



November 2023

Board Meeting – Committee of the Whole

# NextGen Update | HCM/Finance

Imagine the Possibilities

MINNESOTA STATE

# NextGen Guiding Principles

The NextGen Guiding Principles were established when the initiative kicked off and will be used to drive decision making as well as leadership alignment communications and activities.



## Seamless Experience for Students

Enhancing the student experience is foundational to providing extraordinary education in Minnesota. This includes a seamless experience for students across the Minnesota State system, regardless of the Minnesota State institution attended.



## Student Outreach

Deliver targeted outreach and engagement throughout the student lifecycle. Enable interactions across channels and devices (including mobile devices).



## Data and analytics

Create an integrated environment for data sharing. Improve the flow of information and access to business operations system-wide. Improve decision making. Provide a mechanism for capturing data comprehensively across the Minnesota State. Reduce the amount of redundant data across the Minnesota State system.



## Full Integration of "non-core" and third-party solutions

To provide the best overall experience, all ERP and ancillary technology solutions must be fully integrated and adequately supported.



## Maintain Competitiveness

To provide Minnesota with the highest value and most affordable higher education option, Minnesota State must remain competitive with other educational entities within and outside the state, including private and primarily online institutions.



## System-wide processes and procedures

To both establish and maintain a consistent user experience, and to leverage cloud-based SaaS technology solutions effectively, future-state processes will need to be defined or redefined consistently across the system. This may also include the definition or refinement of policies and practices that assure efficient and consistent process are adopted system-wide.



## System-wide software consistency

The number and type of technology solutions must be streamlined; duplicative solutions must be minimized or eliminated; and clear, effective governance must be established around the introduction, integration, and maintenance of third party and "non-core" solutions.



## Security

Implement a stable, maintainable, secure, and intuitive suite of applications.

# NextGen Guiding Principles - Vision

We selected 10 Guiding Principles to help drive project implementation decisions.

## 1. Start with leading practices

Set of structured activities designed to fill gaps or address needs in service delivery, and to produce innovative knowledge and tools.

## 2. Challenge the status quo

We are not rebuilding a replica of ISRS!

## 3. Design solutions for the end user

## 4. Minimize manual processes

## 5. Simplify when possible

## 6. Operate as a system

## 7. Work collaboratively and transparently

## 8. Communicate frequently

## 9. Engage institutions early and often

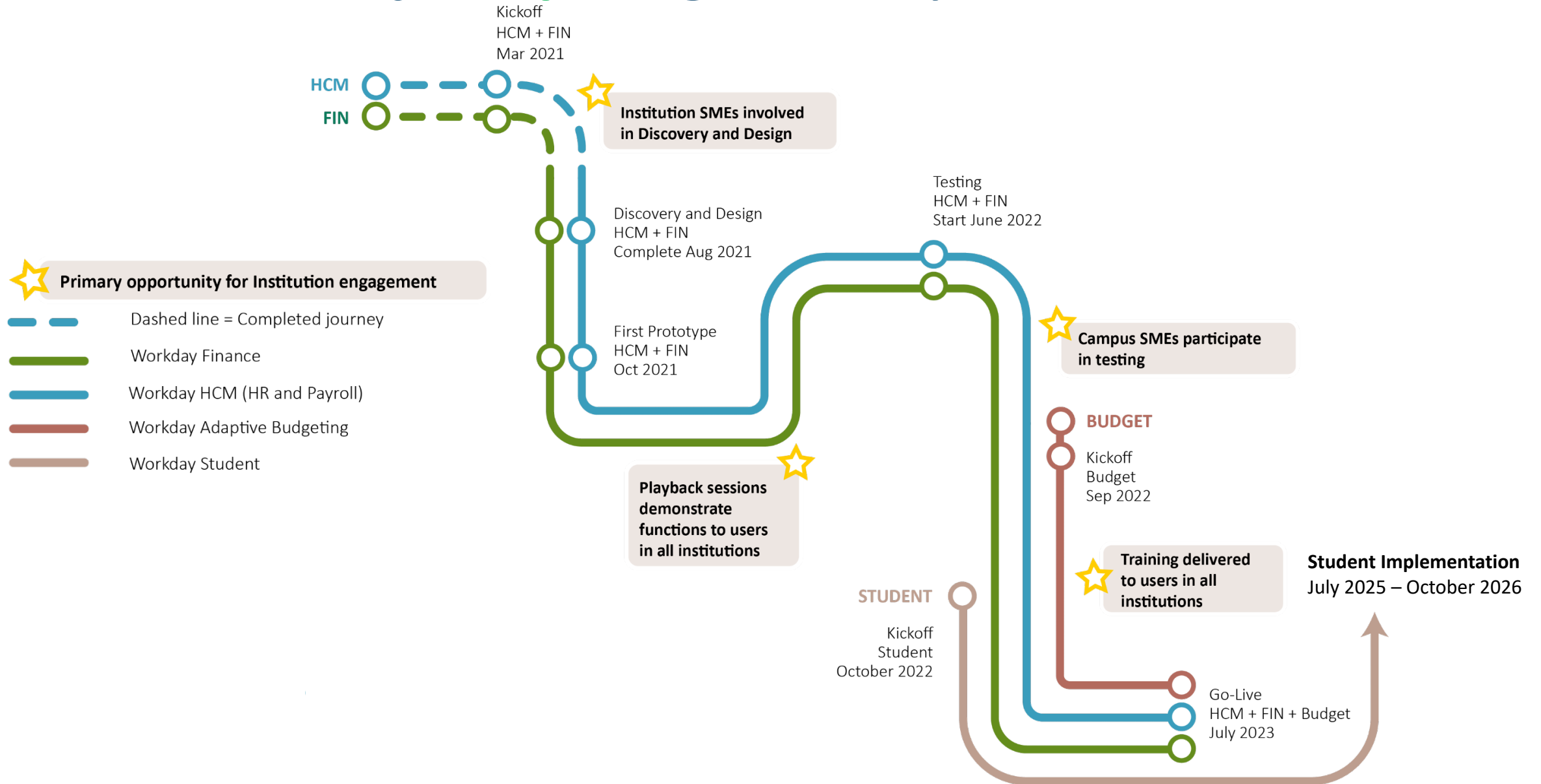
## 10. Maintain a single system of record

