

## Action Project

**Institution:** Crowder College

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Timeline:

Planned project kickoff date: 09-01-2008

Target completion date: 09-30-2011

Actual completion date: --

A. Give this Action Project a short title in 10 words or fewer:

Crowder College Student Information Systems Improvement

B. Describe this Action Project's goal in 100 words or fewer:

The goal of this action project is to successfully implement a new ERP system - Jenzabar. Attain a level of consistency in processes through development of step by step procedures and training on the new system. Monitoring and tracking tools will need to be developed, to not only ensure consistency, but also to measure effectiveness of processes. Reporting tools that are currently in place will need to be re-created in order to support Institutional operations and new tools will need to be developed to allow us to measure where we are at and continue to improve our processes.

C. Identify the single AQIP Category which the Action Project will most affect or impact:

Primary Category: Supporting Institutional Operations

D. Describe briefly your institution's reasons for taking on this Action Project now -- why the project and its goals are high among your current priorities:

This action project will have a direct effect on Institutional Operations. The implementation of a new student information system is essential in order not only to provide online services to students, but also to have all service areas under one relational based system vs. multiple separate systems that do not communicate, hence making it impossible to gauge institutional effectiveness in services.

E. List the organizational areas - -institutional departments, programs, divisions, or units -- most affected by or involved in this Action Project:

This action project will affect all areas of the College. Service areas will be the ones affected the most directly, such as admissions, records, financial aid, human resources, payroll, cashiering, institutional research, development, business, etc. Instructional areas will be impacted in terms of policies, in addition to processes such as grading, dropping, enrolling, reporting, etc.

F. Name and describe briefly the key organizational process(es) that you expect this Action Project to change or improve:

The primary processes affected will be those involved in the initial entry of students into College, their tracking, payment, financials, academic status and alumni status. Processes for faculty to not only do the above listed, but also for their employment, payment, benefits, grading and online processes.

G. Explain the rationale for the length of time planned for this Action Project (from kickoff to target completion):

The time frame is based around completion of the performance targets as outlined: Phase One: Map all data from old system to new system and conduct data validation. Review all data utilized to conduct business and make sure it is functioning properly in the new system (student services, business, payroll, IR, HR, etc.). Phase Two: Implementation of new system Modification of current processes and policies to address capabilities of new system. Perform error correction and additional data validation. Conduct process review, correction and validation. Develop training materials. Phase Three: Conduct training on new processes and new system Creation of new reports to support institutional processes Begin data collection and review of processes for continuous quality improvement.

H. Describe how you plan to monitor how successfully your efforts on this Action Project are progressing:

Following a detailed timeline for implementation and training. Following a timeline for implementation and development of reporting tools. Review by Information Systems Improvement Team and AQIP Steering Committee of outcome measures below.

I. Describe the overall "outcome" measures or indicators that will tell you whether this Action Project has been a success or failure in achieving its goals:

Completion and successful of implementation of a new student information system. Development of training materials for all impacted by changes and completion of training for all areas. Completion and successful implementation of online services.

Creation of reporting instruments for Institution.

J. Other information (e.g., publicity, sponsor or champion, etc.):

All AQIP Action Projects have been presented to employees through the AQIP Survey 2008 in which not only were the proposed projects presented, but additional input was also solicited. An AQIP Information Systems Improvement Team will be assembled with subgroups put in place to address specific areas of the ERP. Tasks assignments will be kept on track via timelines and Project Managers will ensure timelines are met or adjusted depending on circumstance.

