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

<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                                                                                                                                                                                          |
| 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                                                                                                                                                                         |
STATUS UPDATE
OVERALL HEALTH STATUS

<table>
<thead>
<tr>
<th>OVERALL</th>
<th>SCOPE</th>
<th>SCHEDULE</th>
<th>BUDGET</th>
<th>RESOURCES</th>
</tr>
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<tbody>
<tr>
<td>ON TRACK</td>
<td>ON TRACK</td>
<td>ON TRACK</td>
<td>ON TRACK</td>
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</table>

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

<table>
<thead>
<tr>
<th>Phase 1 Budget (FY18-FY19)</th>
<th>$ 8,000,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spent to Date</td>
<td>392,231</td>
</tr>
<tr>
<td>Current Obligations</td>
<td>5,160,746</td>
</tr>
<tr>
<td>REMAINING BUDGET</td>
<td>$ 2,447,023</td>
</tr>
</tbody>
</table>

RFP for BPR and ERP Consulting Services

Business Process Reviews (HR, Finance & Student)  Possible Funding Available


Legacy Technology Preparation

AUDIT REVIEWS ✶ ✶ ✶ ✶
### 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>7/27/18</td>
<td>7/27/18</td>
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<td>AT RISK</td>
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#### PHASE 1

<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>Planning</td>
<td>1/23/18</td>
<td>4/04/18</td>
<td>--</td>
<td>3/2018</td>
<td>COMPLETE</td>
</tr>
<tr>
<td>Current State Process Reviews</td>
<td>2/12/18</td>
<td>6/29/18</td>
<td>--</td>
<td>--</td>
<td>ON TRACK</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>
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<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>
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</table>

#### PHASE 2

<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>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.
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)

**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
COMMUNICATIONS PLAN
Communications Plan

Communication Review and Distribution Process

Create → Final Review → Leadership & Stakeholder Distribution → Local Distribution

- Communications Lead
- ERP Steering Committee
- Steering Committee Co-Chair
- Presidents
  - Sr. VC Student
  - VC Finance
  - VC HR
  - VC IT
  - Program Manager
  - CDO
  - Workforce Sol. Dir.
  - Bargaining Units
  - Student Assoc.
- Students
- Faculty
- Staff

Input / Review from:
- Program Mgr.
- Change Mgmt.
- Marketing (for branding and format)
- Coordinating Committee (as needed)
## Communications Plan

<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</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>
<tr>
<td></td>
<td></td>
<td></td>
<td><em>Volume 1 sent June 7</em></td>
</tr>
<tr>
<td>Project Artifacts</td>
<td>Phase 1 Overview / Infographic (pdf) Phase 1 Timeline (pdf)</td>
<td>Once (updated as needed)</td>
<td>May, 2018</td>
</tr>
</tbody>
</table>
## Communications Plan

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

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.

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

Announcements

<table>
<thead>
<tr>
<th>Title</th>
<th>Created</th>
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</thead>
<tbody>
<tr>
<td>UpNext Quarterly Newsletter: Volume 1, May 2018</td>
<td>Yesterday</td>
</tr>
<tr>
<td>Current State Regional Reviews</td>
<td>May 1</td>
</tr>
<tr>
<td>NextGen Phase 1 Kickoff</td>
<td>April 10</td>
</tr>
<tr>
<td>NextGen Update from Interim Chancellor Malhotra</td>
<td>March 2</td>
</tr>
</tbody>
</table>

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.

Student Login: YourStarID@go.minnstate.edu and StarID password
Faculty and Staff Login: YourStarID@minnstate.edu and StarID password
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)

- We Change for a Reason
- Organizational change requires individual change
- Organizational outcomes are the collective result of individual change
- Change Management is an enabling framework for managing the people side of change
- We apply change management to realize the benefits and desired outcomes of change

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.”

Change & Transition

Time

The New Beginning
- Hope
- Optimism
- Clarity
- Purpose

The Neutral Zone
- Curiosity
- Uncertainty
- Highs / Lows

Ending, Losing, Letting go
- Denial
- Anxiety
- Shock

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