# Agenda

- Our Journey Thus Far
- Project Status Update
- Budget
- Governance
- Workday Student Prep Work

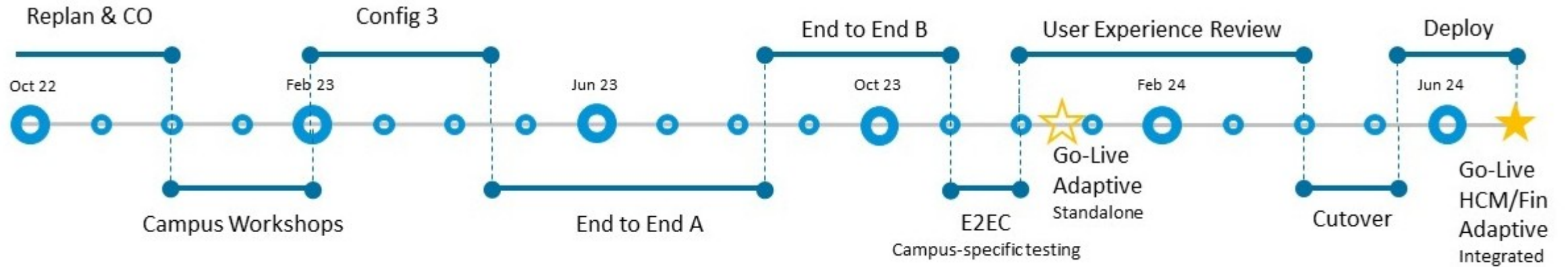
**Our journey thus far - 8 months to Go-Live!**

# NextGen Project | Original July '23 Timeline



# July 2024 Timeline

Key activities and milestones to successfully go-live in **July 2024**.



## \*Adaptive Planning Module

Suite of budget and planning tools that offer new capabilities in financial forecasting, reporting, and analysis to support decision making

# NextGen HCM/Fin –as of 10/2/23 (UPDATE)

## Project-Wide Status Summary

Project Wide Status				
Project Status	Overall Trending	Overall Scope	Overall Resources	Overall Schedule
●	→	●	●	●

Status by Workstream					
Workstream	Overall Status	Trending	Scope	Resources	Schedule
PMO	●	→	●	●	●
HCM	●	→	●	●	●
Finance	●	→	●	●	●
Adaptive	●	→	●	●	●
Conversion	●	→	●	●	●
Extend	●	→	●	●	●
Integrations	●	↓	●	●	●
PRISM	●	→	●	●	●
Reporting	●	→	●	●	●
Comms	●	→	●	●	●
Change Readiness	●	→	●	●	●
Training	●	→	●	●	●
Testing	●	→	●	●	●
Sustainment	●	→	●	●	●
Security	●	→	●	●	●
CP - 3rd Party/API	●	→	●	●	●
CP - Workday	●	→	●	●	●
CP - Inst. Reports	●	→	●	●	●
CP - NGDS	●	→	●	●	●



# Project Status Update

# NextGen HCM/Fin – 5 Key Pressure Points

- 1 Testing
- 2 Reporting
- 3 Sustainment
- 4 Companion Projects
- 5 Adaptive

# NextGen HCM/Fin – Testing

- Important business process being tested is Payroll
- Complex due to the differing bargaining unit contracts
- Adding complexity is the integration from Minnesota State Workday to the State of Minnesota payroll system (SEMA4)
- Payroll testing is behind schedule due to its complexity
- To expedite Payroll testing outcomes, the project team members involved with Payroll have focused exclusively on testing
- Team anticipates completing testing by 12/1, within the overall testing schedule, but behind when Payroll was expected to complete
- Very positive partnership with MMB

