



Shared IT Services for Higher Education & Research

Conference 2018

Starting the ERP Journey at Vancouver Island University

Presented by Shelley Legin, Elfie Smith, and Andrew Speed

Presenters



Shelley Legin

CFO and Vice-President Administration



Elfie Smith

Chief Transformation & Project Coordinator,
Project AURORA



Andrew Speed

Director Enterprise Systems & Technical
Leader, Project AURORA

Vancouver Island University



- Located in Nanaimo
- Celebrating 10th year as a regional designated teaching university
- Focus on both access and excellence

Students:

- 1,983 International students from more than 85 countries
- 1,454 Indigenous students
- 11,067 Domestic non-Indigenous students



Vancouver Island University

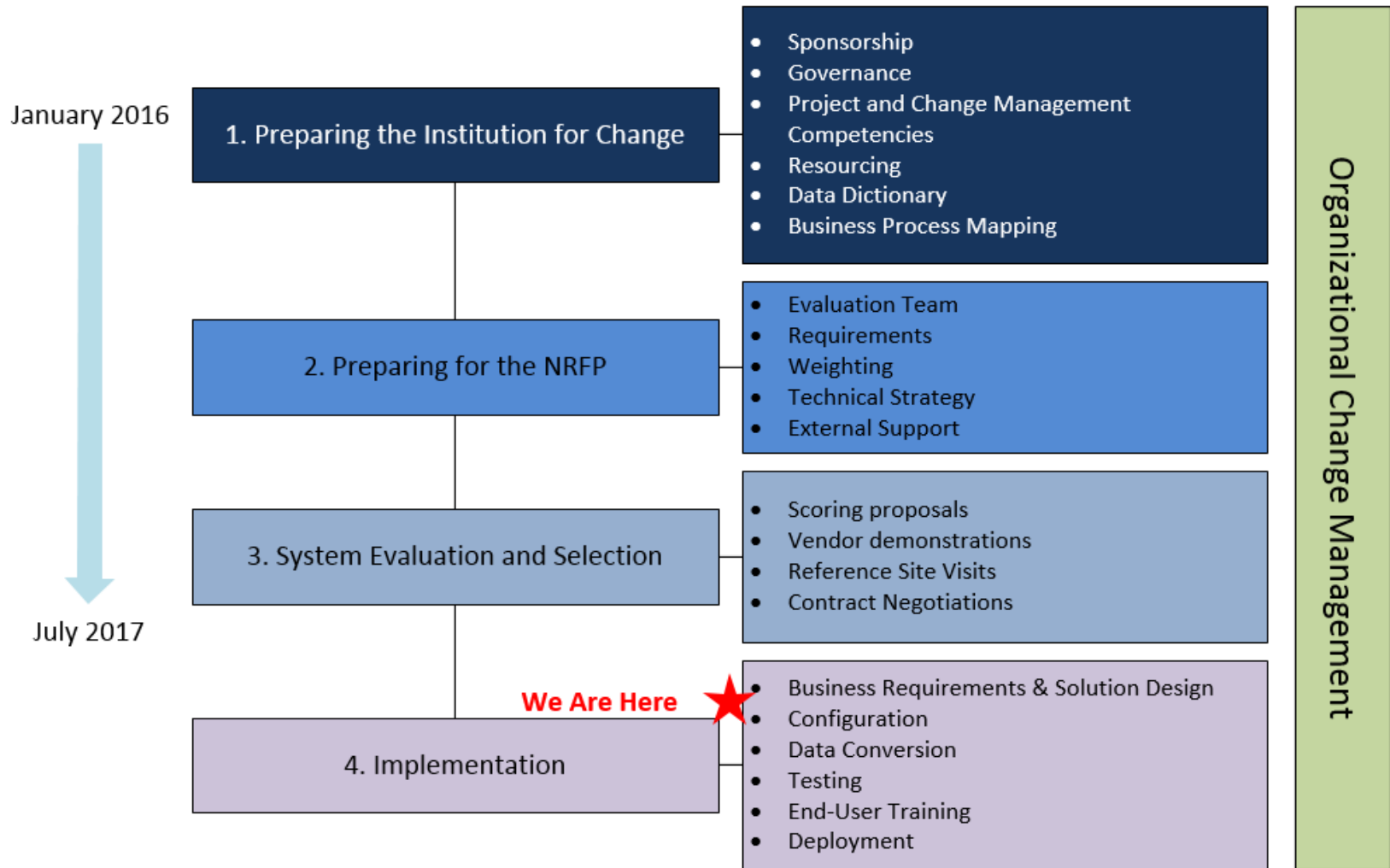


- 2,000 staff
- \$150M Budget
- 3 campuses, 9 locations, 50 buildings

- Diverse programming - 200:
 - Bachelors and Masters degrees
 - Trades
 - Career & Academic Prep



Our ERP Journey



What is Project AURORA?

