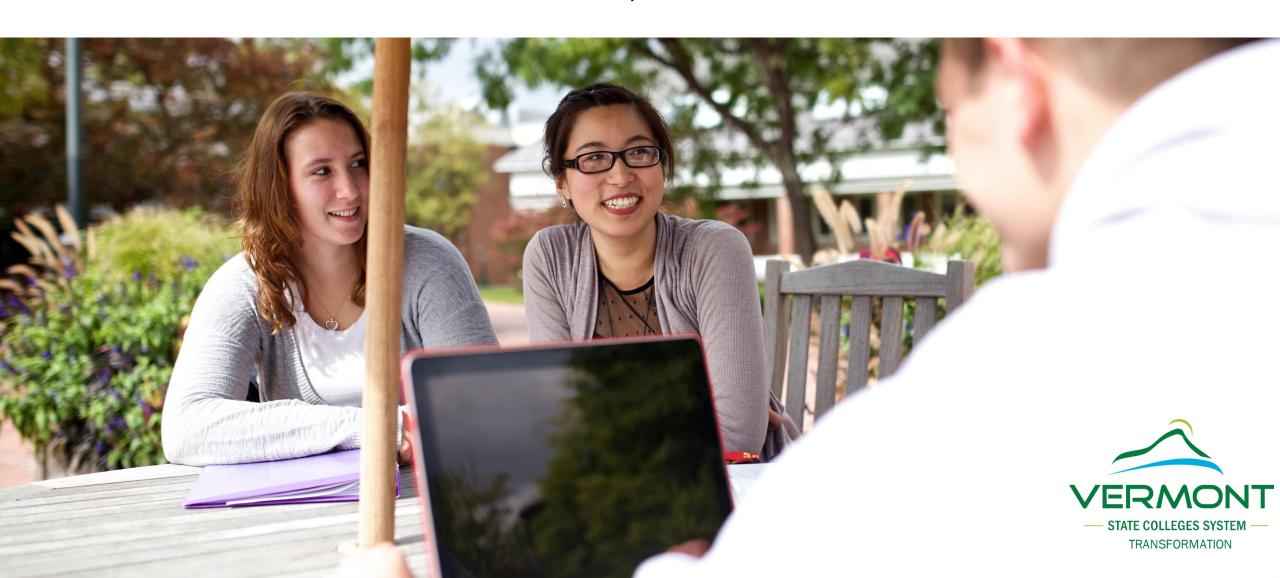# ERP Roadmap – Board Update
November 13, 2023

What is an ERP, what is our ERP, why assess current state?

- ERP = Enterprise Resource Planning
  - Software system that helps run our "business" – supports core processes
- Ellucian Colleague (implementation in 2002)
  - Currently on Colleague Student, Financial Aid, Finance, HR (module still exists due to some processes not transitioned to UKG)
  - Other disparate systems support other processes and connect to Colleague via integrations, such as:
    - Slate (Admissions system), UKG (HR system), a # of others
- Why?
  - Cost containment, consolidation, efficiency, streamline processes, and understand market to support the student experience

VERMONT
— STATE COLLEGES SYSTEM —
TRANSFORMATION

Scope of Assessment

- Ferrilli's work is underway, conducting a current state ERP Assessment and working to develop an ERP Roadmap. This assessment includes a review of:
  - The current environment setup and utilization, including infrastructure
  - Support structure and budget
  - Stakeholder engagement
  - Core ERP business process
  - Stakeholder, IT, and institutional change readiness for an ERP Migration
  - Inclusive of broad system portfolio

- The work on this Assessment and Market Analysis is in four broad phases, as detailed in the following sections.
  - Phase 1: Current State Assessment – currently underway, expect to be done in early December
  - Phase 2: ERP Market Analysis
  - Phase 3: Reports and Presentations Development
  - Phase 4: ERP Roadmap – recommendation to upgrade, migrate, or stay

VERMONT
— STATE COLLEGES SYSTEM —
TRANSFORMATION

What should we, as a leadership team, start thinking about to prepare for something like this?

- This is not an IT project. This is a massive business operations project.

- Funding and resourcing is critical
  - Funding should consider much more than the technology

- This will require key and critical functional owners - backfilling positions is a best practice

- This will be a multi-year project

- The market has some limitations, assessment phase will be critical

Governance Proposal

Governance Structure	Responsibility/Function
SPONSORS Board of Trustees	SPONSOR FUNCTION • Final decisions on recommendation • Approval to move to next stage • Removal and support of organizational/budget barriers
STAKEHOLDERS Council of Presidents, CFOO, CIO	STAKEHOLDER FUNCTION • Consultation with sponsors regarding recommendation • Removal of functional institutional barriers • Decisions related to internal processes • Engagement and participation with Executive Steering Group Team Lead/Members as needed
EXECUTIVE STEERING GROUP -Delegate a team lead(s) as appropriate -Inclusive of executive level leadership and broad functional leads MEMBERSHIP: Each institution nominates 5-6 individuals with broad functional understanding	TEAM LEAD(S) FUNCTION • Decisions delegated to the team • Recommendations to bring to stakeholders and sponsors TEAM MEMBERS FUNCTION • Full team participation • Communication back to functional/institution teams as needed • Collect input from functional/institution teams

VERMONT
— STATE COLLEGES SYSTEM —
TRANSFORMATION