
- University of Adelaide (South Australia)
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Deloitte Touche Tohmatsu is an organization of member firms devoted to excellence in providing professional services and advice. We are focused on client service through a global strategy executed locally in nearly 150 countries. With access to the deep intellectual capital of 120,000 people worldwide, our member firms, including their affiliates, deliver services in four professional areas: audit, tax, consulting, and financial advisory services. Our member firms serve more than one-half of the world’s largest companies, as well as large national enterprises, public institutions, local clients, and successful, fast-growing global growth companies.
Attachment I – Deloitte Project Documentation and Tools

eRoom

eRoom is a Web-based project repository and collaboration tool to increase project management effectiveness.

The eRoom works like a virtual meeting room. It is always open to all team members (client and Deloitte); they can log in at any time (and from anywhere) to share ideas, resolve issues, and get up-to-date on the project.

Benefits of the eRoom include the following:

Accelerates deliverable development—The eRoom leverages people’s time and efforts through collaborative tools and more opportunities for re-use of content within the project.

Increases the quality and value of deliverables—the eRoom allows for more project team participation and more frequent reviews by Project Management before deliverables are finalized.

Reduces non-value added time by capturing and preserving knowledge over the project life cycle—the eRoom shortens the time needed to retrieve and disseminate information.

Provides a forum for team members—the eRoom allows members to post presentations, files, communications, and other important information the team wants to share internally.

Total Campus™ implementation tools and documentation

Total Campus™ has evolved through each version of PeopleSoft. A library has been developed to guide customers through the complex decisions from beginning to end. Providing template deliverables helps guide you through setup decisions, streamlines the upgrade process and reduces overall risk.

It is important to note that at the completion of the project, MCCCD will own the entire set of documentation that is developed during the project. This documentation is valuable for future reference and can be maintained to determine the long term success of your system. The documentation also provides valuable information in the future as to the reasoning behind these decisions. Selected examples are described below.

Configuration workbooks

A cornerstone of our approach is the Total Campus™ Configuration Workbook. These materials utilize the table sequencing provided by PeopleSoft and supplement this with visual and narrative support, along with possible configuration options.

The Workbooks are used to facilitate the Configuration Workshops. The Workbooks create real value for clients by accelerating the process, while providing client resources with a better understanding of the configuration decisions they are being asked to make, and how each decision fits in the larger scheme.

Any changes to existing MCCCD business process are to be documented in the configuration workbooks. MCCCD will be responsible for executing the necessary changes within the organization.

These Workbooks are valuable resources after the project, since they become client specific workbooks. They serve as a valuable tool for training, troubleshooting and knowledge transfer among your employees. These workbooks have recently been updated to PeopleSoft v9.
Technical design specifications

A Technical Design Specification is created for each piece of development work; Conversions, Interfaces, Reports, and Modifications, including:

- Outlines overall functionality of the development item;
- Identifies programming requirements;
- Describes data components and data flow; and
- Provides program details.
## Key documentation and deliverables

Our goal is that no deliverable will be started from a blank page of paper. Key deliverables will be seeded through pre-existing templates. Selected examples are described below.

