NextGen ERP
Board of Trustees Meeting
Topics

• Status Update / Upcoming Milestones
• Vendor Showcase
• Defining Future State
• Change Management Plan
STATUS UPDATE
OVERALL HEALTH STATUS

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

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

<table>
<thead>
<tr>
<th>FY18</th>
<th>7/23/2018</th>
<th>FY19</th>
<th>FY20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>JUL 2017</td>
<td>Q1</td>
<td>JUL 2019</td>
</tr>
<tr>
<td>Q2</td>
<td>AUG 2017</td>
<td>Q2</td>
<td>AUG 2019</td>
</tr>
<tr>
<td>Q3</td>
<td>SEP 2017</td>
<td>Q3</td>
<td>SEP 2019</td>
</tr>
<tr>
<td>Q4</td>
<td>OCT 2017</td>
<td>Q4</td>
<td>OCT 2019</td>
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</tbody>
</table>

Business Process Reviews (HR, Finance & Student)

Possible Funding Available

RFP Process, Evaluation, Vendor Selection for ERP Solution

Planning

Post RFP, Evaluation, Vendor Selection, Contract Negotiations

Legacy Technology Preparation

AUDIT REVIEWS

PREPARED BY Melinda Clark
REPORT DATE 7/23/2018

Phase 1 Budget (FY18-FY19) $ 8,000,000
Spent to Date 392,231
Current Obligations 5,160,746
REMAINING BUDGET $ 2,447,023
<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>
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<tbody>
<tr>
<td>Project Charter</td>
<td>9/2017</td>
<td>9/2017</td>
<td>1/2018</td>
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<td>COMPLETE</td>
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<tr>
<td>Risk Management Plan</td>
<td>1/2018</td>
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<td>COMPLETE</td>
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<tr>
<td>Communications Plan</td>
<td>1/29/18</td>
<td>4/03/18</td>
<td>5/2018</td>
<td>6/2018</td>
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<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>IN PROGRESS</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>
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<tbody>
<tr>
<td>Planning</td>
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<td>4/04/18</td>
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<td>3/2018</td>
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<tr>
<td>Current State Process Reviews</td>
<td>2/12/18</td>
<td>6/29/18</td>
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<td>COMPLETE</td>
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<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>ON TRACK</td>
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<tr>
<td>Conduct ERP Request for Proposal (Draft, Post, Evaluations)</td>
<td>10/15/18</td>
<td>7/26/19</td>
<td>--</td>
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<td>Not Started</td>
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<tr>
<td>Vendor Selection (Selection &amp; Negotiations)</td>
<td>7/29/2019</td>
<td>10/25/19</td>
<td>7/2019</td>
<td>7/2019</td>
<td>Not Started</td>
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<tr>
<td>Legacy Technology Updates</td>
<td>7/2016</td>
<td>12/2019</td>
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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>
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<td>TBD</td>
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<td>HR Planning &amp; Implementation</td>
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<td>4/2021*</td>
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<tr>
<td>Student Planning &amp; Implementation</td>
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<td>11/2023*</td>
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<td>TBD</td>
<td>Not Started</td>
</tr>
</tbody>
</table>

*Tentative – dates subject to change during implementation planning with ERP vendor.
Upcoming Milestones

July 2018
• IT and Data Management Teams begin drafting current state.
• Student, HR and Finance Teams begin drafting future state business processes.
• 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
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:

1. We Change for a Reason
2. Organizational change requires individual change
3. Organizational outcomes are the collective result of individual change
4. Change Management is an enabling framework for managing the people side of change
5. We apply change management to realize the benefits and desired outcomes of change
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 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 Management 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
DRAFT

Minnesota State NextGen ERP | Change Management Timeline

<table>
<thead>
<tr>
<th>FY18</th>
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<th>FY20</th>
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<tbody>
<tr>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
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</tbody>
</table>

**Transition Management & Sustainability**

- Initial Change Management Planning
- Form Transition Mgmt Teams
- Transition Management Teams - Feedback, Analysis & Mitigation
- Establish Change Management Structure
- Develop Phase 2 ERP Software Training Requirements
- Develop Phase 2 ERP Change Mgmt Strategy

**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
- **December 2018:** Readiness Assessment
- **June 2019:** Software Training Requirements

**Training**

- Develop Content for Virtual Training
- Virtual Training Available for Institutional Leadership
- Develop Leadership Tool
- KR(s)

