



June 2018

NextGen ERP

Board of Trustees Meeting

Topics

- Project Objective & Overview
- Topics Presented to Date
- Status Update / Upcoming Milestones
- Communication Plan
- Change Management Strategy

NextGen Overview

Project Objective: Provide an enhanced student experience and “future proof” our technology investment.

- Deliver tools to improve registration, degree planning, credit transfer, online advising, data analytics and recruitment.
- Total estimated cost of the project is \$150 million over 7 years.
 - Phase 1 – Design phase November 2017 – January 2019 - \$8M from 2018 Omnibus bill. Funding to cover: Business process reviews, ERP development, platform refresh, data integration, project management and communication
 - Phase 2 – Implementation phase - \$25M /year FY2020- FY2024. Funding to cover: Implementation of all new functionality, new reporting and data analytics

Topics Presented To Date

BOT SESSION	TOPICS PRESENTED	DECISIONS MADE
June 2014	<ul style="list-style-type: none"> • Topic introduced 	
October 2015	<ul style="list-style-type: none"> • Student Experience (overview) • Update on listening sessions and business case development 	
March 2016	Presentation of NextGen Business Case	Board supports.. <ul style="list-style-type: none"> • moving forward with planning • submitting FY2018 biennial legislative request
October 2016	Presented estimates timeline and budget	NextGen updates to be presented to Board biannually - in January and June
June 2017	<ul style="list-style-type: none"> • Received \$8M from FY2018 legislative request - enough for team to kickoff Phase 1 (business process reviews, RFP, legacy technology preparation) • RISK! Failure to provide sufficient funding to enter into long term contracts for Phase 2 (implementation) will add significant and critical delays to the project. 	Board supports... <ul style="list-style-type: none"> • moving forward with Phase 1 • submitting FY2018 supplemental funding request and FY2019 biennial legislative request
January 2018	<ul style="list-style-type: none"> • Introduction of ERP Steering Committee • Introduction of Phase 1 and vendor (CampusWorks) 	Board supports... <ul style="list-style-type: none"> • Project overall design • Phase I timeline
March 2018	<ul style="list-style-type: none"> • Project organization structure • Reviewed program dashboard template • Communication Plan for BOT and Leadership Council Updates 	Board supports... <ul style="list-style-type: none"> • Revised project team structure • Reporting format • Update cadence for BOT and LC



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STATUS UPDATE

PREPARED BY : Melinda Clark

REPORT DATE : 6/04/2018

OVERALL HEALTH STATUS

	OVERALL	SCOPE	SCHEDULE	BUDGET	RESOURCES
CURRENT STATUS	ON TRACK	ON TRACK	ON TRACK	ON TRACK	ON TRACK
LAST STATUS	ON TRACK	ON TRACK	ON TRACK	ON TRACK	ON TRACK

