Unified ERP Program Update

CAT IRP Fall Meeting

Friday, November 6th

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Agenda



1 | Guiding Principles & Program Updates

2 | Presidential Message

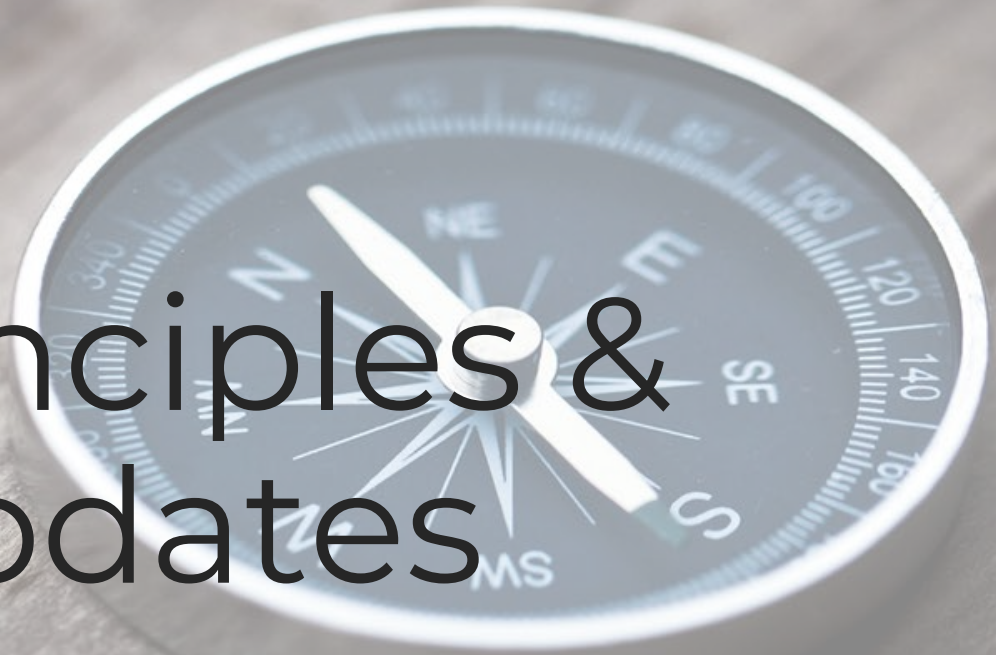
3 | Organizational Change Management

4 | Data Strategy

5 | Questions?

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Guiding Principles & Program Updates

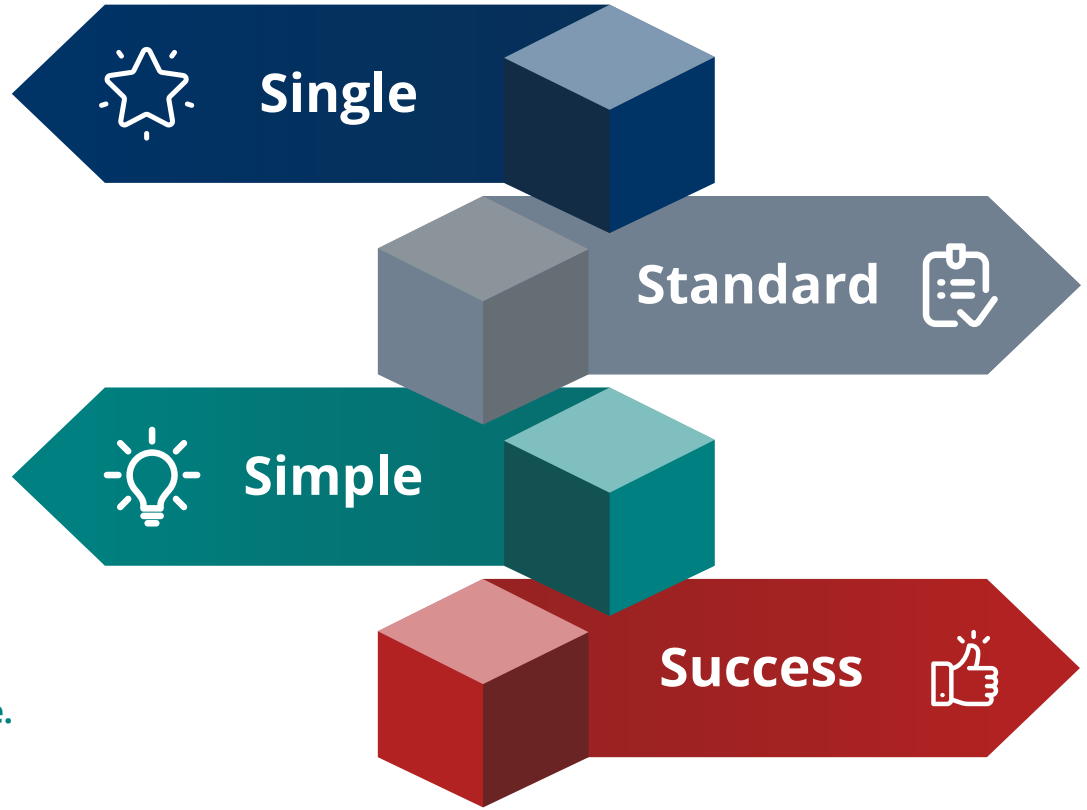


Guiding Principles

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Build Together

Align cross-functionally to maximize efficiency



Simplify to Amplify

Focus on clarity and sustainability to strengthen adoption and long-term value.

