



# VERMONT

— STATE COLLEGES SYSTEM —  
TRANSFORMATION



## Transformation Update

Board of Trustees – January 23, 2023

# Summary of Progress

- All senior VTSU leadership positions are filled
- Critical program array approval milestone reached in late December
- Functional organizational and staffing plans are behind schedule, but carefully working through complex details as university transitions to the new operating structure ( $\approx 50\%$  complete)
- Started admitting students in December and final preparations are underway to award financial aid by the end of January for incoming Fall'23 students
- Completed the organizational transition for the new IT Shared Service organization
- Staffing plan for HR shared service and VTSU people and culture department approved
- Systems projects being prioritized by what is needed to register and enroll students for Fall
- Workforce Development team being aligned to support the new VTSU organizational structure and strategic plan



# Update on Risks and Dependencies

- NECHE 1<sup>st</sup> Progress Update on track and due March 24, 2023
- Faculty assemblies and the president have approved the program array and General Education requirements for VTSU
- Risk has shifted to timeline for configuring new programs and courses within the scheduling and registrations system in time for April registration launch
- Overall, projects on track but with limited slack in the schedule on critical path projects
  - Increasing project oversight on key process and systems projects
  - Holding daily stand-up meetings with core team leaders
- Staff capacity and morale remain significant concerns as implementation work accelerates
  - Top priority is finishing staffing plan and transitions to reduce anxiety
  - HR prioritizing culture, communication, staff development, recognition, and support

# Core Team Updates



# New Student Experience

## Accomplishments

- Started admitting students for Fall'23
- Planning to release Financial Aid offers for admitted students in the incoming class by the end of January
- Completed and implemented all staffing plans for Admissions, Marketing, and Financial Aid
- New combined VTSU graduate application launching in February
- Outreach and recruitment teams are out in the field visiting schools and attending fairs
- Consolidated Slate CRM systems project nearing completion in the next month

Critical Path Items	Milestone	Status	Priorities/Next Steps
Begin FA packaging for new and returning students	1/27/23		Colleague updates on track for Financial Aid.
Launch marketing and application for online and graduate programs	2/22/23		Launching next week.
Hold admitted student events	February through May		Planning underway for yield events beginning in February
Complete Merge of institutions with US Department of Education	7/1/23		Finalize documentation necessary to complete merge: authorization from Alaska, Wisconsin, Maine, New Hampshire and letter of authorization from Chancellor
Maximize new student commitments and deposits	Ongoing		Applications and admissions tracking behind last year. Increasing outreach and working on efforts to increase yield and commitments.

# Student Success

## Accomplishments

- Staffing mostly complete for Advising, Career Development, and Academic Support
- Staffing in early stages for Student Life, Residence Life, Health & Wellness, and Public Safety
- Implementing advising model, designing staff training, and retooling Aviso
- Housing application in eRezLife ready to launch for new students
- New student onboarding team has completed design for Fall '23; online orientation implementation in early stages
- Career development resource development underway for Fall '23

Critical Path Items	Milestone	Status	Priorities/Next Steps
Finalize and implement remaining staffing plans	3/1		Continue to work through HR process; communicate with unions; notify individuals.
Launch registration process for incoming and returning students.	4/15		Coordinating student experience from admissions to advising to enrollment, including student checklist and numerous software platforms
Implement new Advising model and staff/faculty training	5/10		Training to begin in March; model to launch in May.
Launch New Student Onboarding	5/10		Online orientation to launch 5/10, with additional programming on a rolling basis through the first week of classes in August.
Finalize University Handbook	7/1		First draft on track for March.
Welcome students to Fall'23 term, including move into housing	8/21		Rolling programming and options from spring to summer and culminating during the first week of the semester.

# Academic Programs & Administration

## Accomplishments

- Faculty assemblies completed their review and approval of 100+ programs and the Gen Ed requirements
- Completed review and updates to all undergraduate academic policies for VTSU
- Launched second phase of Face-to-Face Plus project, piloting 1:1 device kits with students

Critical Path Items	Milestone	Status	Priorities/Next Steps
Finalize and implement remaining staffing plans and new school administration			Continue to work through HR process; communicate with unions; notify individuals.
NECHE 2 <sup>nd</sup> progress update due March 24 <sup>th</sup>	3/24		Progress report being drafted. All required elements are on track.
Completion of scheduling and catalog systems projects	3/30		Transferring the approved programs and courses into the catalog, scheduling, and registration systems is underway. Deploying additional resources.
Faculty approve new Faculty Governance model for VTSU including Online programs	4/24		High priority for Faculty Assemblies during this term.
Faculty Development plan launched	5/1		The structure for the Center for Teaching and Learning has been approved and plans being developed for summer training.
General Education program elements developed	8/1		The scope of the initial phase of the Connections program elements has been approved. Additional elements will be included next year.
Required classroom updates for F2F+ courses complete	8/15		The F2F+ 1:1 Device Pilot will be expanded in the Fall, and addition rooms will require audio and wifi upgrades.

