



July 2018

NextGen ERP

Board of Trustees Meeting

Topics

- Status Update / Upcoming Milestones
- Vendor Showcase
- Defining Future State
- Change Management Plan



MINNESOTA STATE
NextGen

STATUS UPDATE

PREPARED BY : Melinda Clark

REPORT DATE : 7/23/2018

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**

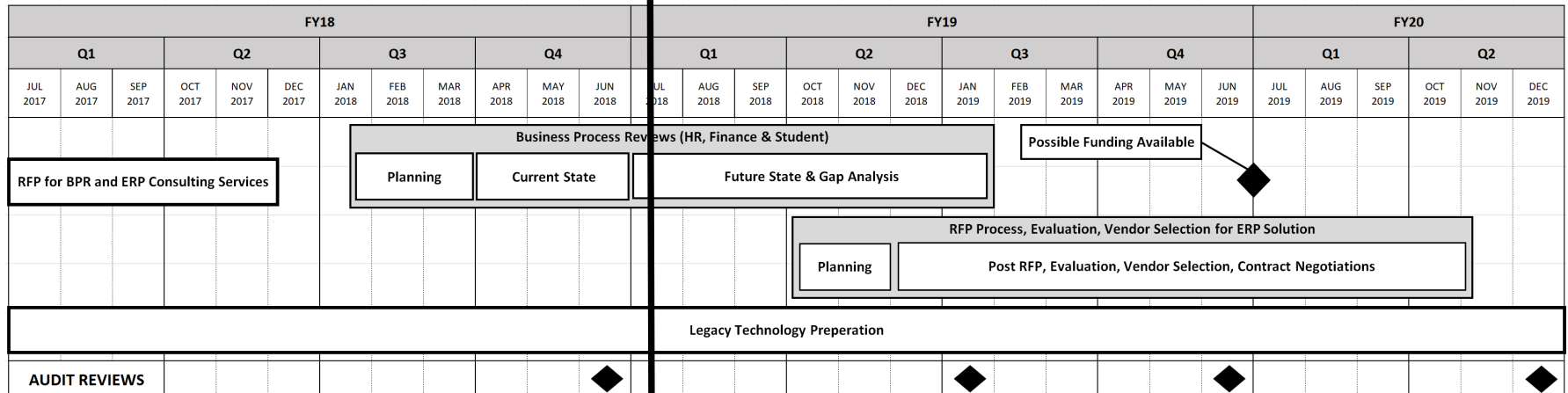
REMAINING BUDGET \$ **2,447,023**

HEALTH STATUS NOTES:

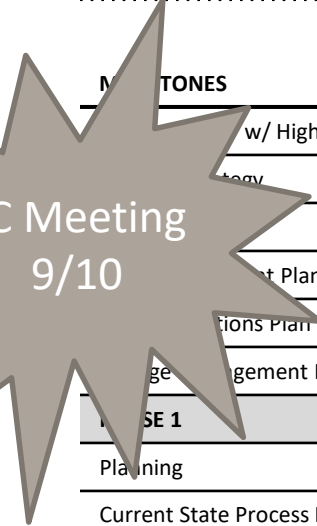
Project remains ON TRACK. Current state business processes and vendor showcases have been completed. Working Teams began future state business process mapping on July 16. Change Management Plan will be review with Leadership Council on July 25.

PHASE 1 TIMELINE

7/23/2018



MILESTONE STATUS



MILESTONES	START DATE	END DATE	LEADERSHIP COUNCIL REVIEW	BOARD OF TRUSTEES REVIEW	STATUS
w/ High-level Timeline for ERP Replacement	7/2015	3/2016	3/2016	3/2016	COMPLETE
Legacy	1/2016	6/2017	6/2017	6/2017	COMPLETE
	9/2017	9/2017		1/2018	COMPLETE
Cost Plan	1/2018	1/2018	--	--	COMPLETE
Options Plan	1/29/18	4/03/18	5/2018	6/2018	COMPLETE
Change Management Plan	1/24/18	7/27/18	7/27/18	--	IN PROGRESS
PHASE 1					
Planning	1/23/18	4/04/18	--	3/2018	COMPLETE
Current State Process Reviews	2/12/18	6/29/18	--	--	COMPLETE
Future State Business Process Mapping	7/16/18	1/18/19	1/2019	1/2019	ON TRACK
Conduct ERP Request for Proposal (Draft, Post, Evaluations)	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 (Selection & Negotiations)	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

July 2018

- IT and Data Management Teams begin drafting current state.
- Student, HR and Finance Teams begin drafting future state business processes.
- Finalize Change Management Plan– Review with Leadership Council.
- Change Management: Identify local Transition Management Teams.
- Begin RFP Planning.

