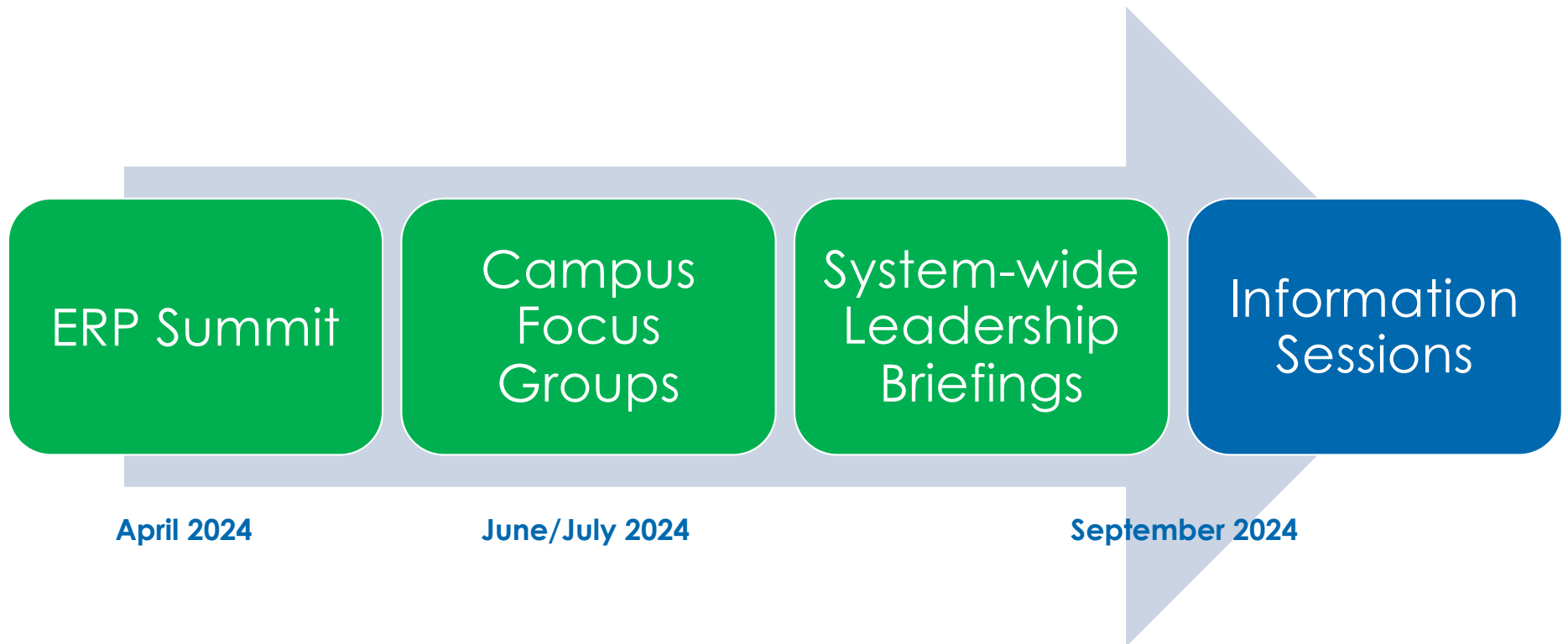# Agenda

1. ERP Activities to Date

2. Campus Focus Group Results

3. ERP Roadmap Phase Approach & Next Steps

Questions/comments in the chat please

UMass ERP Activities to Date

ERP Summit	Campus Focus Groups	System-wide Leadership Briefings	Information Sessions
April 2024	**June/July 2024**	**September 2024**	

System-wide ERP Activities to Date

ERP Summit	Campus Focus Groups

120 Participants   **133** Participants

5 Campuses and the President's Office

14 Functional Areas

- Academic
- Budget
- Bursar
- Controller

- Finance
- Grants/Research
- Program Management

- Procurement
- Risk/Policy
- Student Financials
- Treasury

- Human Resources
- Information Technology
- Enrollment

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Campus Focus Groups Results

Campus Focus Groups - Approach

The Deloitte team conducted research through facilitated focus group sessions for each UMass campus and the President's Office, tailoring each session to meet specific needs and/or requests.

Participants were encouraged to share the **challenges and limitations with the current ERP systems** (SIS, HR, FIN) as well as its strengths, along with their **desired changes, future enhancements, and critical enablers and barriers** to a potential ERP modernization.

133 UMass Stakeholder Participants

07 Campuses and Offices Engaged

08 Focus Groups Conducted

1,076 Unique Inputs Analyzed

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Campus Focus Groups - Key Takeaways

Insights gathered through this phase reinforced the themes from the April 2024 ERP Summit

There is a widespread acknowledgement that UMass' current ERP systems are antiquated and inefficient, building a foundation for potential modernization

There is a strong need for System-wide governance and stakeholder engagement to align on and initiate next steps

UMass' highly decentralized current state has influenced the relationships between System offices and the campuses

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System-Wide Results | Current State of the ERP

While *Familiarity & Institutional Knowledge* was **identified as the current state's main strength**, the system's *Poor User Experience & Accessibility* **was identified as its predominant weakness**, especially for new users.

