



Student Information System Fact Finding Project

Faculty IT Subcommittee

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Agenda

Introductions

Moran Technology Consulting Background

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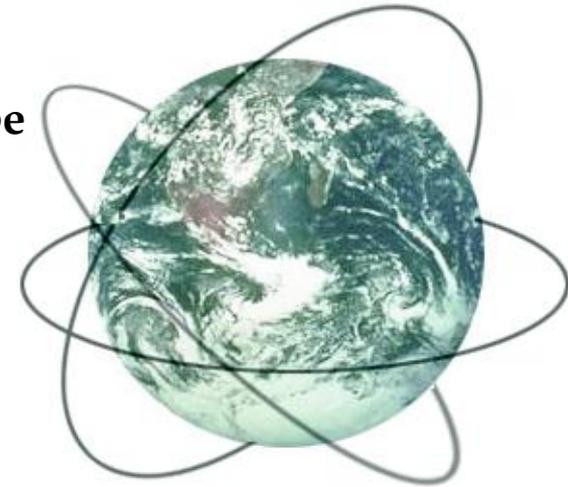
Guiding Principles

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Moran Technology Consulting – Who We Are

- **Moran Technology Consulting (MTC) is an experienced and proven provider of consulting services to the higher education industry**
- **We are a VENDOR INDEPENDENT firm – we do not sell any ERP software or implementation services for any ERP vendors – we provide objective and no “conflict of interest” recommendations to our clients**
- **Our Sr. Partner has supported Higher Education institutions for over 35 years**
- **Our management team has been working together for almost 15 years**
- **We are headquartered in Naperville, IL, USA, with offices in California and Virginia**
- **We serve Higher Education institutions around the globe (US / Canada / Europe /Asia)**
- **Our consultants have provided services to over 100 different Higher Education clients**
- **We have a corps of “Trusted Partners”, who supplement our skills and resources, as needed**



Goals of the SIS Fact Finding Project

- Understand how UF provides student information services to its stakeholders (students, faculty and staff) today, but more importantly, what services and in what manner does UF want to provide them to its stakeholders in the future
- Develop requirements for a new student information “solution” based on future service needs
- Conduct a fit/gap analysis for the current student information solution and develop a total cost of ownership between institutional requirements and potential solutions

Executive Steering Committee

- Chaired by – Dr. Joseph Glover, Provost
- Includes select Deans and Vice Presidents

SIS Working Team (SWT)

- These team members represent the various appropriate student services communities of the institution and will provide the sounding board for MTC developed project plans, approaches and deliverables.

Tammy Aagard, Associate Vice President for Enrollment Management

Rimjhim Banerjee, Management Analysis Coordinator, Graduate School

Greg DuBois, Director, Business Relations, Enterprise Systems

Dave Gruber, Senior Director, Enterprise Systems

Jodi Gentry, Director, Training and Organizational Development

Patrick Herring, Director of Admissions

Stuart Hoskins, Senior Associate Controller, Finance and Accounting

Bernard Mair, Associate Provost for Undergraduate Affairs

Jeanna Mastrodicasa, Assistant Vice President, Student Affairs

William "Andy" McCollough, Associate Provost for Teaching and Technology

Steve Pritz, Assistant Vice President for Enrollment Management and University Registrar

Rick Wilder, Director, Office for Student Financial Affairs

Ward Wilson, Business Relationship Manager, Student Services

Marie Zeglen, Assistant Provost and Director of Institutional Planning and Research

Elaine Turner, Associate Dean College of Agriculture and Life Sciences

Joseph Spillane, Associate Dean for Student Affairs, College of Liberal Arts and Sciences

Debra Anderson, Coordinator International Center Student Services

Stephanie Hanson, Executive Associate Dean, College of Public Health and Health Professions

