| **Project Name/Title**: Banner Reimplementation **Date:** March 4, 2017 |
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| **Requested by**: B. Decatur/D. Hubbard **Prepared By**: L. Asante-Appiah |
| **Background & Business Need**: *State the business problem/issue to solve or what opportunity exists to improve a business function. What is the current state? Narrative background with drivers for the project.* |
| Wayne State University implemented Banner during the late 1990’s/early 2000’s. Since then, WSU has remained fairly current with Banner upgrades & has maintained a relatively vanilla version of the software.  The driving objective for the implementation was to gain a stable IT environment; there was little attention given to business process re-engineering. In fact, the goal was to find a way to configure the system to transact business as it was currently executed. When the application could not be configured to meet these needs, we relied on technical solutions outside the application to provide the necessary solution. Although this approach allowed us to maintain a stable Banner application, WSU is experiencing the added cost of maintaining our special programming and the additional effort necessary to successfully migrate to new releases.  The Banner product has matured and added functionality over the past few years. In many cases, these new functions replicate the added solutions we have developed and/or purchased. Similarly, there is Banner functionality that we elect not to utilize, as it does not fit our current practices even though the functionality may be considered a best practice approach. In short, our current Banner environment, across all modules, has become too costly to maintain. As a result, we bear, additional costs in the maintenance of the technical environment; the loss of efficient business processes; and added costs due to not utilizing the full capabilities of the application.  Lastly, but most critical, we need to move forward with the Banner project at this time because our current version of Banner will be phased out December 31, 2018, and therefore, no longer supported by our vendor, Ellucian. |
| **Project Scope Statement**: *A concise vision or scope statement that summarizes the purpose and the intent of the project; What will be included in this project? What will not be included in the project?* |
| We propose to undertake a full “re-implementation” of the suite of Banner modules. The objectives of this project focuses on a review of:   1. system functionalities to ensure we use the system as it was designed to meet administrative requirements; and, where system functionality does not meet our needs, employ an approach that is cost effective and results in improved efficiencies; 2. prioritized business processes will be reviewed to ensure that they are streamlined, incorporate best practices and appropriate internal controls; 3. institutional policy when such policies appear to drive inefficient practices; and 4. data, with the goal of cleaning up data for identified business process that will be reviewed and/or reengineered. 5. Lastly, the Banner reimplementation project initiative will support and serve as input into the Data Governance Framework.   **The project *will not* include:**   1. a full review of all associated business processes within each functional area. Only the business processes that have been prioritized will be reviewed during the duration of the project. Additional business process review activities will occur after the project period ends. |

| **Project Goals and Benefits**: *What result will be gained from the project?* | | |
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| The primary goals of this project are as follows:   1. Productivity: Increase productivity through enhanced processes, operational efficiencies, minimizing manual processes and manual data entry and eliminating redundant, non-value added steps. 2. Enhanced Decision Making: Determine and close gaps related to improving data stewardship and data integrity. Develop an integrated information and reporting strategy that improves data driven decision-making and planning capabilities. 3. Reduced Costs: Minimize our reliance on bolt-on applications in instances where Banner provides functionality. Generate savings related to – 1) the cost of maintaining additional internal processes, and 2) the costs of third party software. 4. Continuous Improvement: Create a cyclical review of business processes with an eye towards maximizing Banner technology. Develop a scalable and sustainable training platform to ensure current and new users are skilled, within their role, to effectively use the system to complete day-to-day job duties. 5. Student Success: Enhance self-service environment for students/faculty/staff to support the goals related to student success. 6. State of the Art Technology: Maximize the use of Banner technology to include integrated workflows not currently in place and leverage industry best practices. | | |
| **Project Objectives/Deliverables**: *Outline the high-level objectives for the project. What will exist when the project is complete? Include the benefits of the project, including how the project will benefit the customer or stakeholder.* |
| * When the project is completed, WSU will benefit from both direct and indirect deliverables of the project. At the basest level, WSU will have a new suite of administrative applications that have been configured/implemented to meet its current business needs. The ERP (enterprise resource planning) application ecosystem will be stable and sound, utilizing the latest in technology and platform capabilities. Delivery of the application services will be done via a number of platforms, (i.e., desktop, mobile, etc.). * At the next level, WSU will be positioned to focus on their administrative processes to ensure a set of effective and efficient business processes on two levels. First, the users (faculty, staff, students, etc.) will not be burdened by administrative processes that do not enable them to meet their objectives. Secondly, the technology environment will be very cost effective for the institution. * Finally, WSU will benefit as we advance our organizational capacity and capabilities. Through our continuous improvement approach, we will deliver a quality experience for faculty, staff, students, and all other WSU stakeholders. |
| **Assumptions**: *What assumptions were made when conceiving this project?* | | |