Phase 1 Budget (FY18-FY19) \$ 8,000,000

Spent to Date 392,231

Current Obligations 5,160,746

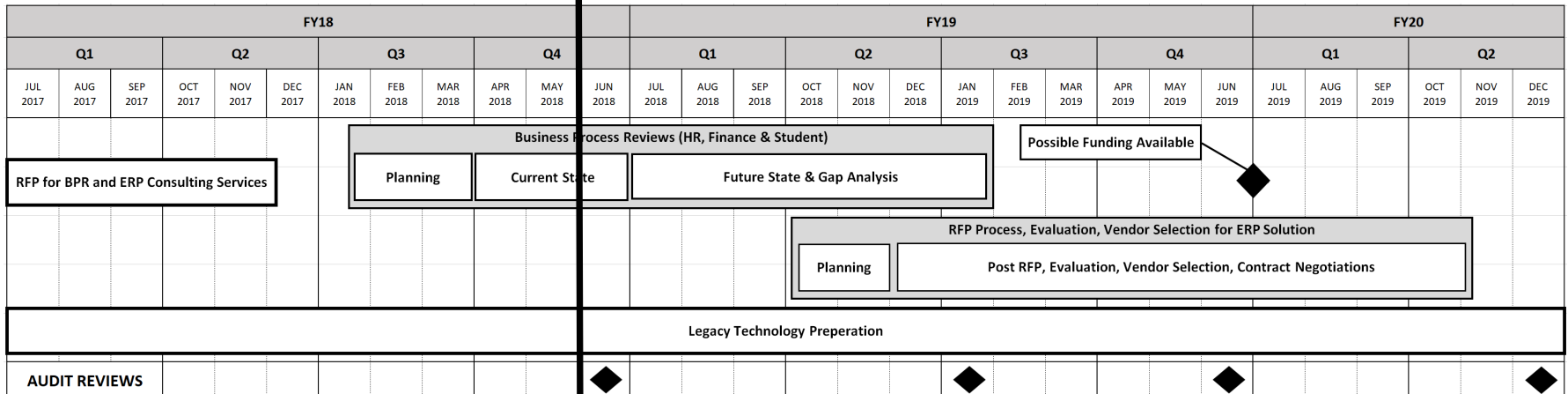
REMAINING BUDGET \$ 2,447,023

HEALTH STATUS NOTES:

Project remains ON TRACK. Current state business processes are on track for a completion date of 6/22. Vendor Showcase (of three ERP Solutions) will be hosted virtually 6/25 – 7/13. Working Teams will begin future state business process mapping mid-July.

PHASE 1 TIMELINE

6/04/2018



MILESTONE STATUS

MILESTONES	START DATE	END DATE	LEADERSHIP COUNCIL REVIEW	BOARD OF TRUSTEES REVIEW	STATUS
Business Case w/ High-level Timeline for ERP Replacement	7/2015	3/2016	3/2016	3/2016	COMPLETE
Funding Strategy	1/2016	6/2017	6/2017	6/2017	COMPLETE
Project Charter	9/2017	9/2017		1/2018	COMPLETE
Risk Management Plan	1/2018	1/2018	--	--	COMPLETE
Communications Plan	1/29/18	4/03/18	5/2018	6/2018	ON TRACK
Change Management Plan	1/24/18	7/27/18	7/27/18	--	AT RISK
PHASE 1					
Planning	1/23/18	4/04/18	--	3/2018	COMPLETE
Current State Process Reviews	2/12/18	6/29/18	--	--	ON TRACK
Future State Business Process Mapping	7/16/18	1/18/19	1/2019	1/2019	Not Started
Conduct ERP Request for Proposal	10/15/18	7/26/2019	--	--	Not Started
Finalize Phase 2 Funding Strategy	7/2019	7/2019	7/2019	7/2019	Not Started
Vendor Selection	7/29/2019	10/25/19	7/2019	7/2019	Not Started
Legacy Technology Updates	7/2016	12/2019	--	--	ON TRACK
PHASE 2					
Finance Planning & Implementation	11/2019*	7/2021*	TBD	TBD	Not Started
HR Planning & Implementation	1/2020*	4/2021*	TBD	TBD	Not Started
Student Planning & Implementation	8/2020*	11/2023*	TBD	TBD	Not Started

Upcoming Milestones

June 2018

- Complete Current State Regional Reviews (Student, Human Resources & Finance)
- Working Teams finalize current state business processes (Student, Human Resources & Finance)
- Identify members for IT Working Team and Data Management Working Team

July 2018

- Vendor Showcase – Imagine the possibilities with demos of three industry leading ERP solutions. **Note: This is not the RFP.**
- IT and Data Management Teams begin drafting current state
- Working Teams begin drafting future state business processes (Student, Human Resources & Finance)
- Finalize Change Management Plan – Review with Leadership Council.

Future State Regional Reviews will be held October / November 2018

Continuous Process Improvement

IT Risk Review Group was formed to review the Internal Auditing Report for Human Resources Transaction Services Model (HR-TSM).