A Unified Renewal of Related Applications

What?

- Replace VIU's legacy administrative systems:
 - Finance
 - Human Resources/Payroll
 - Student Records and Registration
 - Replacement of and/or integration with >100 peripheral systems
- Business process review of related functions





Why Project AURORA?

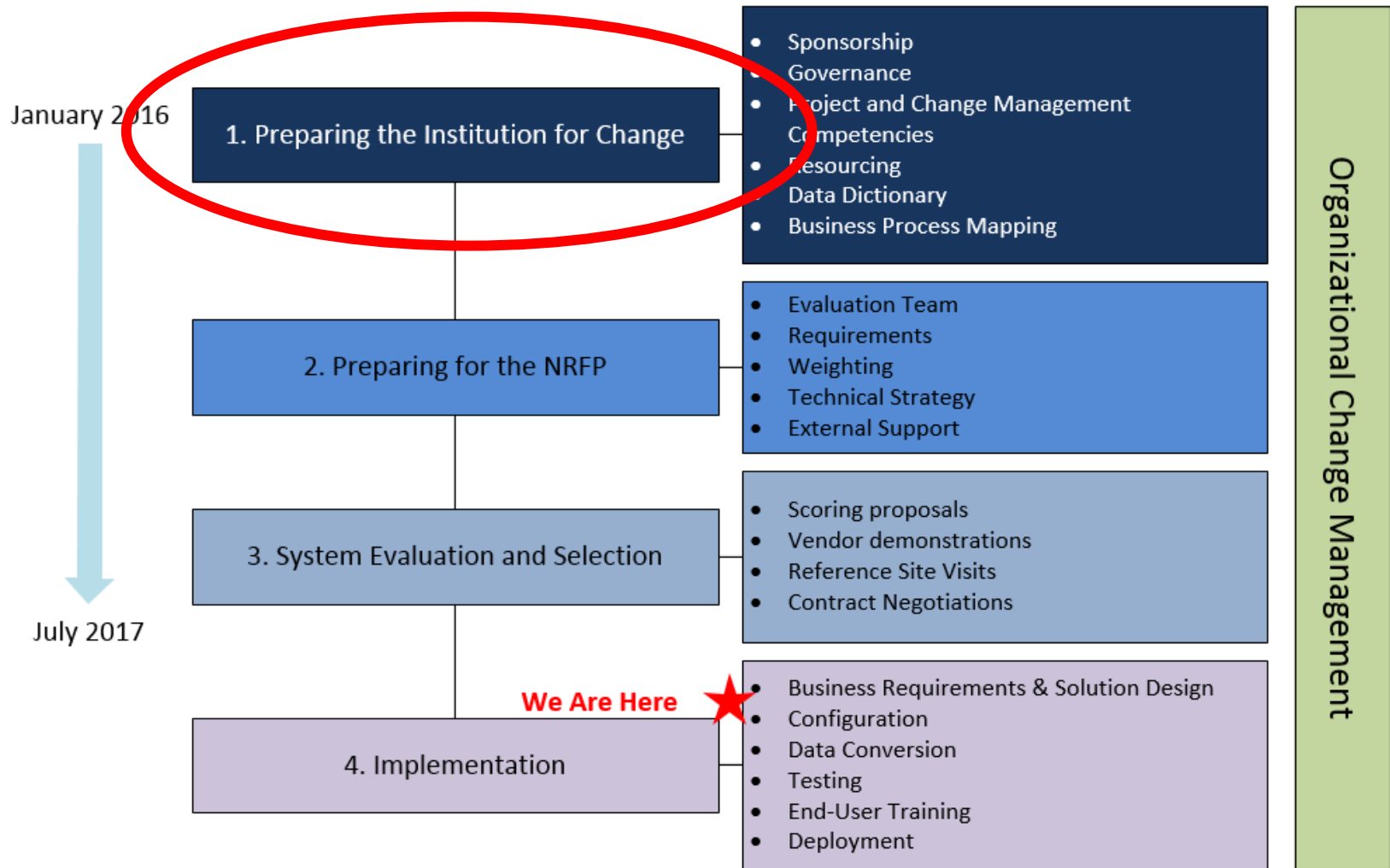
- Mitigate risk and realize benefits
- Significant risk associated with sustainability of our current systems
- Limited platform for innovation
- Limited ability for data analytics and data-driven decisions

Benefits Realization Framework

1. Improved Student Experience
2. Risk Reduction
3. Improved Data Accuracy and Reporting Capabilities
4. Increased Efficiencies



Our ERP Journey



Project Governance

Executive Sponsor	Ralph Nilson, President
Co-Sponsors	Shelley Legin, CFO and Vice-President Administration
	David Witty, Provost and Vice-President Academic
Sponsorship Coalition	Members of President's Council
Project Advisory Committee	20 members from across the institution, including a student representative