# Administrative Operations

## Accomplishments

- Finalized chart of accounts structure to support VTSU billing
- Policies approved for allocation of base appropriation, shared revenues, capital funds
- Conducted labor-management task force to review benefits structure
- Designed and implemented shared services model for IT
- Launched requests for proposal for "wayfinding" signage for VTSU
- Designed an HR Shared Service model to support VTSU, CCV, and Shared Services organizations

Critical Path Items	Milestone	Status	Priorities/Next Steps
Complete Colleague configurations needed to support launch of VTSU	1/31		Finalize configuration requirements, complete configuration of registration
Fully launch new chart of accounts and associated reports	2/13		Load new ledger codes to support VTSU. Subsequent changes include creating crosswalk between old/new codes, developing reports, and integrating with Colleague
Complete the implementation of the HR Shared Services model	3/3		Review current service levels with Council of Presidents and their teams
Finalize services levels for Shared Services Finance	3/3		Review current service levels with Council of Presidents and their teams, implement the new services
Finalize the consolidated FY'24 Budget for VSCS	2/13		First pass of institutional budgets reviewed by Finance & Facilities Committee, subsequent reviews April & May with final review/approval by Board in June
Complete a 10-Year Facilities Master Plan	2/1		Request for proposals launched. Review of proposals and vendor selection to follow, work launches in March



# Workforce Development

## Accomplishments:

- Making strong business and state connections to build pipeline of new opportunities
- Jayshree Bhat, Associate VP for Workforce, Community and Economic Development on board and taking the lead for VTSU
- Developed working definitions for KPI's
- Adjusting transformation team to align with strategic objectives and new VTSU workforce division

Key Priorities	Milestone	Status	Priorities/Next Steps
Finalizing a project plan for the CDS program development projects	First financial draw down by 1/31		Needs are being identified for proper staffing given the process for project development. Work has begun on mental health needs assessment.
Developing processes for project development with VTSU and CCV	Present to COP by Feb. 6th		Pat Moulton, OC; Jayshree Bhat, VTSU and Tiffany Walker, CCV to finalize processes to present to COP by Feb. 6th
Design and implement a staffing plan for Workforce, Community, and Economic Development unit within VTSU	3/1		Organizational chart completion and review
Complete business process mapping and design to support VTSU Workforce efforts	3/31		Complete in February

# Systems Project Updates

System	Status Update
Slate	Project is nearing completion
Colleague	New Slate/Colleague integration is in place, improving on past process. Implemented the new VTSU term structure in Colleague. Federal financial aid records are being imported into Colleague.
Formstack	Form building for key areas underway, training efforts being offered.
Ad Astra	Strategic analysis check-in and faculty demo are complete. Schedule building training scheduled for the last week of January. Kicking off phase 2 of project, events, in February.
Acalog/Curriculog	Project team meeting weekly on courses and programs sections until January, January through March will be focus on narrative content.
Perceptive Experience	Business process review is complete and project plan/timeline is being developed by the vendor.
UKG	Discussing improvements required for Colleague/UKG integrations before launch of VTSU.
ERez Life	VTSU environment is configured. Housing application is built, and residence life staff are being trained on use of the system.
DEISJ Data Elements	DEISJ recommendations incorporated into the Slate to Colleague integration assuring consistency in data collection and storage. Mapping data and drafting instructional resources around name and pronoun changes.

