# Oklahoma Information Technology Officers (CoIT) Informational Paper

# On ERP Consortium Opportunities, Challenges, and Possibilities

# January, 2015

This report provides a synopsis and a high-level overview of our current state regarding Jenzabar PX (formerly known as POISE). Herein we respectfully provide background information regarding the current state and use of information systems utilized by Jenzabar PX institutions, potential opportunities and challenges in moving to shared consortium models, and considerations and recommendations for moving forward. Additional information is provided in Appendices A-C, including a description of the Council on Information Technology (COIT), a group comprised of the lead IT officers from each public college and university in Oklahoma, its goals, initiatives, and strategies currently being addressed and executed. Although this paper mainly applies to Jenzabar-PX schools, the conceptual framework may easily apply to other platforms in use as well.

## Current Jenzabar Information Systems in Oklahoma

Enterprise information systems designed specifically for higher education generally include base modules for finance, financial aid, student and human resources. Larger systems also include alumni and development modules, and continuing education modules. In most cases, an institution will create interfaces which allow other licensed and in-house developed software to interact with the enterprise information system.

Institutions in the State of Oklahoma are operating using various enterprise information systems. Systems currently in use were selected based on institution size, fit, and need.

Northeastern State University and the University of Central Oklahoma both operate with Ellucian Banner. Ellucian remains in the Gartner Group’s Magic Quadrant for quality products and services. Banner maintenance covers support and upgrades to licensed products.

East Central University is currently using Jenzabar CX which has traditionally been considered Jenzabar’s flagship product. The CX product is now being transitioned by Jenzabar to a new, modern system called Jenzabar JX. ECU’s strategy in moving forward is to transition to the new JX modules as they become available and are proven stable by testing and use from early adopters. ECU purchased a step-up license that allows a seamless move to JX without having to re-license the JX software. As ECU moves towards implementing JX modules, Jenzabar has pledged the support and expertise of Jenzabar-Tulsa (See Appendix A) in ensuring that JX modules will interface with the state of Oklahoma functions and services and will be developed and supported by Jenzabar. This is significant because not having this support in the past has caused issues with utilizing some of the CX modules, particular HR/Payroll and Finance.

Northwestern Oklahoma State University, Southwestern Oklahoma State University, and Southeastern Oklahoma State University are currently using Jenzabar PX, formerly known as POISE.

These (and other) PX schools will need to move to another Jenzabar platform, as PX is moving toward being decommissioned at some point. Given the smaller size of these schools and the current offerings available on the market, the institutions may choose to upgrade to another Jenzabar product, “JX” or “EX”, depending on the characteristics and needs of their institution. Currently, Jenzabar is offering PX customers a “step-up” license that, once purchased, allows an institution the ability to license any other Jenzabar software module comparable to the school’s PX current license.

# Moving Towards Consortium Models

Moving towards consortium models in support of interested Oklahoma institutions presents challenges and opportunities. Certainly, should institutions choose to pursue this option, many considerations must be factored into the decision. The most challenging component of replacing an information system is ensuring business processes are supported. Consolidating information systems may require aligning business processes across the system. Everything from acceptance, enrollment, and transcripts to financial and human resources systems will need to be coordinated.

Information systems are expensive. Replacing information systems requires more than the cost of licensing new products, services, and equipment. Information Technology leaders price systems based on TOC or Total Cost of Ownership. TOC includes soft costs of planning, retooling, installation and implementation, long-term support, in-house interface development, staff training (both end-user and technical staff), and business process redesign.

The IT officers have bulleted high-level opportunities and challenges of using consolidated systems and have also included questions for consideration in the event institutions wish to pursue the opportunities further:

## Opportunities

* Using consortium pricing combines total FTE and can reducing initial pricing, increase software offerings, and reduce maintenance cost by leveraging total FTE.
* Using common hardware (consolidation) that is centrally located can reduce hardware support and further reduced maintenance costs
* Resource sharing for troubleshooting and technical skills may benefit all schools
* Consolidation may improve disaster recovery possibilities
* Potentially, combining FTE and/or Head Count to negotiate pricing contracts can allow institutions to have access to a wider array of features than otherwise licensed individually
* Easier to describe cost avoidance tactics
* Builds stronger collaborations within Oklahoma institutions
* Leverages dollars and expertise for training, consultants, problem solving, sharing code, and software.