AURORA Guiding Principles

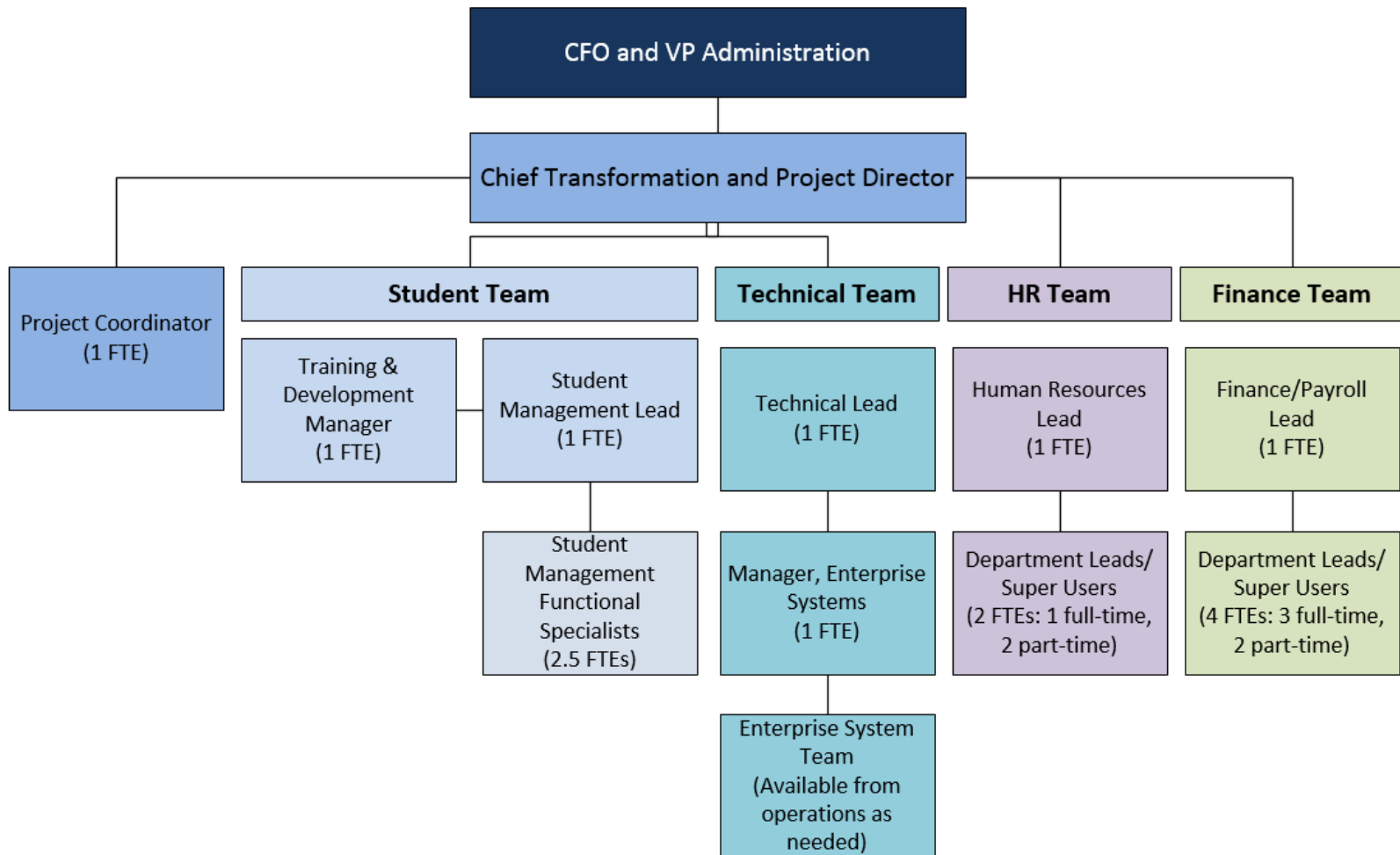
- Promote a culture of collaboration
- Acknowledge AURORA is an *Institutional Project* facilitated by IT
- Configuration trumps customization
- Not a workforce rationalization strategy
- No individual will be left behind
- Manage the project professionally
- Lead the people side of change with compassion and patience



