Next Gen ERP
Project Management & Board Oversight

March 20, 2018
Topics Today

• Project Objective
• Project Design summary
• Review of dashboard template
• Communication plan/ frequency of communication
Overview

- **Project Objective:** Provide an enhanced student experience and “future proof” our technology investment.
- 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.
  - Received $8 million from the legislature to fund Phase 1 – (Business Process Mapping and RFP for Enterprise Resources Planning Tool) FY2018 -2019
  - Additional funding will be requested for Phase 2 – (Implementation) FY2019 -2024
What is the difference between Minnesota State NextGen project and rewrite of a legacy system

<table>
<thead>
<tr>
<th><strong>NextGen project</strong></th>
<th><strong>Typical legacy rewrite project</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase of commercially available software.</td>
<td>Contractor/internal staff hired to rewrite in house/legacy code.</td>
</tr>
<tr>
<td>No customizations allowed – change business processes to match software.</td>
<td>Code is written to accommodate business practices. Emphasis on process standardization varies by project.</td>
</tr>
<tr>
<td>Business readiness and organizational change management is part of the software as a service acquisition process.</td>
<td>Process tends to focus on transferring legacy functionality to new software platform; may not start with effort to rethink how business is done.</td>
</tr>
<tr>
<td>Project governance, stakeholder engagement, board and audit oversite are integral to the project. There are many checkpoints for course correction.</td>
<td>Often seen as an IT project since the focus is on rewriting existing system.</td>
</tr>
<tr>
<td>Software is maintained and hosted by vendor.</td>
<td>Resulting software is “one of a kind” tailored to own environment.</td>
</tr>
<tr>
<td>Project design includes substantial user engagement in product selection and change management.</td>
<td>Project design may or may not include user engagement as code is written.</td>
</tr>
</tbody>
</table>
Project Budget

• Phase 1 – Design phase November 2017 – January 2019 - $8M from 2018 Omnibus bill
  – Business process reviews, ERP development, platform refresh, data integration, project management and communication

• Phase 2 – Implementation phase - $25M /year FY2020- FY2024
  – Implementation of all new functionality, new reporting and data analytics
## Topics Presented

<table>
<thead>
<tr>
<th>BOT SESSION</th>
<th>TOPICS PRESENTED</th>
<th>DECISIONS MADE</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 2014</td>
<td>• Topic introduced</td>
<td></td>
</tr>
</tbody>
</table>
| October 2015 | • Student Experience (overview)  
• Update on listening sessions and business case development | Board supports..  
• moving forward with planning  
• submitting FY2018 biennial legislative request |
| March 2016   | Presentation of NextGen Business Case                          | Board supports..  
• 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    | • 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..  
• moving forward with Phase 1  
• submitting FY2018 supplemental funding request and FY2019 biennial legislative request |
| January 2018 | • Introduction of ERP Steering Committee  
• Introduction of Phase 1 and vendor (CampusWorks)            | Board supports...  
• Project overall design  
• Phase I timeline         |
Phase 1 – Organizational Structure

ERP Steering Committee

ERP Program Manager

Project Management Team

Minneapolis State Project Managers

Business Process PM

Communications Specialist / Coordination Specialist

Change Management

Coordinating Committee

Academic & Student Services

Curriculum & Academic Scheduling

Admissions & Recruitment

Student Success & Advising

Workforce Solutions

Financial Aid

Student Payroll, Taxes

Academic Records

Academic & Student Services

Finance

General Ledger, Chart of Accounts, Cost Allocation, Interfund

Accrual, Auxiliary, Grants

Procurement, Payables, Fixed Assets

Student Payroll, Taxes

Accounts Receivables

Budgeting

Facilities

Public Safety, Campus Security, Env. Compliance

Facilities Planning, Capital Project Design & Construction Management, Space Management

Human Resource

Staffing (Recruiting, Hiring, Onboarding)

Personnel Actions (Position Management, Org Charts, Off-boarding)

Payroll (Time and Leave)

Benefits

Faculty Credentialing & Workload

Minnesota State Project Managers

Business Process PM

Communications Specialist / Coordination Specialist

Change Management

Coordinating Committee

Academic & Student Services

Financial Aid

Academic Records

Curriculum & Academic Scheduling

Admissions & Recruitment

Student Success & Advising

Workforce Solutions

ERP Steering Committee

ERP Program Manager

Project Management Team

Campus Constituents

Reporting & Analytics, IR, and Data Warehouse

Information Technology
HEALTH STATUS NOTES:
Change Request #1 was approved by Steering Committee on 3/05 changing the SCHEDULE status from OFF TRACK to AT RISK.
- During planning, the Steering Committee requested a 9 week extension to PHASE 1 to provide the time required for forming working teams and completing future state business processes. Schedule status for current state is AT RISK due to no slack in schedule.
# MILESTONE STATUS