- Tasked with comparing lessons learned from TSM to the NextGen Project Plan
- Recommend areas of improvement to mitigate similar issues within NextGen

Participants: Sr. Enterprise Architect, Chief Information Security Officer, IT Business Architect, NextGen Program Manager

Next Steps

- June – Review ERP Steering Committee
- July – Review with Board of Trustees

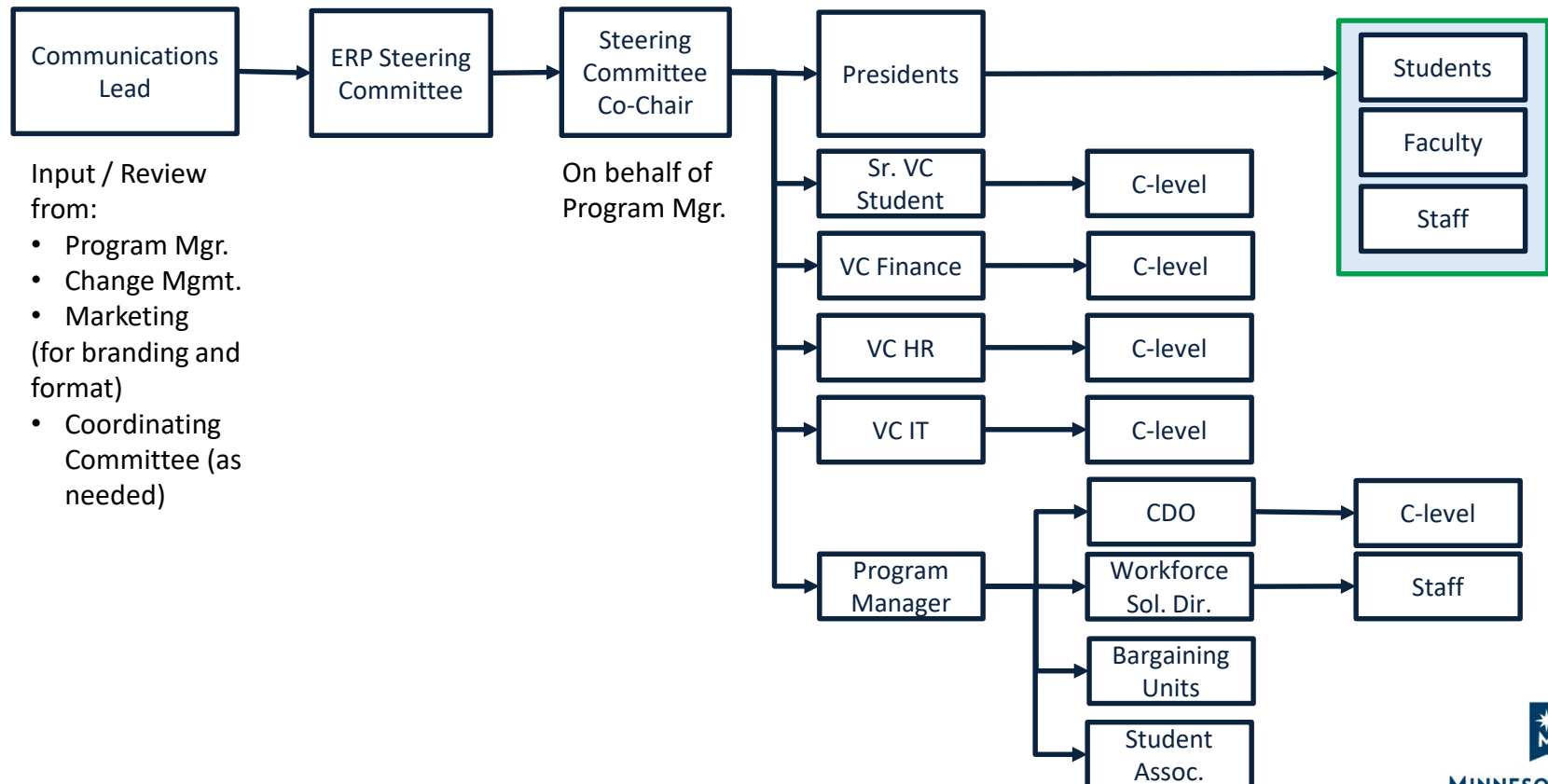


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COMMUNICATIONS PLAN

Communications Plan

Communication Review and Distribution Process



Communications Plan

COMMUNICATION	FORUM	FREQUENCY	DATES
BOT Status Updates (includes Project Risk Reviews from Internal Audit)	Email	Monthly	2018 - 2024
BOT Status Updates	Board of Trustees Meeting	Quarterly (or as major deliverables are accomplished)	January, March, June and September (thru 2024)
Leadership Status Update	Leadership Council Meetings	Monthly	2018 – 2024
Minnesota State Update (Faculty, Staff, and Student)	Email	Quarterly	January, March, June, September, December (thru 2024) <i>Volume 1 sent June 7</i>
Project Artifacts	Phase 1 Overview / Infographic (pdf) Phase 1 Timeline (pdf)	Once (updated as needed)	May, 2018