<table>
<thead>
<tr>
<th>Deliverable name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration Workbooks</td>
<td>This document defines how configurable tables need to be configured to achieve the desired process flow or structure.</td>
</tr>
<tr>
<td>Communication Plan</td>
<td>The plan will give direction to determine well-planned and effective communication with end-users and stakeholders.</td>
</tr>
<tr>
<td>Security Matrix</td>
<td>Access provided to specific employees and groups of employees based upon roles and permission lists. The security matrix documents the roles and will be used to build the technical security in the ERP application.</td>
</tr>
<tr>
<td>Test Scripts</td>
<td>Test scripts are documented steps for the testing of processes within the applications. These scripts will be used for Configuration Testing, User Acceptance Testing, and as exercises for end-user training.</td>
</tr>
<tr>
<td>Configuration Testing</td>
<td>Test functionalities of the configured application applicable to MCCCD proposed use of the application. This includes integration testing both within the ERP modules and to any interfaces in scope.</td>
</tr>
<tr>
<td>Training Plan</td>
<td>A plan that specifies how training needs are determined, the skill level of personnel to be trained, the functions for which they will be trained.</td>
</tr>
<tr>
<td>Reports and Queries</td>
<td>The re-development of existing reports being used to support operations of the organization.</td>
</tr>
<tr>
<td>Application Performance Tuning</td>
<td>Once the upgraded environment has been created and re-configured, the system will be subjected to real-world volume testing. Measures will be taken to optimize the system performance.</td>
</tr>
<tr>
<td>Establish Security</td>
<td>Create and configure system access security levels. The Security Matrix defines system access to be granted to users.</td>
</tr>
<tr>
<td>End-user Training</td>
<td>End user training on system functionality is delivered to the core users of the new system.</td>
</tr>
<tr>
<td>User Acceptance Testing</td>
<td>Users help verify that all system components operate together to satisfy the user requirements. The test is designed to simulate the users’ regular use of the system.</td>
</tr>
<tr>
<td>Cutover Plan</td>
<td>Detailed plan of the process to move from current systems and the development environment to a production environment.</td>
</tr>
<tr>
<td>Production Move</td>
<td>In this activity, the final move to production will be executed.</td>
</tr>
<tr>
<td>Go Live Acceptance</td>
<td>This is the final deliverable in the Deploy phase and is signed off by Deloitte and MCCCD to releasing the ERP applications into Production. The purpose of this document is to determine the outstanding issues have been logged and their impact on the Go Live has been assessed accordingly, along with a plan for resolution.</td>
</tr>
<tr>
<td>Production Transition Support</td>
<td>Project team members provide support to the staff responsible for the maintenance and operation of the application. At this time a formal post go-live error/issue logging process is determined and put in place.</td>
</tr>
<tr>
<td>Instance Strategy</td>
<td>Identification of application instances to support the deployment strategy for the organization.</td>
</tr>
<tr>
<td>Conversion Strategy</td>
<td>Identifying the source and target of conversion objects together with approach to delivery.</td>
</tr>
</tbody>
</table>
Attachment J – Representative Deloitte Oracle/PeopleSoft Cross-Industry Client List

- Advance Publications Inc
- AGF Management Limited
- Allegis Group
- American Red Cross
- AT&T Wireless
- AXA Equitable Life Insurance Co
- Blue Cross Blue Shield of Florida
- Blue Cross Blue Shield of Michigan
- Bowling Green State University
- Chase Mellon Shareholder Svc.
- Children's Hospital of Boston
- City of West Palm Beach
- CoBank
- Credit Suisse
- Detroit Public Schools
- DST Systems Inc
- Entergy Corp
- Enwin Utilities
- FedEx Corp
- FedEx Freight
- FedEx Kinkos
- Florida A&M University
- Florida State University
- Franklin Templeton Investment
- Future Farmers of America
- GAF Corp
- Health Care Services Corp
- HHS-National Institute of Health
- Hobart and William Smith Colleges
- Hydro Ottawa Holding Inc
- Japan Travel Bureau
- JB Hunt Transport Services
- LabCorp
- Lazard LLC
- LA County Office of Education
- Moody's Investor Services
- Neuberger Berman
- Nuveen Investments
- Oakland County, MI
- Online Computer Library Center
- Orbits
- Pfizer Inc
- Philadelphia Housing Authority
- San Diego County
- Sprint Nextel Corp
- State of Florida
- State of Georgia
- SunCorp Metway
- TD Securities
- Time Warner
- University of California-Berkeley
- University of Connecticut
- University of Connecticut Health Center
- University of Florida
- University of Missouri System
- University of Texas Medical Branch
- US Courts
- US Federal Home Loans Mortgage
- US Oncology
- VediorBis
- Verizon Wireless
- Virginia Community Colleges System
- Washington Mutual
- WellPoint Health Networks Inc
- Westchester Community College
- Workplace Safety and Insurance Board of Ontario
- Yum! Brands Inc
- U.S. Dept of Interior
- U.S. House of Representatives
Attachment K – Deviations from RFP and Deloitte General Terms and Conditions

Section 3.2 Liability for Taxes:

Deloitte Consulting's pricing assumes that MCCCD is tax exempt and we request the contract state that accordingly. This should also be clarified in Section 3.9.