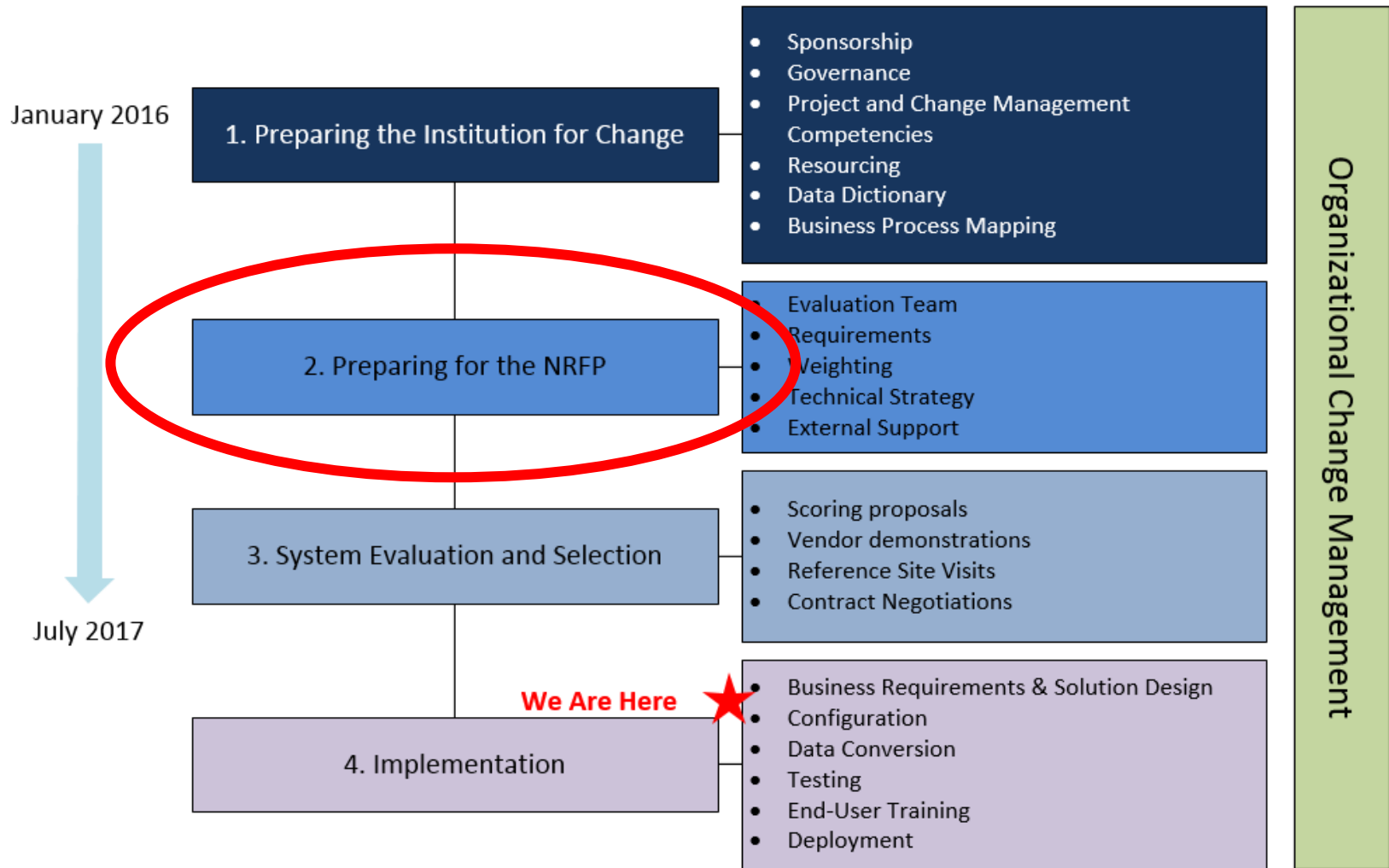
Building Competencies, Capability, and Capacity

- Project Management Training
- Change Management Training
- Data Conversion Planning
- Current-state Process Mapping

Resourcing the Project



Our ERP Journey



Collaboration with Selkirk College

- Long-standing relationship
- Running the same administrative systems:
 - Finance and Student Systems developed in-house at VIU
 - Same vendor-supplied HR/Payroll system
- Joint Negotiated Request for Proposal (NRFP)
- Collaborative system implementation process