Be Bold, Innovative, and Purposeful

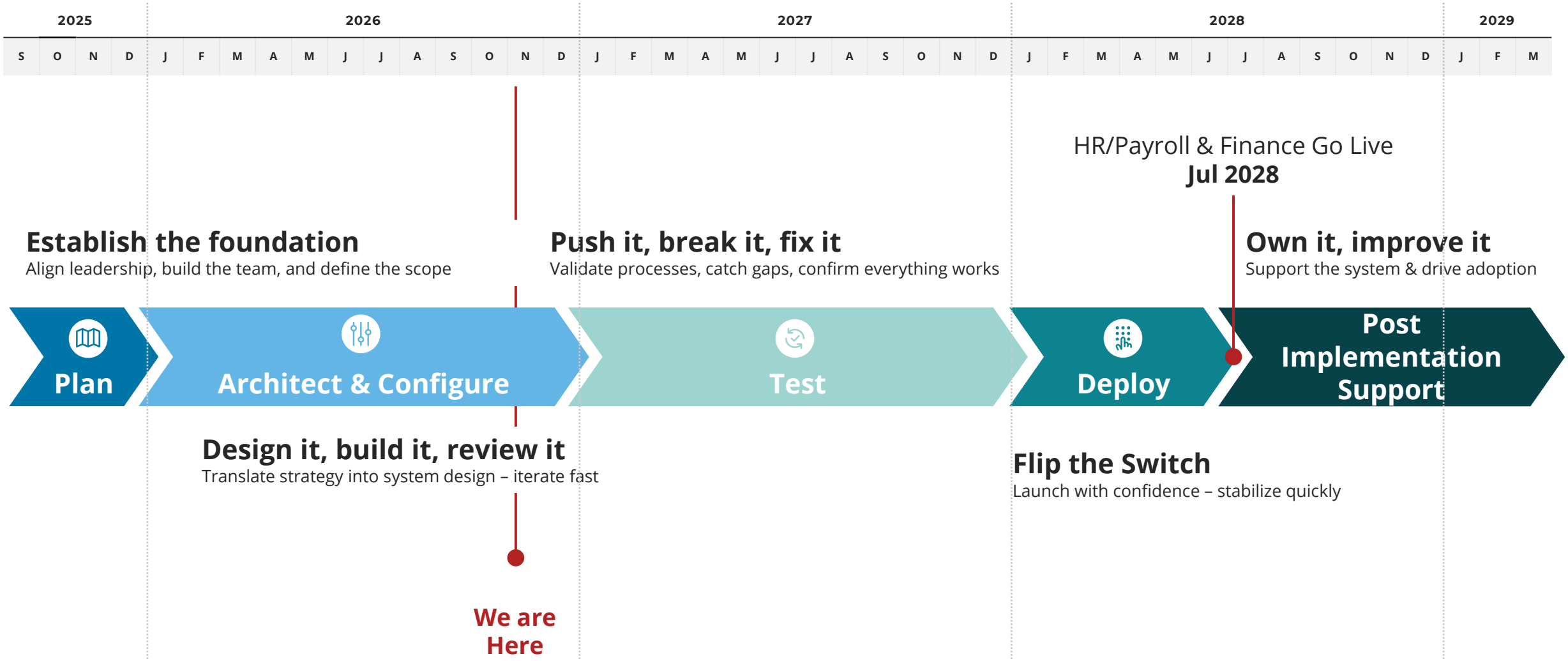
Drive progress through innovation, consistency, and continuous improvement