# NextGen HCM/Fin – Reporting

- Have some resource constraints
- Change requests have added to scope
- Recent approval of an institution reporting strategy has helped turn this from Red to Yellow

# NextGen HCM/Fin – Sustainment

- How will Minnesota State support, operate, and govern Workday after go-live
- Sustainment Plan being finalized and will be communicated out to all stakeholders
- Will inform about plan and its rationale, impact on staffing, and how the cost of Sustainment will be managed

# NextGen HCM/Fin – Companion Projects

- Third party business processes and technology applications managed at campus level
- Project experienced continued challenges in this area specific to scope and scale of the work needed to assist campuses.
- Business processes and applications have potential data needs of Workday
- In partnership with campuses, project team created a technology solution that best supports data needs, while outlining a more permanent solution post go-live

# NextGen HCM/Fin – Adaptive

- Budgeting tool that runs alongside and integrates with the Workday Platform
- On track to go-live in February '24 as standalone product used by all institutions
- Financial staff across system will load results of Fiscal Year 2025 budget planning into Adaptive Planning during February go-live
- Used to establish initial budget control levels in Workday
- Will have a second go-live alongside the HCM/Finance Platforms in July 202
- End-to-end testing is in process
- Pressure on testing timeline - data needed for Adaptive requires validation by institutions
- Team will maintain high engagement level with the institutions during testing

# Budget



# NextGen – Overall Project Budget

NextGen Budget November 1, 2023	May 2023 BOT Approved Budget	Current Budget	Expenditures	Encumbrance	Balance	% Spent/ Encumbered of Current Budget
HCM/Finance	\$ 100,400,000	100,400,000	61,537,063	15,399,540	\$ 23,463,398	76.6%
Student	101,100,000	101,100,000	160,326	151,609	\$ 100,788,065	0.3%
Overall Project Support	41,200,000	41,200,000	15,676,965	1,694,506	\$ 23,828,529	42.2%
<b>Totals</b>	<b>\$ 242,700,000</b>	<b>\$ 242,700,000</b>	<b>\$ 77,374,355</b>	<b>\$ 17,245,654</b>	<b>\$ 148,079,991</b>	<b>39.0%</b>

# NextGen HCM/Fin – Budget Contingency (UPDATE)

NextGen Contingency Funding		
	Approved	
<b>Contingency</b>		\$ 15,000,000
<b>Workday CO#14</b>	14-Sep-23	(20,900)
<b>Workday CO#13</b>	22-Aug-23	(35,506)
<b>Workday CO#12</b>	May-23	(8,750,000)
<b>Minnesota State</b>	May-23	(5,700,000)
<b>Legal</b>	Jan-21	(23,385)
<b>Balance</b>		\$ 470,209

# NextGen Steering Committee

# NextGen HCM/Fin – Steering Committee

The NextGen Steering Committee:

- Expanded, welcoming seven new members (2 CHROs, 2 CIOs, 2 CFOs, and new presidential rep)
- Fuller complement of members allow for more colleges and universities to provide insight for informed decision making
- New members bring additional cross-functional expertise, with representation from Finance, HR, and IT
- Having candid conversations and meaningful interactions in helping to solution challenges/issues

# Change Management

# NextGen HCM/Fin – Change Management (OCM)

- Team continues to hone its outreach and engagement strategies as the project progresses.
- Learning and engagement resources sent out across functional teams to ensure they have the needed learning opportunities to better get to know Workday prior to formal end user training.
- Biggest direct engagement with future Workday users will be **Training**, which will begin in April 2024.
  - Training will be “just in time” to ensure that what is learned is still fresh at go-live.
  - End users will be enrolled to receive various kinds of training:
    - Instructor-Led Training (in person), Virtual Instructor-Led Training, and/or Computer-Based Training. (Training courses must be passed with a 70%.) Employees will also have access to Quick Reference Guides and Job Aids.

# Workday Student

# NextGen HCM/Fin – Workday Student Planning

- Primary goals:
  - Review and update the catalog of current business processes that support the student lifecycle
  - Delve deeply into specifics of student lifecycle business processes at two colleges and two universities
- Understanding current state of system wide business processes and documenting college and university third-party software solutions and integrations



# NextGen HCM/Fin – Workday Student Planning

- Support the organizational change management and cultural transformation that will be necessary for a successful student implementation.
- Updated catalog of business processes has been shared with college and university ASA leaders and staff for input and feedback
- Initial work to document processes at two colleges and two universities is nearing completion.
  - Equity has served as primary lens through which the student lifecycle and business processes have been reviewed.
  - Each working team asked if business process had potential to create or address disparities in experiences and outcomes for students and identify potential changes that could make business process more equitable and inclusive.



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