NextGen ERP Update

Imagine the Possibilities

MINNESOTA STATE
Topics

- Project and Risk Review
- Quarterly Project Update
- RFP Process
  - Development
  - Scoring Proposals
  - Evaluate Demos
  - Negotiations
  - Vendor Selection
  - Wrap up
NextGen PRR | Background

- Approved as part of the annual Audit Plan

- Provides ongoing and objective assessments of NextGen for two purposes:
  1. Providing assurance to the Board on project risk management
  2. Providing assurance and advisory guidance to the project Steering Committee on project risk leading practices
NextGen PRR | Categories of Risk Areas Reviewed

**Project governance and management**
Leadership, oversight, guidance, and decision-making over the project

**Organizational change management**
Planning, communications, training, support related to the successful transition, and adoption

**Stakeholder involvement**
Participation of key business process and control owners in definition and validation of requirements

**Project execution**
Evidence of all implementation activities, including operational, technical, and compliance controls
NextGen PRR | Leading Practices for Board’s Role

**Project governance and management**
- Approve upcoming key milestones as recommended by the Steering Committee
- Monitor project risks (via regular project team updates and PRRs)

**Organizational change management**
- Promote and support the project goals
- Direct any individual wanting to provide feedback to the project team

**Stakeholder involvement**
- Promote and support the participation of key stakeholder constituencies in the project

**Project execution**
- No board role in project execution
Current stage of NextGen Phase 1 is selecting and negotiating with the vendor(s) that were recommended by the project team following proposal evaluation; at this time, the overall risk of not achieving success, not meeting the revised timeline, and not staying within budget for Phase 1 is still low.

Note: Conclusion is based on the information available to Internal Audit and analyzed as of January 7, 2020.
Internal Audit noted ongoing opportunities to enhance certain project activities in one of the four PRR process areas.

- Significant Project Changes Required: Items the organization must change immediately since the project is failing.
- Project Changes Required: Items the organization must change immediately due to active risk issues.
- Project Controls Recommended: Items the project team should implement in the short term to mitigate known risks.
- Project Improvements Recommended: Items the project team should consider implementing to mitigate potential risks.
- No Changes Recommended: No items identified for project team to address at the time of the checkpoint.

= Recommendation identified was addressed by the project team during the checkpoint.
NextGen PRR | Checkpoint 5 – Strengths

- Proposal evaluation activities, including:
  - scoring rubric development
  - written proposal scoring
  - written proposal scoring debrief working sessions
  - vendor demo scenario development
  - vendor demo scoring
  - vendor demo scoring debrief working sessions
  - overall vendor scoring and recommendation

were thoroughly and thoughtfully executed with appropriate representation from all stakeholder constituents
• Project team solicited and evaluated proposals, and checked references, for owner’s representative to assist project team during system implementation; contract approval is on the Finance Committee’s agenda for January 2020

• Engaged external legal counsel to assist with vendor negotiations and contracting
NextGen PRR | Checkpoint 5 – Review Activities

• Reviewed, with Baker Tilly’s enterprise system implementation professionals, proposal scoring methodology and approach and validated that it was adequate and appropriate for the project.

• Observed proposal debrief sessions, where stakeholders discussed their feedback on specific sections of the written proposals, and provided recommendations to the project team for items to address during vendor demonstration sessions.

• Conducted periodic check-in meetings with the NextGen program manager to stay engaged and up-to-date with project activities.
Participated in, as an ex-officio steering committee member, each of the vendor finalist’s first demonstration session on the overview of their respective solutions

Participated in the proposal review process for the owner’s representative solicitation

Observed final vendor demonstration debrief session, where stakeholders discussed their feedback on vendor demonstrations

Provided on-going feedback to project leadership

Validated results with project leadership
• Internal Audit identified one new recommendation during this checkpoint, which the project team has already addressed

• One prior recommendation remains open, the project team will address during future implementation phases since the recommendation relates to system configuration
### NextGen PRR | Checkpoint 5 – New Recommendation

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Impact</th>
<th>Status</th>
</tr>
</thead>
</table>
| **PE-5-01:** Vendor demonstrations should include specific topics and scenarios to address certain request for proposal (RFP) requirements. This will increase the completeness and effectiveness of the vendor demonstrations to allow stakeholders to adequately evaluate how well the system and vendor meet the detailed requirements of Minnesota State.  

**Note:** The specific topics and scenarios identified by Internal Audit were provided to the project team under separate cover following the written proposal scoring debrief sessions.  

*Project Improvement Recommended* | Without specific items documented for vendors to demonstrate, stakeholders may not have significant information about system and vendor capabilities to meet requirements, potentially resulting in an inadequate vendor selection.  