## Challenges

* Depending on the level of consolidation, consistent procedures and business processes may need to be developed and followed among partner schools. The task could be herculean in nature, *very* expensive, and time consuming.
* Some institutions may not have adequate IT staff to support current or extended services, especially in comparison to peer institutions
* Varying school sizes will cause different requirements for system capabilities
* Varying timeframes. Some schools are already moving ahead, while others are waiting for various reasons.
* Unique customizations are necessary to support individual campus policy, procedures, timelines, and other requirements.
* Some campuses may potentially lose all of their customizations that were previously implemented upon moving to a new system.
* Any system new to the state of Oklahoma may require significant customization to be compatible with OMES and OSRHE requirements.
* Information systems are expensive and time-consuming to implement. Staff (technical and functional areas) must continue to perform current jobs while implementing new systems.

# Considerations, Questions, and Recommendations for Future Discussion

The CoIT Officers have created an opportunity for discussion and potential action of the following considerations, questions and recommendations in moving forward with analyzing the feasibility of consortium pricing and partnerships at the state level. These common items are typical for an IT Officer to consider in determining the need or desire to change information systems.

## Define the mission

* What problem are we trying to solve?
* Articulate the end goal and clearly define expectations.
* If using the term IT platform, describe what is meant: financial, academic, other?
* Find systems that are already plugged in to the state of Oklahoma.
* Is a target completion date set?
* What are the costs for the initial study, and who will pay for it?

## Possible Next Steps:

* Determine costs and allocate funds to initiate a study.
* Engage a consultant firm with at least five years’ experience in evaluating information technology services in a higher education system environment
  + The consultant should meet with presidents, business officers, academic affairs officers, and IT officers and their related staff.  The consultant should first focus business processes, then on information technology
  + Should the consultant need written documentation, s/he should prepare a distinct question set with ample time for completion
  + The consultant should not be allowed also to be the professional services provider in the event a new system is to be implemented (to avoid conflict of interest).
* A consultant’s review process could be used as an educational tool and/or opportunity for improvement
* Proceed using in-house expertise and coordination

# Appendix A

# Current Oklahoma Information Systems

# POISE / Jenzabar

Approximately ten Oklahoma institutions are running “Jenzabar PX”, formerly called “POISE” (People Oriented Information Systems for Education). One institution, ECU, uses “Jenzabar CX”, formerly called “CARS”.  Jenzabar PX/POISE has been supported in Oklahoma since the late seventies by a company called ESP located in Tulsa and has seen significant upgrades and changes while maintaining a core set of databases.

Carl Albert State College – Michael Martin

East Central University – Jeremy Bennett

Murray State College – Shawn Wakefiled

Northern Oklahoma College – Michael Machia

Northwestern Oklahoma State College – Craig Ricke

Redlands Community College – Matthew Hamilton

Rogers State University – Brian Reeves and/or Cathy Burns

Seminole State College – Marc Hunter

Southeastern Oklahoma State College – Dan Moore

Southwestern Oklahoma State College – Karen Klein

University of Science & Arts – Lynn Boyce

Western Oklahoma State College – Steve Prater

ESP was acquired by Jenzabar in 2014 and POISE/Jenzabar PX continues to be supported by former ESP employees and is now called “Jenzabar-Tulsa”.  Jenzabar-Tulsa remains committed to supporting POISE for as long as customers choose to use it and Jenzabar-Tulsa is expanding their services to include support for other Jenzabar solutions other than Jenzabar PX/POISE.

Some schools are very interested in moving to EX in the next couple of years. Others schools are interested in moving but are in no hurry, as they be waiting to see how the Jenzabar JX product matures or for some other reason.

