Transformation Update

Board of Trustees – June 16, 2022

Summary of Progress

- Announced leadership organizational structure for Vermont State University informed by the Transformation discovery and design work
- Most Student Experience and Academic Operations teams have completed design and are moving into development
- Administrative Operations teams have completed discovery and have moved onto business process review and design work as part of the design stage
- Workforce Development is completing discovery and will work with sponsors to clarify the vision and develop strategies for design
- Significant systems projects (Slate and Colleague) underway while others are being scoped and prioritized to support university launch and operations

Creating Vermont State University

- Dr. Grewal will assume the presidency on July 1, 2022
- Senior leadership positions have been announced and posted as part of the search process, including interim and transitional roles as needed
- Functional organizational structures will be based on strategic priorities and design input from teams as the work is completed
- Brand advertising for Vermont State University has been launched and initial response from prospective applicants has been good

Vermont State University

Integrating Diversity, Equity, and Inclusion

Progress

- Chief Diversity Officer is a priority hire for Vermont State University leadership
- Three DEI pillars are being used to guide the work of transformation teams
- DEI Data Project at the center of system design and development work

Challenges

- Inconsistent use of pillars across teams during design (limited knowledge, capacity, and data)
- Need additional dedicated resources and capacity to drive DEI work across all teams

Three DEI Pillars

Data-Informed Decisions:
Are your work processes shaped by data-informed decisions related to diversity, equity, inclusion, and social justice?

Professional Knowledge:
Can your work process reviews address an institutional need around diversity, equity, inclusion, and social justice? Are you asking questions in a way that facilitates opportunities for discussion around a related issues of diversity, equity, inclusion, and social justice?

Personal Knowledge:
Are you seeking opportunities to increase your own knowledge of diversity, equity, inclusion and social justice?

Update on Risks and Dependencies

- Received approval from NECHE on Substantive Change Request
- Faculty working intensively this summer and fall to finalize, review, and approve programs and curriculum – significant volume and capacity is stretched thin
- Staff capacity and technical expertise in key departments remains a significant concern
  - Continued attrition due in large part to uncertainty and change
  - Shift to new organization structure, new systems, and new processes will strain capacity
  - Gaps in specialized knowledge need to be filled through training and recruitment
  - Project management capacity stretched due to scope and number of technical projects

Core Team Updates

Student Experience

Accomplishments

- Successful brand launch and VTSU advertising campaigns (Look for us at events this summer!)
- VTSU Micro-website near completion