Mike Weigold, Associate Dean, College of Journalism

Overall Project Approach

***** Phase A: SIS Migration Alternatives Analysis *****

Step 1: Project Kickoff

Step 2: Transformation Strategy Development

Step 3: Vision Focused Needs Development

Step 4: Evaluate Fit of Requirements versus Existing Student Solution

Step 5: High-Level IT Support Assessment

Step 6: SIS Migration Alternatives Analysis

Step 2: Transformation Strategy Development

Objectives:

- Develop a set of Transformation Guiding Principles that support the high level SIS transformation vision and define major change themes
- Identify the set of high-level change inhibitors that face Florida's SIS project and document the high level set of impacts that these inhibitors will have on the project
- Develop a communications plan to actively engage the project's stakeholders and to support their buy-in to the project

Approach:

Communications Plan

- Develop a project communication plan that includes: Communication Goals, Stakeholders Identified & People Responsible, Media Identified & Key Project Events

Transformation Guiding Principles

- Conduct an executive transformation workshop with the ESC to:
 - ▲ Develop a high level Vision for how student services need to be transformed
 - ▲ Develop and document the Transformation Guiding Principles for this project which will be utilized in the functional transformation workshops

Step 2: Transformation Strategy Development (cont'd)

Approach (cont'd):

Change Readiness Assessment

- Identify and interview select user and functional department stakeholders focusing on:
 - ▲ Executive Sponsorship - assesses the readiness of the key stakeholders
 - ▲ Organization Structure - includes the high-level design of the organization
 - ▲ Organization Behavior - assesses the pulse of its culture, "how we do things here"
 - ▲ Structural and Behavioral Enablers - includes performance management systems, communication, development and training
- Conduct workshops with select members of the UF community to validate and refine the draft strategies and responsibilities

Deliverables:

- Communications Plan
- Guiding Principles
- Change Readiness Assessment, including remediation strategies

Step 3: Vision Focused Requirements Development

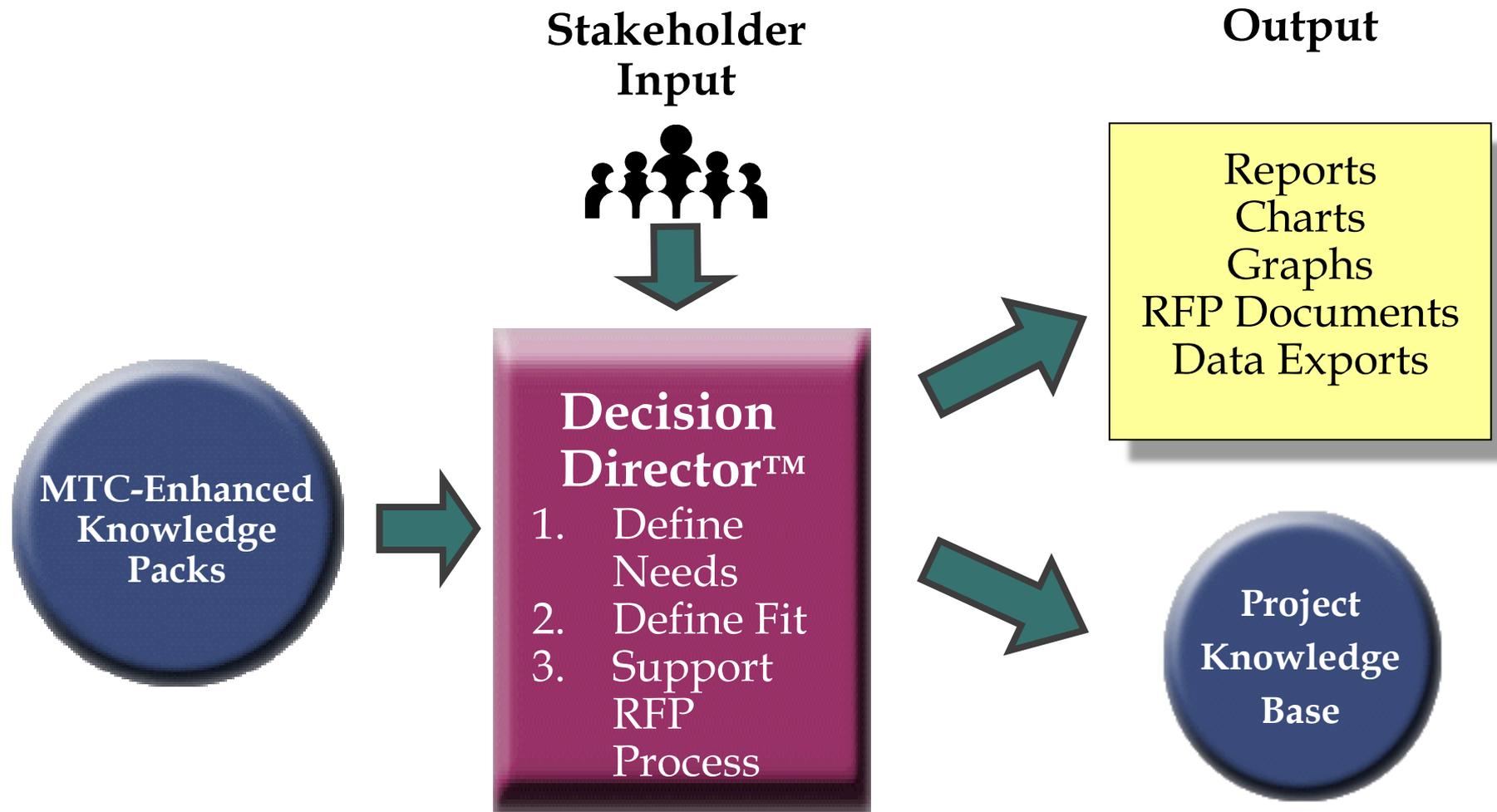
Objectives:

- Ensure MTC team has consistent understanding of the impact of the transformation vision on Florida's current strategy, business practices, organization and culture, and supporting technical/application architecture for the targeted process areas
- Identify opportunities for improvement across processes
- Identify critical business objectives, decisions, and other initiatives that may govern/constrain potential solutions
- Define the functional and technical requirements

Approach:

- Collect and review any documentation related to the current state processes, technology and organization as well as any work that may have been done regarding future state needs (organization charts, past surveys, studies and reports)
- Facilitate process workshops with the Florida campus SME's and MTC SME's to gain an initial understanding of the core processes that are within scope. These workshops will document the current process flow and identify opportunities to streamline the processes to meet the goals of the transformation vision
- MTC will combine SIS requirements from our intellectual capital, information from the workshops and the DecisionDirector Knowledge Packs and generate a consolidated set of potential Student Information Requirements

Advantiv's DecisionDirector



Step 3: Vision Focused Requirements Development (*cont'd*)

Approach: (cont'd)

- Conduct reviews with teams from each target functional area, as well as the technology support group, to finalize the DecisionDirector survey and identify stakeholders who will be asked to respond to the DecisionDirector survey
- Conduct a requirements validation/refinement survey of all appropriate campus stakeholders from Florida. Advantiv will manage the survey data collection process. MTC will serve as the contact point for stakeholder questions about the survey. Advantiv will generate an initial set of charts and provide MTC with data upon request.
- MTC will analyze the survey results and create a prioritized set of final requirements for each area and conduct a workshop with the SIS Working Team (SWT) to review the survey responses and the MTC analysis.