People First, Always

Shape every decision around user needs, adoption, and real value

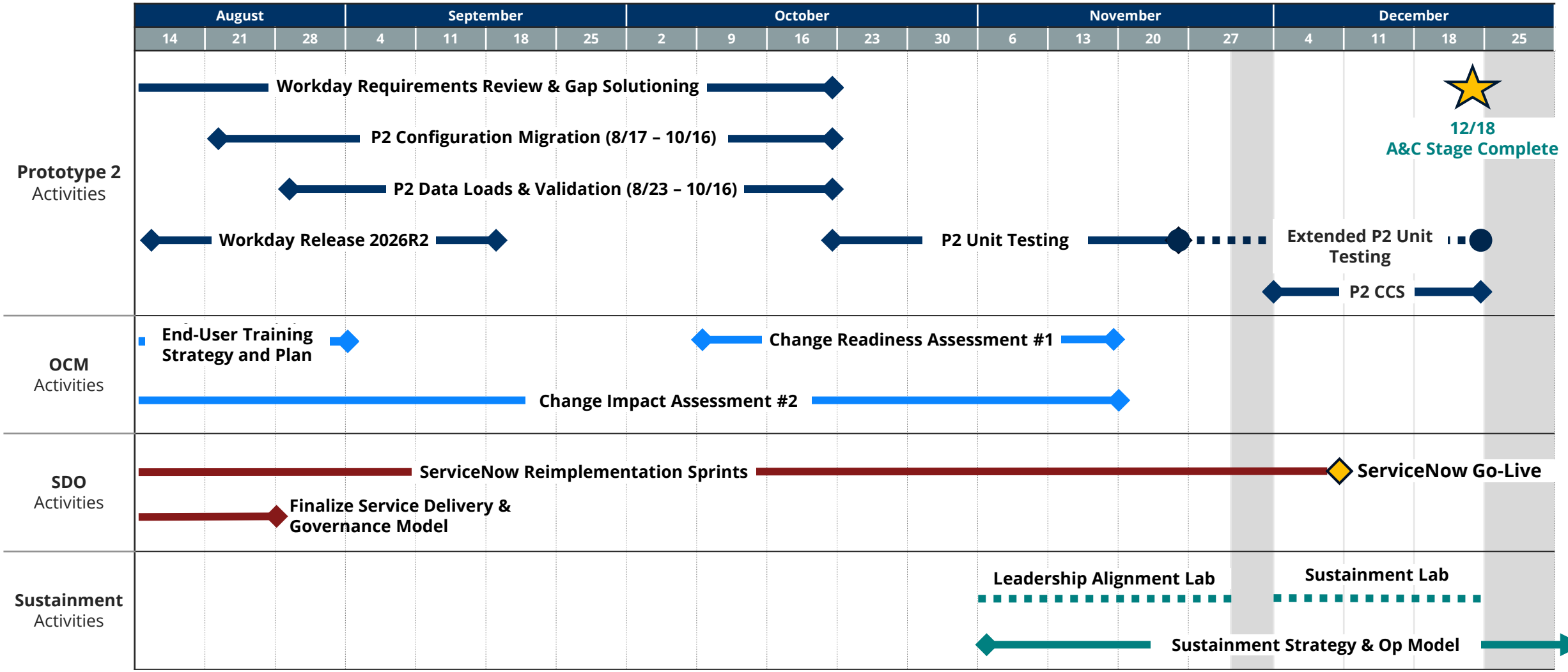
Program Timeline

Where we currently are

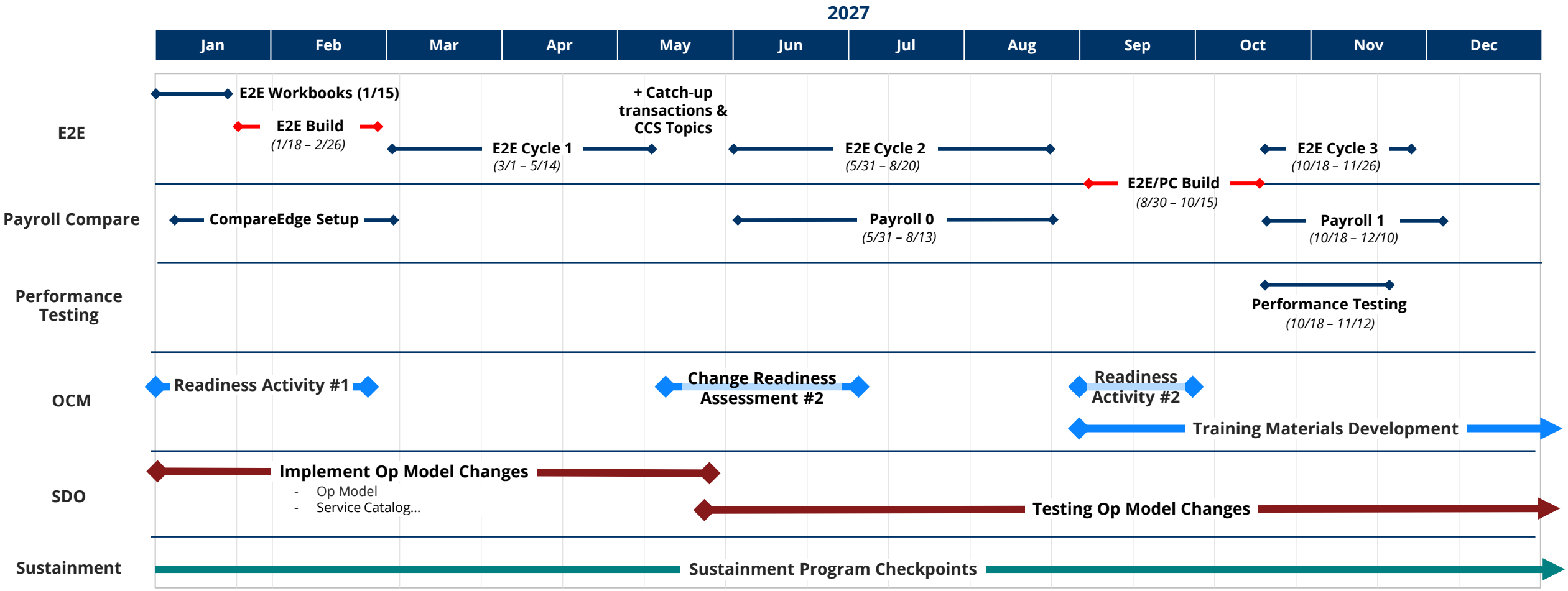


CY2026 Timeline

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CY2027 Timeline



Payroll Compare: C1 source periods Aug–Sep '27; compare runs Oct–Nov '27. C2 source periods Sep–Oct '27; compare runs mid-Jan–mid-Mar '28*

*Pending confirmation: payroll timing/faculty threshold, institutional E2E participation timing, UER timing, SR&R schedule, and Integration & Report Development groups

Iterative Approach to Workday

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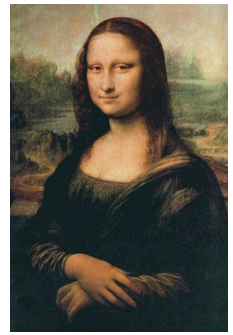
What do we mean by iterative & incremental?