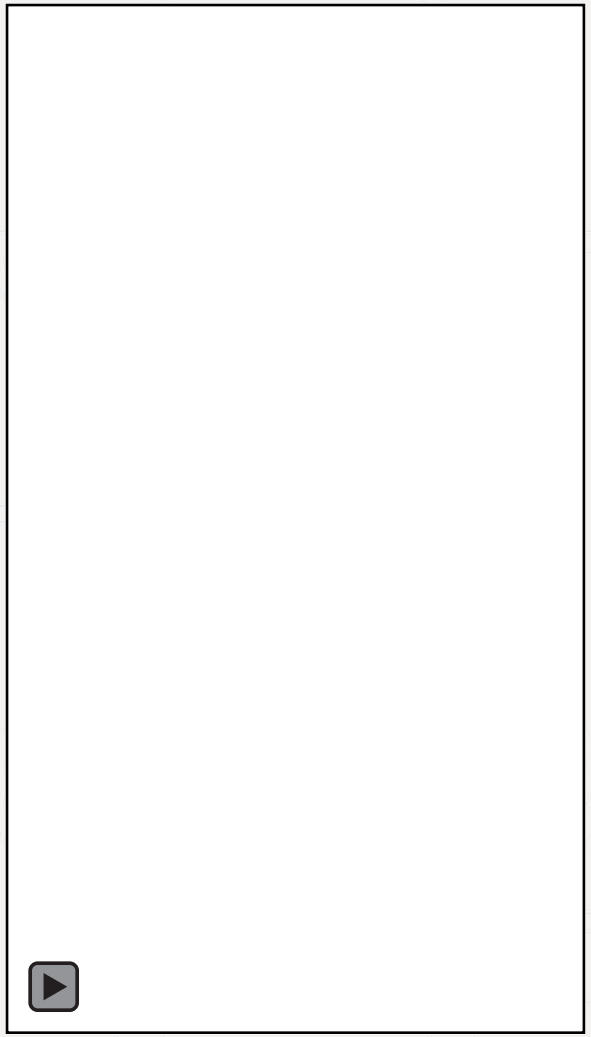
Key Priorities

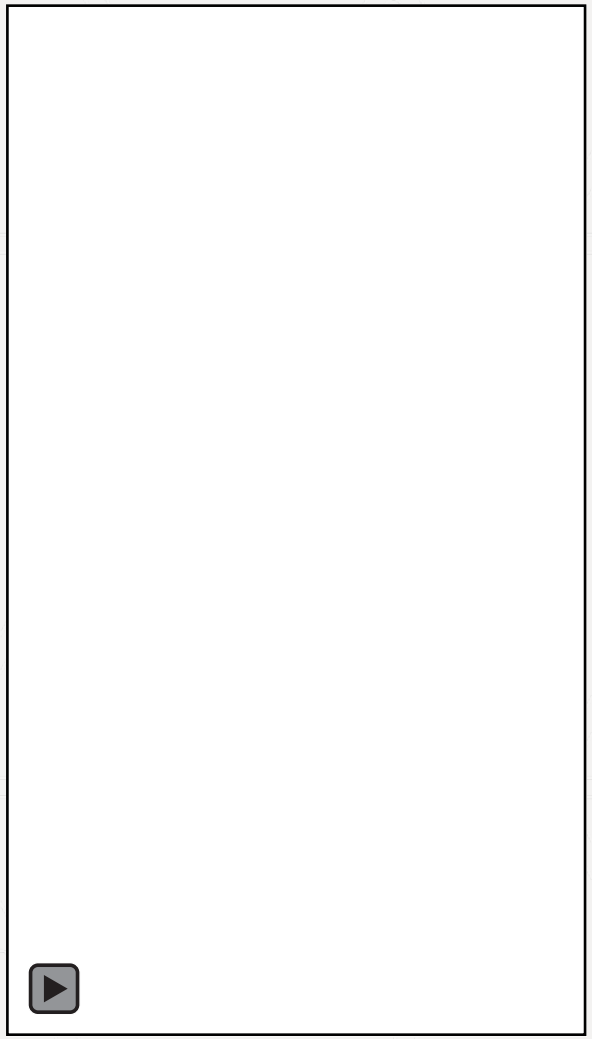
- Prep for upcoming recruitment cycle and launch VTSU application
- Secure vermontstate.edu URL and begin new website project
- Finalize cost of attendance and scholarship awarding strategy

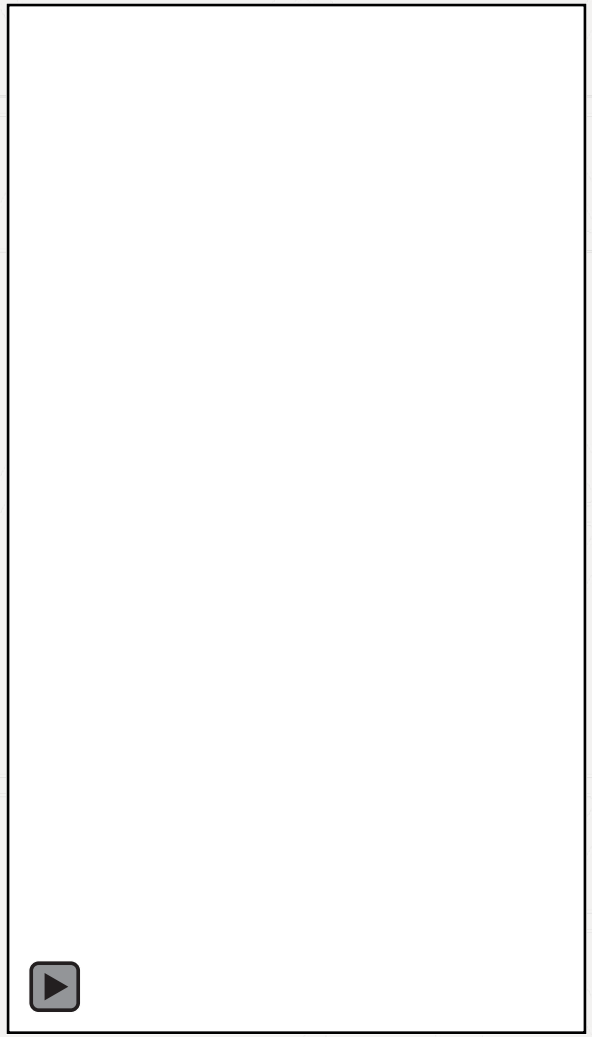
Risks & Dependencies

- Details on academic program curriculum and delivery modalities
- Vision and description of VTSU locations

