

UMass ERP Activities

System-wide Information Session

ERP Roadmap Update

December 2024



University of Massachusetts

Amherst • Boston • Dartmouth • Lowell • Medical School • UMassOnline

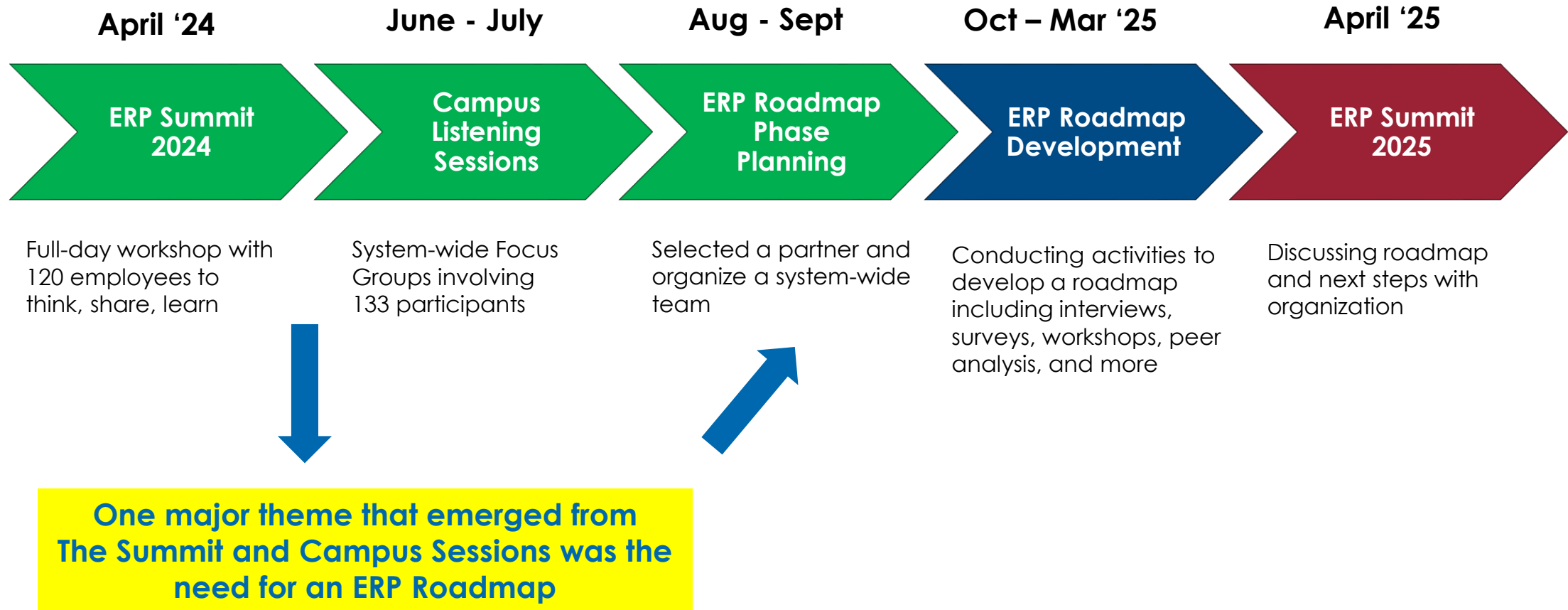
Topics

- ERP Roadmap Update
- Leadership Interviews & Questionnaire Results
- Stakeholder Workshops
- Higher Ed Modern ERP Project Research
- Modern ERP Product Demonstrations
- Communication

Questions/comments in the chat please

ERP Roadmap Update

System-wide ERP Activities Timeline



ERP Roadmap – Approach & Deliverables

Campus Engagement

✓ **Leadership Interviews**
November 2024

✓ **Functional Questionnaire**
November 2024

Stakeholder Workshops
Dec 24 – March 25

UMass ERP Product Inventory
Dec 24 – March 25

External Perspective

Accenture Expertise

**Higher Ed
Modern ERP Project
Research**

**Modern ERP
Platform Demos**

ERP Roadmap April 2025

**Across the ERP Pillars,
develop options and
recommendations for
executive leadership on
potential future
investments in modern
ERP technology,
including benefits,
timelines and estimated
costs for each
recommendation.**

Leadership Interviews & Questionnaire Results

Completed ERP Roadmap Activities

Leadership Interviews

- Interviews with senior leadership on ERP challenges, goals, and vision for future technologies
- Conducted interviews during October and November
- Student, HRA, VCs A&F, CIOs