Section 3.7 Insurance Requirements:

Deloitte Consulting will have limited changes in this provision that are necessary to conform it to our actual coverage and terms

Section 3.8 Indemnification:

Deloitte Consulting would agree to indemnify MCCCD for certain damages to third parties. However, we believe that the indemnification obligation in this Section is broader than what is customary in the industry and what is necessary to provide adequate protection to MCCCD. We would propose that Contractor's indemnification obligations under the Contract be modified to place reasonable, commercially standard parameters on Contractor's indemnification obligations. Moreover, we would propose procedural terms to ensure Contractor is given prompt notice of and the ability to effectively defend or settle, as appropriate, any indemnification claims. Please refer to Deloitte Consulting's General Business Terms, attached to this response, in Section 6, Limitation on Damages and Indemnification

Section 3.9 Permits:

This provision should be clarified to provide that no bonds are required (e.g., performance, payment or fidelity) and that MCCCD is tax exempt

Section 3.10 Provision of Supplies, Materials, and Labor:

In the event MCCCD will seek to have Deloitte Consulting resell software of hardware under the contract, certain limited resell related terms will need to be included in the final contract.

Section 3.13 Audits:

This provision should be clarified to address the scope and other relevant aspects of the audit.

Section 3.16 Compliance with Laws:

Deloitte Consulting agrees with the obligation to comply with applicable laws. The specific indemnity included in this section should be addressed in context of the indemnity provision in Section 3.8

Section 3.18 Contract Termination:

Deloitte Consulting would like to change the notice period from 10 days to 30 days and clarify that the written notice must identify with specificity the alleged breach, which must be a material noncompliance, and further clarify that the written notice initiates the cure period wherein the alleged material noncompliance must be cured within the 30 day period and/or an acceptable plan to cure must be agreed to by the parties.
Section 3.20 Replacement:

Deloitte Consulting agrees that cover cost can be an accurate measure of direct damages. Deloitte will require clarification of certain portions of this provision, including that it will perform in a good and workman like manner consistent with prevailing industry standards and will seek to further clarify the categories of cost for which it may be liable as well as the applicable process for procurement of replacement services (including the reference in the provision to “go[ing] outside of the contract to complete the required services....”). This provision will also need to be subject to an agreed to limitation of liability to be included in the final contract.

Section 3.21 Risk

Deloitte Consulting will seek to clarify this provision and it may be more appropriate to address the control/indirect control issues as well as the known or should have known standards in connection with the specific engagements under the contract.

Section 3.22 Confidential Information/Privacy Laws:

Deloitte Consulting fully recognizes the importance of maintaining and protecting confidential information. An initial step is proper identification of confidential information. Deloitte will seek to modify this provision to include a requirement around identification and definition of confidential information as well as clarification of the applicable restrictions.

Section 3.24 Extended Contract:

Deloitte Consulting is agreeable to allowing other entities that utilize the Cooperative Purchasing Agreements to purchase under the contract. Deloitte Consulting will need to validate in each instance that it has no conflict or independence issues with the various entities. Deloitte Consulting also assumes that such purchases will be negotiated and agreed to and that this is not a unilateral purchase right.

Deloitte Consulting’s General Business Terms:

Deloitte Consulting has included a copy of our General Business Terms on the following pages. Subject to its responses above, Deloitte Consulting anticipates discussing and negotiating with the MCCCD in good faith to resolve any differences between our General Business Terms and the standard terms and conditions provided in the RFP, including the addition of provisions to address omitted terms. Deloitte’s pricing and its proposal are conditioned upon reaching mutual agreement on the applicable contract terms. If selected, Deloitte Consulting will commit the appropriate personnel to expeditiously address and resolve any open issues.
GENERAL BUSINESS TERMS

1. Services. It is understood and agreed that Deloitte Consulting’s services (the “Services”) under the engagement letter to which these terms are attached (the “Engagement Letter”) may include advice and recommendations, but all decisions in connection with the implementation of such advice and recommendations shall be the responsibility of, and made by, the Client. For purposes of these terms and the Engagement Letter, the “Client” shall mean the entity to which the Engagement Letter is addressed.

