

TWIN CITIES COLLABORATION



PRESIDENT'S REVIEW FEBRUARY 7, 2006



TWIN CITIES COLLABORATION



Northwestern College
SAINT PAUL, MINNESOTA



AGENDA

Set the stage: <ul style="list-style-type: none">▪ Recap since last meeting▪ Snapshot of current status▪ Interactive discussion - expectations and concerns	David Wheaton
Collaboration - benefits we have seen <ul style="list-style-type: none">▪ Common timeline & implementation approach▪ Leveraging resources▪ Vendor performance	Randy Thomann
Managing project challenges <ul style="list-style-type: none">▪ Project management▪ Institutional requirements▪ Vendor accountability	Phil Asgian
Leveraging our investments <ul style="list-style-type: none">▪ Within our institutions▪ Across the Collaboration▪ Beyond the Collaboration	Doug Schroeder
What's next <ul style="list-style-type: none">▪ Involvement expands▪ Risks to watch▪ Next review	Tammy Mc Gee

TWIN CITIES COLLABORATION



Set the stage:

- Recap since last meeting
- Snapshot of current status
- Interactive discussion - expectations and concerns



TWIN CITIES COLLABORATION



Northwestern College
SAINT PAUL, MINNESOTA



Recap of key events:

- 2004 -Requirements and vendor selection, budget by institution
- Early 2005 – initial Collaboration organization and role definition
- ***End of May, 2005 – SunGard contract signed***
- June, 2005
 - Project planning with vendor begins
 - Procure hardware and software
- ***July, 2005 – SunGard project manager identified***



TWIN CITIES COLLABORATION



Recap of key events:

- August, 2005
 - Current-state process mapping begins
 - ***Project definition***
 - Start search for Collaboration project manager

- September, 2005
 - Data Standards teams start
 - ***Collaboration project manager on board (mid month)***
 - ***Initial Finance team training begins***
 - Implementation Approach developed
 - Work Breakdown Structure (WBS) - detail project planning



TWIN CITIES COLLABORATION



Recap:

- October, 2005
 - ***SunGard project manager replaced***
 - Detail planning and scheduling
 - Teams trained on implementation approach
 - Finance and Technical training



TWIN CITIES COLLABORATION



Recap:

- November, 2005
 - SunGard performance improves
 - ***Intense project definition work***
 - Finance and Technical training continues
 - Data Standards definition continues



TWIN CITIES COLLABORATION



SunGard Performance Rating – scale 0 – 4.0

October 20, 2005

SCHEDULING

- right people doing the training/consulting	3.3
- notified 3 weeks in advance	0.5
- include enough information/advice to attendees	0.3
- communicate same information to all 4 institutions	0.7
- schedule throughout the project with greater than 90% accuracy	0.5
- all plans fit within timelines including project deliverables	0.7

TRAINING MATERIALS LIBRARY

- maintain current training materials library	0.0
---	-----

GUIDANCE

- sequencing - proper order for task completion	1.7
- resourcing - who needs to be involved	1.0
- relationships between modules	1.3
- expertise - what worked well for other projects	0.5

REPORTING

- timely, accurate, complete reporting - consultants and others work performed	0.3
- status reporting to help us know where we are and what we need to focus on	1.0
- forward looking (forecasting of project needs)	1.0
- billing information that is understandable	1.0

DELIVERY/QUALITY ASSURANCE

- technical set-up	0.8
- project progress	0.5
- cross communication within SCT - robust & timely	0.7

ISSUE ESCALATION/RESOLUTION

- early warning	
- clear description - of project impact	
- assist with decision making, resolution	

COMPOSITE AVERAGE

→ 0.9

December 20, 2005

SCHEDULING

- right people doing the training/consulting	3.3
- notified 3 weeks in advance	2.4
- include enough information/advice to attendees	3.0
- communicate same information to all 4 institutions	3.3
- schedule throughout the project with greater than 90% accuracy	2.7
- all plans fit within timelines including project deliverables	3.0

TRAINING MATERIALS LIBRARY

- maintain current training materials library	3.9
---	-----

GUIDANCE

- sequencing - proper order for task completion	3.3
- resourcing - who needs to be involved	3.4
- relationships between modules	3.0
- expertise - what worked well for other projects	3.0

REPORTING

- timely, accurate, complete reporting - consultants and others work performed	2.5
- status reporting to help us know where we are and what we need to focus on	3.0
- forward looking (forecasting of project needs)	2.8
- billing information that is understandable	3.1
	1.9

DELIVERY/QUALITY ASSURANCE

- technical set-up	2.5
- project progress	2.9
- cross communication within SCT - robust & timely	2.9

ISSUE ESCALATION/RESOLUTION

- early warning	3.0
- clear description - of project impact	3.4
- assist with decision making, resolution	3.6