Preparing the Negotiated RFP

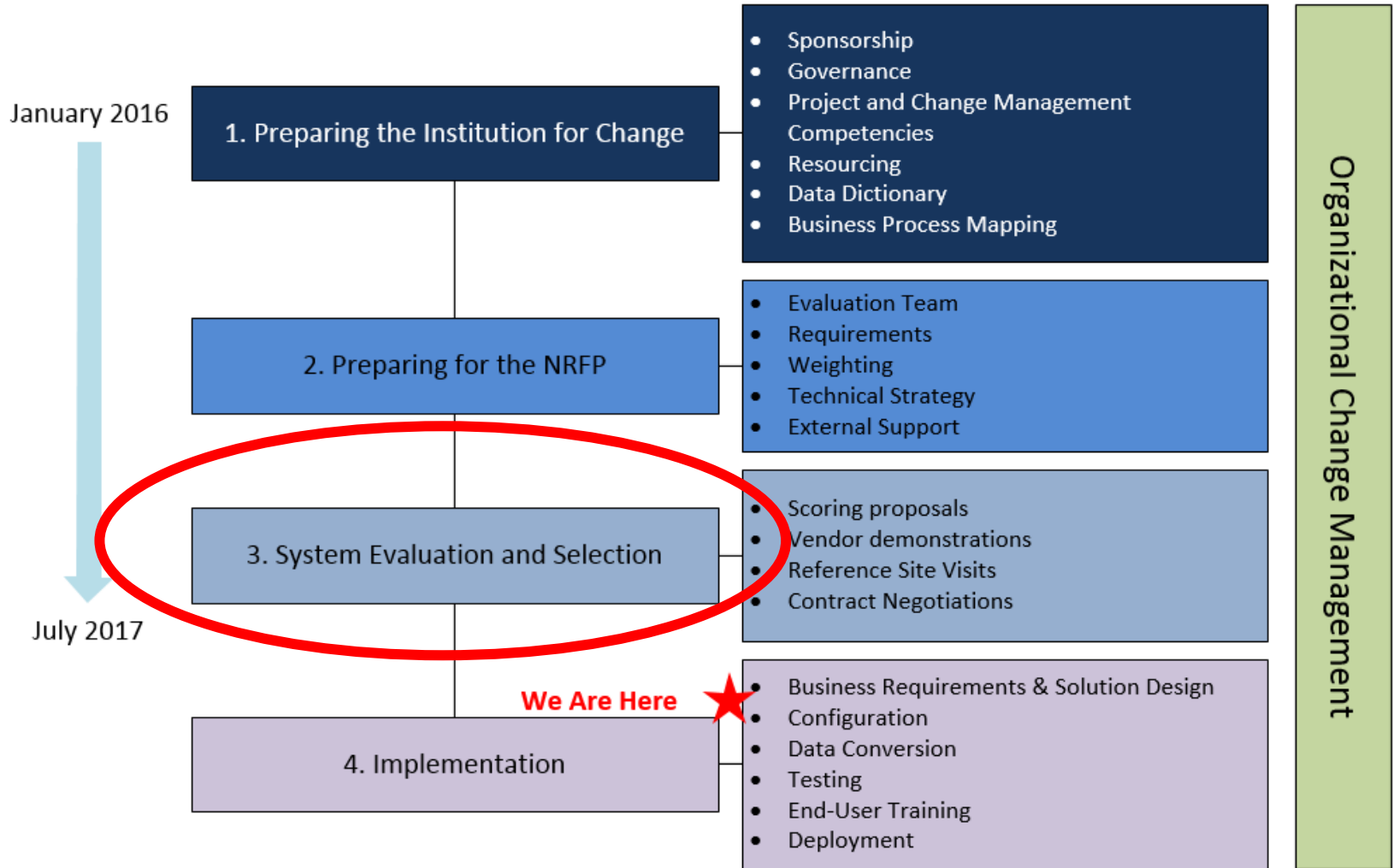
- Evaluation team led by Strategic Procurement Manager
- Engaged external support from MNP
- Requirements gathering:
 - Over 2,000 individual requirements
 - Identified Mandatory vs. Desirable requirements
- Determined Technical Strategy
 - Cloud vs. On-Premise vs. Hybrid

Preparing the NRFP

Weighting:

Functional Requirements	30%
Technical Requirements	15%
Implementation Requirements	15%
Proponent Capacity	10%
Proposed Pricing	20%
Presentations/Demonstrations	10%

Our ERP Journey



Evaluation Process

- Scoring Proposals
- Demonstrations from short-listed vendors
- Reference site visits



Contract Negotiation Process

- Concurrent vs. Consecutive Negotiations
- Engaged external legal support
- Privacy considerations



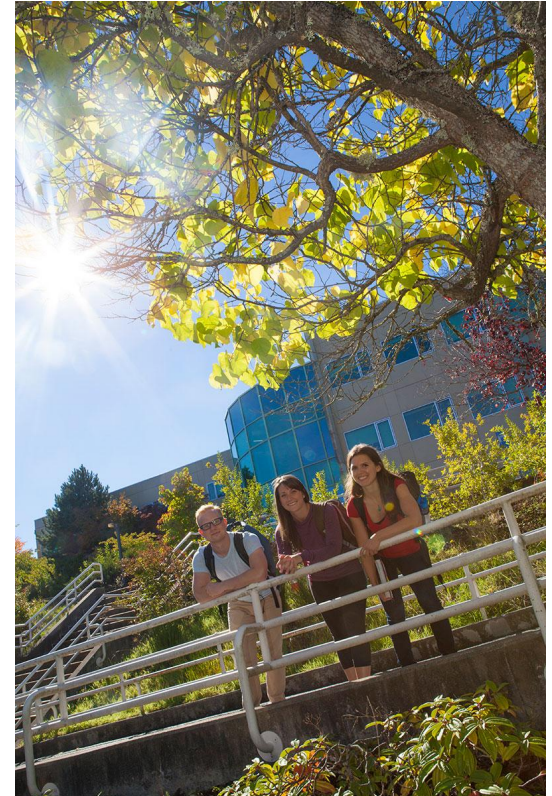
Unit4 Modules Purchased

- Business World On: Finance, HR, Payroll
- U4SM: Student Management
- All in the Cloud (SaaS)