2. Payment of Invoices.

   a) Deloitte Consulting’s invoices are due upon presentation. Invoices upon which payment is not received within thirty (30) days of the invoice date shall accrue a late charge of the lesser of (i) 1½% per month or (ii) the highest rate allowable by law, in each case compounded monthly to the extent allowable by law. Without limiting its rights or remedies, Deloitte Consulting shall have the right to halt or terminate the Services entirely if payment is not received within thirty (30) days of the invoice date. The Client shall be responsible for all taxes imposed on the Services or on the transaction, other than Deloitte Consulting’s income taxes imposed on a net basis or by employment withholding, and other than taxes imposed on Deloitte Consulting’s property.

   b) Client acknowledges that temporary living reimbursements to Deloitte Consulting’s personnel may be deemed compensatory under federal, state, and local tax laws if such personnel’s assignment in a particular location will exceed or has exceeded one year. The parties shall cooperate in good faith to limit the duration of a person’s assignment in a particular location to less than one year. If Client’s requirements are such that it becomes necessary for a person’s services in a particular location to continue for a year or more and, as a result, such person’s living expenses are deemed compensatory for tax purposes, then Client shall pay Deloitte Consulting the amount of additional compensation provided to Deloitte Consulting’s personnel to compensate for taxes imposed therefor as reflected on a corresponding invoice.

3. Term. Unless terminated sooner in accordance with its terms, this engagement shall terminate on the completion of the Services. This engagement may be terminated by either party at any time, with or without cause, by giving written notice to the other party not less than thirty (30) days before the effective date of termination; provided that, in the event of a termination for cause, the breaching party shall have the right to cure the breach within the notice period. Upon termination of the engagement, the Client will compensate Deloitte Consulting under the terms of the Engagement Letter for the Services performed and expenses incurred through the effective date of termination.

4. Deliverables.

   a) For purposes of these terms (i) “Technology” means works of authorship, materials, information and other intellectual property; (ii) “Deloitte Consulting Technology” means all Technology created prior to or independently of the performance of the Services, or created by Deloitte Consulting or its subcontractors as a tool for their use in performing the Services, plus any modifications or enhancements thereto and derivative works based thereon; and (iii) “Deliverables” means all Technology that Deloitte Consulting or its subcontractors create for delivery to the Client as a result of the Services.
b) Upon full and final payment to Deloitte Consulting hereunder, and subject to all other terms and conditions herein, Deloitte Consulting hereby (i) assigns to the Client all rights in and to the Deliverables, except to the extent they include any Deloitte Consulting Technology; and (ii) grants to the Client the right to use, for Client’s internal business purposes, any Deloitte Consulting Technology included in the Deliverables in connection with its use of the Deliverables. Except for the foregoing license grant, Deloitte Consulting or its licensors retain all rights in and to all Deloitte Consulting Technology.

c) To the extent any Deloitte Consulting Technology provided to the Client hereunder is a product (to the extent it constitutes merchandise within the meaning of section 471 of the Internal Revenue Code), such Deloitte Consulting Technology is licensed to the Client by Deloitte Consulting as agent for Deloitte Consulting Product Services LLC on the terms and conditions herein. The assignment and license grant in Paragraph 4(b) do not apply to any Technology (including any modifications or enhancements thereto or derivative works based thereon) that is subject to a separate license agreement between the Client and a third party, including, without limitation, Deloitte Consulting Product Services LLC.

5. Limitation on Warranties. THIS IS A SERVICES ENGAGEMENT. DELOITTE CONSULTING WARRANTS THAT IT SHALL PERFORM THE SERVICES IN GOOD FAITH AND IN A PROFESSIONAL MANNER. DELOITTE CONSULTING DISCLAIMS ALL OTHER WARRANTIES, EITHER EXPRESS OR IMPLIED, INCLUDING, WITHOUT LIMITATION, WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. THE CLIENT’S EXCLUSIVE REMEDY FOR ANY BREACH OF THIS WARRANTY SHALL BE FOR DELOITTE CONSULTING, UPON RECEIPT OF WRITTEN NOTICE, TO USE DILIGENT EFFORTS TO CURE SUCH BREACH, OR, FAILING ANY SUCH CURE IN A REASONABLE PERIOD OF TIME, THE RETURN OF PROFESSIONAL FEES PAID TO DELOITTE CONSULTING HEREUNDER WITH RESPECT TO THE SERVICES GIVING RISE TO SUCH BREACH.