Deliverables:

- For each functional area, MTC will produce the following:
 - ▲ Documented high level process flows with descriptions of the current processes
 - ▲ Documented list of improvement opportunities for each of the business process areas
 - ▲ Final set of functional and technical requirements

Step 4: Evaluate Fit of Reqs. vs. Existing Student Solution

Objectives:

- Understand how the existing student solution compares to the future state needs addressed in the workshops

Approach:

- Utilizing the Guiding Principles and Transformation Vision as the high level basis for where the University desires to move, along with the DecisionDirector responses, analyze the current state functionality and future state requirements, developing a gap analysis. This effort will also take into account Best Practices utilized in higher education student information systems
- Develop draft gap analysis of defined needs vs. the existing student solution
- Conduct review sessions with the appropriate Florida representatives to finalize the analysis

Deliverables:

- A documented gap analysis that contrasts Florida's needs with the existing student solution and documents unique UF needs

Step 5: High Level IT Assessment

Objectives:

- Assess the IT environment's readiness for a new SIS and major recommendations for lowering any risks that are found within each scenario

Approach:

- Interview the IT Support managers to gain their perspective on the readiness of UF's IT environment to effectively support a new SIS
- Conduct workshop with IT Support staff to gain their perspective on the readiness of UF's IT environment to effectively support the new SIS
- MTC will develop an initial assessment document
- MTC will conduct reviews with IT management to review and refine our findings and recommendations.

Deliverables:

- IT Assessment and Risk Mitigation Report

Step 6: SIS Migration Alternatives Analysis

Objectives:

- Help the SWT evaluate the selected migration scenarios and develop its recommendation for moving towards a new SIS solution for the UF

Approach:

- MTC will work with the SWT to help it develop a draft analysis of up to four migration alternatives for the future state SIS solution. The analysis will include:
 - ▲ Tangible and Intangible risks and benefits
 - ▲ IT and User staffing recommendations
 - ▲ Software scope to be included
 - ▲ High-level Total Cost of Ownership analysis of the migration alternatives
- MTC will work with the SWT to help it develop a draft recommendation for the future state SIS scenario. The recommendation document will include:
 - ▲ Implementation strategy
 - ▲ Governance and Funding models
 - ▲ Software scope to be included
 - ▲ High level staffing estimates
- Conduct workshops to review and refine the recommendations with the SWT
- Conduct meetings with the ESC to review and refine the draft recommendation

Deliverables:

- Analysis of the SIS migration alternatives
- Documented final report recommendation by the SWT for the future state SIS solution for the University of Florida.

What are Guiding Principles?

High-level strategic direction statements that:

- Are designed to guide decisions and provide direction for transforming the student services environment and deploying the new software
- Provide statements of preferred approach, practice or agreement
- Are not open to interpretation – they must be clear

They are used to:

- Establish a standard of personal and organizational behavior that aligns with and supports Florida's student services philosophy
- Establish the decision making boundaries that define the People, Processes, Technology and Information
- Establish an agreed upon model of governance to which the project team and Florida's leadership can agree and commit
- Clearly define the fundamental ways that Florida will change the way it wants deliver to student services

Florida's Guiding Principles

- Students, faculty and staff should have efficient and intuitive real-time electronic access to the data and information necessary to perform and manage their functions.
- We will maximize our use of SIS self-service functionality.
- We will move to common processes which meet the unique needs of our units.
- We will work collaboratively to optimize services to our students, faculty, staff and institution.
- We will improve our access and use of data to support management decision making through “easy to use” reporting processes and technologies.
- We will treat data and information as a strategic asset that is: commonly defined with a single authoritative source; electronically captured once at its point of origin; and appropriately shared across the entire institution.
- We will reengineer our processes and business requirements as needed to improve the student experience.
- Any customizations that are not dictated by legislation, regulation or policy will require senior management approval.
- We will establish decision due dates to keep our project on time and on budget. If these due dates are not met, the delayed decision will immediately be escalated and made by senior management – the project will then move on.
- Project participants or designees are expected to manage project and personal calendars to allow full and active participation – non-responsiveness or non-engagement implies agreement.
- Senior management will support the impacted units with the appropriate resources to successfully complete the project while sustaining current operations.
- The University will learn from its past experiences and use this information to support our project.

Tomorrow's Goals

- Craig Foley - Senior Consultant MTC

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Questions and Answers

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