The **juxtaposition between** the views that the ERP is "**reliable and works**" and that it has "**ineffective integration and performance**" highlights a critical hurdle for UMass.

Stakeholders universally noted the ERP's **limited reporting capabilities**, which is exacerbated by UMass' **complex, decentralized IT ecosystem.** Coupled with the reality of **a long-tenured workforce**, some of which are near retirement, this presents UMass with a critical strategic decision point.

Current State of ERP
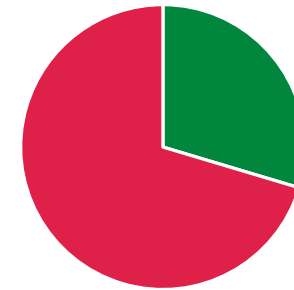
■ Positive Themes   ■ Negative Themes

Current State Positive Themes	Responses
Familiarity & Institutional Knowledge	**24**
Integration & Customization Capabilities	22
Reporting & Data Management Capabilities	19
Available Support Infrastructure & Resources	8
System Stability & Reliability	20
Total # of Responses	**93**

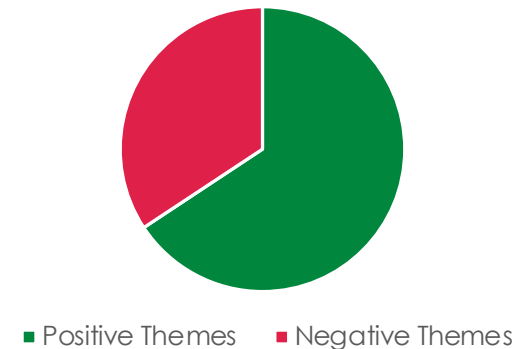| Current State Negative Themes	Responses
Inadequate Data Management & Reporting	50
Limited Governance & Strategic Alignment	22
Challenging System Maintenance, Support, & Customization	33
Ineffective System Integration & Performance	52
Poor User Experience & Accessibility	**64**
Total # of Responses	**221**

System-Wide Results | Potential Future State ERP

While *Change Management and User Adoption was* **identified as the overwhelming negative of the future state system**, the functionality benefits of the future state system (i.e., *Improved User Experience, Process Optimization & Automation, Modern Infrastructure & Support, and Enhanced Reporting & Data Analytics)* **account for 83% of all positive sentiments recorded.**

The **juxtaposition between** *Strategic Alignment & Collaboration* being the **third most identified positive sentiment** for a new ERP with the reality **that over 77% of those responses came from UMPO** showcases a potentially major sticking point for UMass.

Stakeholders acknowledged the **benefits of modern ERPs**. However, given **UMass' complex, decentralized IT ecosystem**, UMass will need to **conduct a comprehensive assessment** of the current state as well as potential future opportunities.

Future State of ERP

- ■ Positive Themes ■ Negative Themes

Future State Positive Themes	Responses
Enhanced Reporting & Data Analytics	33
Improved User Experience (e.g., Integration, Accessibility, Usability)	**73**
Modern Infrastructure & Support	38
Process Optimization & Automation	46
Strategic Alignment & Collaboration	40
Total # of Responses	**230**

| Future State Negative Themes	Responses
Change Management & User Adoption	**59**
Resource & Cost Implications	23
Strategic & Political Challenges	14
Technical & Operational Risks	17
Integration & System Compatibility	7
Total # of Responses	**120**

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System-Wide Results | ERP Modernization Enablers & Barriers

The **near universal view** amongst stakeholders **that change resistance poses the largest threat** to a potential ERP modernization highlights a critical obstacle for UMass.

The **juxtaposition between** the views that *Inadequate Governance & Strategic Alignment* is **a large barrier**, and that *Strategic Planning & Governance* is **overwhelmingly a critical enabler** showcases a clear priority for UMass.

Given *Resource Management* and *Resource Constraints* were commonly **recognized as an enabler and barrier, respectively**, this identifies a key priority for UMass should it proceed with modernizing its ERP.

Enablers & Barriers
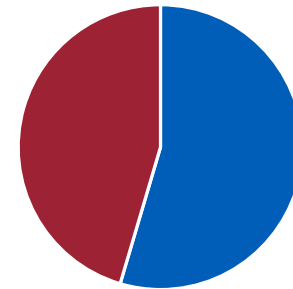
■ Enablers   ■ Barriers

Enablers	Responses
Change Management & Stakeholder Engagement	18
Resource Management	20
Strategic Planning & Governance	**89**
Technical & Operational Efficiencies	18
Training & Skills Development	10
Grand Total	**155**

Barriers	Responses
Change Resistance & Limited Stakeholder Buy-In	**39**
Inadequate Governance & Strategic Alignment	34
Resource Constraints	33
System Design & Implementation Challenges	23
Grand Total	**129**

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Functional Systems | Key Findings

Throughout the outreach, a few key findings by each function emerged that UMass should keep in consideration should it proceed with its ERP modernization, which are summarized below.