An **iterative approach** builds incrementally as we refine the product; this means we will have a rough draft to start with and refine further with an increase in details.

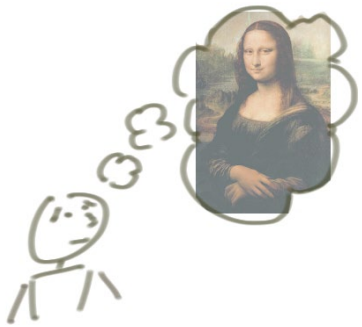




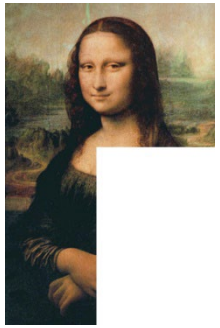


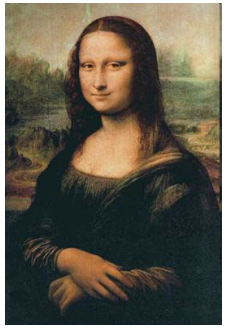


A **waterfall approach** requires the solution to be built one piece at a time; building incrementally also calls for the need to have the full idea formulated at the very beginning.





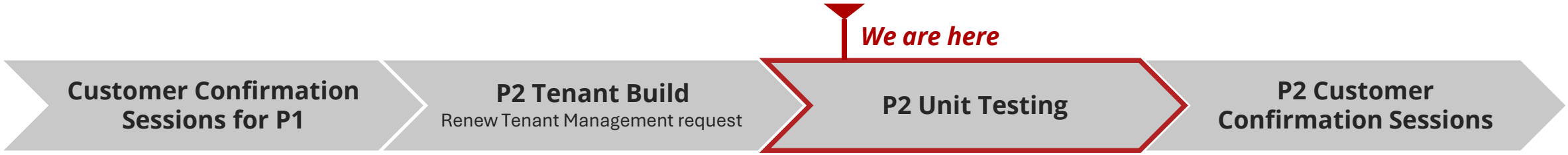


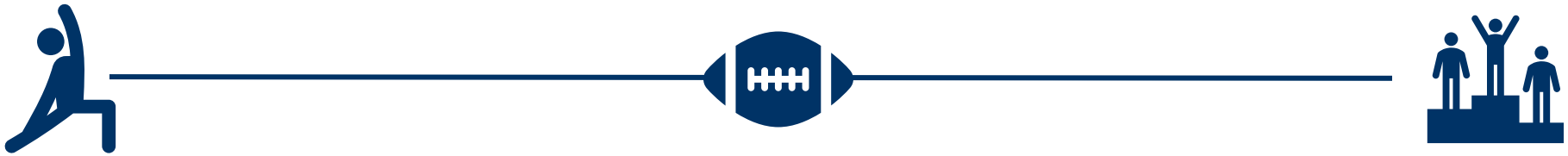


P2 Tenant Build, Unit Testing & Customer Confirmation Sessions

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The team is currently building the new P2 tenant based on design feedback from P1 Unit Testing and Customer Confirmation Sessions. The P2 Tenant is targeted for completion on **October 16**, with P2 Unit Testing beginning the next week.





P2 Tenant Build

Currently in-progress and targeted to complete by October 16

Start of P2 Unit Testing

P2 Unit Testing will begin promptly thereafter, on October 19 and will end November 20.

P2 Customer Confirmation sessions

P2 Customer Confirmation Sessions will be held once P2 Unit Testing ends. Currently slated to start December 1.

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Presidential Message

Unified ERP is Changing How We Work

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Standardize

Adopt common USG/Workday processes and reduce unnecessary institutional variation

Modernize

Use modern workflows, automation, data and controls rather than recreate legacy processes

Operate as a System

Make decisions for the enterprise, even when they differ from current institutional practices

Evolve our Organizations

Expect roles, responsibilities, structures and service delivery models to change

We are not moving today's processes into a new system.
We are changing how the USG works.

One Program. Shared Responsibility.

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The Program Team is not implementing Workday for your institutions. Your institutions are implementing Workday alongside the enterprise team. The work is interconnected, and delays or competing priorities at one institution can affect the entire System.

Workstream	Enterprise Program	Institutions
Design & Standardization	Define enterprise processes, configuration, and standards	Provide expertise, validate requirements, adopt standards
Data & Systems	Lead enterprise conversion, data lake, and system integration efforts	Map and validate data, understand campus systems, remediate local systems, data lakes, and integrations
Testing & Readiness	Configure and test Workday, coordinate end-to-end testing	Participate in testing, validate institutional processes and data
Change & Adoption	Develop enterprise change management, communications, and training	Build on enterprise change management efforts, lead campus-specific engagement and readiness, and ensure employees complete training

What We Need From You

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1 Prioritize Unified ERP

- Stop or defer nonessential institutional administrative initiatives
- Evaluate new initiatives for impacts on program
- Finalize data mapping by December 18

2 Commit the Right Expertise

- Make institutional experts available when needed for conversion, integrations, testing, and readiness
- Protect their capacity to complete program work

3 Deliver on Commitments

- Complete institutional deliverables and data validation on time
- Resolve questions early and escalate barriers that put deadlines at risk

4 Lead the Change

- Prepare your institutions for changes to process, roles, and structures
- **Adopt the standard, think System-first, and prepare for organizational change**

Focus Through Go Live

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Now → Go Live

- Protect critical scope
- Adopt the standard
- Resolve what is required for Go Live
- Maintain institutional capacity

Why?

