THE COLLEGE SYSTEM of TENNESSEE

Shared Services Initiative Kickoff Discussion

Campus Visits

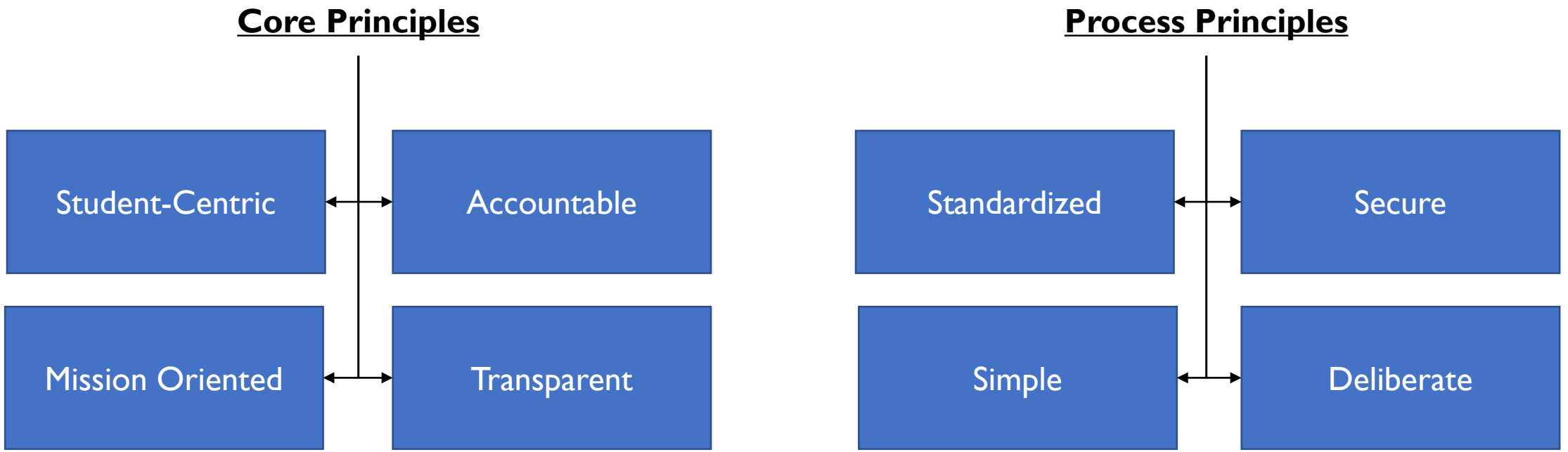
February – March 2017

Project Vision

To create a shared services center that meets the core administrative needs of the community colleges, TCATs, and system office in a consistent, timely, and economical manner, thereby freeing up resources to support campus student success initiatives.

Guiding Principles

As key discussions and decisions occur throughout the project, the team will refer to the following guiding principles to resolve conflicts:



Shared Service Center Timeline

Today
Project Initiation

2005-2006 Banner Implementation
Ellucian implemented Banner across the 13 Community Colleges as well as the universities

2013-2015 Business Process Models
SIG lead the Business Process Model Project from 2013 - 2015 to standardize select administrative processes across the 13 TBR Community Colleges

2015 Huron Admin Assessment
Huron was engaged in 2015 to assess current administrative services across TBR system and identified opportunities to consolidate all ERP systems and create a shared services center for certain functions

2020 Shared Service Center Go-Live
Using a cohort model, TBR plans to launch the shared services center by 2020, with all institutions operating in a MEP environment

2022 SSC Funding Repayment
Two years after the SSC launch, the CCs, TCATs, and System Office will begin the ten-year repayment of half the SSC implementation costs

Upcoming Project Deliverables

Over the next several months, the project team is working diligently to complete the following deliverables with your assistance:

- Project work teams
- Ongoing funding model
- Shared Services Center approach
- Business process analysis
- Detailed timeline

Implementation Partners

TBR is working with a number of implementation partners throughout this initiative:

TBR – The College System of Tennessee

- TBR is sponsoring this project at the system level and providing leadership throughout
- The System Office will coordinate amongst the different institutions and leverage existing resources throughout
- TBR institutions will provide the subject matter expertise, process backgrounds, and other critical institutional knowledge