6. Limitation on Damages and Indemnification.

a) Each party agrees that the other party, its affiliates, subcontractors, and their respective personnel shall not be liable for any claims, liabilities, or expenses relating to this engagement (“Claims”) for an aggregate amount in excess of (i) in the case of Deloitte Consulting, the fees paid by the Client to Deloitte Consulting pursuant to this engagement, or (ii) in the case of the Client, the fees paid and payable by the Client to Deloitte Consulting pursuant to this engagement, except to the extent finally judicially determined to have resulted primarily from the recklessness, bad faith or intentional misconduct of the other party, its subcontractors or their respective personnel. In no event shall either party, its affiliates, subcontractors, or their respective personnel be liable for any loss of use, data, goodwill, revenues or profits (whether or not deemed to constitute a direct Claim), or any consequential, special, indirect, incidental, punitive or exemplary loss, damage, or expense (including, without limitation, lost profits and opportunity costs), relating to this engagement. The provisions of this Paragraph 6(a) shall not apply to any Claim for which one party has an obligation to indemnify the other or to any Claim for breach of Paragraph 4. In circumstances where all or any portion of the provisions of this Paragraph 6 or Paragraph 11(b) are finally judicially determined to be unavailable, the aggregate liability of each party, its affiliates, subcontractors, and their respective personnel for any Claim shall not exceed an amount which is proportional to the relative fault that their conduct bears to all other conduct giving rise to such Claim.
b) Deloitte Consulting shall indemnify, defend and hold harmless the Client and its personnel from and against any and all Claims attributable to claims of third parties solely for bodily injury, death or damage to real or tangible personal property, to the extent directly and proximately caused by the negligence or intentional misconduct of Deloitte Consulting while engaged in the performance of the Services; provided, however, that if there also is fault on the part of any entity or individual indemnified hereunder or any entity or individual acting on the Client's behalf, the foregoing indemnification shall be on a comparative fault basis.

c) The Client shall indemnify, defend and hold harmless Deloitte Consulting, its subcontractors and their respective personnel from and against any and all Claims attributable to claims of third parties solely for bodily injury, death or damage to real or tangible personal property to the extent directly and proximately caused by the negligence or intentional misconduct of the Client while Deloitte Consulting is engaged in the performance of the Services; provided, however, that if there also is fault on the part of any entity or individual indemnified hereunder or any entity or individual acting on Deloitte Consulting's or any subcontractor's behalf, the foregoing indemnification shall be on a comparative fault basis.

d) Deloitte Consulting agrees to indemnify, defend and hold harmless Client, its officers and employees from and against any and all Claims attributable to claims of third parties for infringement by a Deliverable of any U.S. patent known to Deloitte Consulting or copyright or any unauthorized use of any trade secret, except to the extent that such infringement or unauthorized use arises from, or could have been avoided except for (i) the indemnified party's modification of the Deliverable or use thereof in a manner not contemplated by the Engagement Letter, (ii) the failure of the indemnified party to use any corrections or modifications made available by Deloitte Consulting, (iii) information, materials, instructions or specifications provided by or on behalf of the indemnified party, or (iv) the use of the Deliverable in combination with any product or data not provided by Deloitte Consulting whether or not with Deloitte Consulting's consent. If Client's use of any such Deliverable, or any portion thereof, is or is likely to be enjoined by order of a court of competent jurisdiction as such an infringement or unauthorized use, Deloitte Consulting, at its option and expense, shall have the right to (x) procure for Client the continued use of such Deliverable, (y) replace such Deliverable with a non-infringing Deliverable, or (z) modify such Deliverable so it becomes non-infringing; provided that, if (y) or (z) is the option chosen by Deloitte Consulting, the replacement or modified Deliverable is capable of performing substantially the same function. The foregoing provisions of this paragraph constitute the sole and exclusive remedy of the indemnified parties, and the sole and exclusive obligation of Deloitte Consulting, relating to a claim that any of Deloitte Consulting's Deliverables infringes any patent, copyright or other intellectual property right of a third party.

e) As a condition to the foregoing indemnity obligations, the indemnified party shall provide the indemnifying party with prompt notice of any Claim for which indemnification shall be sought hereunder and shall cooperate in all reasonable respects with the indemnifying party in connection with any such Claim. The indemnifying party shall be entitled to control the handling of any such Claim and to defend or settle any such Claim, in its sole discretion, with counsel of its own choosing.

