

ERP Governance Committee

Purpose, Principles and Implementation

ERP Defined

ERP originally stood for Enterprise Resource Planning, but has evolved from an acronym to a word that connotes the entire academic, administrative and business systems IT environment.

ERP was developed in the business world during the 1990s as software became more capable and businesses sought ways to better manage themselves. ERP often referred to a single, comprehensive business system, such as “the student ERP system.” Though from its inception ERP was meant to refer to the overall administrative environment, early ERP systems typically did not integrate across the enterprise. Systems might conflict with each other, such as a “student system” and a “learning management system.” Early systems were often intended for the staff in a business unit – there might be an ERP student system, but students might still stand in line or use a touch-tone phone to register for classes.

ERP systems, even in higher ed, provide competitive advantages for staff and “customers,” and so they evolved to become directly interactive with customers, and with each other. That direct interaction often done thru a portal. A portal is a web page or site that provides an interactive point of access or gateway to enterprise information and tools. Portals in a sense provide for customer interaction with and across systems, and from system to system with the ever advancing but elusive goal of being intuitive to and anticipating the needs of staff and customers. We are all familiar with the MyCUInfo portal, which serves faculty, students, and staff. We are also aware the MyCUInfo is the center of a number of loosely knit campus portals that may be department centric but are not necessarily customer centric, a problem senior leadership has asked us to address.

Next generation ERP systems are comprehensive software packages that seek to integrate and automate the complete range of business processes and functions to present a holistic view of the business from a single information and IT architecture. They address the processes of multiple academic and administrative units and have evolved to include customer relationship management, integrate Internet-enabled applications for e-business, incorporate big data, provide for mobile integration, be secure and accessible, and provide access to information at any time and from anywhere.

As ERP systems have progressed, so have their costs. We cannot run CU or CU-Boulder without ERP systems that reliably serve our needs, which are increasingly demanding as higher ed becomes more competitive in a changing and fiscally austere world and as advances in technology bring both greater functionality and cost. In the ROI of ERP, the “I” is finite and must be uniformly managed, at least campus-wide, in order to maximize the “R.”

Current major CU/CU-Boulder ERP systems include SIS (all related systems), Elevate, InfoEd, CRM, PSC systems (notably Marketplace), various portals (notably MyCUInfo), Concur, CIW/Cognos, OAO (Online Admissions Offering), and www.colorado.edu. There are also many small systems across campus, which may be an actual application, or perhaps a spreadsheet or a Filemaker or Access data base. We expect that as the committee works to improve the performance, management, and governance of our ERP systems, the need for localized ERP systems will decline.

Committee Principles

ERP Governance Principles were given to the ERP Governance Committee on January 29, 2016 by Provost/EVCAA Moore and SVC/CFO Fox, to quote:

1. “The Office of Information Technology (OIT) will be the single voice of direction to University Information Systems (CU System, UIS) as to how UIS resources are allocated to CU-Boulder technology projects.
2. For departments, the ability to deploy IT to meet some departmental need may have significant negative consequences for the larger campus. New tool/technology exploration will be in partnership with OIT to meet identified and prioritized gaps within a department. Influencing factors include cost, extra-departmental impacts, and already existing solutions.
3. An investment roadmap will be created and adjusted at minimum each year to reflect planned investments in support of academic, research, and administrative computing needs.
4. The needs of the campus as a whole may require compromise at the departmental level.

We recognize that this is a new way in which we operate. It requires our collective strength to make the most of our resources. We believe coming together as a shared voice will yield the most value for our campus.”

Implementation: How We Work

The purpose of the committee, per the above principles, is to assist and advise the Provost and SVC/CFO to ensure our ERP environment is strategically organized, coordinated and cost-optimized for the academic, research and administrative goals necessary for the success of CU Boulder. The committee will also develop a multi-year prioritized ERP strategic plan that recognizes the value and security of data, the ability to analyze it, and leads to sound decisions that support the mission of the university.

The work of the committee is to:

- Work as a collective governance committee to effectively and appropriately prioritize and resource ERP efforts, whether UIS, OIT, or local/departmental.
- Review and prioritize campus ERP efforts and determine which local/departmental efforts should be reviewed and prioritized at the campus level (see “campus autonomy with collective governance” below) in order to best maximize departmental and campus resources.

How we prioritize

The ERP committee’s scope is an ERP roadmap, as opposed to a list of IT projects. The committee will determine and revisit on a regular basis what comprises the roadmap. Discussion and decisions will be documented for transparency and shared understanding. The Provost/EVCAA and SVC/CFO will attend meetings when issues demand and will be regularly informed and updated by the CIO. OIT, UIS, and

committee members as appropriate will provide the administrative and analysis resources to prepare and inform the committee appropriately.

The committee will rely on OIT for dedicated business analysis, as well as other IT expertise (e.g. subject matter experts in various departments) to provide reports and facilitate discussion with the committee of ERP initiatives. This will provide the committee with the information needed to align investments with CU-Boulder's mission and goals, adhere to the four committee principles given above by the Provost and the CFO, and ensure that everyone understands their role, is fully informed, and can be engaged in the discussion at a strategic level.

