WACUBO
Rising to the Challenge
2023 WACUBO ANNUAL CONFERENCE

Digital Transformation Initiative for Rural Higher Education

A Collaboration of Adams State University, Fort Lewis College, and Western Colorado University

Presenters

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Adams State University

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Fort Lewis College

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Western Colorado University

Location

Adams State University

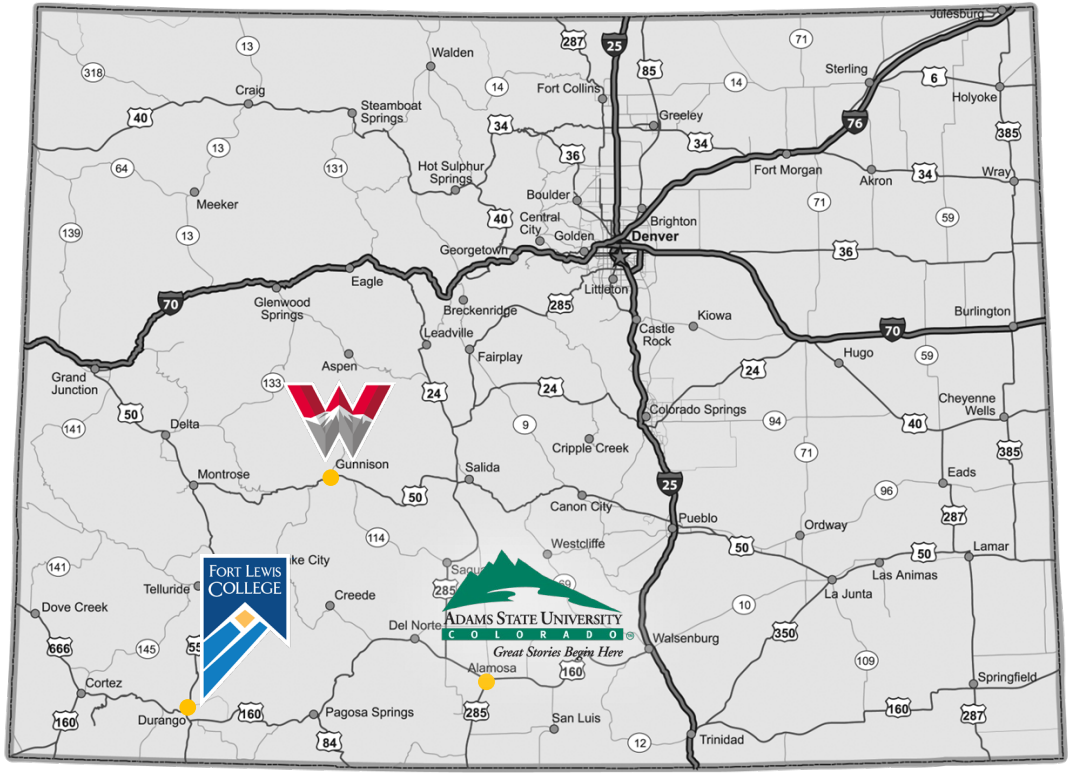
est. 1921, Alamosa

Fort Lewis College

est. 1911, Durango

Western Colorado University

est. 1901, Gunnison



Audience & Objectives

- **Audience**
  - Any institution that is considering undertaking a major IT project, in particular an ERP/SIS change

- **Learning Objectives**
  - Identify cross institutional opportunities for collaboration
  - Understand the pros and cons of a partnership project
  - Understand the major challenges for large IT projects

ERP

Enterprise Resource Planning

System that facilitates your business, typically Human Resources & Finance

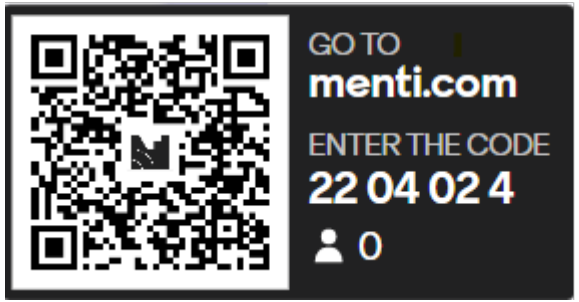
SIS

Student information System

Supports the unique needs of education, enrollments, grades, credentials, etc.

Audience Poll #1

- What ERP/SIS does your institution use?
- How long has your institution had its ERP/SIS?



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Setting the Stage/Our Answers

- Ellucian Banner
- 30 years!

Audience Poll #2

- Is your ERP/SIS meeting your needs?
- Would you change?
- If you have considered changing, what is holding you back?