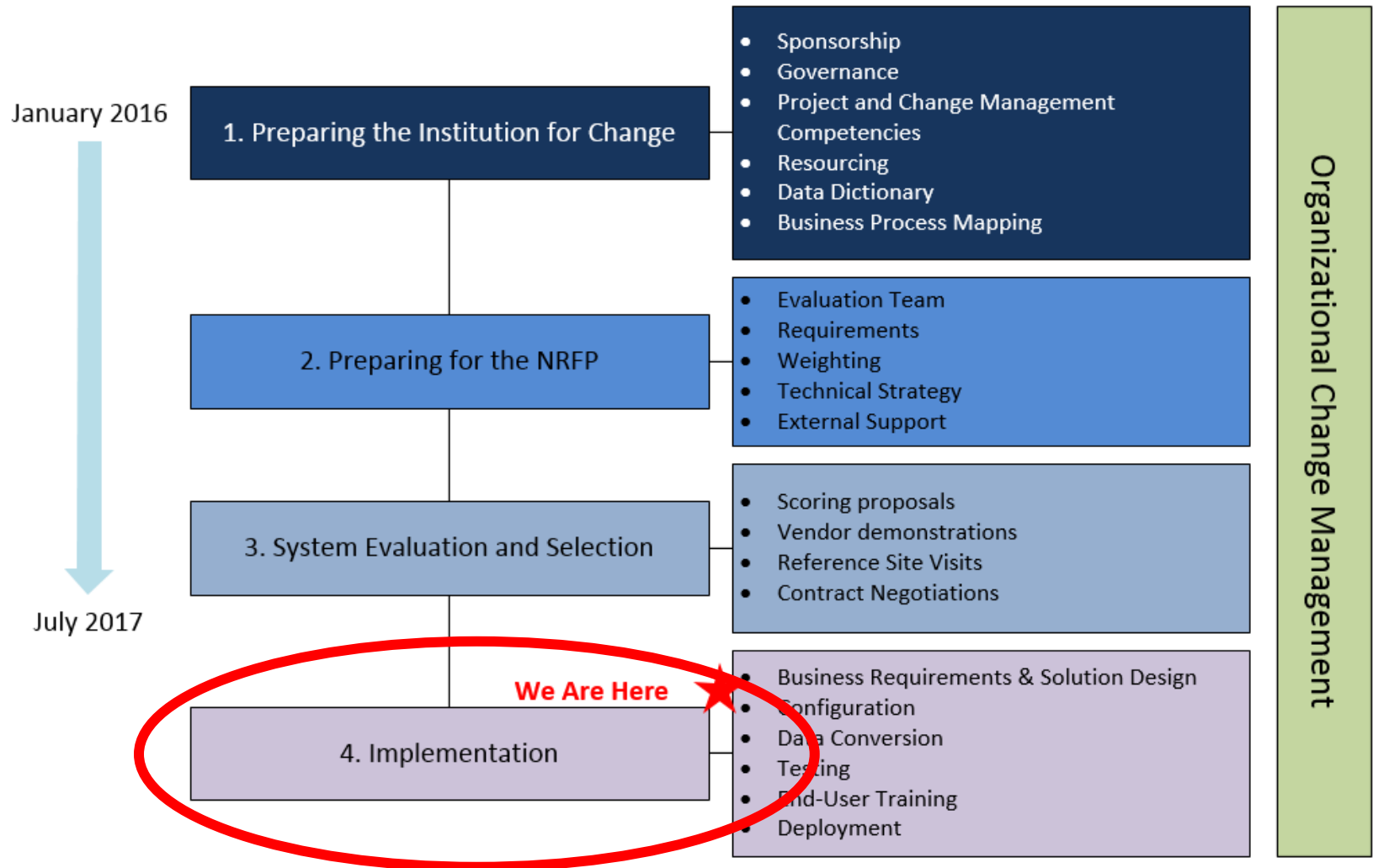


Why we Selected Unit4

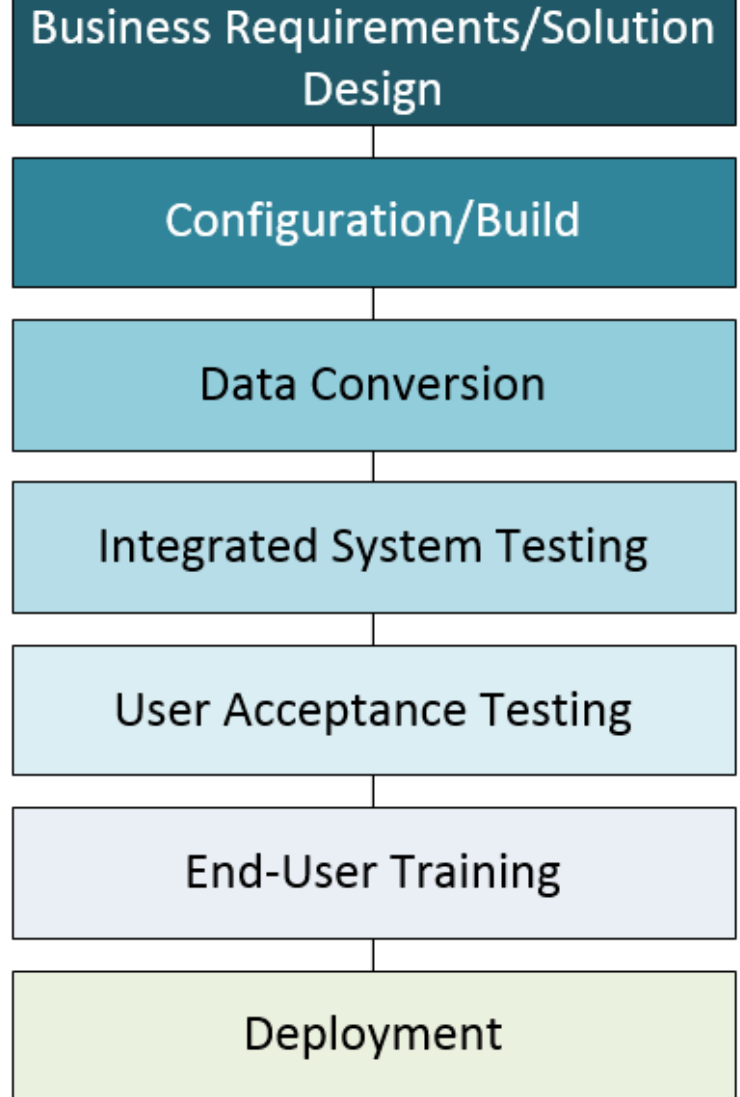
- Student-centric design
- Built for the Cloud
- Best met VIU's requirements
- Flexibility
- User interface
- Communication functionality
- Workflow tools



Our ERP Journey