TikTok / SnapChat Video Ads







Better Together

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Academic Operations

Accomplishments

- All Faculty Assemblies voted to approve a 5-school organizational model
- Face-to-Face Plus Pilot project launched this summer with 28 faculty participants

Key Priorities (summer 2021)

- Create single academic catalog and policies
- Align General Education requirements with optimized programs for Fall 2021 governance reviews
- Work on governance design by faculty leaders
- Complete design of comprehensive student success goals and integrated model for advising, career development, and student support

Risks & Dependencies

- Faculty and staff time and bandwidth for multiple time-sensitive academic projects
- Vision and description of VTSU locations

Administrative Operations

Accomplishments

- Completed discovery for all areas
- Reviewed business planning design principles with Finance & Facilities Committee
- Established new chart of accounts structure
- Completed business process reviews with Ferrilli
- Identified critical IT priorities

Key Priorities

- Design allocation methodologies for base appropriation, shared revenues, and shared expenses. Gain approval from Board of Trustees
- Design student workers processes
- Launch labor-management task force to review benefits structure
- Design and implement key IT initiatives

Risks & Dependencies

- Capacity to perform necessary work
- Competing priorities relative to day-to-day operations

Workforce Development

Accomplishments:

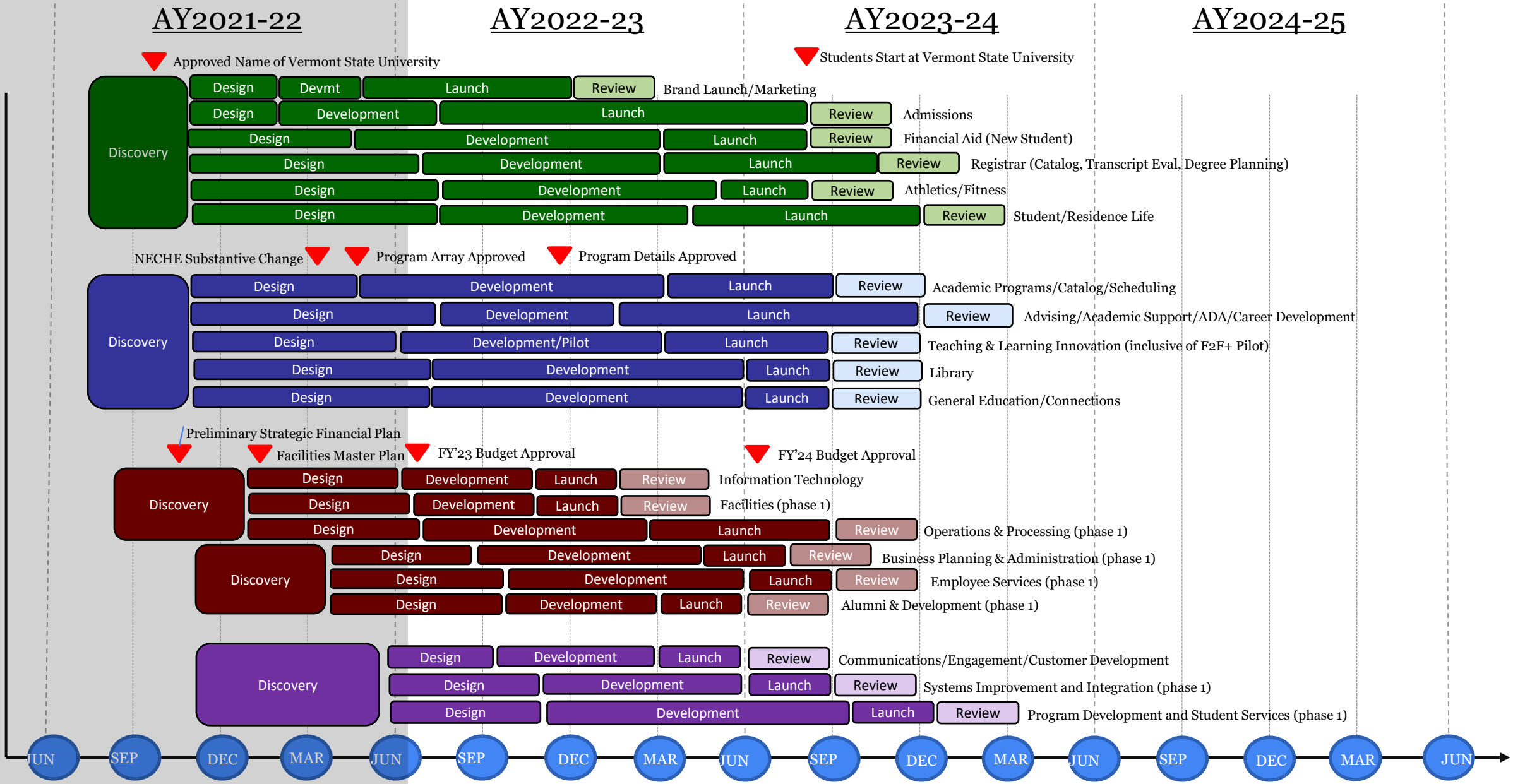
- Finalized definitions of workforce development and continuing education.
- Finalizing discovery, discovery gate presentation July 14
- Appointed an Executive Director
- Continued exploration of best practices as needed