August 2018

- IT and Data Management Teams continue to draft current state.
- Continue RFP Planning.

September 2018

- Student, HR and Finance Teams continue to draft future state business processes.
- Minnesota State IT Community to review/edit current 3rd party integrations.
- Change Management: Conduct local readiness assessment surveys.
- Identify RFP Team

Future State Regional Reviews will be held October / November 2018

Vendor Showcase

The Minnesota State community was invited to view best-of-the-best features from three ERP vendors (Ellucian, Workday and Oracle) in late June / early July.

- 36 viewing parties were held across the state for each Showcase.
- Attendees were shown how modern systems handle every-day student services and administrative business processes--such as mobile access, reporting/analytics, and self-service.
- View vendor showcase recordings on the NextGen Site. Recordings have been accessed 56 times on the NextGen site since published

NOTE! *The showcases were not part of a Request for Proposal, and no vendor discovery was not permitted.*

Defining Future State

Evolve from ISRS into NextGen. The 18 working teams will propose Future State student and administrative processes. Processes will be shared to the Minnesota State community at Future State Regional Review sessions in October.

Regional Review Schedule

10/10-11/14: Online Reviews

10/10: Virtual Q&A

10/16-10/18: East Region On-site Review

10/23-10/25: West Region On-site Review

10/30-11/1: North Region On-site Review

11/6-11/8: South Region On-site Review

11/13: Virtual Q&A

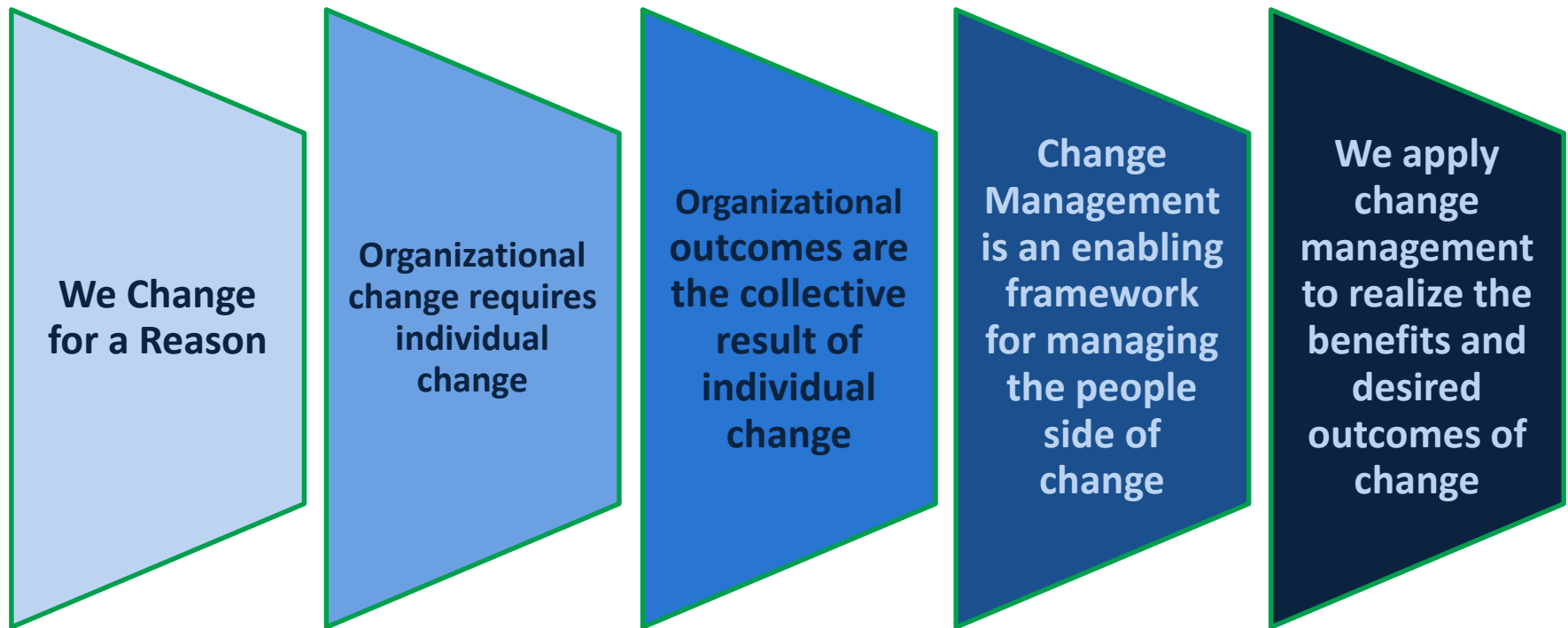


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CHANGE MANAGEMENT STRATEGY

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 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