Functional Questionnaire

- Survey to gather input from senior level stakeholders on ERP priorities and opportunities
- Collected 106 responses from across the system during November

Results from both activities are being analyzed by Accenture and will be shared in more detail during the next information session

Leadership Interviews - Potential Gains from a New ERP



Finance

- Financial integration
- Flexible budget tools
- Compliance-ready workflows
- Capital project planning
- Unify billing processes
- Actionable, user-friendly Dashboards
- Mitigate implementation



HR

- Automate HR workflows
- Accessible employee data
- Integrate HR functions
- Enhance employee experience
- Supports complex compliance needs



Student

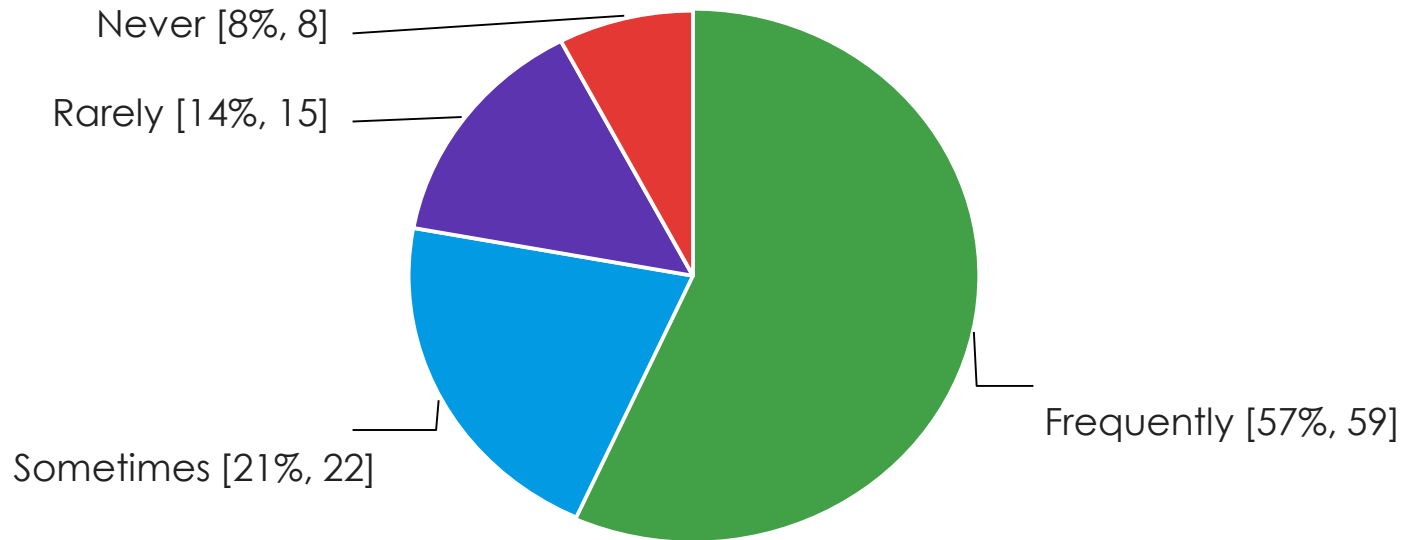
- Simplify enrollment processes
- Analytics to monitor student performance
- Unified portal for students
- Advising case management systems
- Multilingual support



IT

- Data definitions
- Cybersecurity, data encryption, and compliance requirements
- AI, digital accessibility, and data-driven decision-making
- Technical debt and integration complexity

To what extent do you use "shadow systems" (e.g. spreadsheets, databases) to augment the current ERP software ecosystem? .



Questionnaire – Top Priorities Reported

% of Survey Responses	Theme
55%	Technology Modernization and Digital Transformation
42%	Process Optimization and Operational Efficiency
37%	Unified Systems and Integration
32%	Compliance, Risk Management and Data Integrity
27%	Student Success and Experience

Stakeholder Workshops

ERP Roadmap - Stakeholders

Who are the ERP Stakeholders that will be involved in the development of the Roadmap?

Senior level employees from across all campuses in areas most impacted by ERP systems and processes.

What are ERP Stakeholders being asked to do?

Partnering with Accenture, Stakeholders will develop the ERP Roadmap. They will provide perspective, point of view, experience, and insights via interactive Workshops

How are ERP Stakeholders organized?

Stakeholders are organized into groups that most align with their role:

- There are 21 groups across the primary ERP areas
- Each group includes around 15 Stakeholders (approximately 2 per campus)

How are ERP Stakeholders determined?