Implementation Phases



Implementation Status

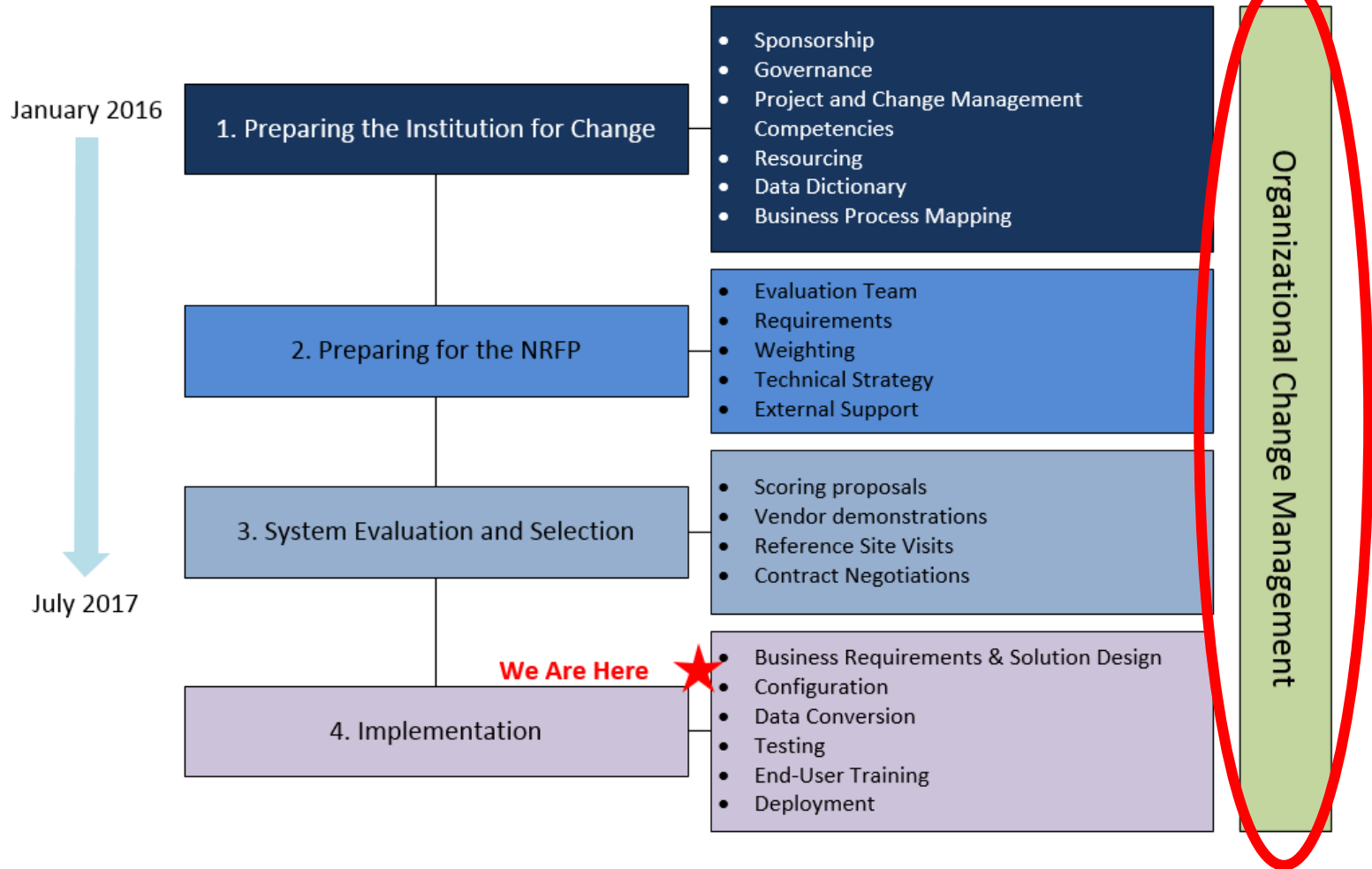
Module	Implementation Start	Current Phase
Finance	September 2017	Configuration
HR/Payroll	September 2017	Requirements & Solution Design Validation
Student Management	January 2018	Requirements Documentation