Communications Plan

COMMUNICATION	FORUM	FREQUENCY	DATES
Feedback Surveys (Experience Workshops, Working Teams, Regional Reviews)	Online Survey	Continual	2018-2024
Overview Video	Video	Once	August, 2018
Conferences CHRO/Spring HR Meeting IT Conference ASA Spring Conference Finance Conference Facilities Conference Students United LeadMN	Conference Presentations	Annually (semi-annually when available)	2018-2024

Communications Plan

NextGen SharePoint Site is the main communications hub for the project.

- All project artifacts will be posted
- Students, Faculty and Staff can register for updates via “Friends of NextGen”

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imagine the possibilities

Welcome to the NextGen ERP site!

[Subscribe to Friends of NextGen](#)

[NextGen Phase 1 Current State Review](#)

Your input is needed! Current State Regional Reviews will be held throughout Minnesota May 10- June 8. There will be three ways to provide feedback. Reviews.

[Click here for more information about Virtual Q&A and On-site Review Sessions.](#)
[Click here to start Online Reviews beginning May 10.](#)

To review Current State documentation and provide feedback:

1. Open the **[Current State Review Table of Contents](#)** document.
2. Find the **Category** (i.e., Finance, Human Resources, or Student Services) for the processes you'd like to review and click the process document you
3. Once reviewed, open a separate browser and **[click here to submit feedback](#)**. Be sure to enter the Process Id (located in the top, left of

Information will be submitted to the NextGen ERP Working Teams. Appropriate changes/improvements will be made prior to Future State Regional Reviews. If you have any questions, please feel free to send an email to the NextGen Project Team at: NextGenERP@MinnState.edu.

Title	Created
UpNext Quarterly Newsletter: Volume 1, May 2018 ✨	Yesterday
Current State Regional Reviews	May 1
NextGen Phase 1 Kickoff	April 10
NextGen Update from Interim Chancellor Malhotra	March 2

Student Login: YourStarID@go.minnstate.edu and [StarID password](#)

Faculty and Staff Login: YourStarID@minnstate.edu and [StarID password](#)



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CHANGE MANAGEMENT STRATEGY

Defining Change Management

Change management is defined as: **“the application of processes and tools to manage the people side of change from the current state to a new future state so that the desired results of the change are achieved.”** (Hiatt & Creasey, 2012)