7. **Client Responsibilities.** The Client shall cooperate with Deloitte Consulting hereunder, including, without limitation, (i) providing Deloitte Consulting with reasonable facilities and timely access to data, information and personnel of the Client; (ii) providing experienced and qualified personnel having appropriate skills to perform their assigned tasks and duties in a competent and timely fashion; (iii) providing a stable, fully functional system infrastructure environment
which will support the Services and allow Deloitte Consulting and Client to work productively; and (iv) promptly notifying Deloitte Consulting of any issues, concerns or disputes with respect to the Services. The Client shall be responsible for the performance of its personnel and agents and for the accuracy and completeness of data and information provided to Deloitte Consulting for purposes of the performance of the Services. The Client acknowledges and agrees that Deloitte Consulting’s performance is dependent upon the timely and effective satisfaction of the Client’s responsibilities hereunder and timely decisions and approvals of the Client in connection with the Services. Deloitte Consulting shall be entitled to rely on all decisions and approvals of the Client. The Client shall be solely responsible for, among other things: (i) making all management decisions and performing all management functions; (ii) designating a competent management member to oversee the Services; (iii) evaluating the adequacy and results of the Services; and (iv) establishing and maintaining internal controls, including, without limitation, monitoring ongoing activities.

8. Force Majeure. Neither party shall be liable for any delays or non-performance directly or indirectly resulting from circumstances or causes beyond its reasonable control, including, without limitation, acts or omissions or the failure to cooperate by the other party (including, without limitation, entities or individuals under the other party’s control, or any of their respective officers, directors, employees, other personnel and agents), acts or omissions or the failure to cooperate by any third party, fire, epidemic or other casualty, act of God, strike or labor dispute, war or other violence, or any law, order or requirement of any governmental agency or authority.

9. Limitation on Actions. No action, regardless of form, relating to this engagement, may be brought by either party more than one year after the cause of action has accrued, except that an action for non-payment may be brought not later than one year following the date of the last payment due to the party bringing such action.

10. Independent Contractor. It is understood and agreed that each party is an independent contractor and that neither party is, nor shall be considered to be, the other’s agent, distributor, partner, fiduciary, joint venturer, co-owner or representative. Neither party shall act or represent itself, directly or by implication, in any such capacity or in any manner assume or create any obligation on behalf of, or in the name of, each other.

11. Confidentiality and Use.

a) To the extent that, in connection with this engagement, either party (each, the “receiving party”) comes into possession of any trade secrets or other proprietary or confidential information of the other (the “disclosing party”), it will not disclose such information to any third party without the disclosing party’s consent. The disclosing party hereby consents to the receiving party disclosing such information (i) as expressly set forth in the Engagement Letter or to subcontractors, whether located within or outside of the United States, that are providing services in connection with this engagement and that have agreed to be bound by confidentiality obligations similar to those in this Paragraph 11(a), (ii) as may be required by law, regulation, judicial or administrative process, or in accordance with applicable professional standards or rules, or in connection with litigation pertaining hereto, or (iii) to the extent such information (A) shall have otherwise become publicly available (including, without limitation, any information filed with any governmental agency and available to the public) other than as the result of a disclosure in breach hereof, (B) becomes available to the receiving party on a nonconfidential basis from a source other than the disclosing party which the receiving party believes is not prohibited from disclosing such information by obligation to the disclosing party, (C) is known by the receiving party prior to its receipt from the disclosing party without any obligation of
confidentiality with respect thereto, or (D) is developed by the receiving party independently of any disclosures made by the disclosing party to the receiving party of such information. In satisfying its obligations under this Paragraph 11(a), each party shall maintain the other’s trade secrets and proprietary or confidential information in confidence using at least the same degree of care as it employs in maintaining in confidence its own trade secrets and proprietary or confidential information, but in no event less than a reasonable degree of care. Nothing in this Paragraph 11(a) shall alter the Client’s obligations under Paragraph 11(b). Notwithstanding anything to the contrary herein, the Client acknowledges that Deloitte Consulting, in connection with performing the Services, may develop or acquire experience, skills, knowledge and ideas that are retained in the unaided memory of its personnel. The Client acknowledges and agrees that Deloitte Consulting may use and disclose such experience, skills, knowledge and ideas.