Key Priorities

- The Workforce Division needs to be fully supported with VTSU systems: marketing/PR, finance, IT, student supports, registrar, administration, IR, HR, and systems
- The work of the Division must remain nimble and responsive to state, employer, and student needs
- Programs and the Division need to be financially viable
- Current good work needs to continue while we expand opportunities and offerings
- The Division support credit and non-credit offerings through the University and CCV.
- Workforce education needs must be continually assessed using existing resources as well as data we develop
- The Division will incorporate DEI principles and practices.

Risks & Dependencies

- Office of Sponsored Programs
- It and operating systems
- Contracts and contracting
- Academic Affairs



VERMONT STATE COLLEGES SYSTEM

Transformation Projects

Key

- Student Experience (NCE)
- Academic Operations (NCE)
- Administrative Operations
- Workforce Development
- Key Milestone

Systems Project Updates

Colleague

Accomplishments

- Over 40 Business Process Review (BPR) sessions (thanks to 90+ staff!), we completed documenting current business processes, understanding current roadblocks and bottlenecks, and identifying opportunities to streamline processes, improve the student experience, and better leverage the technology
- Validation of most critical BPRs finishing up
- Critical decisions/dependencies have been identified and are under review
- Collaborative conversations between key system/vendor partners to ensure process transition between systems

Key Priorities

- Reviewing key decisions and responding – people and process critical decisions to drive technology
- Developing more concrete and critical timeline and transitioning to the next phase of our Ferrilli engagement

Risks & Dependencies

- Inter-system dependencies
- Resources, competition with other system projects
- Time

Slate CRM*

Accomplishments

- Inquiry form live on landing page
- Initial testing phase of application happening now
- Agreements reached on application requirements

Key Priorities

- Communication roll-out
- Travel and Recruitment set-up
- Reporting

Risks & Dependencies

- Integration with Colleague
- We do not have all the answers yet
- Time is not on our side

* Customer Relationship Management (main applicant contact/communication system)

DEI Data Project

Accomplishments

- Identified key data elements we collect, data elements we may be missing, conducted gap analysis
- Established bi-weekly meeting structure with key cross-team representatives
- Inventory of our value lists in our most key systems: Slate, Colleague, UKG
- A review of the value lists by key members of the DEISJ working group is underway
- Starting to map our name change process

Key Priorities

- Finalizing value list changes to ensure alignment with timing of our Slate/Colleague work (example: launch of application)
- Finalizing documenting processes for name change
- Developing guidelines for ethical use of DEI elements and education

Risks & Dependencies

- Ensuring alignment with other key dependency system projects

UKG – HR Information System

Accomplishments

- Completed BPRs with Ferrilli and HR/Payroll
- Report has been distributed; validation underway

Key Priorities

- Prioritizing design work and aligning resources to support system work needed

Risks & Dependencies

- Large scope of work/investment needed in UKG to make adjustments – both in terms of staff time, but also will require project management/vendor support
- Working through historical and current integration challenges, current support

Other Important Systems Projects

Project	Status	Target Date
Forms	In progress	8/15/22
Catalog/Curriculum Management	Product selected, not started	10/1/22
Perceptive (doc management)	Not started (dependency on Ferrilli BPR)	10/1/22
Academic/Events Scheduling	Product selection	1/1/23
eRez Life	Not started	3/1/23