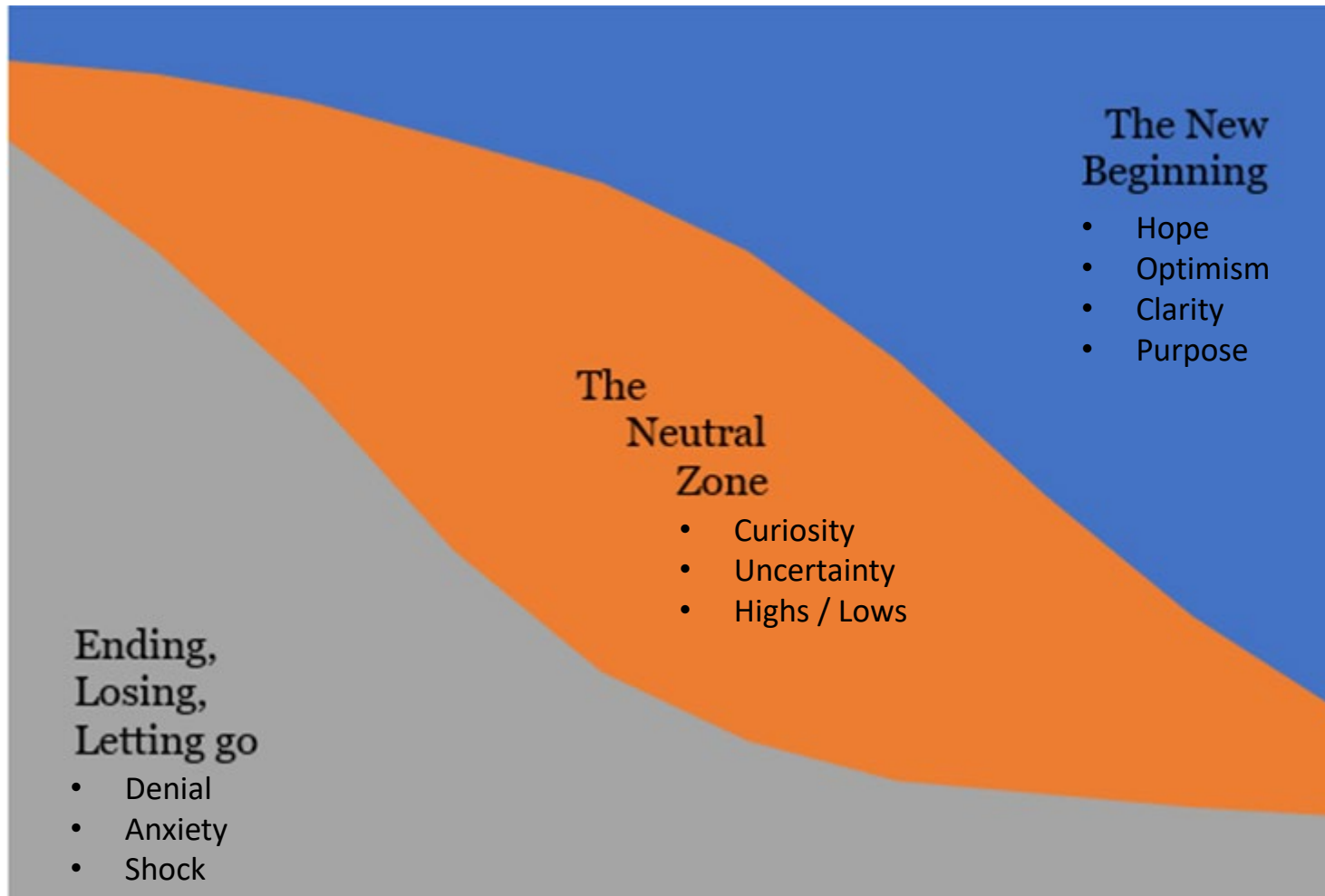
Jeff Hiatt's 5 fundamental tenants for change management.

Communicating Change Management

- “In the workplace, employees have specific expectations related to communications surrounding change. Messages about why the change is being made and how the change aligns with the business strategy are expected from the person near or at the top of the organization. Messages about how the change will impact employees locally and how the change may impact them personally are expected from their immediate supervisor.”
- (Best Practices in Change Management report, Prosci, 2003)

Change & Transition

Time 



William Bridges' Transition Model.

Change Management Strategy

Objectives & Deliverables

NextGen Change Management Readiness & Engagement



- Engage Institutional Presidents and Vice Chancellors
- Stakeholder Conference, forums, and meetings
- Experience Workshops
- Future State process development
- Gather input through surveys and other vehicles
- Institutional Readiness Assessment Plan

NextGen Change Management Training



- Leadership equipped with NextGen Change Management tool kits
- Supervisors trained in NextGen Change Management
- Curriculum development (LMS) for NextGen Change Management training modules

NextGen Change Transition Management



- Local NextGen activity coordination
- Local transition management
- Transition monitoring and reporting feedback
- Issue mitigation and resolution

NextGen Change Management Sustainability



- Long-term Change Management structure
- Revised Change Management strategy for ERP implementation
- NextGen software training approach

Upcoming Milestones

(recap of slide 8)

- June 2018: Current State definitions complete
- July 2018:
 - Conduct Vendor Showcase
 - Review Change Management Plan at Joint Leadership Council and Board Meeting
- July - September 2018: Future State Workshops underway
- October - November 2018: Future State Regional Reviews