Most enterprise systems are informed by a users group. The POISE schools in Oklahoma actively participate in the POISE USERS GROUP (PUG, Inc., a nationally organized user group.)

PUG Activities Include:

* Code Sharing (National & State Level). The POISE Users’ Group (PUG) officially encourages POISE sites to submit information and programming code to the “PUG Share” website. An award is given annually to the top rated submission.
* Within Oklahoma, POISE institutions routinely share code for common needs. An example would be the Higher One data interface for financial aid. More complex requirements are provided by ESP/Jenzabar-Tulsa, who is most often the only commercial support vendor to attend state requirements meetings on behalf of their clients. For example, the Oklahoma CORE project required significant modifications to payroll, HR, and purchasing systems.
* The annual POISE conference provides more than 60 institutions opportunities to present on current topics and to train their new employees on using the system.

ESP/Jenzabar-Tulsa is in the process of steering PX/POISE sites to another Jenzabar platform. Most Jenzabar POISE/PX sites will choose either Jenzabar “JX” or Jenzabar “EX” depending on the characteristics of their institution. Although this process will take many years, the transition offers current PX sites the opportunity to negotiate a volume (state-wide) purchasing contract that could include significantly discounted Jenzabar services, software, and support that would otherwise be financially unfeasible to acquire on a campus-by-campus bases.   Furthermore, Jenzabar is offering PX customers a “step-up” license that once purchased allows a site access to license any other Jenzabar software module that is comparable to what the site is currently licensed for on PX.

# Appendix B

# Council on Information Technology

# Background

## Council on Information Technology

The Council on Information Technology comprises the lead IT officer from each public college and university in Oklahoma. The Council meets bi-monthly with the State Higher Education CIO. The body depends on OneNet and other OSRHE resources to coordinate statewide network efforts and related policy.

### Why is this Relevant?

By working with the COIT, IT directors are actively engaged in efforts to define shared resources and shared services. These efforts began in November, 2000, when the CIOs from Oklahoma State University and the University of Central Oklahoma recognized the need to form a body consistent with other councils who serve as coordinating and advisory bodies to the Oklahoma State Regents for Higher Education. This group officially became the Council on Information Technology in 2006. From the start, the Council addressed the need to coordinate Oklahoma’s IT efforts to affect cost savings through leveraging resources and contracts. More recently the Council has added events that are meant to be collaborative in nature and that develop our staff professionally.

#### The Council’s By-Laws specify its purpose:

*The Council on Information Technology considers technology and related issues affecting Oklahoma higher education, proposes technology and related policy and procedures and serves as the principal statewide advisory council rendering advice and counsel to the chancellor, other advisory groups and the entire state system in the review of current and recommended technology and related policy and procedures.*

*The council also serves as a forum for IT officers to discuss matters of common interest, conducts studies and issues reports designed to strengthen the mission of Oklahoma higher education institutions. Membership is comprised of principal IT officers from each institutional campus and higher education center (as appropriate) in the state system. In addition, a representative from the independent sector is selected from nominations provided by the Independent College Association and is invited to serve on the council.*

Based on its Mission and the planning process, COIT is poised to achieve significant collaborations and cost savings for the State of Oklahoma through intentional activities defined for initiation or completion in FY2015.

**Council on Information Technology, Strategic Direction**

COIT clarified its role, defined its capability compass to set its direction and defined its growth path:

*“The Council on Information Technology provides unified and strategic information technology expertise to drive success for students, faculty, and staff within Oklahoma Higher Education.”*

As a result, the participants identified four vectors the COIT leverages year after year to achieve success.

1. Common Focus and Voice (various levels of advocacy and leverage for expedient collective bargaining)
2. Forum for Interaction and outreach (for members and their staff)
3. Expertise and professional development
4. Collaboration (in the form of sharing resources, contract sharing, and technical solutions)

#### Our strategic activities, values, and outputs include

* Advocacy and Influence
* Professional development
* Sharing services for cost savings and efficiency.
* Collective bargaining.
* Sharing best practices.
* Showcasing technological innovation.

