

Oklahoma Jenzabar Consortium - First Meeting
Notes from Dan Moore
Jan 16th, 2015

Attendance Included:

(via phone, face-to-face, & IETV)

Dan Moore, Southeastern, CIO (meeting organizer)
Ross Walkup, Southeastern, CFO
Karen Klein, Southwestern Oklahoma State University, CIO
Tom Volturo, RSU, (Finance VP)
Mike Machia, IT, Northern Oklahoma College
Craig Ricke, Northwestern, CIO
Jeremy Bennett, ECU, CIO
Jessica A. Boles, ECU, VP for Finance
Lynn Boyce, USAO, CIO
Mike Coponiti, USAO, VP for Business & Finance
Michael Martin, CASC, CIO
Marc Hunter, SSC, IT Director
Matthew Hamilton, Redlands, CIO
Jena Marr, Redlands, VP for Finance
Anita Simpson, NOC, VP for Financial Affairs
Steve Prater, WOSC, CIO
Tom Fagan, Southwestern Oklahoma State University (Finance VP)
David Pecha, Northwestern
Cynthia Rolfe, UCO, CIO
Tom Rudolph (Jenzabar-Tulsa)
Sam Burgio (Jenzabar-Corporate)

Agenda:

- 9:00 Introductions
Overview of the purpose of meeting (*Dan Moore*)
- 9:15 Review Survey Results (*Dan Moore*)
- 9:30 Discuss Possible Benefits, Challenges, and Goals, of ERP Consortium Purchasing, Operations, & Maintenance (*open discussion, see attached document for reference*)
- IT perspective(s)
 - Business Perspective(s)
- 10:45 Discuss Next Steps & possible benefits with Tom Rudolph (*Jenzabar-Tulsa*) and Sam Burgio ([Jenzabar Corporate](#)), via remote.
- 12:00 End Meeting

Consortium Survey Results Overview (12 Institutions Responded):

1. Five institutions have selected EX as their next ERP platform
2. Six institutions are still deciding among EX, JX, and perhaps Banner
*ECU is in the process of moving from CX to JX and will be the first in Oklahoma to do so.
No EX systems are currently operational in Oklahoma*
3. Timing: Five institutions plan to move within three years. Four are not sure. Two plan to move in five.

Meeting Overview Notes:

1. Jenzabar has worked with several consortiums/purchasing groups and is willing to work with us as we move forward (see attached handout). Sam described several different consortiums that Jenzabar already works with.
2. Jenzabar-Tulsa staff mentioned that Arkansas saved 22% statewide after setting up a consortium.
3. The modifications on EX for Texas State-Report (e.g. Regents UDS) required 4000 hours of programming.
4. The consortium could start with a few institutions and then grow as others come on board.
5. The consortium could take on several forms and one person referred us to state statutes that allows for agencies to form a group for a unique purpose such as this.
6. Those that had quotes for system migration w/out the consortium pricing are in the million dollar range and may not include all aspects of the migration (e.g. training).
7. A tour of the Onenet data center was made available to Tom from Jenzabar-Tulsa to allow him to survey the facility to support future discussions that may include consolidated hardware located there.
8. Jenzabar is committed to supporting PX for as long as customers want to use it.

Concerns were discussed include:

1. Perceived trend of corporate takeover of regional control seems to be happening nationwide in several industries. Opinions on the impact of this varied.
2. The staffing levels at Jenzabar-Tulsa were discussed and Jenzabar indicated that the entire Jenzabar apparatus could be leveraged to support platform transitions. *Sam Burgio noted that Jenzabar has performed up to 24 migrations in one year.*

Next Steps:

1. Jenzabar-Tulsa is developing a matrix of what products each institution are licenced for and they will need data from each institution as to what platform they intend to migrate to. This information will be used to develop a group discount option.
2. Other discussion needs to occur to fully develop our needs list and then communicate to the vendor (e.g. including the need to limit annual software maint. increase to a 3% cap).
3. The 2015 annual "SCRUM" conference (April 2015 in Tulsa) will include a meeting for this group to continue to work on the consortium parameters.

4. Jenzabar agreed to host webinars for this group as we move forward. Webinars would mainly consist of feature demonstrations of the ERP systems that are available from Jenzabar.