COMPOSITE AVERAGE

→ 3.0

Recap (continued):

- December, 2005
 - Finance and Technical training continues
 - Data Migration planning begins
 - **WBS - detail work plan completed**
 - Project definition work completed & approved
 - Week by week activity plans for all functional teams



TWIN CITIES COLLABORATION



Northwestern College
SAINT PAUL, MINNESOTA



Recap:

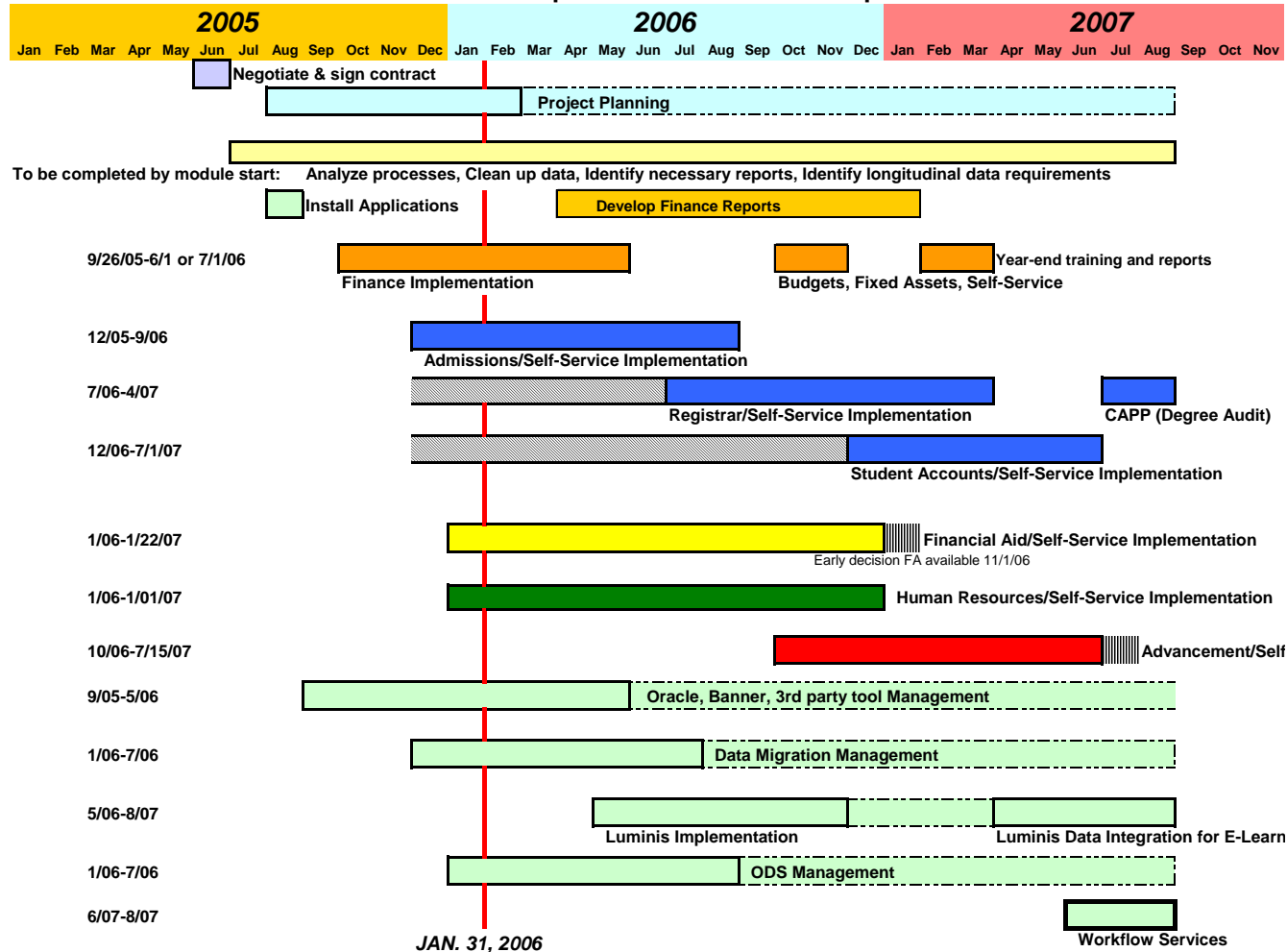
- January, 2006
 - Finance and Technical training continues
 - Student module training begins
 - Detail work plans reviewed with Finance team
 - Data Standards well under way
 - Finance team starts mapping requirements to SunGard software
 - ***Common report writing tool selected***
 - Report development strategy in process



TWIN CITIES COLLABORATION



TCC Implementation Timeline -- updated 12/19/05 v8 r4



- DRIVERS:**
- Finance – start of the fiscal year
 - Student – register incoming class for 2007
 - Financial Aid – early decision date
 - Human Resources – calendar year