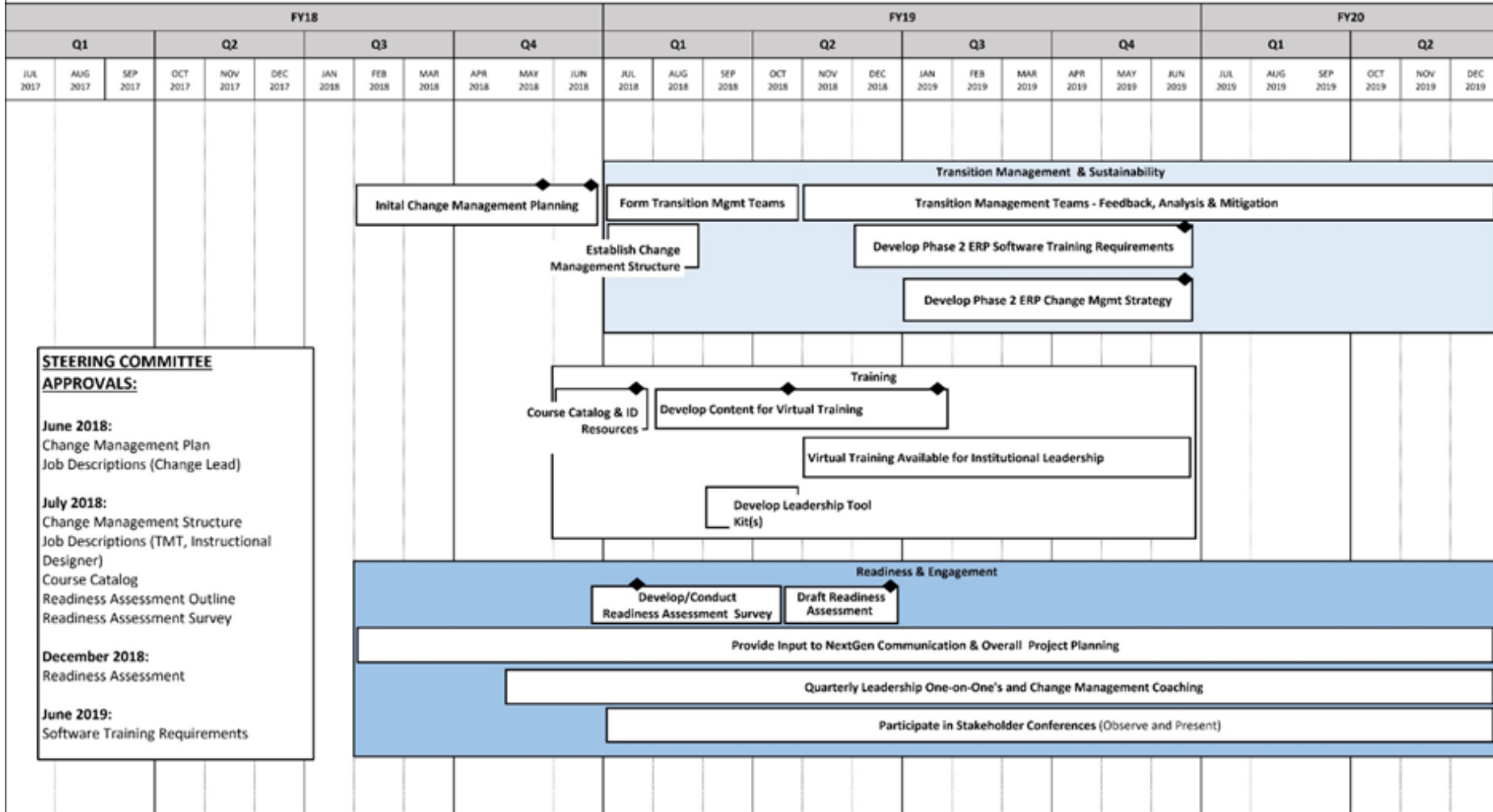


- Local NextGen activity coordination
- Local transition management
- Transition monitoring and reporting feedback
- Issue mitigation and resolution

NextGen Change Management Sustainability



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



STEERING COMMITTEE APPROVALS:

June 2018:
Change Management Plan
Job Descriptions (Change Lead)

July 2018:
Change Management Structure
Job Descriptions (TMT, Instructional Designer)
Course Catalog
Readiness Assessment Outline
Readiness Assessment Survey

December 2018:
Readiness Assessment

June 2019:
Software Training Requirements

President's Role in Change Management

- Sponsor and enable the NextGen Change Management program.
- Name a Transition Management Team.
- Ensure institutional participation in change management training (managers, supervisors, administrators).
- Distribute communications and readiness assessment survey.
- Provide feedback through readiness assessment survey.

