

SOUTH DAKOTA BOARD OF REGENTS

Academic and Student Affairs

AGENDA ITEM: 9 – C

DATE: June 27-29, 2017

SUBJECT: Ellucian Student Banner

Over the past several months, regent and university staff have been in the process of evaluating the Colleague Student software application system which has been deployed since approximately 2003. With the implementation of Colleague, the student software system required significant modification to meet the overall needs of SDBOR. These modifications have created challenges in functionality, cost and long-term strategy and effectiveness.

In 2007, the Banner HRFIS was implemented for the Regental system. Consequently, the ongoing discussions regarding a student software application progressed toward the evaluation of Banner Student. The benefits of utilizing a complete Banner suite (which is an Enterprise Resource Planning [ERP] system) include a single source of data (data truth), a seamless integration between Finance, Human Resources and Student, and enhanced functionality.

In fact, the number one issue facing the university system was not whether a new technology solution was necessary, rather when would the optimum time be for implementing a new solution. Throughout the demonstrations and discussions with module and institutional leads a greater share of the stakeholders had clearly stated their desire for new functionality, with a universal understanding that the system must implement self-service. Ellucian Banner has self-service features that would ultimately enhance the student experience. Therefore, Dr. Turman recommended adoption of the Banner Student project to the Academic Affairs Council on May 24, 2017. This recommendation was accepted due to the limited functionality and long-term needs of the Student system. During the Council of President and Superintendents (COPS) meeting on June 13, the council discussed a number of concerns related to the campus level staffing, commitment of institutional resources, and the projected roadmap for Ellucian products over the next 5 to 10 years. Institutions were encouraged to supply additional questions and formal responses were provided during the week of June 19.

The next step to this process is the creation of the project structure. A project charter which establishes the overall charge and objectives must be created. To ensure that the project meets the Regents expectations, a project charge and project assumption statements are provided for formal

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DRAFT MOTION 20170627_9-C: I move to approve the endorsement of the Banner Student project, and approval of the project charge and assumption statements for inclusion in the project charter.

approval by the Board of Regents. These two important expectations will be the endorsed methodology to the project teams, project leadership and software system design. The Project Charge and Assumption Statements are listed below.

Project Charge

The Board of Regents adheres to an integrated systems approach. As we look to the objectives of this project, the goals include implementing a student system that allows for consistent policies and service-transactions across the system. The student system and the stakeholders of that system will be unified and experience comprehensive financial and academic records covering all of the universities.

This includes then that the Regents will have a system-wide administrative database (with a single source of data [data truth]). Therefore, the system will implement a data-centric system that encompasses database, software, views, workflows, tools, reports, queries, quality assurance, and end-user training.

In addition to establishing a data-centric framework, the student software shall be student-rather than institution-centered. Students will be able to perform all common student services online (within BOR policy and guidelines, University Policy and Practices). Students will be able to commonly apply online, audit and plan progress toward a degree, register for classes, apply for financial aid, purchase textbooks, access library services, request transcripts, drop and add courses, pay fees, review grades, use self-service, etc.

The governance of the system will remain the same with the expectation that the student transactions and processes will be integrated across the system. Policies, procedures, and timetables will remain consistent in this new system as in the past. The student software will allow for system reporting as well as university specific reporting and management of services while maintaining FERPA requirements. All student transactions will be consistent and integrated. All student information unique to an institution and directly required for accreditations will be separable from the aggregate database.

In this new solution, all policies and practices that exists in the current system will be consistent per Regent policies and guidelines. Therefore, the rules and validation tables will be consistent inasmuch as possible. Instances that may require flexibility due to University requirements must be reviewed and approved by the appropriate council during the implementation process.

Project Assumptions

- *The Banner Student Information System has the full support of the Regents, Executive Director, and Presidents of the University.*
- *The Academic Vice Presidents fully support this project and will continually support this project throughout the project plan, execution and closeout.*
- *Stakeholders will be assigned and engaged on this project. The team members will work together for the success of the project. All stakeholders will agree to the standards of behavior outlined in the project charter.*

- *Project team members will be empowered to make decisions on behalf of the functional modules they represent. The decisions will be based on the mission, objectives and the overall project charter.*
- *Stakeholders will be permitted through the project governance to provide input, raise issues, and address the functional/operational needs as well as overall strategic needs of the university, module, and system. Staff are encouraged to communicate to help mitigate risk and jeopardy of the project.*
- *All stakeholders will be regularly informed regarding this project through various means including Campus Module Leads, Affair Council Updates, Board of Regents Updates, Steering Committee Updates, Module Updates, and various technology sources may be used (e.g., website, communication portal, etc.).*
- *Modification of baseline or the use of extensibility will only be permitted if and only if the baseline system cannot support a feature. In the event the baseline cannot work due to functionality (not workflow, business process) then an appropriate business case must be presented and approved by all levels of the project team and change plan.*
- *Common data standards will be developed for governing the data system(s) when new functionality and workflows emerge..*
- *“Shadow IT” systems that can be replaced by Banner SIS should be. Integration of 3rd party vendors that supplement the Banner SIS will undergo a review, prioritization and approval for integration.*
- *Universities will need to commit the appropriate necessary personnel to analyze, design, configure, and test in a timely manner. The understanding is that this project will require university and system personnel and will require the dedication of those staff members.*
- *This project will be the priority for the system until closeout is completed.*
- *System and university leaders will provide budget management of this project to ensure mission, scope, goals and objectives are met.*
- *System will have the appropriate hardware available per solution hardware requirements.*
- *System will provide resources to the Banner consultants per consultant requests that are within the project scope.*