Huron

- Create program management infrastructure needs: governance, communication plan, management tools, etc.
- Support the Shared Services initiative moving forward in a program management role
- Currently engaged with TBR on 'Project Initiation' prior to launching the full SSC implementation

Strata Information Group

- Support the Shared Services initiative with:
  - Business Process Analysis (BPA)
  - Org Design
  - Talent Management
  - Change Management
  - Client Implementation Support

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- Provide full-time subject matter expert support for software solutions
- Evaluate current Community College customizations
- Support the Shared Services initiative
- Currently managing the TCAT implementation of Banner Student, Financial Aid and Workflow

Program Management Office

Huron will continue to support the Shared Services initiative moving forward in a program management role.

- **Program Management Office (PMO):** the program management office is responsible for the management of the multiple related projects – SSC design, Banner implementation, process redesign – with the intention of improving TBR's organizational performance.

Huron Team Members:

Matt Jones, Managing Director
Merritt Neale, Director
Kim Sprankle, Director
Brian Korblick, Manager
Nick Kozlov, Associate

Critical Success Factors

Based on Huron's experience on similar engagements, we have identified the following 'Critical Success Factors' for effective program management:

1. Transparency and communication
2. Holding stakeholders accountable
3. Issue and risk management

Project Initiation Deliverables

To support a smooth project kickoff, Huron has developed a number of project initiation deliverables:

- **Project Charter:** provides a preliminary delineation of roles and responsibilities, outlines the project objectives, identifies the main stakeholders, and highlights the project's guiding principles.
- **Governance Model:** outlines the governance committees charges, meeting frequencies, and reporting relationships, and will ultimately identify specific individuals.
- **Executive Dashboard:** highlights key project items on a weekly basis, including: Overall Status, Project Activity Summary, Risks/Issues, Decisions, etc.
- **Communications Plan:** identifies key project communications as well as the audience, format, frequency, dates, sensitivities, and objectives among other items, while continuously being updated.

Project Charter

Tennessee Board of Regents
Shared Services Project Charter

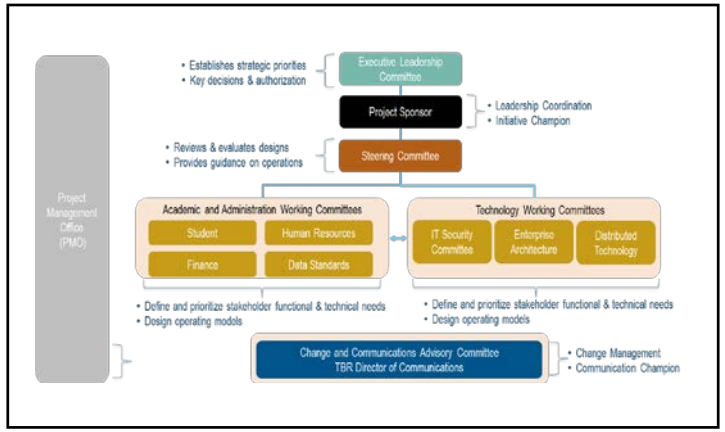
Purpose of the TBR Shared Services Project Charter

Project Background & Purpose

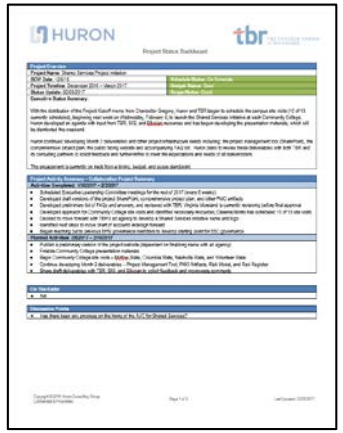
Guiding Principles

Critical Success Factors

Governance Model



Executive Dashboard



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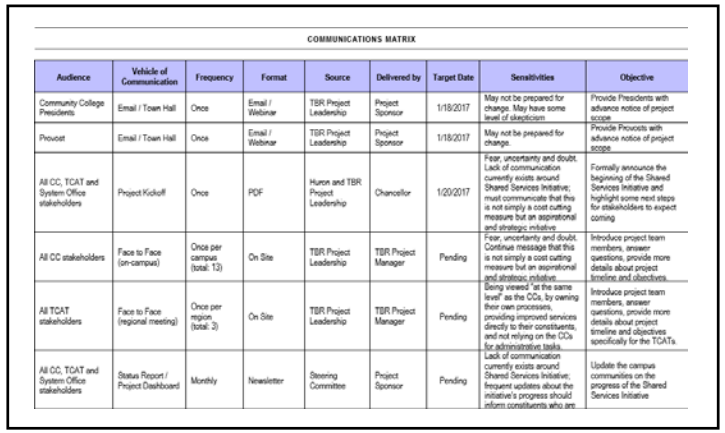
Project Status Dashboard