Transformation Budget Update

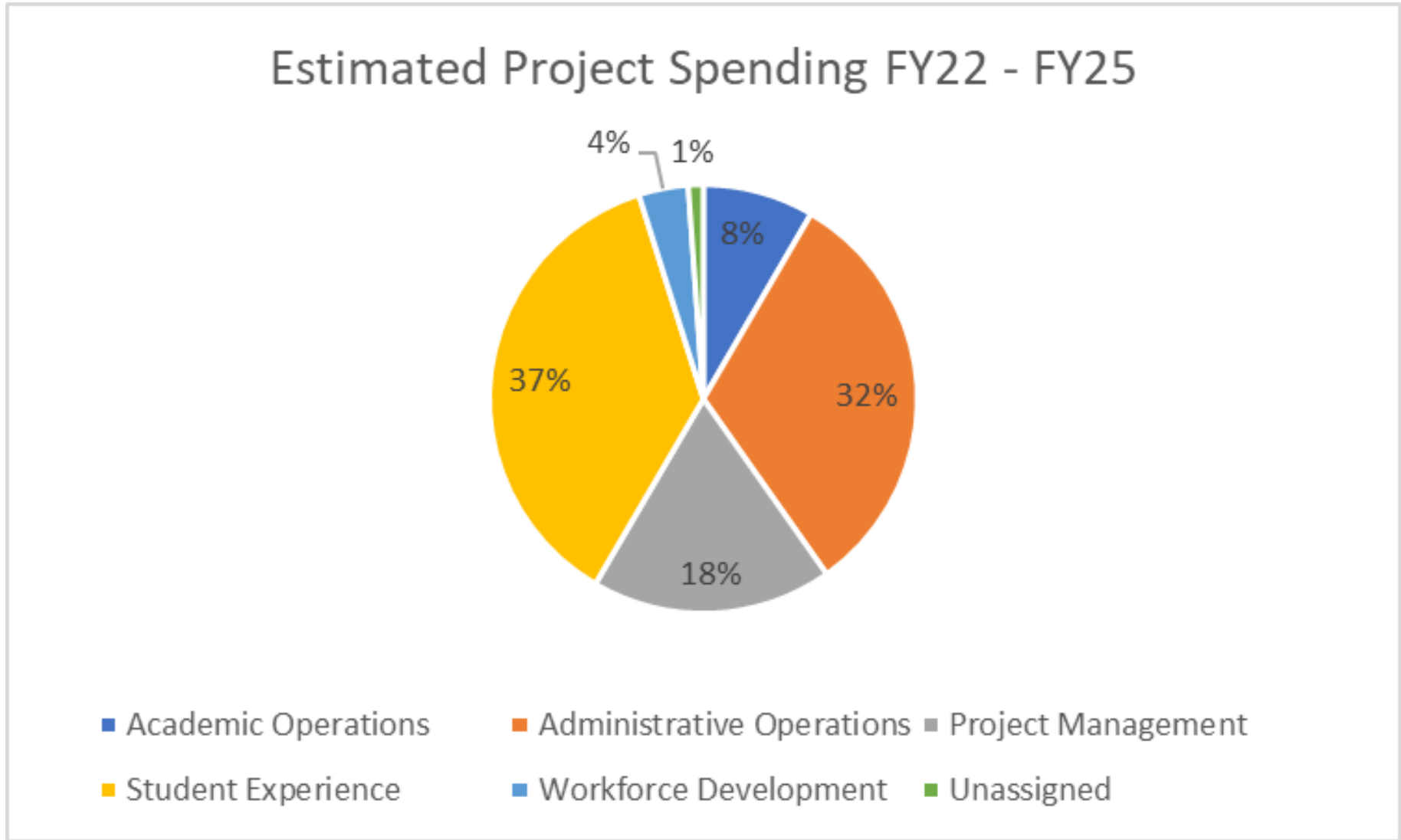
State Funded Transformation Spending

Transformation Project Spending	FY2022	FY2023E	FY2024E	FY2025E	Total
Academic Ops	180,935	750,000	500,000	250,000	1,680,935
Admin Ops	913,680	4,750,000	500,000	200,000	6,363,680
Project Mgmt.	542,248	1,300,000	1,000,000	800,000	3,642,248
Student Exp.	835,270	3,750,000	2,500,000	1,250,000	7,335,270
Workforce Dev.		250,000	250,000	250,000	750,000
Unassigned		127,867	75,000	157,867	227,867
Total	**2,472,133**	**10,927,687**	**4,325,000**	**2,275,000**	**20,000,000**

Supplemental Transformation Spending

Supplemental Spending	FY2022
Program Optimization (Davis Foundation)	261,000
Facilities Studies (State Capital)	448,688