NextGen Transition Management



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

Every institution in the Minnesota State system will need to be engaged in a complex set of activities and communications. A Minnesota State Change Management Lead and local "Transition Management Teams" will be established to coordinate activity and provide feedback to the NextGen project.

Milestones

	Start	Finish
Develop Transition Management Team call for nominations	July 2018	July 2018
Steering Team Approval of local NextGen Transition Management Teams	July 2018	July 2018
Form Local NextGen Transition Management Teams	August 2018	September 2018
Regional Transition Management Team Feedback Monitoring, Analysis & Mitigation	September 2018	On-Going

Transition Management Teams

Local Transition Management Teams will consist of 5 to 12 representatives from various areas of the institution impacted by the NextGen project – encourage participation from current members of a NextGen Working Team.

Membership is defined locally and should include:

- Leaders from Finance, Student Services, HR/Payroll, Information Technologies, Data & Analytics, Equity & Inclusion and Communications
- Other representatives the college/university leadership feels will add value to the process, communication channels or acceptance of a new solution

Responsibilities may vary by institution and should include:

- Coordinate Local NextGen activities and preparing the local campus for NextGen
- Actively gather information about NextGen progress
- Monitor the effects the transition is having on people
- Facilitate communications between the institution and the NextGen project
- Participate in online change management training
- Participate in monthly transition management check-in meetings facilitated by NextGen Change Management Leads

NextGen Change Management Training/ Culture Development



- 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 management will equip institutional leaders with the tools needed to help individual stakeholders make the transition from current state to the future NextGen.

Milestones

	Start	Finish
Develop NextGen Change Management Training Curriculum Catalog	July 2018	July 2018
Steering Committee Approval of Training Curriculum Catalog	August 2018	August 2018
Develop On-Line Course Content for Initial NextGen Change Management Training	August 2018	November 2018
Develop Leadership Toolkit(s) for NextGen Change Management	September 2018	November 2018
Publish and track initial NextGen Training for end users & Supervisors/Managers/Administrators (Phase I)	November 2018	February 2019
Develop On-Line Course Content for next level NextGen Change Management Training	November 2018	February 2019
Publish and track next level NextGen Training for Supervisors/Managers/Administrators (Wave 2)	February 2019	May 2019

NextGen Change Management Readiness & Engagement



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

CampusWorks will provide Minnesota State with an Institutional Readiness Assessment Plan that includes an analysis of the organizational capacity for change as well as potential risks and possible mitigation strategies for NextGen. Analysis will be conducted via online survey in Sept / Oct.

Milestones

	Start	Finish
Steering Team Approval of Initial Change Management Strategy & Plan	July 2018	July 2018
Engage in Existing Conferences, Forums and Meetings	July 2018	On-Going
Meetings with Senior Divisional Management	July 2018	August 2018
Develop On-Line Input channel	July 2018	July 2018
Introduce Change Management to the Leadership Council	July 2018	July 2018
Conduct Readiness Assessment Surveys	September 2018	October 2018
Develop Readiness Assessment Document	October 2018	December 2018
Steering Team Approval of Readiness Assessment Document	December 2018	

Note: Assessment will be used as input to the Change Management Plan for Implementation

NextGen Change Management Sustainability



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

To accomplish the needed changes in processes, people, organizations and technology, Minnesota State will provide sustainable resources (such as training and toolkits) to prepare students, faculty, and staff for these changes and position them to be successful in using the future NextGen.

Milestones

	Start	Finish
Steering Team Approval for Additional Change Management Resources	July 2018	July 2018
Analyzing ERP Software Training Structures	December 2018	January 2019
Develop ERP Software Training Approach Requirements	January 2019	January 2019
Develop Change Management Strategy/Plan for Phase 2: ERP Implementation	January 2019	June 2019
Steering Committee Approval of the Change Management Strategy/Plan for ERP Implementation and training	June 2019	June 2019

Note: Dates for implementing training structures will be part of phase II of NextGen

Upcoming Milestones

Recap of slide 6

July / August 2018

- Finalize Change Management Plan. Review with Leadership Council.
- Change Management: Identify local Transition Management Teams.

September 2018

- Minnesota State IT Community to review/edit current 3rd party integrations.
- Change Management: Conduct local readiness assessment surveys.
- Identify RFP Team

****Future State Regional Reviews will be held October / November 2018****



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QUESTIONS?



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APPENDIX

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

Topics Presented To Date

BOT SESSION	TOPICS PRESENTED	DECISIONS MADE
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
June 2018	<ul style="list-style-type: none">• Status Update• Communications Plan• Change Management Strategy	Board supports... <ul style="list-style-type: none">• Communications Plan• Change Management Strategy

NextGen Phase 1 | Structure/Teams