*[CMMI for Acquisition, V1.3; Section 22]* | **Resolved** - The project team used our specific feedback and recommendations to improve the vendor demonstration scenario scripts and timing prior to finalization. Then the project team executed the four sets of separate vendor demonstrations to thoroughly evaluate all of the vendors. The results of the vendor demonstrations were incorporated into the overall proposal scoring and used to adequately complete the vendor evaluation process. |
### Recommendation

**PE-2-01:** Future state business process documentation should identify (i.e., mark with a symbol on the process flow documents) preliminary or likely internal control activities (e.g., approvals, reviews, reconciliations). This initial effort should attempt to identify the most important system/automated controls for each business process.

The project team can leverage Internal Audit’s initial identification of control activities in the current state documentation as a starting point for the identification of future state controls (see annotated current state business process documentation provided under separate cover).

*Project Improvement Recommended*

### Impact

Internal controls, both automated and manual, are critical to effective and compliant business processes that are implemented with the new system. Identifying those control requirements and including them in the request for proposal is important for evaluating vendor proposals and implementing the control activities as part of the system implementation project, instead of attempting to add controls after the fact.

*PMI PMBOK, 5th Edition; Section 1*

*CMMI for Services, V1.3; Section 11*

### Status

**Partially Resolved** - Future state documentation does include control activities, such as approvals, reviews, decision points, however these controls are not yet explicitly identified in the documentation. The specific controls will be identified and confirmed during implementation phases, as the controls will be dependent on system functionality.
Internal Audit will continually track all checkpoint recommendations and report on the status of each during every checkpoint report. The summary of the prior recommendations is reflected in the table below. The specific details of the prior recommendations are included on the following pages.

<table>
<thead>
<tr>
<th>PRR Process Area</th>
<th>Recommendations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Resolved</td>
</tr>
<tr>
<td>Project governance and management [PGM]</td>
<td>6</td>
</tr>
<tr>
<td>Project Execution [PE]</td>
<td>2</td>
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<tr>
<td>Organizational change management [OCM]</td>
<td>6</td>
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<tr>
<td>Stakeholder involvement [SI]</td>
<td>3</td>
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<tr>
<td><strong>Totals</strong></td>
<td>17</td>
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</table>

*: This recommendation has been partially resolved, but cannot be fully resolved until the system implementation phase.
NextGen PRR | Next Steps

- Continue serving as ex-officio member of Steering Committee

- Execute and Report on Checkpoint 6 activities in 2020, exact timing still to be determined based on the results of the proposal evaluation and start of NextGen Phase 2
Quarterly Project Update
OVERALL HEALTH STATUS

<table>
<thead>
<tr>
<th>HEALTH STATUS NOTES:</th>
<th>Overall status remains ON TRACK with no risks or issues requiring assistance.</th>
</tr>
</thead>
</table>

The NextGen RFP evaluation teams completed vendor demonstrations with four vendors: **Campus Management**, **Ellucian**, **Oracle**, and **Workday** (in alphabetical order). Evaluation teams will debrief on findings through January. Next steps are to enter negotiations with one or more vendor(s). In parallel, another RFP evaluation is in process to select a Third Party Owners Representative who will advise Minnesota State throughout implementation.

Change Management efforts continue with the development of Wave 1 toolkits for increasing project awareness and assisting leaders in guiding their teams through change - two of the five modules to be published in January.

PHASE 1 TIMELINE

**Phase 1 Budget (FY18-FY20)**
- Legislative Funds: $16,000,000.00
- Campus/System Office Contributions: $20,500,000.00
- Total Funding Sources: $36,500,000.00
- Spent to Date: $5,916,784.04
- Current Obligations: $2,161,045.82
- Remaining Budget: $28,422,170.14

**PHASE 1 TIMELINE**

<table>
<thead>
<tr>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
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<th>Q2</th>
<th>Q3</th>
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<tbody>
<tr>
<td>Business Process Reviews (HR, Finance &amp; Student)</td>
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<td>Planning</td>
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<td>RFP Process, Evaluation, Vendor Selection for ERP Solution</td>
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<td>RFP Planning &amp; Draft Requirements</td>
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<td>Conduct Final Reviews</td>
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<tr>
<td>Post RFP, Evaluation, Vendor Selection, Contract Negotiations</td>
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</table>