- Optimize
- Enhance
- Address additional opportunities
- Continuously improve

When new needs arise, ask:

1. Required for Go Live?
2. Enterprise Requirement?
3. Must it be solved now?

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Organizational Change Management (OCM)



Change Considerations and Change Impacts

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CHANGE CONSIDERATION

A potential change surfaced in design sessions, IDR, and CCS. It reflects the current anticipated future state and stays a working hypothesis until testing, and workstream approval confirm it.

CHANGE IMPACT

A consideration that passed workstream review, institutional validation, and multiple testing phases, including Unit and E2E testing. The change is confirmed and ready for end users.

HOW A CONSIDERATION BECOMES A CHANGE IMPACT

1 Captured

Surfaced during design sessions, IDR, and CCS, then cleaned up by the OCM team

2 Validated

Reviewed for accuracy by workstreams, then checked against institutional constraints

3 Confirmed

Verified through multiple phases of testing (i.e. Unit Testing, E2E testing: officially a Change Impact

THE PROCESS WITH EACH INSTITUTION

1
Share Change Considerations
Share Change Consideration List with IMPACT Teams

2
Discover local impact
Teams work with local business owners to find what each change means

3
Validate, Confirm, and Share
Considerations are tested and confirmed as Change Impacts over time

4
Train end users
The OCM team delivers training ahead of go-live

5
Go-live
Institutions move to Workday prepared

We are here: step 1 has been completed, and IMPACT Teams are asked to conduct step 2 monthly

OCM Engagement

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The Unified ERP Program has established multiple engagement channels to communicate with and hear from the larger USG community.

Frequency	Channel	Description	Latest Iteration
Weekly	**Workday Word of the Week**	Bite size series introducing one Workday term, what it means, and why it matters.	This week's word = **Job Profile**
Monthly	**Workday Wednesday**	Monthly overview session designed to build workday awareness and maintain visibility through go-live.	September 30th = **Foundation Data Model (FDM)** Next November 18th = **Training**
Monthly	**The Grace Period**	Podcast sharing program process, key decisions, and insight from across the unified ERP initiative.	October 1st = **What is Workday FIN?** November 6th = **What Happens at Workday Rising…**
Quarterly	**Pathway to 2028**	General program newsletter providing updated news and relevant guidance on the Unified ERP Journey.	Last quarterly newsletter sent on July 23rd Next issue distributes on October 20th

Change Readiness Assessment

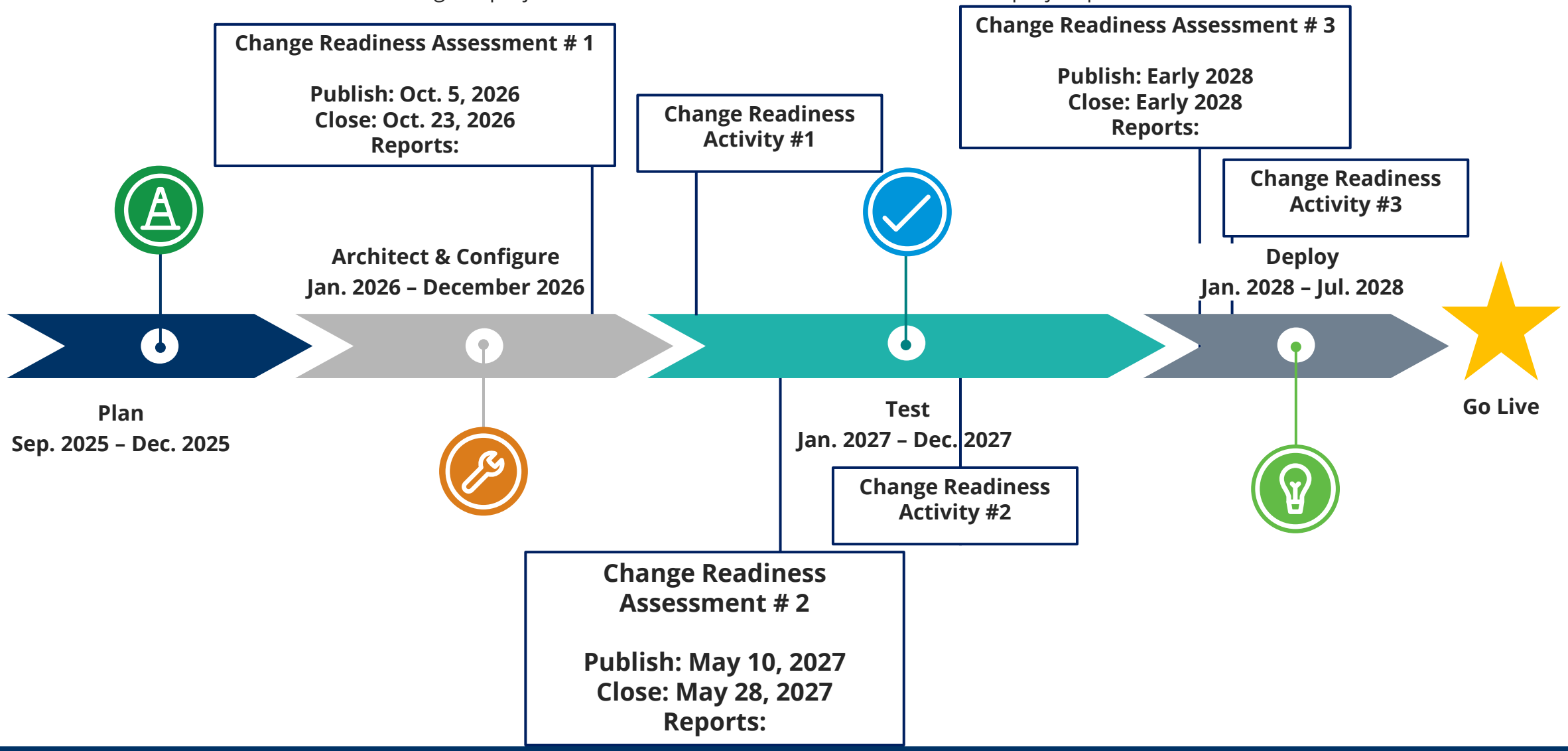
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What?	Why?	Who?	When?
8–10 minute confidential survey	**Establish a readiness baseline**	**~32,000 employees**	**October 5–23**
Measures perceptions of the program and confidence with upcoming process and system changes.	Identifies areas of support and resistance to inform communications, training, and engagement.	Employees meaningfully impacted by the new system. Target response: 25%.	December: Results shared with leadership to inform OCM priorities.