K. Project Leader and contact person:

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### **Annual Update: 2009-09-01**

A. Describe the past year's accomplishments and the current status of this Action Project.

This year we have completed phase 1 of the Jenzabar implementation. We selected module managers from each department across the campus and proceeded to develop them in terms of their knowledge of Jenzabar. During the course of the year we worked with our internal processes, determined workflows regarding old processes and established new processes based on how the new system handled data and the needs of our student population. We looked at every field in our student information system and determined where it needed to be placed in Jenzabar. Both data validation and process validation took place over a period of over 12 months. Changes and adjustments needed to be made to the data to ensure it was compatible with the new system. Several data passes took place and all module managers had to test the changes to the system and how the data was flowing. Because the new system is a relational database, the fact that the data behaved as it should in one module did not necessarily mean it would flow correctly to another. This portion of the project was a challenge for all involved as correcting one piece of the system often created errors in other pieces down the road. In addition the Financial Aid area was had to setup and learn a system called PowerFaid, which is a partner product utilized by Jenzabar to process financial aid. They not only ran their old system and new system in parallel to ensure the integrity of the aid they were awarding, but also needed to verify how the information from PowerFaid joined with Jenzabar. In addition 13 individuals were trained in the usage of Infomaker, which is the tool Jenzabar utilizes for the creation of reports. These processes were also a challenge in terms of policies as several policies needed to be brought back to College Council for adjustment based on the capabilities of the new system. All involved had to ensure data integrity and policy integrity was maintained through the transition to Jenzabar and that the policies we had in place were feasible. In addition, step by step process manuals were developed for various areas, so current supervisors and future supervisors would have easy access to the knowledge needed to make the system run for their area. Step by step training manuals were also developed and training for the entire campus was provided in order to ensure individuals throughout the campus and the various sites were familiar with the system once it went live. Although a lot of work was done on data validation, conversion errors were found and module managers worked, and continue to work, towards correcting them. Once the system was up and running we have also had to work on having external systems communicate with Jenzabar. Things such as document imaging, printing ID cards, the Library, etc. have required a lot of time and validation. We have faced challenges in every area from business to admissions, student life to cashiering, records to instruction. This ERP touches every area of the College and as such has had a huge impact on how we conduct business. We continue to move forward examining our data, making changes to our processes based on feedback and putting new processes in place as we find out more about the capabilities of the system. Department chairs are currently building courses in Jenzabar; advisors and faculty are currently using the system to enroll students, payroll is currently doing their runs, student life is assigning all housing students to rooms in the system, records is printing transcripts and grades, financial aid software is communicating with Jenzabar, etc. At this time we find the system is functioning and we continue to improve and make corrections as we move forward to the next phase of the project. At this point of the project our main goal was to have a functional project that could be utilized by the campus to serve students. I believe we have, so far, accomplished this goal.

*Review (09-15-09):*

The College has chosen a challenging Action Project and has made effective progress in Phase I of the ERP implementation. The planning involved in Phase I demonstrates an understanding of the importance of collaboration between departments to successfully implement a functional ERP system. The first year's accomplishments demonstrate the AQIP approach. The collaboration across the College is exemplary and creates a foundation for success [AQIP Category 9 - Building Collaborative Relationships]. This

collaboration has demonstrated that the team listened to feedback, utilized data to measure effectiveness, and put new processes in place—all elements of the AQIP approach to develop a continuous improvement system [AQIP Categories 7 - Measuring Effectiveness and 8 - Planning for Continuous Improvement].

B. Describe how the institution involved people in work on this Action Project.

The institution selected leaders from every area who needed to be involved in this project and each was made a module manager. This allowed different areas of the College to develop experts which could be used as resources for others as we moved forward with the project. At the same time the module managers developed step by step training tools and were the trainers for the rest of the College. A training schedule based on the different modules was developed and all individuals at the College went through the training. Additional training was provided for division chairs and others who would be building classes. Updates for this project were also provided at all staff day, College Council and Board meetings, so individuals beyond those directly involved in the project would be aware of what stage the project was at and would have an idea as to the impact of the ERP. Overall, trainings were key to getting everyone involved with learning and using the new system. Regardless of how much work was put in to getting the system up and running, without the training step the project would not have been as successful as it has been.

*Review (09-15-09):*

The team has done an excellent job of involving people in the work of this Action Project. The training was not detailed; however, it appears that to-date the training has been on how to use the new system. Organizational culture plays an important role in the successful implementation of an ERP system. When implementing an ERP system, there can be resistance among specific individuals and/or groups, so the team may want to consider additional training to help stakeholders across the organization develop an understanding how their work can be enhanced by the use of the ERP system, as well as address areas where the ERP implementation may have a negative impact on their work and develop strategies for overcoming these negative impacts. In addition, to be able to measure the success of the ERP implementation, you may want to consider user satisfaction as a critical variable.