# IT Shared Service Update



# Timeline



- Approval for IT Shared Services – service areas and leadership positions
- Posting/hiring leadership positions
- Begin SLA drafts

- SLA drafts (reviews with key stakeholders)
- Organizational chart approved
- Service areas start to meet
- Individual job duties discovery
- Service area discovery activities

- Discovery continued
- Review of all IT budgets
- Service area retreats – identifying priority work to support transition

- SLAs drafts completed
- Service area development
- Project prioritization by service area
- Transition planning – appt. letters
- Shared services budget development

Service Level Agreements (SLAs), COP (Council of Presidents)

# Timeline



- Final staffing plans completed – appt. letters with HR
- Budget development and approval for FY24
- Communication planning/roll out
- Website/service catalog development
- Project priorities → project charters and timeline mapping (Wrike implementation)
- Leadership and service area communication/meeting structure roll out
- Ongoing, communication roll out
- Implementation of specific projects/combined services
- Governance planning

# Priority Projects

## Technical Support Services

- Helpdesk Process workflow
- Remote Application Delivery
- Endpoint Management Alignment

## Enterprise IT Infrastructure

### Network

- Wireless coverage maps
- Pending deployments
- Phone system alignment
- E911 compliance review

### Data Center/Sys Admin

- Domain Consolidation
- File management strategy roll out

## Security

- Incident Response
- Compliance Review
- Eliminating Vulnerabilities
- Endpoint Detection and Response Project Implementation
- MFA: phase 2 rollout
- Review of back up strategies

## IT Professional Services

- Budget
- Service Catalog Development
- Website/communication
- SLAs
- Governance

## Enterprise Applications

- Support matrix
- Review of CCV web apps

## Learning Technologies

- Faculty development/technology rollout for VTSU
- Learning Spaces upgrades

## Systems Projects

- Slate (Admissions)
- Ferrilli/Colleague (Core ERP)
- Ad Astra (Scheduling System)
- Formstack (Forms Solution)
- Perceptive Content (Document Management)
- UKG data integrations (HR)
- eRezLife (Housing system)
- Acalog/Curriculog (Catalog)
- DEI Data (Ensuring inclusive data fields among systems)
- Portal Phase 2 (consolidation of portal for VTSU)



# Wins

- Generally, positive morale and commitment to team
- Improved communication/transparency
- Budget discoveries/opportunities
- Enhanced project management approach
- Addressing some long-standing issues

## & “concerns”

- This level of change, investment and project need will take time - disparate historical strategies and investments
- Ongoing clarity of new individual role function will be needed