<table>
<thead>
<tr>
<th>MILESTONES</th>
<th>START DATE</th>
<th>END DATE</th>
<th>LEADERSHIP COUNCIL REVIEW</th>
<th>BOARD OF TRUSTEES REVIEW</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Charter</td>
<td>9/2017</td>
<td>9/2017</td>
<td>--</td>
<td>1/2018</td>
<td>COMPLETE</td>
</tr>
<tr>
<td>Risk Management Plan</td>
<td>1/2018</td>
<td>1/2018</td>
<td>--</td>
<td>--</td>
<td>COMPLETE</td>
</tr>
<tr>
<td>Communications Plan</td>
<td>1/29/18</td>
<td>4/03/18</td>
<td>5/2018</td>
<td>6/2018</td>
<td>ON TRACK</td>
</tr>
<tr>
<td>Change Management Plan</td>
<td>1/24/18</td>
<td>4/03/18</td>
<td>5/2018</td>
<td>6/2018</td>
<td>ON TRACK</td>
</tr>
</tbody>
</table>

## PHASE 1

<table>
<thead>
<tr>
<th>Activity</th>
<th>START DATE</th>
<th>END DATE</th>
<th>LEADERSHIP COUNCIL REVIEW</th>
<th>BOARD OF TRUSTEES REVIEW</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning</td>
<td>1/23/18</td>
<td>4/04/18</td>
<td>--</td>
<td>3/2018</td>
<td>ON TRACK</td>
</tr>
<tr>
<td>Current State Process Reviews</td>
<td>2/12/18</td>
<td>6/29/18</td>
<td>--</td>
<td>--</td>
<td>AT RISK</td>
</tr>
<tr>
<td>Future State Business Process Mapping</td>
<td>7/16/18</td>
<td>1/18/19</td>
<td>1/2019</td>
<td>1/2019</td>
<td>Not Started</td>
</tr>
<tr>
<td>Conduct ERP Request for Proposal</td>
<td>10/15/18</td>
<td>7/26/2019</td>
<td>--</td>
<td>--</td>
<td>Not Started</td>
</tr>
<tr>
<td>Legacy Technology Updates</td>
<td>7/2016</td>
<td>12/2019</td>
<td>--</td>
<td>--</td>
<td>ON TRACK</td>
</tr>
</tbody>
</table>

## PHASE 2

<table>
<thead>
<tr>
<th>Activity</th>
<th>START DATE</th>
<th>END DATE</th>
<th>LEADERSHIP COUNCIL REVIEW</th>
<th>BOARD OF TRUSTEES REVIEW</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance Planning &amp; Implementation</td>
<td>11/2019*</td>
<td>7/2021*</td>
<td>TBD</td>
<td>TBD</td>
<td>Not Started</td>
</tr>
<tr>
<td>HR Planning &amp; Implementation</td>
<td>1/2020*</td>
<td>4/2021*</td>
<td>TBD</td>
<td>TBD</td>
<td>Not Started</td>
</tr>
<tr>
<td>Student Planning &amp; Implementation</td>
<td>8/2020*</td>
<td>11/2023*</td>
<td>TBD</td>
<td>TBD</td>
<td>Not Started</td>
</tr>
</tbody>
</table>

*Tentative – dates subject to change during implementation planning with ERP vendor.
**Board, Leadership Council, Faculty, Staff and Student Communications**

<table>
<thead>
<tr>
<th>COMMUNICATION</th>
<th>FORUM</th>
<th>FREQUENCY</th>
<th>DATES</th>
</tr>
</thead>
<tbody>
<tr>
<td>BOT Status Updates (includes Project Risk Reviews from Internal Audit)</td>
<td>Email</td>
<td>Monthly</td>
<td>2018 - 2024</td>
</tr>
<tr>
<td>BOT Status Updates</td>
<td>Board of Trustees Meeting</td>
<td>Quarterly (or as major deliverables are accomplished)</td>
<td>January, March, June and September (thru 2024)</td>
</tr>
<tr>
<td>Leadership Status Update</td>
<td>Leadership Council Meetings</td>
<td>Monthly</td>
<td>2018 – 2024</td>
</tr>
<tr>
<td>Minnesota State Update (faculty, staff and student)</td>
<td>Email</td>
<td>Quarterly</td>
<td>January, March, June, September, December (thru 2024)</td>
</tr>
</tbody>
</table>

**Additional stakeholder communications will be outlined within the project communications plan**
Next Milestones....

• June 2018: Current State definitions complete
• September 2018: Future State Workshops underway
• January 2019: Future State definitions complete