Implementation Status

- Project planning and scheduling is nearly complete
- Goal to prepare a ***realistic*** schedule
- Close to establishing feasible go-live dates



Organizational Change Management



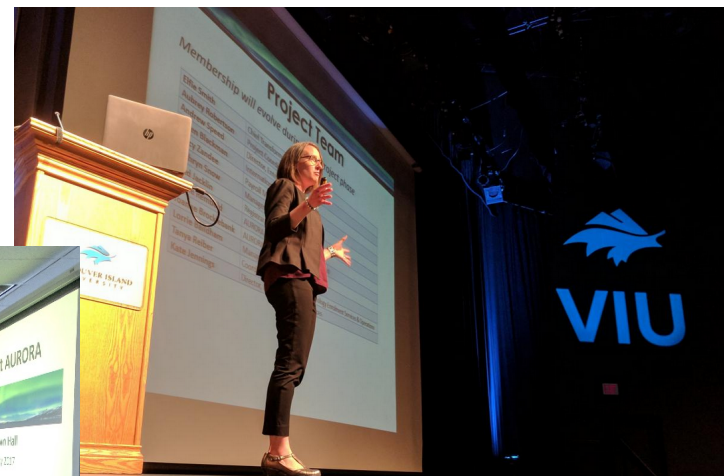
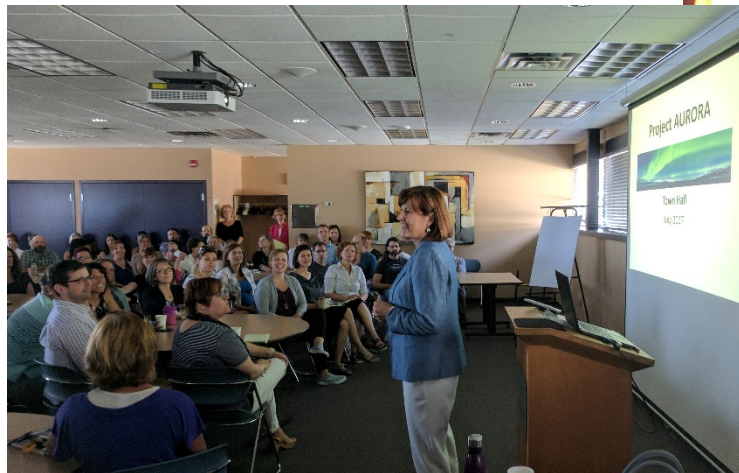
Organizational Change Management

- Awareness Campaign early in the process
- Invited participation in NRFP Process (vendor demonstrations)
- Encouraged participation through Special Assignment Teams



Organizational Change Management

- Delivered “Exploring Change” workshops to employees
- Regular Status Update Bulletins
- Town Hall Meetings



Keys to Success

1. Executive sponsorship at the highest level of authority in the organization
2. Ready-state the institution
 - Competencies, capacity, capabilities
3. Structure the project
 - Excellence in planning, governance, and resourcing
 - Don't select go-live dates too early in the process
4. Rigour and due diligence in selection of implementation partners
 - Fill gaps in expertise and capacity
5. Institutional engagement through change management

Questions?