C. Describe your planned next steps for this Action Project.

We will continue examining the data and work through any inconsistencies we find. In addition we will work towards developing the basic reports the College had in place prior to moving forward with the ERP. We expect to move towards a reporting committee in order to continue to develop standardized reports for the College. Preparation for phase 2 of the project which involves an online portal and online services is set to begin in October. Although the expectation for this portal is it will eventually be open to students, during the initial phase we will be working on the setup and development of the portal and testing for functionality. Only after we have been successful in this phase will we consider moving forward with our next phase which involves training and opening it to students. As we move forward with the next phase of the project we will also be bringing someone on board to train on all aspects of the online system - JICS - as they will be responsible for the technical portion of the project. Again module managers from all respective areas will be brought in to learn about JICS, development and functionality of the portal. Once the system has been setup training will be developed and both Jenzabar EX and JICS will be tested in parallel by staff to ensure there are no difficulties for students. This will also familiarize staff with the functionality of the system. Processes and policies will be reviewed as they were in phase 1 of this project. We expect additional changes will need to be made to take into account students being able to perform a number of functions online without advisor or faculty supervision.

*Review (09-15-09):*

The team appears to have an excellent plan for the next phases of the ERP implementation. You may want to consider additional indicators for the overall success of the new student information system including user satisfaction both from the employee and student perspectives. In addition, as you continue to build out your reporting capabilities, you will have the ability to triangulate data, which can help build a more robust understanding of information.

D. Describe any "effective practice(s)" that resulted from your work on this Action Project.

The practice I saw as the most effective was the development of step by step setup materials and training materials for others. At the same time allowing module managers to be the instructors proved to be most effective as they could showcase their knowledge and expertise in the areas and helped staff with the transition to the new system. They also proved to be great resources for people to go through when they are having difficulties. Training materials have been used to ensure the consistency of processes through multiple campuses, which has worked well. In addition having individuals sit in on each others trainings proved to be very effective. As this is the first time the College has been on a relational database the understanding of who originates the data and how the data impacts other department has been crucial. Having all departments who may be impacted by a change meet or speak prior to a change being made has been essential. Although someone is occasionally left out because we can't see how a change in one area will impact another, we learn as we go and make it a point to contact them in the future if we think they may be impacted.

*Review (09-15-09):*

The College has done an excellent job of developing effective practices including processes and training to support each step of the

ERP implementation. In addition, having module managers trained on the new system can help overcome resistance within individual groups to the ERP implementation. Continuing to develop change management strategies for all departments will also provide additional support to stakeholders as they begin to utilizing the system to do their work.

E. What challenges, if any, are you still facing in regards to this Action Project?

This project involved many manpower hours from a lot of individuals, all of whom were doing tasks related to this project in conjunction with their regular daily tasks without additional compensation. My main concerns at this point focus around staff burnout. The time and work demands we are currently placing on the module managers are very heavy and I am unsure as to how to provide them with some relief and give them a sense of accomplishment while instilling a feeling of appreciation for all they have done and are doing. In addition meeting the reporting demands has been very challenging and I foresee only being able to meet these demands by coming together as a reporting group to work through the challenges and ensure proper validation of any reporting tools utilized by the campus.

*Review (09-15-09):*

Implementing an ERP system is an enormous task and it is understandable that a major challenge is staff burnout. You may want to consider messaging across the organization about the work these individuals are taking on to successfully implement the ERP system, so they feel valued. In addition, you may consider small tokens of appreciation throughout the project that will allow the team to recognize individual and group efforts and send a message that their efforts are noticed and appreciated.

F. If you would like to discuss the possibility of AQIP providing you help to stimulate progress on this action project, explain your need(s) here and tell us who to contact and when?

*Review (09-15-09):*