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Setting the Stage/Our Answers

- No longer meeting our needs or student expectations
- Yes. we would change
- Funding, staffing, fear

Tradition of Collaboration in CO

- CHECO: Colorado Higher Education Computing Organization www.checoweb.org
- CHECO: CIO Council

Form a Partnership

Troi-ka: 1. a Russian vehicle pulled by a team of three horses abreast. 2. a group of three people working together, especially in an administrative or managerial capacity.

Project Troika

Adams, Fort Lewis and Western formed a partnership to take on the largest IT project contemplated by any of the institutions since implementing our legacy ERP/SIS 30 years ago.

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Benefits of Partnership: Anticipated

- Save time and expense during implementation by standardizing business processes that can be built once and shared among the institutions
- By entering a joint agreement, realize economies of scale on licensing costs
- Deploying a common digital platform, we hoped to encourage long term collaboration, sharing and cost saving opportunities among the partner institutions

Challenge: Funding

- We needed money, lots of it
- Needed to be from an external source
- Special request for IT Capital Funding from the Colorado legislature
- Joint Technology Committee/State Legislature
  - May 2021: Awarded $9M for Phase 1
  - May 2022: Awarded $15M for Phase 2

Challenge: Finding the System

- Issued a joint Request for Information
- Five respondents
- Technical criteria narrowed the field to two finalists
- Dozens of meetings with the vendors to establish the scope

- Months of demonstrations, calls, discussion and debate to assess functionality
- Many, many, cost estimates
- Concluded in a final cross institutional survey…

And the winner is:

- Comprehensive, cloud based multi tenant software-as-a-service solution
- Predictable costs with subscription model
- Less costly over 10 years than legacy alternative
- Modern UI preferred by employees and students

Two and a half years after we started…

- ☑ Secured the funding
- ☑ Garnered support (mostly) from our institutions
- ☑ Selected a solution

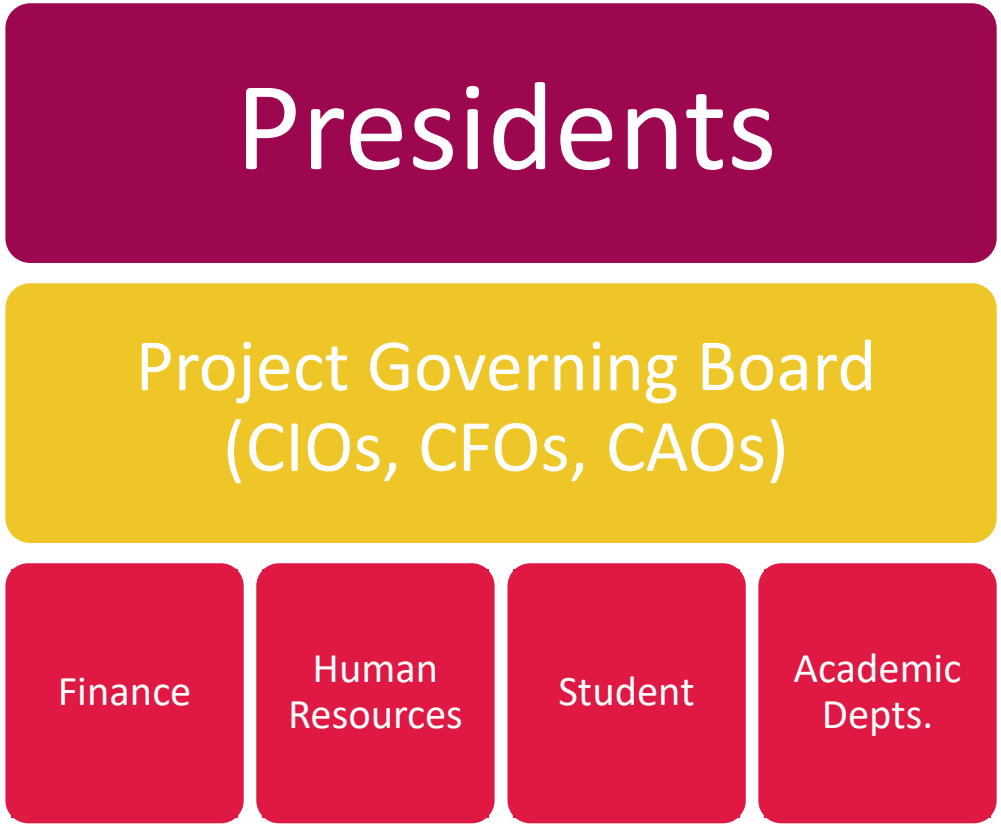
Implementation

So, now what…?

Project Governance

Guiding Principles

- Strive for consensus
- Share processes first
- Diverge only when absolutely necessary, understand why
- Conflict resolution plan



Change Management

- **Communication, Communication, Communication**
  - Web site, intranets, bulletin boards
  - Team, staff, department meetings
  - Presentations to the Board, administration, students
  - Elevators, hallways, sidewalks, gym
- **Build Support Structure**
  - Highest level support: VP's, Presidents, Boards
  - Cultivate Champions & Early Adopters

Communicate like you would vote in Chicago, early and often!