SIS

Competitive Mindset
A centralized, System-wide ERP for SIS presents different challenges than HR and FIN as campuses believe they are competing for students.

Student Self-Service Functionality
A future state ERP would provide students with enhanced self-service functionality, greatly improving the user experience for UMass' key constituency.

HR

Complex, Decentralized Technology
In the current state, UMass has an excessive number of systems that HR staff must use to process their workload, with one campus noting they have over 100 HR systems alone.

Self-Service Functionality
A new ERP would provide staff with enhanced self-service functionality (e.g., self-service reporting), providing an improved user experience and operational efficiencies.

FIN

Inefficient, Manual Current State
UMass' current state financial systems are not integrated, requiring staff to access numerous systems and pull data into an offline, shadow system (e.g., Excel) to conduct routine tasks.

Utilize Lessons Learned
Before a potential ERP modernization, UMass should conduct a robust analysis of recent modernization projects (e.g., Concur) to identify and leverage lessons learned.

Cross-Cutting IT Findings

Legacy Current State Presents Risks
The current on-premises ERP presents risks to UMass with its legacy code base, which makes it difficult to source staff with the skillsets needed to maintain the system.

Potential for Streamlined Support
A modern, cloud-based ERP will allow for streamlined support, including easier upgrade cycles as well as a reduction in the resources needed to "keep the lights on".

Future Considerations (per Deloitte)

Why Should UMass Consider Modernization?

- UMass' current ERP ecosystem is **complex, reportedly burdensome, and difficult** to maintain, **limiting how responsive and agile** UMass can be to changing needs.
- A modern, cloud-based ERP could help UMass enhance day-to-day work by **holistically transforming System-wide technology and business practices**.

What are the Impacts of the Path Forward?

- A modern, cloud-based ERP system could allow UMass to relieve **pressing pain points, become more agile, and evolve capabilities** to meet the changing needs of key stakeholders.
- A cloud solution could **simplify the UMass system IT landscape** and **provide state-of-the-art capabilities** for students, faculty, and staff.

What is the Cost of Inaction?

- UMass' siloed current state ERP ecosystem necessitates **significant workarounds**, the use of **shadow systems**, and **limits analytical capabilities**, requiring a high level-of-effort, often manual, for routine processes.
- If not modernized, the ERP may present UMass with **increasing risks** (e.g., security, operations and maintenance, etc.) due to its outdated technology stack.

System-wide ERP Roadmap Phase

Moving Ahead to an ERP Roadmap Phase

- Target the development of an ERP Roadmap between October and March

- Engage a partner with demonstrated experience working with multi-campus systems on ERP strategy/roadmap

- Establish a system-wide project team (cross discipline)

- Engage Leadership throughout for direction/feedback

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ERP Roadmap – What will be included?

Recommendations/options as it relates to future ERP focus and investments based on the UMass current state and on the ERP market/trends—potentially varied across the primary ERP functions

A **cost estimate and timeline** associated with each recommendation

A **business case** to embark on a potential ERP transformation

Guidance related to enterprise system future state options and how each aligns/positions UMass to achieve goals moving forward

Identified gaps in functional use, risks, and unmet needs with the existing ERP products that could be met in an ERP modernization

Peer analysis of the University to other institutions of similar size and scope to understand best practices and challenges (informed by peer analysis already conducted by UMass)

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ERP Roadmap Partner Selection

- Identifying the best partner to work with UMass on the ERP Roadmap

- Selected by a system-wide, cross discipline Evaluation Team

System Wide Partner Evaluation Team		
Campus	**Name**	**Title**
Amherst	Patricia Roper	Sr Director for A&F Systems
Boston	Chris Giuliani	Associate Vice-Chancellor for A&F
Chan	Cynthia Nicholson	Exec Director, Admin & Finance
Dartmouth	James Anderson	VC for Enrollment
Lowell	Lori Dembowitz	Assoc Chief Info Officer
UMPO A&F	Patrick Hitchcock	Assist VP and Univ Controller
UMPO UITS	Bradford Smith	Chief Info Security Officer

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Communication

- Monthly report out to system-wide governance groups

- Monthly updates for system-wide affinity groups

- Monthly email status report to campus stakeholders (anyone who has participated in any of activities to date)

- Monthly Website updates
  - Status Report, Questions and Answers, various materials
https://www.umassp.edu/innovation-and-operational-services/ERP-roadmap-project

- Periodic Information Sessions

Questions/Suggestions?

https://www.umassp.edu/innovation-and-operational-services/ERP-roadmap-project

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