

**SOUTH DAKOTA BOARD OF REGENTS**

**Academic and Student Affairs**

**AGENDA ITEM: 6 – B**  
**DATE: October 3-5, 2017**

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**SUBJECT**

**Banner Student Update**

**PERTINENT HISTORY:**

The Board of Regents approved the Banner Student Project during their [June 2017](#) meeting and provided direction through the Project Mission and Project Assumptions. The Executive Director signed a contract with Ellucian for the Banner Student and Financial Aid Information System (SIS/FA) in July 2017, and most recently the Board approved a funding proposal to allocate \$200,000 to each campus and RIS, and provide up to \$300,000 loans to the universities from the system tuition fund during the [August 2017](#) meeting. The loan amounts would have to be paid back in FY20 and FY21.

**CONTROLLING STATUTE, RULE OR POLICY**

[BOR Policy 1:1 – General Authority, Powers, and Purpose of the Board](#)<sup>1</sup>  
[BOR Policy 1:7:6 – Technology and Telecommunications Council](#)<sup>2</sup>

**BACKGROUND/DISCUSSION**

***Project Planning Phase***

The Banner Student Project (Banner SIS/FA) is currently engaged in the planning phase of this project. Per the Ellucian contract, the planning phase “includes reviewing, enhancing, and completing the build out of the project plan based on detailed and validated requirements. The focus is to complete the project management plan.” The list below represents project planning deliverables that are being developed:

1. ***Project Charter*** – An overarching document that identifies organizational goals, objectives and assumptions, summarizes the project scope, high-level timeline, budget,

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<sup>1</sup> Policy 1:1 outlines the constitutional authority the Board of Regents has to govern the University system. This governance includes full power, responsibility, and authority to supervise, coordinate, manage and regulate.

<sup>2</sup> Policy 1:7:6 outlines the goal to incorporate technology systems as outlined by the Board of Regents.

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**INFORMATIONAL ITEM**

This item is for informational purposes only. Any action will be at the Board’s discretion.

- constraints, etc. The goal of this document is to serve as a guide for team leads as they implement the project.
2. ***Project Plan*** – This planning document will provide more specific details on the planning standards and processes for the following areas of the project: timeline, cost, communication, change, procurement, risk, quality, and project resource management. This operational document will be used to manage this project.
  3. ***Project Scope Statement*** – This operational document outlines all of the services per the Ellucian/SDBOR contract.
  4. ***Project Manager Reporting and Tools*** – Ellucian has dedicated a Project Manager (Roger Strain) who will be using internal Ellucian software tools to manage this project. With those toolsets, Microsoft Project will be utilized and each SDBOR project manager will also be utilizing this software. The tools outlined will facilitate managing resources, the timeline, milestones, dependencies, action items, risks, etc.
  5. ***Banner Student Portal*** (via SharePoint Portal) – SDBOR project management team with RIS staff have been working to create a portal for this project. This portal will be the collaboration tool for those working regularly on the project. All campus project advisors/managers (CPMs) have been working with Dr. Minder to ensure all staff are added as requested by the campuses. The portal will contain calendars, announcements, formal planning documents, contract, budget, agendas, minutes, training materials, etc.
  6. ***Banner Student Intranet Webpage*** – SDBOR project management team and RIS staff are currently developing an internal webpage for all employees and students of the university system that may not be working on the implementation of the project. This page is under construction currently; however, the goal is to provide regular updates to all stakeholders that may not have access to the Banner Student Portal.

Ellucian has allocated a project manager, student/academic consultant, financial aid consultant and a technical consultant for this project. With the resources now fully engaged, the next phase of this project will commence.

### ***Project Execution Phase***

The execution phase is defined in the contract as “providing for ongoing direction and management of the project execution and delivery team for one or more services being delivered.” The contract further specifies the functions and deliverables for this project associated with the execution and implementation. During this phase, Ellucian training, Ellucian consulting, and various meetings will be scheduled. The execution phase then requires the project to move from initiating the plan documents to executing the project. This execution includes various areas of the project (i.e., needs analysis, define/design, configuration, test and deployment).

The project has just embarked on the Needs Analysis for the project. The needs analysis will be conducted as an information gathering session scheduled for September and early October. Specifically, these meetings will allow the consultant to identify gaps, best practices, and other business processes unique to South Dakota or a campus. The primary outcome will be a recommendation of specific business processes (for Banner) and an executive summary report of major findings. The design of the system will be the next major emphasis. From there, a myriad of processes and development will occur which will likely include: configuration, data conversion, testing, training, reporting, and finally deployment.

### *Communication*

A major emphasis of this project includes communication with key staff across the system. Because multiple stakeholders are engaged in this project, the system has identified a multitude of communication strategies. In summary (not meant to be all inclusive), those strategies include:

1. Executive Project Status Updates – The goal is to bring a status update to all of the Affair Council meetings, the Council of Presidents and the Board of Regents.
2. Project Management Status Updates – The universities have identified an individual at their campus as their Campus Project Manager. This individual will provide status updates to system teams as well as communicate back to their teams any pertinent information. Each campus has created internal campus teams for which the Campus Project Manager will be communicating with ongoing throughout this project.
3. System Project Management Meetings and Updates – Ellucian's Project Manager will work with the Board staff weekly on status updates. During these calls, the project management tools will be evaluated, consulting reports will be reviewed, issues and barriers will be evaluated, timelines will be monitored, resource allocation will be examined, etc. This team will then be updating all of the Campus Project Managers and the leadership team (Steering Committee including team leads for this project) ongoing.
4. Banner Student Portal – All updates affecting this project are posted on this portal. In addition, any training, agenda, meeting information, calendar information is also provided to ensure that this portal is the central collaboration resource for campus and Board staff.
5. Weekly Communication – To help increase communication a weekly email has been generated to the Campus Project Managers and the leadership team (Steering Committee). The goal of this is to identify substantive items that are currently influencing the project followed by informative items. The Campus Project Managers

and Steering Committee members can then work with their teams and members of the campus community.

6. Monthly Meetings – As the project is ramping up, teams will begin to hold regular meetings. The Campus Project Managers and Steering Committee have standing monthly meetings on this project. Several universities have regularly scheduled meetings with their core stakeholders. A majority of the module teams are starting to meet on a regular schedule.

### **IMPACT AND RECOMMENDATIONS**

This is an informational update on the status of the Student Banner Project.

### **ATTACHMENTS**

None