Stakeholder lists were created by assigning participants from past ERP activities and then consulting campus leadership for additional participants

ERP Roadmap - Stakeholders by Pillar & Group

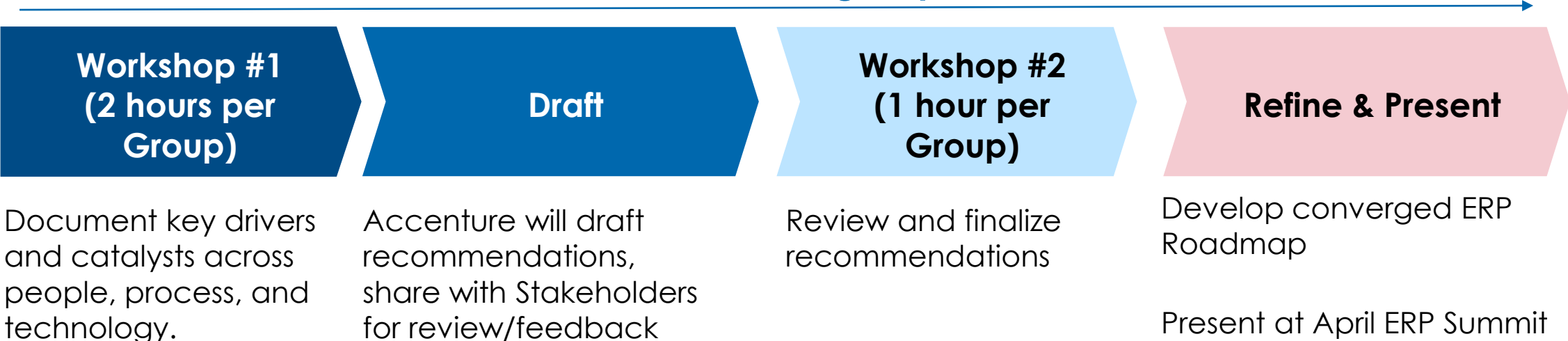
Pillar	Group	Stakeholder Count
Human Resources (HR)	Talent and People Management Compensation Commitment Accounting Operations, Time & Labor, Benefits, Campus Payroll	48
Finance	Accounting, Financial Reporting Budget, Planning (including Capital) Operations System-wide Shared Services	53
Research Administration	Grants Research	29
Student	Recruiting and Admissions Student Financials Financial Aid Advising and Curriculum Registration and Records	73
Information Technology (IT)	Application Management, Configuration Application Development, Integration Infrastructure Security & User Access (CISO)	47
Overarching	Legal, Risk, Compliance IR, Data and Analytics	19



~ 250 Unique Stakeholders

ERP Roadmap – Stakeholder Workshop Process

December through April



Expected Stakeholder Time Investment (7-15 hours per participant)

2-4 Hours

- Prepare for workshop
- Participate in workshop

3-5 Hours

- Participate in follow-up discussions or reviews

1-3 Hours

- Review materials before or after workshop
- Participate in workshop

1-3 Hours

- Review materials to support roadmap finalization

Higher Ed Modern ERP Project Research

Background/Goal

- Gathering facts about what UMass “peers”/comparable institutions have done to modernize their ERP
- Research publicly available information to answer the following questions:
 1. To what extent have UMass-comparable institutions addressed their legacy ERP? Which ones?
 2. What were the driving factors/motivations?
 3. Did they include HR, Finance, and Student in their scope?
 4. What products and partners did they select?
 5. How much did they budget/invest on modernizing their ERP?
 6. What was their timeline?

Higher Ed Modern ERP Projects - Research Approach

Identify **comparable** higher Ed organizations that have initiated a Modern ERP Project



Public



R1



At least 25,000 enrollment

Multi or single campus

10 projects researched to date

Understand the who, what, why, when, and how much

- Motivations
- Product and partner selected
- Scope
- Timeline
- Budget and Funding source

ERP Project Research to Date - Summary

Motivation – Motivations vary by university. Modern ERP projects are sometimes connected to a strategic plan. Process efficiency is a common theme.
