The committee will prioritize work by contextualizing and understanding the functionality, benefits, costs, risks and ERP system impact of any initiative. A roadmap, developed by the committee and updated by OIT and UIS will contextualize each ERP area to campus goals, and will provide a comprehensive overall view of the ERP landscape. Taking the time to develop and discuss the roadmap and vision adheres to the concept espoused by the committee of "slowing down to speed up" or spending more time up front understanding the implications and cost/benefit analysis of ERP decisions.

Given that ERP initiatives classically suffer from significant scope creep, clear objectives will be established and documented up front and change decisions will be documented and reviewed by the committee.

The work of existing advisory groups, such as the eCRM Advisory and CU-SIS Advisory, will be positioned in the context of priority setting happening through more centralized governance. These groups will continue in their function of operational decision making. For example, decisions such as schedules for installing bundle releases or patches, how to prioritize campus change requests, or functional input into ERP related projects would typically be operational. Strategic priority setting through the ERP governance process would direct decisions such as how many resources to dedicate to campus change requests on an on-going basis, when to add or redirect resources to new projects to meet new needs (or perform a major upgrade to stay current with existing needs), or how to manage risks escalated from a project.

The relationship of this group to UIS and the System

CU-Boulder's position is that we are a customer of UIS and the System for our ERP needs. The committee, in partnership with UIS and OIT, develops an ongoing ERP roadmap, sets priorities and direction, and holds OIT, UIS, and the CU System Office accountable for meeting those needs. We expect to govern how UIS will help achieve campus ERP roadmaps and ultimately CU's overall ERP roadmap to serve the campuses.

Campus autonomy with collective governance

Any campus effort or system needing significant, dedicated resources should be considered a campus-wide ERP solution. OIT will work with the committee and with individual department members to jointly determine what IT solutions are needed to meet campus business needs, which will also then help the committee recommend to the Provost and SVC/CFO comprehensive approaches to meet campus and departmental needs. The committee will consider not only sheer project size and degree of campus-wide scope, but potential project impacts for relatively smaller and departmentally local ERP efforts.

Since campus ERP needs and ERP systems provided by the System, the campus, or a department are interdependent, how we assess degree of impact will be refined with experience as the committee performs over time. Initially, anything directly involving ERP system functionality, or that will use or rely on data from, or feed data to, one of the ERPs should have visibility to the committee. Such visibility may come from one or more members and from OIT and UIS based on contact from a department regarding functionality or data.

Unintended consequences created by departmental decisions will be discussed by the ERP committee and used as lessons learned, followed by policy/best practice recommendations for future decisions. We seek to create a more disciplined, cohesive ERP governance structure and will implement a cycle of continuous improvement into our discussions.

Staff in units who identify ERP needs currently not provided by campus or CU System will contact OIT for consultative support to help identify where a solution fits on the ERP continuum. Each committee member bears a responsibility to be aware of ERP activity in their areas.

How we communicate

The committee will maintain a web site with both private and public information that describes the work of the committee, lists members and their areas, and describes and documents the ERP landscape, including all ERP work, categorized as stable/in production, in development, or planned, along with prioritizations and anticipated dates for milestones for all projects. In addition, the committee will conduct outreach through usual channels – Cabinet, CEC, Deans’ Council, Chairs and Directors, AVC Group, and possibly other campus-wide committees. Each committee member will communicate information from and to his or her area.

2016-2017 Members

Frances Draper—Strategic Relations, Katherine Erwin—Campus HR, Stephanie Gillin—Leeds School of Business, Jon Giltner—OIT, Christina Gonzales—Student Affairs, Amy Lavens—A&S, Larry Levine—OIT, Scott Munson—UIS, Mike Murray—Office of Performance Improvement, Gwen Pomper—Enrollment Services, Laura Ragin—Controllers Office, Tricia Rankin—Office of the VC for Research, Marin Stanek—OIT, Louise Vale—Planning, Budget and Analysis, Steve Vassallo—Integrated Planning, JoAnn Zelasko—Engineering.

Committee Sponsors

Russ Moore, Kelly Fox

Acronyms

- **AVC/CIO** – Associate Vice Chancellor/ Chief Information Officer, currently Larry Levine
- **CEC** – Chancellors Executive Committee
- **CIW** –Central Information Warehouse
- **CRM** – The four-campus Constituent (or commonly customer) Relationship Management system, currently Salesforce
- **CU SIS** – The four-campus Student Information System, currently PeopleSoft Campus Solution
- **EVCAA** – Executive Vice Chancellor, Academic Affairs, currently Russ Moore



- **FIN 9.2** – the four-campus Financial System, currently PeopleSoft v. 9.2
- **HCM** – Human Capital Management, the four-campus Human Resource system, currently PeopleSoft
- **InfoEd**—the four-campus electronic Research Administration system
- **OIT** – Office of Information Technology
- **PSC** – Procurement Service Center
- **ROI** – Return on Investment
- **SVC/CFO** – Senior Vice Chancellor/Chief Financial Officer, currently Kelly Fox
- **UIS** – University Information Systems