**Readiness & Engagement**

- Develop/Conduct Readiness Assessment Survey
- Draft Readiness Assessment
- Provide Input to NextGen Communication & Overall Project Planning
- Quarterly Leadership One-on-One’s and Change Management Coaching
- Participate in Stakeholder Conferences (Observe and Present)
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.
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

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Start</th>
<th>Finish</th>
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<tbody>
<tr>
<td>Develop Transition Management Team call for nominations</td>
<td>July 2018</td>
<td>July 2018</td>
</tr>
<tr>
<td>Steering Team Approval of local NextGen Transition Management Teams</td>
<td>July 2018</td>
<td>July 2018</td>
</tr>
<tr>
<td>Form Local NextGen Transition Management Teams</td>
<td>August 2018</td>
<td>September 2018</td>
</tr>
<tr>
<td>Regional Transition Management Team Feedback Monitoring, Analysis &amp; Mitigation</td>
<td>September 2018</td>
<td>On-Going</td>
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</table>
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

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

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Start</th>
<th>Finish</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steering Team Approval of Initial Change Management Strategy &amp; Plan</td>
<td>July 2018</td>
<td>July 2018</td>
</tr>
<tr>
<td>Engage in Existing Conferences, Forums and Meetings</td>
<td>July 2018</td>
<td>On-Going</td>
</tr>
<tr>
<td>Meetings with Senior Divisional Management</td>
<td>July 2018</td>
<td>August 2018</td>
</tr>
<tr>
<td>Develop On-Line Input channel</td>
<td>July 2018</td>
<td>July 2018</td>
</tr>
<tr>
<td>Introduce Change Management to the Leadership Council</td>
<td>July 2018</td>
<td>July 2018</td>
</tr>
<tr>
<td>Conduct Readiness Assessment Surveys</td>
<td>September 2018</td>
<td>October 2018</td>
</tr>
<tr>
<td>Develop Readiness Assessment Document</td>
<td>October 2018</td>
<td>December 2018</td>
</tr>
<tr>
<td>Steering Team Approval of Readiness Assessment Document</td>
<td>December 2018</td>
<td></td>
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</table>

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

<table>
<thead>
<tr>
<th>Milestones</th>
<th>Start</th>
<th>Finish</th>
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</thead>
<tbody>
<tr>
<td>Steering Team Approval for Additional Change Management Resources</td>
<td>July 2018</td>
<td>July 2018</td>
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<tr>
<td>Analyzing ERP Software Training Structures</td>
<td>December 2018</td>
<td>January 2019</td>
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<tr>
<td>Develop ERP Software Training Approach Requirements</td>
<td>January 2019</td>
<td>January 2019</td>
</tr>
<tr>
<td>Develop Change Management Strategy/Plan for Phase 2: ERP Implementation</td>
<td>January 2019</td>
<td>June 2019</td>
</tr>
<tr>
<td>Steering Committee Approval of the Change Management Strategy/Plan for ERP Implementation</td>
<td>June 2019</td>
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</tbody>
</table>

*Note: Dates for implementing training structures will be part of phase II of NextGen*
Upcoming Milestones
Recap of slide 6

July / August 2018
• 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**
QUESTIONS?
APPENDIX
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 |                |
| 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 |
## 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   | • Status Update  
• Communications Plan  
• Change Management Strategy                                            | Board supports...  
• Communications Plan  
• Change Management Strategy                                               |
NextGen Phase 1 | Structure/Teams

- ERP Steering Committee
- ERP Program Manager

**Project Management Team**
- Project/Change Management Coordinator
- Business Process PM
- Communications Specialist/Coordination Specialist
- Change Management Lead (2)

**Change Management Team**
- Instructional Designer
- Transition Management Teams (37)

**Coordinating Committee**

**Academic & Student Services**
- Curriculum & Academic Scheduling
- Admissions & Recruitment
- Financial Aid
- Student Success & Advising
- Workforce Solutions

**Finance**
- General Ledger, Chart of Accounts, Cost Allocation, Interfund
- Accrual, Auxiliary, Grants
- Student Payroll, Taxes
- Accounts Receivables
- Budgeting
- Procurement, Payables, Fixed Assets

**Facilities**
- Public Safety, Campus Security, Env. Compliance
- Facilities Planning, Capital Project Design & Construction Management, Space Management

**Human Resource**
- Staffing (Recruiting, Hiring, Onboarding)
- Benefits
- Personnel Actions (Position Management, Org Charts, Offboarding)
- Payroll (Time and Leave)
- Faculty Credentialing & Workload

**Data Management**

**Information Technology**