**Legacy Technology Preparation**
## 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>
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<td>Project Charter</td>
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<td>Risk Management Plan</td>
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<tr>
<td>Communications Plan</td>
<td>1/29/18</td>
<td>4/03/18</td>
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<td>Change Management Plan</td>
<td>1/24/18</td>
<td>7/27/18</td>
<td>9/10/18</td>
<td>--</td>
<td>COMPLETE</td>
</tr>
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</table>

**PHASE 1**

| Planning                                                                 |            |          |                           | 3/2018                   | COMPLETE   |
| Current State Process Reviews                                            | 1/23/18    | 4/04/18  | --                        | --                      | COMPLETE   |
| Future State Business Process Mapping                                    | 2/12/18    | 6/29/18  | --                        | --                      | COMPLETE   |
| Conduct ERP Request for Proposal (Draft, Post, Evaluation)               | 7/16/18    | 1/18/19  | 1/2019                    | 1/2019                   | ON TRACK   |
| Finalize Phase 2 Funding Strategy                                        | 7/16/18    | 1/2020   | --                        | --                      | COMPLETE   |
| Legacy Technology Updates                                                | 7/2016     | 3/2020   | --                        | --                      | COMPLETE   |

**PHASE 2**

| Finance Planning & Implementation                                        | 4/2020*    | 9/2022*  | TBD                       | TBD                     | Not Started |
| HR Planning & Implementation                                             | 4/2021*    | 12/2022* | TBD                       | TBD                     | Not Started |
| Student Planning & Implementation                                        | 4/2022*    | 8/2024*  | TBD                       | TBD                     | Not Started |

*Tentative – dates subject to change during implementation planning with ERP vendor.*
Summary of Activities

**ACCOMPLISHMENTS**
- BPR: Conducted Vendor Showcases
- BPR: Student, HR, and Finance Teams finalized current state business processes
- BPR: Student, HR, and Finance Teams began mapping future state
- BPR: Conducted Data Management Team and IT Team Kickoff
- BPR: Data Management and IT Teams began mapping current & future state
- BPR: Student, HR, and Finance Teams mapped future state
- BPR: Data Management and IT Teams mapped current & future state
- BPR: Conducted Data Management Tech Talk with Minnesota State Community
- BPR: Conducted IT Tech Talks with Minnesota State Community to identify current & future state 3rd party integration needs
- BPR: Conducted Future State Regional Reviews
- BPR: Finalized Future State Processes (all teams)
- RFP: Began ERP RFP Planning
- RFP: Finalized ERP RFP Timeline
- RFP: Identified ERP RFP Team
- RFP: RFP Team Kickoff
- RFP: 3rd party review of RFP requirements
- RFP: Completed final reviews of ERP RFP requirements
- RFP: Identified funding strategy
- RFP: Post ERP RFP
- RFP: ERP RFP published for vendor responses
- RFP: Vendor proposals received
- RFP: RFP Teams scored proposals

**ACCOMPLISHMENTS – continued...**
- CM: Finalized Change Management Plan
- CM: Launched Readiness Assessment
- CM: Conducted Transition Management Team Kickoff
- CM: Conducted Readiness Assessment
- CM: Identified Transition Management Teams
- CM: Filled Minnesota State Change Management Lead Position
- CM: Published Organizational Readiness Assessment
- CM: Identified timeline and resource plans for Wave 1 (Awareness) materials. Conducted planning meeting.
- CM: Identified timeline and resource plans for Wave 1 (Awareness) materials. Conducted planning meeting.
- CM: Finalized a high-level change management timeline for training and communications throughout Phase 2 (Implementation)
- CM: Filmed NextGen Videos
- CM: Planned content for Wave 1 (Awareness) materials
- CM: Published NextGen Video

**UPCOMING ACTIVITIES** (through March 2020)
- RFP: Conduct vendor demonstrations and interviews (November-January)
- RFP: Selection and negotiations (January – March)
- CM: Develop Wave 1 (Awareness) Materials (September – December)
- CM: Establish Phase 2 Change Management Strategy (February)
- CM: Deploy Wave 1 (Awareness) Materials (January – March)
NextGen RFP Process
RFP Process 2018-2020

PHASE 1 COMPLETED!