TWIN CITIES COLLABORATION



Status:

- On schedule - all 4 schools working on a common timeline
- Completed the first project milestone - ***project governance documents approved:***
 - Implementation strategy & delivery plan
 - Configuration management plan
 - Quality management plan
 - Communication plan
- We have recovered from lost time
- Secured additional services free of charge in return for lost time.
- Memorandum of understanding re: business relationship

PROJECT PULSE: CURRENT



- ★ Green: project schedule, budget, scope and quality
 - watch – IT leadership, technical resources and experience sufficient to accomplish technical tasks, learn, maintain and support a new system
 - watch – functional resource availability for new system set-up, process definition, testing
 - watch – SunGard “bug fixes”
- ★ Yellow: SunGard performance – coordination across large number of consultants; consultant turnover
 - significant pressure on Finance and Technical staff
- ★ Red: none at this time

TWIN CITIES COLLABORATION



Collaboration - benefits we have seen

- Common timeline & implementation approach
- Leveraging resources
- Vendor performance



Common timeline & implementation approach

- ***Project management team:***
 - Common approach and tools
 - Share team communications and vendor management efforts
 - Internal communication
 - Collaboration project management experience

- ***Chief information officers:***
 - Definition of technical requirements
 - Shorten decision cycle time
 - Maintain end-user focus

- ***Functional teams – e.g. Finance team***
 - Divide work load
 - Developing a peer network

TWIN CITIES COLLABORATION



Leveraging resources:

- **Shared facilities:**
 - St. Kate's – hosting technical training
 - Northwestern – hosting Finance training
 - Macalester – Collaboration Project Manager space
 - Other functional training spread across the 4 campuses
- **Shared training with institutional consulting visits**
 - Bethel – coordinating training events and preventing scheduling collisions
- **Collaboration project repository facilitates solution development**
- **Split work effort on common tasks**

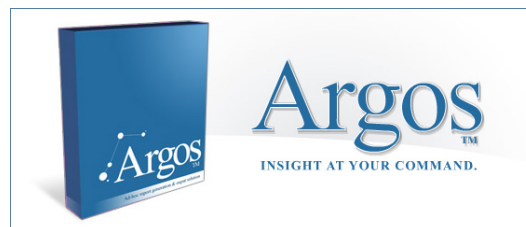


TWIN CITIES COLLABORATION



Vendor performance:

- Greater leverage resolving performance problems
- Ground-breaking project
- Better negotiating leverage
- Collaboration project manager – focused communication



TWIN CITIES COLLABORATION



Managing project challenges

- Project management
- Institutional requirements
- Vendor accountability



TWIN CITIES COLLABORATION



Response to project management challenges:

- Following a common work plan (WBS)
- Defined deliverables, and review and control points
- Weekly project management review
- Oversight for training and consulting activities
- Issue tracking tools for prompt resolution
- Budget tracking

Response to project management challenges (continued):

- Repeatable implementation approach
- Process owner review and approval
- Incorporate experience from other enterprise implementations
- Training institutional project managers
- Process driven approach

Managing vendor performance:

- Monthly scorecard reporting
- On-line survey tool
- Weekly review with the SunGard project manager
- Invoice and payment reconciliation process



TWIN CITIES COLLABORATION



Leveraging our investments

- Within our institutions
- Across the Collaboration
- Beyond the Collaboration



Leverage within institutions

- Establishing repeatable processes
- Strengthening technical process and documentation to improve information integration
- Process driven approach - streamlining current processes
- Inter-department understanding
- Effective team formation and development



Leverage across the Collaboration

- Standard implementation approach
 - Deliverables developed once for all 4 institutions
 - Divide workload where possible
- Shared training and networking
- Report development team
 - Build core components once
 - Bolt-on incremental institutional requirements



Leverage beyond the Collaboration

- Building relationships with other Minnesota institutions
 - Hamline University
 - St. Johns University
 - College of St. Benedict
 - Concordia – St. Paul
 - University of St. Thomas
 - College of St. Scholastica

- Post implementation opportunities

TWIN CITIES COLLABORATION



What's next?