Supplemental Pending	FY2023
Academic Programs: Davis Foundation, *proposed*	251,522
State Capital for Transformation: Divestment	1,000,000
Congressionally Designated Spending: Workforce, *proposed*	2,346,000


Estimated Project Spending FY22 - FY25
4%
1%
8%
32%
37%
18%
Academic Operations
Administrative Operations
Project Management
Student Experience
Workforce Development
Unassigned

Preparing for Next Phase of Transformation – Year 2 –

Aligning Teams with New Structure

- Priority for first year of Transformation was the creation of Vermont State University
- Original structure intended to serve as a proxy for governance and functional structure of the new university and eventual system-wide organization

Existing Team Structure

Sponsor: Council of Presidents			
Stakeholders			
Student Experience	Academic Operations	Administrative Operations	Workforce Development
Admissions and Enrollment	Advising, Academic Support, and ADA	Business Planning and Administration	
Brand Launch & Marketing	Career Service	Employee Relations and Transaction Services	
Brand Identity	General Education	Facilities Planning	
Financial Aid Operations	Institutional Research	IT Services	
Alumni and Development	Teaching and Learning Innovation	Operations and Processing	
Athletics	Libraries		
Student and Residence Life			
Registrar & Scheduling Operations			

Aligning Teams with New Structure

- New core team structure aligns with new university leadership structure
  - New Student Experience
  - Student Success
  - Academic Programs & Administration
- Sub-Teams realigned to match new core team scopes
- Project Teams for Workforce Development will emerge from Design

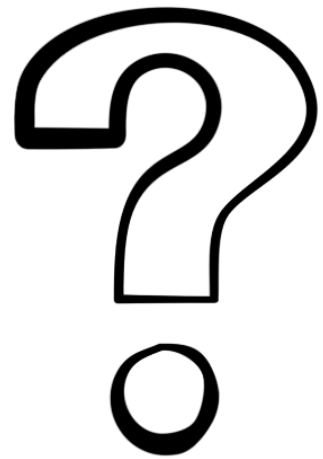
New Team Structure

Sponsor: VTSU President			Sponsor: Council of Presidents	
Stakeholders				
New Student Experience	Student Success	Academic Programs	Administrative Operations	Workforce Development
Admissions and Enrollment	Athletics	Program Optimization/ Governance	Alumni and Development	
Brand Launch & Marketing	Student and Residence Life	General Education	Business Planning and Administration	
Brand Identity	Advising, Academic Support, and ADA	Institutional Research	Employee Relations and Transaction Services	
Financial Aid Operations	Career Service	Teaching and Learning Innovation	Facilities Planning	
		Registrar & Scheduling Operations	IT Services	
		Libraries (accountable to COP)	Operations and Processing	

Shifting Transformation Focus – Year 2

- Administrative Operations and Workforce Development will be key priorities for design and development during this next phase of transformation
- Business process reviews from Colleague project will help inform opportunities for administrative consolidation and efficiency
  - Being intentional about which processes and accountabilities should be at institutions and which should be shared services
  - Improving integrations and handoffs between systems and departments to reduce manual work, errors, and re-work
- Priorities for Workforce Development will come from Discovery and Design

Board Decision Points

Month	Approve	Approver	Review	Originator
Jun '22	• FY2023 Budget: Final	BOT	• IT Shared Services Plan	BOT
Aug '22	• FY2023 Tuition Setting VTSU • Allocation Methodologies	F&F		
Sep '22	• FY2023 Tuition for VTSU • Allocation Methodologies	BOT	• Accountability Dashboard Update • Plan for Finance/Ops and HR Shared Services	BOT
Oct '22	• Financial Statements • Internal Audit: Plan	Audit Audit	• Composite Financial Index • Enrollment Update	F&F
Dec '22			• Q1 Financial Results • Campus Facilities Update	F&F
Jan '23			• Academic Programs & Gen Ed Progress • Shared Governance Progress	EPSL
Feb '23			• Q2 Financial Results • FY2024 Budget: 1st Pass Budget	F&F
Mar '23	• Review/Approval of Revised Board Policies	BOT		
Apr '23	• Internal Audit: Final	Audit	• Cyber Security Update • FY2024 Budget: 2nd Pass	Audit F&F
May '23	• FY2024 Budget: Final	F&F	• Q3 Financial Results	F&F
Jun '23	• FY2024 Budget: Final	BOT	• Vermont State University Strategic Priorities	BOT

Questions?