Vendor Selection

1. Develop RFP
2. Score Proposals
3. Evaluate Demos
4. Vendor Negotiations
RFP Process | Develop the RFP

- November 2018 – June 2019
- RFP drafted by **57 individuals** from across Minnesota State with assistance from Campus Works; reviewed by Internal Audit and external consulting firm BerryDunn
- RFP includes 4,000 requirements
RFP Process | Score Proposals

- September 2019 – October 2019
- **4 Vendors** selected to move forward
  - Campus Management
  - Ellucian
  - Oracle
  - Workday
RFP Process | Evaluate Demos

- November 2019 – January 2020
- Vendors followed a script
  - Each area had an overview
  - Focused on critical requirements
- Evaluation Process
  - Demos lasted 3 days/each area per vendor (HR, Fin, IT, Student)
  - Evaluators completed a survey
  - The people doing the evaluating were the people who will use the tool
- Faculty and Student Experience Sessions published for community engagement in December and January
Demo Scripts - Table of Contents

- General Overview (14 questions / scenarios)
- HR / Payroll (78)
- Finance (includes Student Payroll, Public Safety, Facilities) (90)
- General Student Overview (8)
- Curriculum & Scheduling (32)
- Recruitment & Admissions (46)
- Financial Aid (40)
- Communications & Event Management (19)
- Student Success & Advising (63)
- Academic Records & Registration (76)
- Workforce (18, additional scenarios incorporated within topics above)
- Data Management (38)
- Technology & Security (83)
- Implementation Services (52)

Student Success/Course Placement/Advising

Overall instruction: It is assumed that the functionality to be presented from the proposed solution(s) in this area will function identically for all Minnesota State constituencies: applicants, students, employees, faculty, etc. If not, the vendor must also demonstrate how it will work for different constituencies. Further, if multiple solutions or third parties are utilized for different functionality or different constituents, that solution must be announced as part of the demonstration/presentation.

1. Confirm that the proposed solution(s) will be a single production instance/single database supporting the multiple separately accredited Minnesota State institutions, including the System Office. As vendors work through the scenarios below, in addition to where it is specifically asked, show as much cross-institutional interaction functionality, including the System Office engagement, as possible.

2. Present a brief, high-level overview of the solution(s) that comprise supporting the Minnesota State Student Success domain, its components, as needed, to ground the evaluation team prior to beginning the scenarios.

Throughout the student lifecycle, students must interact with various departments within Student Services and with departments outside of Student Services, including, but not limited to: Judicial Affairs, Advising, Counseling, Library Services, Health and Wellness, Athletics, Veterans, Public Safety, Dining Services, Facilities, club and organization management services, and student leadership. It is imperative that pertinent student information can be shared between departments while maintaining FERPA-required confidentiality and protecting non-directory information.

Student Support

Student success is more likely to be realized when students feel personally significant, when they feel welcomed, recognized as individuals, and that they matter to the institution. Below are the various programs that provide services for students, and the requirements to maintain cohesive service. Note in the following paragraphs “Service Providers” refers to the student service offices and faculty and staff who need appropriate access to the information.

1. Information regarding student participation should be shared across all service providers to maintain cohesive, seamless service to students. Demonstrate how the proposed solution will assist with sharing information with appropriate stakeholders in and across the institutional Service Providers, while maintaining appropriate security.

2. Minnesota State students can schedule appointments with several areas, including Advising, Accessibility Services, Veterans Affairs, Multicultural and Identity Based Student Services, TRIO, and International Student Services, and many other departments in the Student Success domain, and requires multi-faceted calendar scheduling. Demonstrate how the proposed solution enables students and prospective students to schedule appointments with their advisor, counselor, and/or health and wellness staff via a web portal or mobile device.
RFP Process | Vendor Negotiations


- January 2020 – Spring 2020
- Negotiations will be held with one or more vendor(s) with the assistance of external counsel Dorsey & Whitney and a Third-Party Owner’s Representative
- **Important Note:** Until negotiations have concluded, the identity of vendor(s) will not be announced
- Selected vendor will be announced at a board meeting in the spring of 2020
RFP Process | Decision-Making

• In the process of reaching a decision about which vendor(s) to enter into negotiations with, the Steering Committee took into account many variables, including cost, and carefully reviewed all feedback from the RFP evaluation team and components of the RFP responses/demonstrations.
  ✓ Debriefs of the RFP Team after the vendor demonstrations
  ✓ Feedback from students, faculty, and staff

• Reference checks were done.

• The entire process was an exceedingly rich change management opportunity, because through this intense and time-consuming process, our community came away with a much deeper understanding of what ERPs can offer and how organizations select one.

• Those who took part in the RFP process are now more invested in NextGen and well prepared to be change champions at the institutional level.
When a technology solution is selected that will be the official end of Phase 1

Steps after RFP process concludes and Vendor selected:

- Vendor announcement highlighting features and functionality
- Phase 2 Implementation begins
  - Begin planning with selected vendor
  - Identify implementation planning teams
NextGen | From Phase 1 to Phase 2

• Phase 1: a 4-year journey
  ✓ Key priority of the Charting the Future Technology Team
  ✓ 52 listening sessions with students, faculty, and staff
  ✓ Business case made the need for a NextGen solution clear
  ✓ Vendor showcases
  ✓ Regional reviews on current and future state
  ✓ RFP process

• Countless people shared their time, effort, and expertise to get us to this point: the end of Phase 1

• We owe a great debt of gratitude to them all!