First of three planned assessments to measure readiness and track change over time.

CRA Timeline

Assessments will occur at various times during the project timeline. Each assessment and its associated project phase are shown below.



High Level Survey Results – Baseline

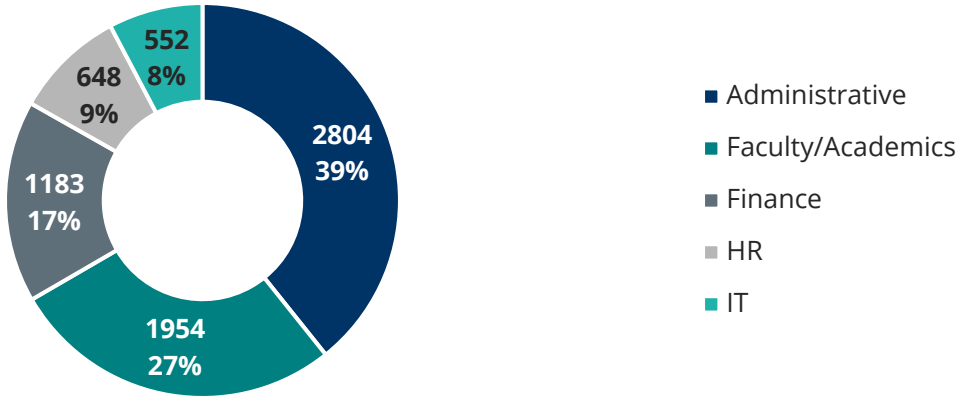
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PARTICIPATION INFORMATION

5,978
Respondents

18%
Response rate

INSTITUTIONAL DEMOGRAPHICS*



**Respondents could select more than one functional area. Percentages show each area's share of all 7,141 selections from 5,978 respondents.*

READINESS SCORE BY CATEGORY

Readiness Category	Survey [#1]
Understanding & Awareness	Monitor 3.52
Overall Readiness Signal	Monitor 3.39
Engagement & Communications	Monitor 3.11
Leadership & Local Support	Monitor 3.53

Readiness Status Key: **Address** (1.0–2.33) **Monitor** (2.34–3.67) **Prepared** (3.68–5.0)