Communications Plan



COMMUNICATIONS MATRIX

Audience	Vehicle of Communication	Frequency	Format	Source	Delivered by	Target Date	Sensitivities	Objective
Community College Presidents	Email / Town Hall	Once	Email / Webinar	TBR Project Leadership	Project Sponsor	1/18/2017	May not be prepared for change. May have some level of skepticism	Provide Presidents with advance notice of project scope
Provost	Email / Town Hall	Once	Email / Webinar	TBR Project Leadership	Project Sponsor	1/18/2017	May not be prepared for change.	Provide Provosts with advance notice of project scope
All CC, TCAT and System Office stakeholders	Project Kickoff	Once	PDF	Huron and TBR Project Leadership	Chancellor	1/20/2017	Fear, uncertainty and doubt. Lack of communication currently exists around Shared Services Initiative; must communicate that this is not simply a cost cutting measure but an aspirational and strategic initiative	Formally announce the beginning of the Shared Services Initiative and highlight some next steps for stakeholders to expect coming
All CC stakeholders	Face to Face (on-campus)	Once per campus (total: 13)	On Site	TBR Project Leadership	TBR Project Manager	Pending	Fear, uncertainty and doubt. Continue message that this is not simply a cost cutting measure but an aspirational and strategic initiative	Introduce project team members, answer questions, provide more details about project timeline and objectives
All TCAT stakeholders	Face to Face (regional meeting)	Once per region (total: 3)	On Site	TBR Project Leadership	TBR Project Manager	Pending	Being viewed "at the same level" as the CCs, by owning their own processes, providing improved services directly to their constituents, and not relying on the CCs for administrative tasks.	Introduce project team members, answer questions, provide more details about project timeline and objectives specifically for the TCATs.
All CC, TCAT and System Office stakeholders	Status Report / Project Dashboard	Monthly	Newsletter	Steering Committee	Project Sponsor	Pending	Lack of communication currently exists around Shared Services Initiative; frequent updates about the initiative's progress should inform constituents who are	Update the campus communities on the progress of the Shared Services Initiative

Business Process & SSC Design

Strata Information Group (SIG) will continue to support the Shared Services initiative moving forward with:

- Business Process Analysis
- Organizational Design
- Talent Management
- Change Management
- SSC Implementation Support