To our evaluation teams: we got here because of your hard work and your evaluations!
Thank you!
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, recruitment, and administrative processes to support student success

- **Phase 1** – Design phase (2017 – 2019)
  Business process reviews, RFP development, data integration, project management, communications and ISRS platform refresh

- **Phase 2** – Implementation phase (2020 – 2025)
  Implementation of all new functionality, new reporting and data analytics
# Topics Presented To Date

<table>
<thead>
<tr>
<th>BOT SESSION</th>
<th>TOPICS PRESENTED</th>
<th>DECISIONS MADE</th>
</tr>
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<tbody>
<tr>
<td>June 2014</td>
<td>• Topic introduced</td>
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<tr>
<td>October 2015</td>
<td>• Student Experience (overview)</td>
<td></td>
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<tr>
<td></td>
<td>• Update on listening sessions and business case development</td>
<td></td>
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<tr>
<td>March 2016</td>
<td>Presentation of NextGen Business Case</td>
<td>Board supports..</td>
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<td></td>
<td></td>
<td>• Moving forward with planning</td>
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<td></td>
<td></td>
<td>• Submiting FY2018 biennial legislative request</td>
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<tr>
<td>October 2016</td>
<td>Presented estimates timeline and budget</td>
<td>NextGen updates to be presented to Board biannually - in January and June</td>
</tr>
<tr>
<td>June 2017</td>
<td>• Received $8M from FY2018 legislative request - enough for team to kickoff Phase 1 (business process reviews, RFP, legacy technology preparation)</td>
<td>Board supports...</td>
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<tr>
<td></td>
<td>• <strong>RISK!</strong> Failure to provide sufficient funding to enter into long term contracts for Phase 2 (implementation) will add significant and critical delays to the project.</td>
<td>• Moving forward with Phase 1</td>
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<td>• Submiting FY2018 supplemental funding request and FY2019 biennial legislative request</td>
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<tr>
<td>January 2018</td>
<td>• Introduction of ERP Steering Committee</td>
<td>Board supports...</td>
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<td></td>
<td>• Introduction of Phase 1 and vendor (CampusWorks)</td>
<td>• Project overall design</td>
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<td>• Phase I timeline</td>
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## Topics Presented To Date

<table>
<thead>
<tr>
<th>BOT SESSION</th>
<th>TOPICS PRESENTED</th>
<th>DECISIONS MADE</th>
</tr>
</thead>
</table>
| March 2018      | • Project organization structure  
                    • Reviewed program dashboard template  
                    • Communication Plan for BOT and Leadership Council Updates | Board supports...  
                    • Revised project team structure  
                    • Reporting format  
                    • Update cadence for BOT and LC |
| June 2018       | • Communications Plan  
                    • Change Management Strategy | Board supports...  
                    • Communication vehicles and cycles  
                    • Change Management Strategy and looks forward to seeing the Change Management Plan during the September Board Meeting. |
| September 2018  | • Revised project timeline  
                    • Change Management Plan | Board supports...  
                    • Tactical adjustments made for the good of the project  
                    • Change Management role of the Board of Trustees |
| October 2018    | • TSM Lessons Learned  
                    • Critical Success Factors | n/a – informational presentation showing the project’s commitment towards continuous improvement (learning from prior projects). |
| January 2019    | • Current & Future State Business Processes  
                    • RFP Process: Teams & Timeline  
                    • Change Management Update  
                    • Implementation Timeline | n/a – informational presentation |

3
## NextGen vs. Legacy Rewrite Project

<table>
<thead>
<tr>
<th>NextGen Project</th>
<th>Typical Legacy Rewrite Project</th>
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<tbody>
<tr>
<td>Purchase of commercially available software.</td>
<td>Contractor/internal staff hired to rewrite in house/legacy code.</td>
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<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>
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<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>
NOTE! All implementation dates are TENTATIVE. Dates are subject to change during implementation planning with ERP vendor.
Recap of Upcoming Activities

February 2020
RFP: Begin negotiations
CM: Establish Phase 2 Change Management Strategy
CM: Deploy Wave 1 Change Management Materials

Spring 2020
RFP: Complete negotiations
RFP: Seek board approval to enter into contract with selected ERP vendor

Next BOT Update

Spring 2020