Scope - 5 projects include Student, HR & Finance, 5 are HR & Finance only

Product/Partner - 8 selected Workday as their ERP provider, 5 selected Deloitte as their implementation partner

Budget - Project budgets vary widely and correlate to scope and duration. Projects are typically funded directly by the University







Timeline - Overall project timelines, from the start of a roadmap to go-live(s), range from 5 to 10 years (COVID likely an impact on several)

Multi-Campus ERP Projects - Overview










Institution	Scope	Product	Partner	Budget*	Funding Source	Status
	HR Finance Student		Deloitte.	\$174M	University Funded	HR/FIN Live Student Impl.
	HR Finance Student		Deloitte.	\$250M	University Funded	HR/FIN Live Student Impl.
	HR Finance Student			\$42M	University Funded	Implementation
	HR Finance			\$170M	State and University Funded	Implementation
	HR Finance			\$211M	University Funded	Implementation
	HR Finance Student		TBD	TBD	TBD	Product Selection

* Project budgets will be further researched to reach an “apples to apples” comparison





Multi-Campus ERP Projects – Timeline Analysis

Institution	Scope	Current Phase	Roadmap Started	Product Selected	Implementation Started	Go Live
 UNIVERSITY OF ARKANSAS SYSTEM	HR Finance Student	Student Implementation	2014	2017	2018	2024-2025
 RUTGERS	HR Finance Student	Student Implementation	2014	2015	2015	2017-TBD
 UNIVERSITY SYSTEM of MARYLAND	HR Finance Student	Implementation	2017	2020	2021	2024-2028
 THE UNIVERSITY OF TENNESSEE SYSTEM	HR Finance	Implementation	2021	2022	2023	2024
 UNIVERSITIES OF WISCONSIN	HR Finance	Implementation	2019	2021	2022	2025
 UNIVERSITY SYSTEM OF GEORGIA	HR Finance Student	Product Selection	2023	TBD	TBD	Target 2028

Single Campus ERP Projects - Overview

Institution	Scope	Product	Partner	Budget*	Funding Source	Current Phase
	HR Finance Student		Deloitte.	\$57M	State Funded	HR, Finance Live Student Impl.
	HR Finance			TBD	TBD	Going Live Dec 2024
	HR Finance		Deloitte.	\$81.3	University Funded	Implementation
	HR Finance		Deloitte.	\$146M	State Funded	Implementation

Single Campus ERP Projects – Timeline Analysis

Institution	Scope	Current Phase	Roadmap Started	Product Selected	Implementation Started	Go Live
 IOWA STATE UNIVERSITY	HR Finance Student	Student Implementation	2014	2016	2017	2019-2024
 ARIZONA STATE UNIVERSITY	HR Finance	Going Live Dec 2024	2020	2023	2023	2024
 Oregon State University	HR Finance	Implementation	2020	2023	2023	TBD
 UNIVERSITY of FLORIDA	HR Finance	Implementation	2018	2023	2024	Target 2027

ERP Project Research Next Steps

- Continue to learn from already identified projects
- Identify additional projects to research
- Incorporate learnings into UMass Roadmap considerations

Modern ERP Product Demonstrations

Background/Goal

- Campus stakeholders from the ERP Summit expressed interest in cloud-based ERP product demos to better understand the offerings and possibilities
- Goal is to educate UMass teams about leading cloud ERP products in use across higher ed
- The target UMass audiences are employees in campus or system-wide management roles heavily involved in ERP (Student, HR, Finance, Research, IT)

Modern ERP Product Demos - Approach

1. Offer participation to the largest ERP providers with a proven track record in higher ed:
 - Oracle Cloud, Workday, SAP, Ellucian
2. Extend demo invites to contacts already identified through ERP activities and their extended teams
3. Use a custom curriculum per ERP area to ensure product demonstrations are organized and impactful to UMass—allow for participation in specific topics as preferred
4. Schedule demos across several months (March – June 2025) on set days (Thursdays) to allow for scheduling flexibility
5. Record/post all demonstrations
6. **These demos are not required and can be attended/consumed as preferred by person.**

Modern ERP Product Demos: March – June 2025



3/6 - Overview & Tech
3/13 – Finance Module
3/20 – HCM Module
3/27 – Student Module



4/3 - Overview & Tech
4/10 – HCM Module
4/17 – Finance Module
4/24 – Student Module



4/31 - Overview & Tech
5/1 – HCM Module
5/8 – Finance Module
5/6 – Student Module



5/29 - Overview & Tech
6/5 – HCM Module
6/12 – Finance Module
6/19 – Student Module

Next Steps:

- Save the Date emails to go out to all contacts via the ERP activities list—ok to extend to other team members
- Detailed agenda/topic times to be posted in January
- RSVPs to go out in February

Project Communication

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 – targeting February 3rd and 4th

Questions