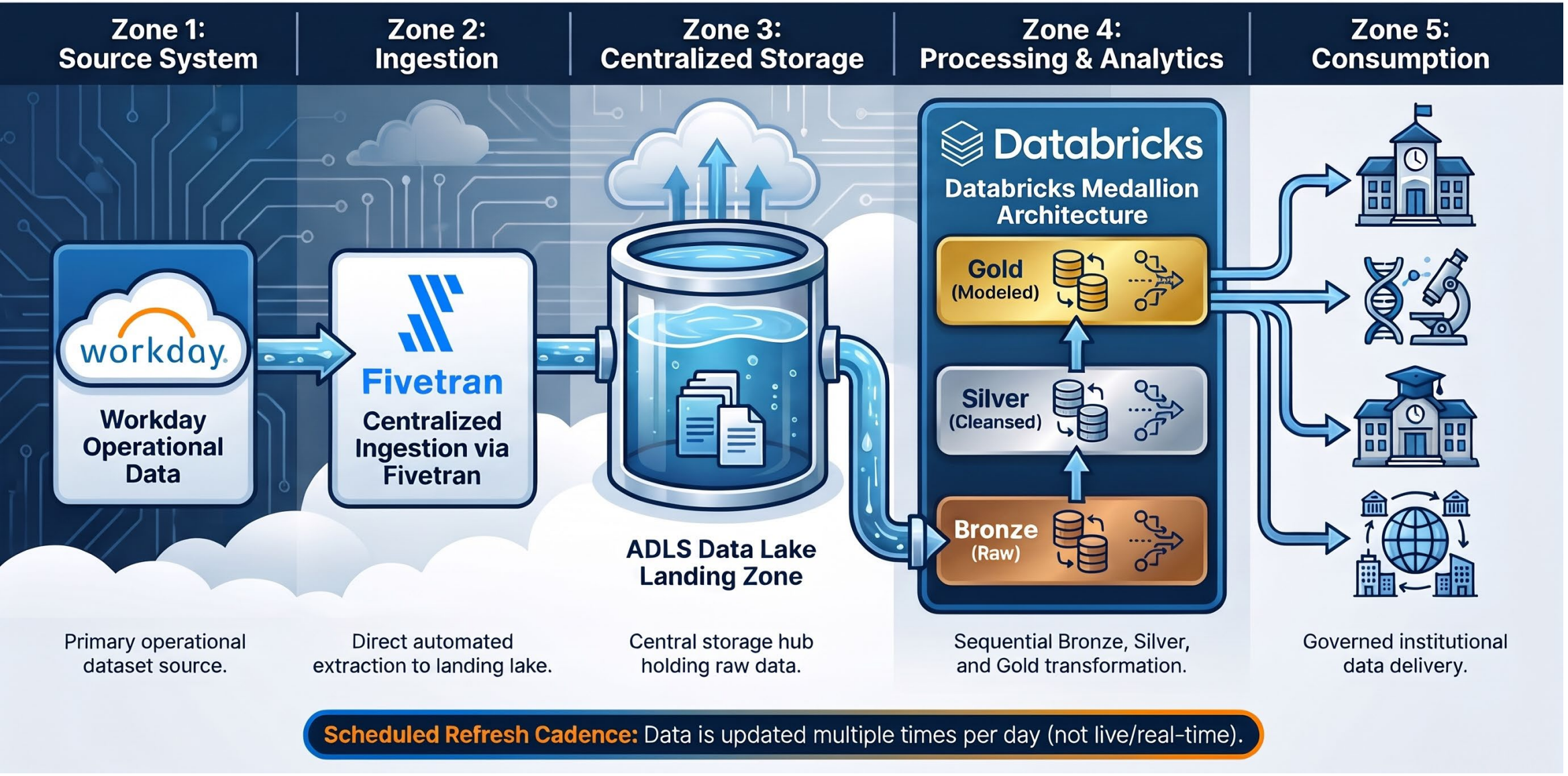
As this is the baseline survey, these results reflect USG's starting point and serves as the comparison point for future survey waves.

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Unified Data Strategy

Future-State Workday Enterprise Data Architecture

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Target Initial Delivery: Early January 2027

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2-Tier Data Delivery/Distribution Model

USG PROVIDES ACCESS

One account per Institution

A **single** service account principal provides access to that institution's authorized data.

INSTITUTION DOWNLOADS

Programmatic and Cached

The institution configures its data platform to download and retain a local cached copy.

INSTITUTION DISTRIBUTES LOCALLY

Transform and Redistribute

Local transformations, analytics, reporting, and redistribution happen from the cached copy under institutional controls.

USAGE BOUNDARIES

- Machine-to-machine access only! No interactive or ad-hoc use will be permitted.
- Do not use for just-in-time queries directly feeding reports, scripts, or other operational processes.

DATA HANDLING

- Data is delivered unfiltered and unmasked end-to-end.
- Institutions must apply their own Data Governance review and handling controls.

WHAT TO EXPECT FROM THE DATA

- Do not feed this data into your production systems until Go-Live!
- Data comes from a prototype Workday tenant and may not be complete or accurate on day 1. Use it for testing and remediation only!
- Initial datasets will not represent the full breadth of data planned for go-live. Additional datasets will be made available as they become ready throughout 2027.

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What Institutions Should Prepare Early

These prerequisites help USG plan onboarding and avoid delays near the release target.

PEOPLE

1. Name a technical Data Handling Contact

Confirm the contact has institutional preapproval to handle sensitive data. **CHRO, CFO, and CIO approval required.**

PLATFORM

2. Identify the Local Data Platform

Confirm what data platform will store the downloaded copy and support automated retrieval.

CONNECTIVITY

3. Provide Source IP Address(es)

Supply the source IP address or range. Azure Data Factory, Synapse, and Fabric require an institution-hosted data gateway where its IP can be allow-listed.

AGREEMENT

4. Review and Complete Required Terms

Review local handling requirements and prepare to sign the Terms of Service and Appropriate Use Agreement.



UERP/SR&R Team will start connecting with Institutions to collect this information starting in late November 2026!

Data Delivery: Feedback

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WEEK 1	WEEK 2	WEEKS 2 & 3	WEEK 4
Account Setup Sessions	**Connectivity Support**	**Data Review**	**Feedback Meetings**
One-hour, institution-specific sessions to establish accounts and confirm initial access.	Drop-in Office Hours to resolve initial connectivity issues or address specific questions.	Institutions review delivered data and identify questions, issues, and feedback in preparation for individual meetings.	1:1 meetings with each institution to review feedback directly with the Data Transformation, Architecture, and SR&R workstreams.
ACCESS	CONNECT	REVIEW	FEEDBACK

Data Delivery Wave 1: What's Included

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HCM

Lookups
- Job Profile
- Job Family + Group
- Job Categories

Worker
- Position
- Manager
- Organization
- Leave

FDM

Lookups
- Company
- Region
- Cost Centers
- Organization
- Locations
- Business Unit
- Program
- Spend Category
- Revenue Category
- Fund

CAVEATS

- "As is" data structures – refinement expected
- Refresh timing TBD

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Questions?

thank you!