b) The Client agrees that neither the Services nor any Deliverables are intended for the express or implied benefit of any person or entity other than the Client. Except as otherwise provided in the Engagement Letter, the Client further agrees that the Services and Deliverables shall not be disclosed, in whole or in part, to any person or entity other than the Client and other contractors of the Client, to whom the Client may disclose the Deliverables solely for the purpose of providing services to the Client, provided that such other contractors shall not disclose the Deliverables to any person or entity. The Client shall indemnify and hold harmless Deloitte Consulting, its subcontractors and their respective personnel from all Claims arising from the Client’s disclosure of the Deliverables to any third party.

12. Survival and Interpretation. All Paragraphs herein relating to payment of invoices, deliverables, limitation on warranties, limitation on damages and indemnification, limitation on actions, confidentiality and use, survival and interpretation, assignment and subcontracting, non-exclusivity, non-solicitation, waiver of jury trial, and governing law shall survive the expiration or termination of this engagement. In the event of any conflict, ambiguity, or inconsistency between these terms and the Engagement Letter, these terms shall govern and control. The Client acknowledges and agrees that no affiliated or related entity of Deloitte Consulting, whether or not acting as a subcontractor, shall have any liability hereunder to the Client or any other person and the Client will not bring any action against any such affiliated or related entity in connection with this engagement. Without limiting the foregoing, affiliated and related entities of Deloitte Consulting are intended third party beneficiaries of these terms, including, without limitation, the limitation on liability and indemnification provisions of Paragraph 6, and the agreements and undertakings of the Client contained in the Engagement Letter. Any affiliated or related entity of Deloitte Consulting may in its own right enforce such terms, agreements and undertakings. The provisions of Paragraphs 6, 9, 11(b), 12, 16 and 18 hereof shall apply to the fullest extent of the law, whether in contract, statute, tort (such as negligence), or otherwise, notwithstanding the failure of the essential purpose of any remedy.

13. Assignment and Subcontracting. Except as provided below, neither party may assign, transfer or delegate any of its rights or obligations hereunder (including, without limitation, interests or Claims) without the prior written consent of the other party. Client hereby consents to Deloitte Consulting assigning or subcontracting any of Deloitte Consulting’s rights and obligations hereunder to (i) any affiliate or related entity, whether located within or outside the United States, or (ii) any entity that acquires all or a substantial part of the assets or business of Deloitte Consulting. Services performed hereunder by Deloitte Consulting’s subcontractors shall be invoiced as professional fees on the same basis as Services performed by Deloitte Consulting’s personnel, unless otherwise agreed.
14. **Non-exclusivity.** The parties acknowledge that Deloitte Consulting shall have the right to (i) provide consulting or other services of any kind or nature whatsoever to any person or entity as Deloitte Consulting in its sole discretion deems appropriate, or (ii) use any works of authorship or other intellectual property that may be included in the Deliverables, to develop for itself, or for others, materials or processes that may be similar to those produced as a result of the Services.

15. **Non-solicitation.** During the term of this engagement and for a period of one (1) year thereafter, each party agrees that its personnel (in their capacity as such) who had direct and substantive contact in the course of this engagement with personnel of the other party shall not, without the other party’s consent, directly or indirectly employ, solicit, engage or retain the services of such personnel of the other party. In the event a party breaches this provision, the breaching party shall be liable to the aggrieved party for an amount equal to thirty percent (30%) of the annual base compensation of the relevant personnel in his/her new position. Although such payment shall be the aggrieved party’s exclusive means of monetary recovery from the breaching party for breach of this provision, the aggrieved party shall be entitled to seek injunctive or other equitable relief. This provision shall not restrict the right of either party to solicit or recruit generally in the media.