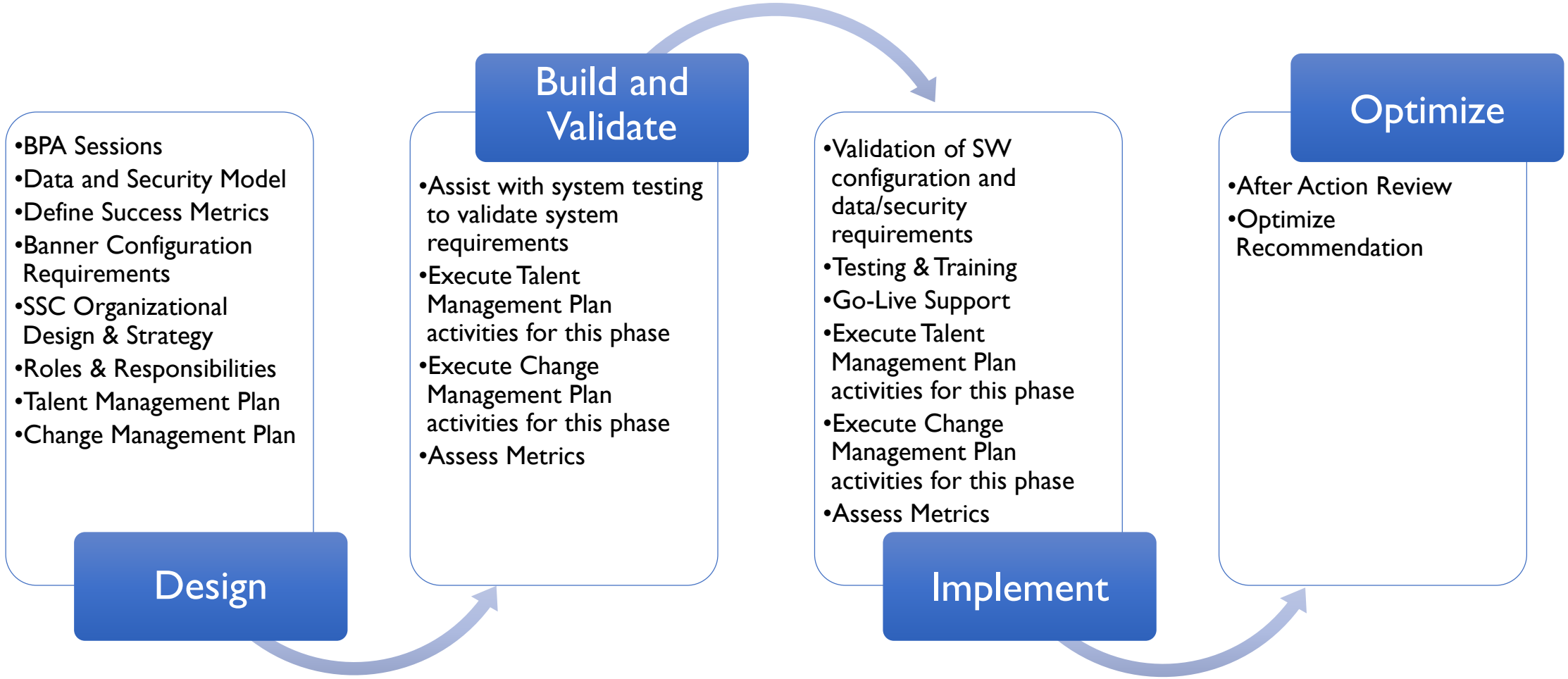
SIG Team Members:

Emily Rudin, Project Director/AE
Henry Eimstad, SIG Project Sponsor
John Pitzel, Project Manager
Business Process Senior Consultant, Kari Blinn
Shared Services Senior Consultant, Preston Cameron
Banner Functional Consultants

Critical Success Factors

- Executive leadership and support
- Collaboration and timely access with Community College staff
- Trust
- Effective Change Management
- Phased implementation approach

SIG Engagement



Solution Implementation

Ellucian will be working closely with all project stakeholders to provide the following support:

- A single Banner instance with student data in a MEP environment
- Installation of Ellucian software
- Support role for Business Process and COA definition
- Configuration delivery for all of the software solutions
- Data Migration support
- Support deployment activities

Ellucian Team Members:

Marsha Lala, Project Director
Nancy Hughes, Ellucian Delivery Director
Dave Harvey, Project Sponsor
Bernadette Gratton, Technical Architect
Ellucian Functional and Technical Consultants

Critical Success Factors

- Timely decision making
- Proactive communications
- Effective Change Management

What is "MEP?"

- Multi-Entity Processing (Oracle/Ellucian terminology) refers to the Ellucian process using Oracle VPD (Virtual Private Database) functionality to restrict access to tables based upon an institution code
- MEP allows multiple institutions to share one Banner database instead of creating a database for each entity
- Benefits:
  - allows for sharing of components for greater efficiency and data integrity
  - minimizes database-related costs
  - enables a proactive account management approach by centralizing and consolidating multiple databases into a single database

Next Steps

The immediate activities for each project team are identified below:

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• Finalize working teams for project governance • Identify cohorts for staggered timing of shared services go-live • Confirm key decisions prior to business process modeling • Launch initiative website and capture FAQs	• Continue developing Project Initiation deliverables • Continue meeting with Community Colleges and TCATS • Incorporate feedback from meetings into presentations and deliverables	• Develop SIG's project plan • Request selected staff members to attend the Business Process Workshops • Request information • Begin interviews with on-site functional areas • Begin BPA	• Participate in the project planning activities and align the Ellucian team to support the project schedule • Collaborate with TBR IT to prepare the solution environment • Support the Business Process activities