# Transformation Budget Update





# State Funded Transformation Spending

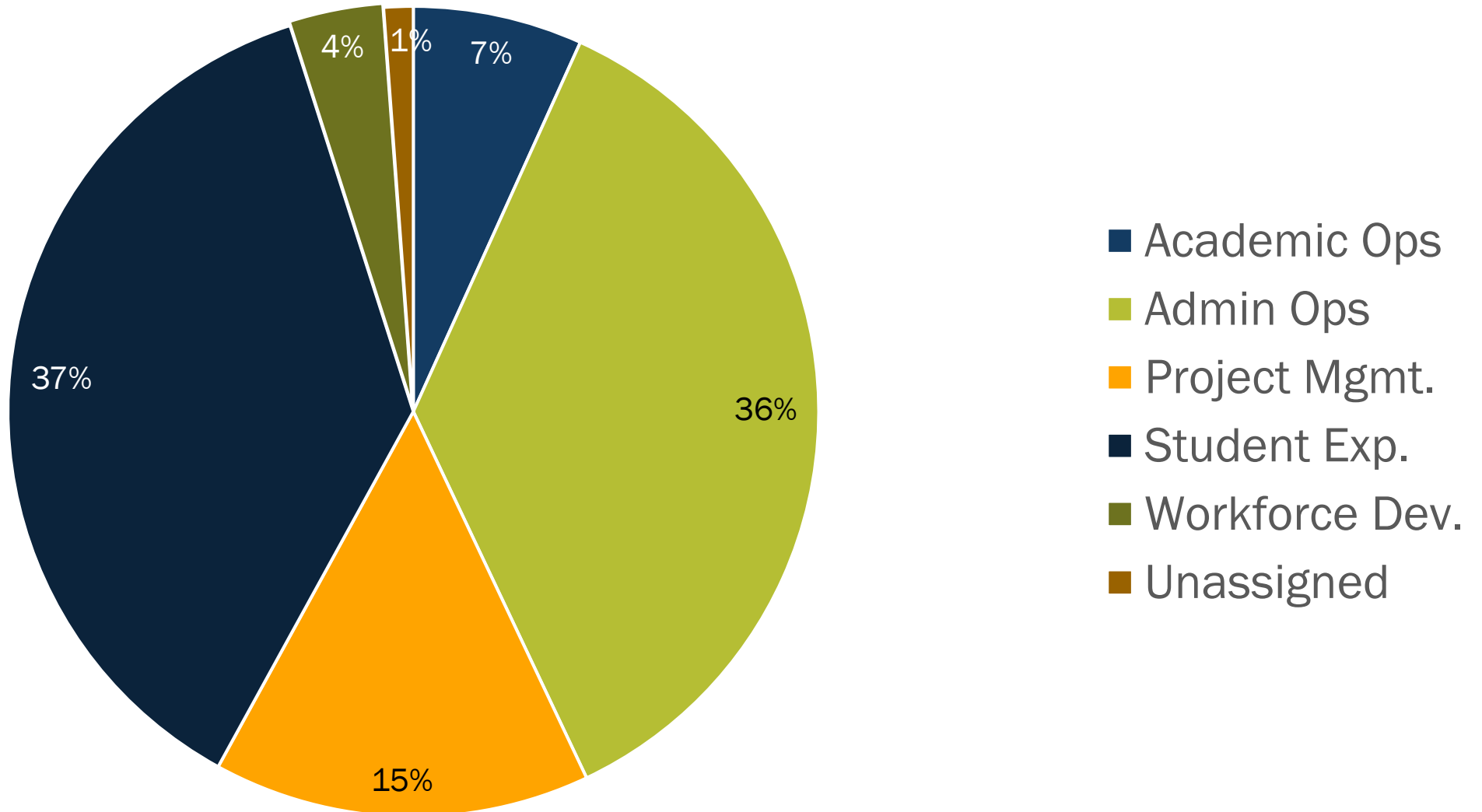
Transformation Project Spending	FY2022	FY2023 YTD (12/31)	FY2023E Remaining	FY2023E Total	FY2024/5E	Grand Total
Academic Ops	180,935	105,186	316,000	421,186	750,000	1,352,121
Admin Ops	913,680	1,177,915	2,650,000	3,827,915	2,500,000	7,241,595
Project Mgmt.	542,248	279,299	559,000	838,299	1,625,000	3,005,547
Student Exp.	835,270	895,255	2,686,000	3,581,255	3,000,000	7,416,525
Workforce Dev.			250,000	250,000	500,000	750,000
Unassigned			75,000	75,000	159,212	234,212
<b>Total</b>	<b>2,472,133</b>	<b>2,457,655</b>	<b>6,536,000</b>	<b>8,993,655</b>	<b>8,534,212</b>	<b>20,000,000</b>

# Supplemental Transformation Spending

<b>Supplemental Spending (complete)</b>	<b>FY2022</b>
Program Optimization (Davis Foundation)	261,000
Facilities Studies (State Capital)	448,688

<b>Supplemental Pending (estimated)</b>	<b>FY2023-25</b>
Academic Programs: Davis Foundation	251,522
State Capital for Transformation: Divestment	1,000,000
Congressionally Designated Spending: Workforce	2,346,000

# Estimated Project Spending FY22 - FY25



# Board Decision Points

Month	Approve	Approver	Review	Originator
Jan '23	<ul style="list-style-type: none"> <li>Policy 403: <i>System Annual Operating Budget Policies</i></li> </ul>	BOT	<ul style="list-style-type: none"> <li>Academic Programs &amp; Gen Ed Progress</li> <li>Shared Governance Progress</li> </ul>	EPSL
Feb '23			<ul style="list-style-type: none"> <li>Q2 Financial Results</li> <li>FY2024 Budget: 1st Pass Budget</li> </ul>	F&F
Mar '23	<ul style="list-style-type: none"> <li>Review/Approval of Revised Board Policies</li> </ul>	BOT		
Apr '23	<ul style="list-style-type: none"> <li>Internal Audit: Final</li> </ul>	Audit	<ul style="list-style-type: none"> <li>Cyber Security Update</li> <li>FY2024 Budget: 2nd Pass</li> </ul>	Audit F&F
May '23	<ul style="list-style-type: none"> <li>FY2024 Budget: Final</li> </ul>	F&F	<ul style="list-style-type: none"> <li>Q3 Financial Results</li> </ul>	F&F
Jun '23	<ul style="list-style-type: none"> <li>FY2024 Budget: Final</li> <li>VTSU Strategic Plan and Metrics</li> </ul>	BOT BOT		

**Questions?**