COIT intentionally serves, collaborates, and communicates with Oklahoma stakeholders in higher education, including Regents, Legislators, Policy Makers, and Information Technology professionals.

Four COIT initiatives specifically defined for FY2015 are outlined below:

### Name of Initiative: Find the Savings! (Trim the Fat!)

**Intent:** Have a completed contract that is a state-wide single purchase from the state regents.

**Milestones and Dates:**

1. Repository of institution contracts
2. Decision on big-win/low hanging fruit
3. Identify negotiation team
4. CoIT approval for which contract to go with and/or final approval for final quote opt-in/out
5. Information Sharing for access

### Name of the Initiative: ADVOCACY

**Intent:** The intent of the advocacy group is to establish CoIT as the expert voice for all higher education technology issues in Oklahoma.

**Milestones and Dates:**

1. Membership & Regents: We will build a communication plan by November 1st to communicate strategy and goals. We will utilize emails and phone calls.
2. Legislative: Develop a SET OF KEY MESSAGES (by November 1st) & OPEN DOOR INVITATIONS to set up opportunities and workshops of how to work with legislators by January 1st.

### Name: Shared Services

**Intent:** Shared Services must achieve increased utilization of shared services by State of Oklahoma Higher Educations

**Milestones:**

1. Establish Committee 8/31
2. Deploy Marketplace 1.0 to OKHed 9/30
3. Publicize Shared Services and recruit institutions participation. 9/30
4. Complete Marketplace feature enhancements. 1/2015
5. Publish Shared Services initiative, progess, and success stories. 2/2015
6. Establish metrics and measure benefits, publish results. 6/30

### Name: Collaboration and Information Sharing

**Intent**: If we do nothing else with Collaboration and information sharing we must hold development events for professional growth for COIT membership and staff.

**Milestones:**

1. Hold an IT Summit in May each year (May 18 and 19, 2015)
2. Central concept for new technologies will be presented 3 times per year. (e.g. the introduction of cloud computing; Janux)
3. Develop a social media plan which includes both public and private platforms for sharing information and for communication(e.g. LinkedIn, blog, …) Plan will be developed by September 30, 2014. Plan will include milestones for implementation of individual components.
4. Create and implement a professional development plan for COIT membership in which each COIT meeting agenda will focus on a relevant topic.
5. Define leveraged collective talents, skills, and resources by Feb 2015: (a) Provide training opportunities in which institutions can share trainers and expenses; (b) Identify campus expertise to be utilized in a mentoring capacity; (c) Identify schedule “strike team” membership from each campus
6. Form a professional association which allows us to manage funds separate from a state agency for the purpose of collecting revenue and expending professional development dollars.

# Appendix C

# Collaborative Efforts - OneNet

The Oklahoma State Regents for Higher Education (OSRHE) have supported collaborative efforts within IT for over 20 years. The best and most robust example is OneNet, one of the Nation’s first statewide network provider for public services.

OneNet provides high bandwidth for distance learning and research and is used by the 25 public colleges and universities in Oklahoma. Additionally, OneNet supports state government, county government, municipalities, and public schools.

The use of OneNet alleviates the need for each institution to contract individually for Internet services, saving institutions thousands (if not millions) per year for high-speed bandwidth connections.  The centralized network allows institutions to configure the network specifically to meet the demand for education in Oklahoma. OneNet also offers specialized services that help share the load including DNS, Email, web hosting, and bandwidth management.

OneNet clients enjoy access to services that benefit education and non-profit entities. Using the same ISP introduces derivative benefits such as enhanced disaster recovery and redundancy. In addition, all OneNet schools enjoy the benefit of research networks without the tremendous cost associated with membership.

OneNet has been successful acquiring federal funding for distance learning and broadband grants that have enhanced Oklahoma’s ability to expand online educational opportunities.