16. **Waiver of Jury Trial.** THE PARTIES HEREBY IRREVOCABLY WAIVE, TO THE FULLEST EXTENT PERMITTED BY LAW, ALL RIGHTS TO TRIAL BY JURY IN ANY ACTION, PROCEEDING OR COUNTERCLAIM RELATING TO THIS ENGAGEMENT.

17. **Entire Agreement, Amendment and Notices.** These terms, and the Engagement Letter, including exhibits, constitute the entire agreement between the parties with respect to this engagement, supersede all other oral and written representations, understandings or agreements relating to this engagement, and may not be amended except by written agreement signed by the parties. All notices hereunder shall be (i) in writing, (ii) delivered to the representatives of the parties at the addresses set forth in the Engagement Letter, unless changed by either party by notice to the other party, and (iii) effective upon receipt.

18. **Governing Law; Jurisdiction and Venue; and Severability.** These terms, the Engagement Letter, including exhibits, and all matters relating to this engagement, shall be governed by, and construed in accordance with, the laws of the State of New York (without giving effect to the choice of law principles thereof). Any action based on or arising out of this engagement or the Services shall be brought and maintained exclusively in any court of the State of New York or any federal court of the United States, in each case located in New York County, the State of New York. Each of the parties hereby expressly and irrevocably submits to the jurisdiction of such courts for the purposes of any such action and expressly and irrevocably waives, to the fullest extent permitted by law, any objection which it may have or hereafter may have to the laying of venue of any such action brought in any such court and any claim that any such action has been brought in an inconvenient forum. If any provision of these terms or the Engagement Letter is found by a court of competent jurisdiction to be unenforceable, such provision shall not affect the other provisions, but such unenforceable provision shall be deemed modified to the extent necessary to render it enforceable, preserving to the fullest extent permissible the intent of the parties set forth herein.

19. **Approval of Deliverables.**

a) Client shall approve each Deliverable that conforms in all material respects with the specifications therefor set forth in the Engagement Letter or as otherwise agreed by the parties.
in writing ("Specifications"). Within ten (10) days (or such other period agreed upon in the Engagement Letter) from its receipt of a Deliverable, Client shall provide Deloitte Consulting with (i) written approval of such Deliverable or (ii) a written statement which identifies in reasonable detail, with references to the applicable Specifications, all of the deficiencies preventing approval (the “Deficiencies”).

b) Deloitte Consulting shall have thirty (30) days (or such other period agreed upon in the Engagement Letter) from the date it receives the notice of Deficiencies to complete corrective actions in order for such Deliverable to conform in all material respects to the applicable Specifications. Client shall complete its review of the corrected Deliverable and notify Deloitte Consulting in writing of acceptance or rejection in accordance with the foregoing provisions of this Paragraph.

c) Notwithstanding the foregoing provisions of this Paragraph, approval of a Deliverable shall be deemed given by Client if Client has not delivered to Deloitte Consulting a notice of Deficiencies for such Deliverable prior to the expiration of any period for Client review thereof as set forth in this Paragraph, or if Client uses the Deliverable in production.

d) To the extent that any Deliverable has been approved by Client at any stage of Deloitte Consulting’s performance under the Engagement Letter, Deloitte Consulting shall be entitled to rely on such approval for purposes of all subsequent stages of Deloitte Consulting’s performance under the Engagement Letter. Client agrees that, in the event an approved Deliverable differs from the Specifications for such Deliverable, the Specifications shall be deemed modified to conform with such approved Deliverable.

e) If Deloitte Consulting is unable to correct the Deficiencies in a Deliverable within the period of time set forth above, Client shall be entitled, at its option, to a refund or credit of professional fees paid to Consultant hereunder with respect to the Services giving rise to such Deliverable and this shall be Client’s sole and exclusive remedy, and Deloitte Consulting’s sole and exclusive obligation, with respect to any claim that the Deliverables do not conform to the requirements of these terms or the Engagement Letter.