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Appendix

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OCM Engagement

SEPTEMBER 2026

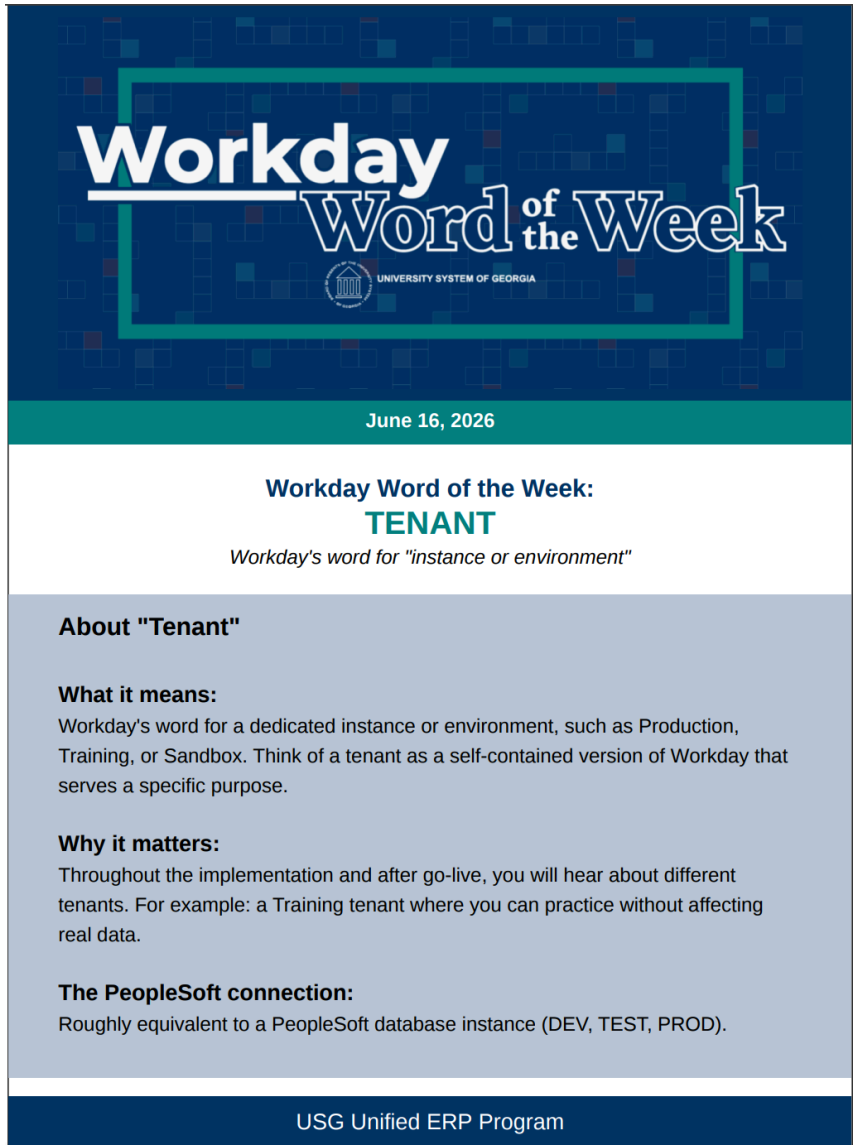
Workday Word of the Week

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The **weekly Workday Word of the Week (WWOW)** is a bite-sized weekly series that features one Workday term, what it means, and why it matters.

September WWOW schedule:

- 9/1/26: Pay Group
- 9/8/26: Period Schedule
- 9/15/26: Earning
- 9/22/26: Payslip
- 9/29/26: Job Profile



Workday Wednesday

Scan QR Code to Register for September Session

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Foundation Data Model (FDM) 102

Wednesday, September 30 at 2 p.m.

Tune in to learn more about:

- Workday organizations, security, and access
- Worker information
- PeopleSoft vs Workday terminology
- What role do Organizations play in reporting and security?

- **The monthly Workday Overview Session** is for the USG community.
- Designed to build awareness before training and maintain visibility through go-live.

- **Click here** to register for future Workday Wednesday Sessions. *Past session recordings can be found on this page as well.*

- **September invitation scheduled for distribution on:** 9/10/26

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THE GRACE PERIOD.

VOICES OF THE UNIFIED ERP PROGRAM

- A **monthly podcast** sharing program progress, key decisions, and insights from guest speakers across the initiative.
- Helps end users and stakeholders better understand the program, address misconceptions, and prepare for go-live.
- Offers a behind-the-scenes perspective on the program's journey and impact.
- All **past episode recordings** will be available on the **podcast homepage**.
- **SIGN UP here** to receive the podcast in your inbox!



YOUR USG HOST

Grace Victor
Change Impact & Engagement Lead
USG Unified ERP Program

The September podcast will focus on **"What is Workday HCM?"** featuring guest **Sharri Peck, HCM/Payroll Suite Lead.**

September episode scheduled for release on: 9/4/2026

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We have **4 resources** for you to **share & amplify** at your institutions.



Want to sign up for all of them at once?

Scroll to the bottom of **this page** to sign up
for all the communications listed below.