- Involvement expands
- Risks to watch
- Next review



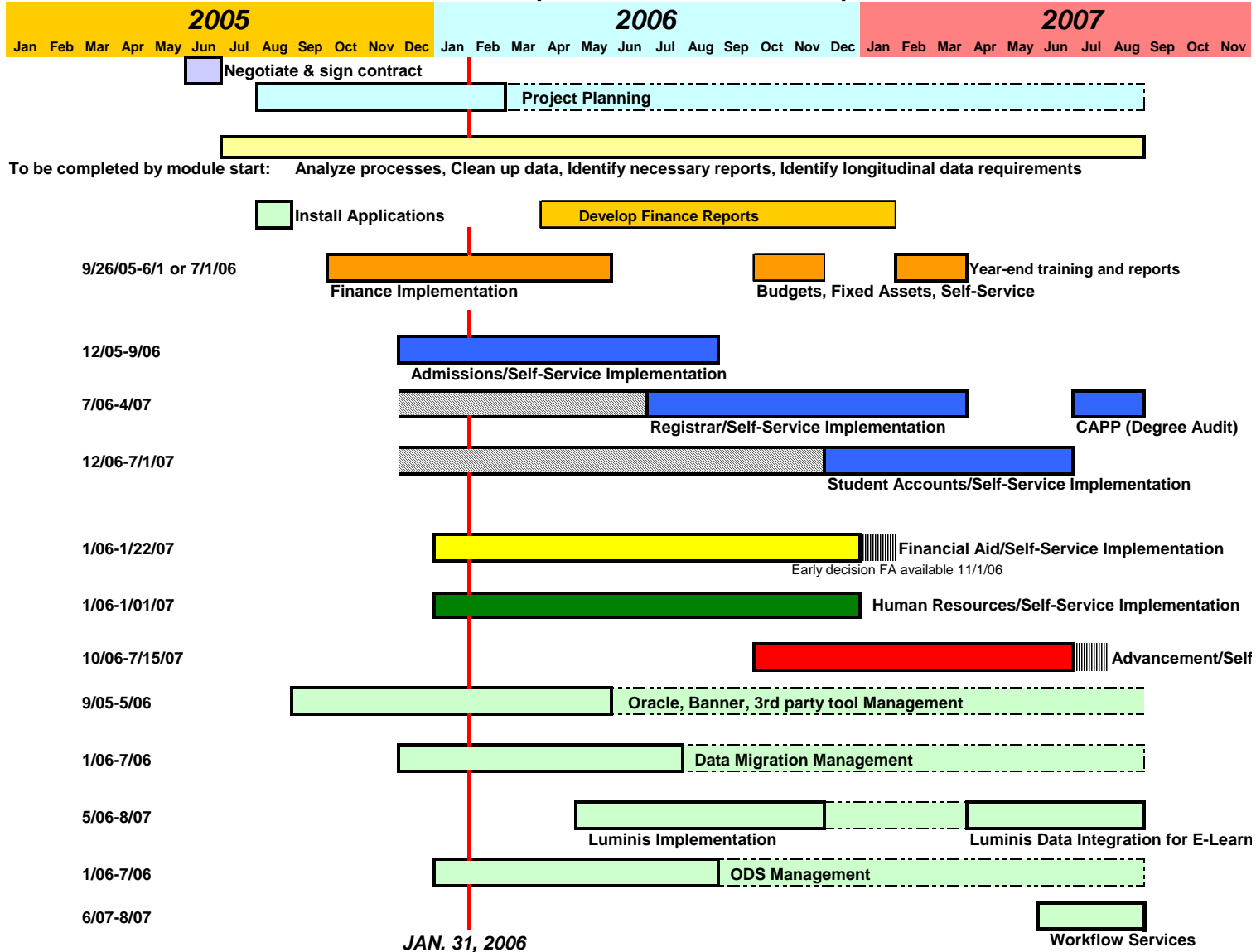
TWIN CITIES COLLABORATION



Northwestern College
SAINT PAUL, MINNESOTA



TCC Implementation Timeline -- updated 12/19/05 v8 r4



Level of involvement expands as we add modules and move beyond training:

- Identify how we will apply the vendor software to meet our requirements
- Develop test cases – avoid surprises when we go-live
- Clean up and convert data according to Data Standards
- Develop reports, forms, and interfaces
- Test system and resolve problems
- Process owner review
- End-user training

Risks to watch:

- Competition for critical resources
- Timely decisions
- Knowledge transfer - especially technical
- Lack of employee buy-in
- Resistance to change
- Turnover of key project personnel – internal and external
- Project information not shared within SunGard
- System fails to perform as expected
- Failure to prioritize reports, data conversions, and interface requirements



TWIN CITIES COLLABORATION



Northwestern College
SAINT PAUL, MINNESOTA



Next review

- 6 months – August, 2006
 - Initial go-live for Finance complete
 - Admissions ready to go-live
 - Financial Aid in process
 - Human Resource in process
 - Advancement – about to start
 - Process mapping complete
 - Data Migration well under way
 - Portal construction in process

TWIN CITIES COLLABORATION



PROJECT PULSE: FORWARD



- ★ Green: implementation approach
- ★ Yellow:
 - IT leadership
 - experience level and availability of technical resources
 - availability of functional resources for peak project times such as testing
 - cross functional communication – technical and functional teams must work together
 - large number of consultants/lack of continuity
 - significant pressure on all staff
- ★ Red: none at this time