Implementation Timeline

- **Phase 1: HR & Finance (aka Platform)**
  - Contract Signed: July 29th, 2021
  - Went Live: December 19th, 2022
  - Post Go-Live Reconfiguration & Optimization
  - 1.5 years (so far)
- **Phase 2: Student (aka Workday Student Services)**
  - Contract Signed: July 14th, 2022
  - Final Move to Production: Fall 2024
  - ~2.3 Years, start to "finish"

Lessons Learned: Contracting

- Take your time.
- Don’t forget about your student workers, they add up in a hurry
- Be sure to understand Workday’s Post-Production Support model
- Establish accepted working hours window for the project if doing fully remote implementation
- Don’t forget about training

Lessons Learned: Resourcing

- Add functional and IT backfill as much as you can
- Expect turnover at all levels and all areas
- Get formal training for your internal PM
- Build in required “Workday Vacations”
- Understand key players will work a lot

Lessons Learned: Cont.

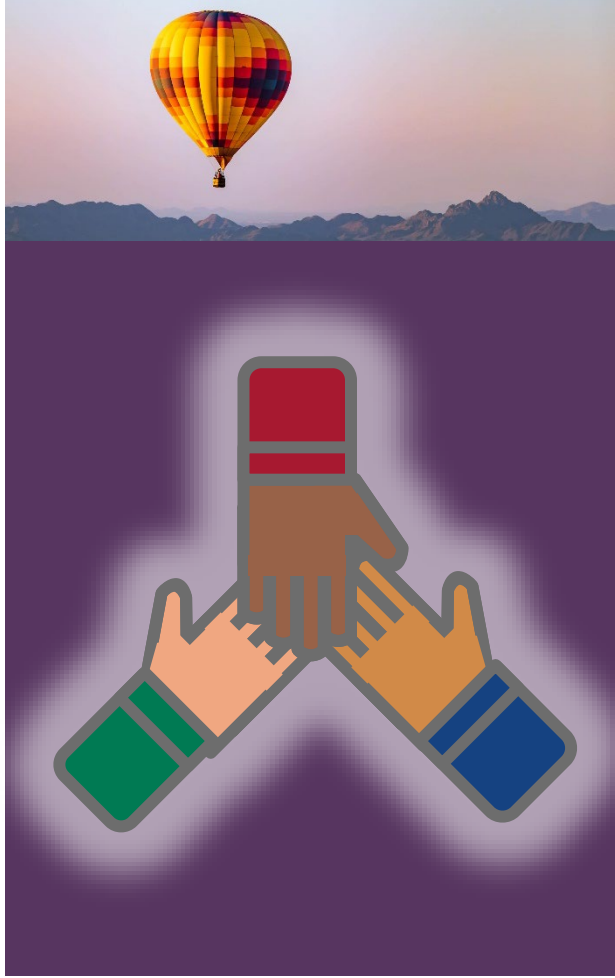
- **Implementation**
  - You can do this entirely with remote teams
  - Launch methodology is **INTENSE**.
  - Live is **NOT** optimized, expect refinement for a year
- **Change Management**
  - NOT an IT project, must be an institutional objective
  - Communicate, communicate and then communicate some more
  - Plan for re-educating and doing demonstrations throughout, as staff and leadership will likely change
  - Partnership helps, harder to say no when two other institutions are saying yes.

Lessons Learned: Cont.

- State funding - lobbying efforts are critical
- Presidential and Board of Trustees must be in alignment
- Look at institutional differences and similarities- Google vs. Microsoft

Benefits of Partnership: Actual

- **Savings**
  - ~35% On time and expense during implementation
  - ~25% On ongoing costs of licensing
- **Collaboration**
  - Made better decisions
  - Built enduring relationships
- **Momentum**
  - Prevented stalling when one school, area was challenged



Parting Thoughts

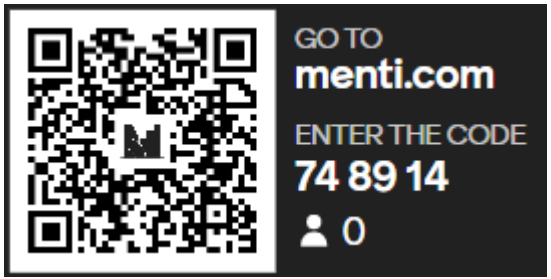
Subtitle Here

- Foster relationships **now** so the opportunities can reveal themselves
- Undergoing transformation is arduous, uncomfortable and often terrifying, but possible
- Partnering has been extraordinarily rewarding

Questions & Answer Session

Audience Poll #3

- **After seeing this presentation are you MORE likely or LESS likely to take on a big IT project?**



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Thank you!