| * The implementation will be handled as a new product installation, not an upgrade of current product. * Senior management is willing to develop simplified tuition/fee assessment models to achieve efficiencies in the student application. * Appropriate resources will be provided to effectuate project. * An assessment of identified business processes will occur to determine opportunities to enhance or redesign outdated, inefficient and ineffective business processes. * Union contracts will be negotiated to support WSU’s ability to leverage best practice, achieve best-in-class human resource practices, and allow for ease in administrative processes. * The executive sponsors have ultimate authority and responsibility for the project including approving scope changes, resolving strategic issues with stakeholders, approving project charter and confirming delivery and sign-off at project close. * Work stream leads will update the project leaders on a regular basis. It is the responsibility of the project leaders to ensure that progress is being made per established plans and costs, to remove obstacles to progress that are within their control, and to escalate those situations to the executive sponsors and steering committee with recommendations to mitigate risk. * An examination and justification of current 3rd party software packages (integrated with core Banner) and customizations will be required. In addition, any requests for new system configurationsand customizations will need to be approved by the executive sponsors. A business process will be created to govern such requests. | | |

| **External Dependencies:** *Note any major external (to the project) dependencies the project must rely upon for success, such as specific technologies, third-party vendors, development partners, or other business relationships. Also, identify any other related projects or initiatives.* | | | | |
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| * There is a challenge in the technology arena to deliver applications to a mobile computing environment. Although a critical success factor, we need to ensure that our environment is ready and stable. * The concurrent implementation and associated timing of a new budget model and its impact on development of the Chart of Account (COA). * Staffing levels for the project is a concern. The concern is two-fold: 1) having the number of staff needed to deliver the project; and, 2) having adequate skills within the team members. | | | | |
| **Project Risks:** *List any known risks for the project that could impact the success of the project or should be considered when planning. Include risk of change management. Does the value of this project ultimately depend on people changing their work or behavior? Identify risks facing this project or organization if the people-side of the project is poorly managed.* | | | | |
| * As a result of the sunset period determined by Ellucian, the project time-line will be difficult to manage and have a significant impact on the project implementation approach. * Change management will be a large component of this project. The ability of the current staff to accept and integrate, as well as unlearn and learn new processes will be critical. * Senior management support will be salient to change the WSU business models in a number of areas. * Technical resources to deliver a seamless, but multi-instance version of Banner. | | | | |
| **Key Stakeholders:** *List the key stakeholders for the project. Stakeholders are individuals, groups, or organizations that are actively involved in a project, are affected by its outcome, or can influence its outcome. Indicate their role or interest in the project. These stakeholders (or representatives) MAY be invited to participate in a project kick-off session, but do not necessarily need to be on the project team. Whose day-to-day work will be impacted by new processes (systems, tools, job roles, organizations structure, etc.) as an outcome or deliverable of this project?* | | | | |
| Stakeholder/Stakeholder Group | | | | Impacted By this Project |
| Board of Governors, President’s Cabinet  Role: Executives, Primary Customer | | | | * Data-driven decision-making; * Institution’s increased levels of service through enhanced business processes; * Overall productivity gains for institution due to efficient and effective processes. |
| VP of Finance/CFO and CIO/AVP C&IT  Role: Executive Sponsors | | | | * Increased levels of service through enhanced business processes; * Overall productivity gains for institution due to efficient and effective processes; * Data-driven decision-making. |
| Darin Ellis  Diana Goode  Allison Martin  Dawn Medley  Alicia Pendleton  Gail Ryan  Role: Steering Committee | | | | * Increased levels of service through enhanced business processes; * Overall productivity gains for institution due to efficient and effective processes; * Data-driven decision-making. |
| Heather King and Lila Asante-Appiah  Role: Project Leadership | | | | * Increased levels of service through enhanced business processes; * Productivity gains due to efficient internal processes; * Use of technology in smart, customer driven practices. |
| Student Information Systems (Financial Aid, SAR, Admissions, Registrar)  Role: Representation on Project Work Streams | | | | * Increased levels of service to student community through enhanced business processes; * Productivity gains due to efficient internal processes; * Use of technology in smart, customer driven practices. |
| Human Resources Staff  Role: Representation on Project Work Streams | | | | * Increased levels of service to University community through enhanced business processes; * Ability to deliver HR best practices to institution; * Productivity gains due to efficient internal processes; * Use of technology in smart, customer driven practices. |
| Finance Staff  Role: Representation on Project Work Streams | | | | * Simplified COA reduces complexity of reporting and increases data integrity; * Productivity gains due to efficient internal processes; * Increased reporting capabilities through use of Banner coding; * Use of technology in smart, customer driven practices. |
| University Budget Office  Role: Representation on Project Work Streams | | | | * Increased levels of service to University community through enhanced business processes; * Productivity gains due to efficient internal processes; * Use of technology in smart, customer driven practices. |
| Sponsored Program Administration  Role: Representation on Project Work Streams | | | | * Increased levels of service to University community through enhanced business processes; * Productivity gains due to efficient internal processes; * Use of technology in smart, customer driven practices. |
| Business Affairs Officers  Role: Representation on Project Work Streams | | | | * Enhanced S/C/D management through better financial and HR practices/processes; * Productivity gains due to efficient internal processes; * Use of technology in smart, customer driven practices; |
| Faculty & Staff  Role: Primary customer, team members | | | | * Reduction of burdens in interacting with institution. |
| Students  Role: Primary customer | | | | * Receiver of enhanced service and simplistic approach to transacting with WSU; * Increased ability to succeed in meeting educational goals/objectives; * Use of technology to meet their needs. |
| **Required Resources:** *Identify the known resources that management is willing to commit to the project at this time.* | | | | |
| Project budget - TBD | | | | |
| **Requested Timeline/Milestones: *Include start and end dates and key milestones.*** | | | |
| Projected Start Date | Projected End Date | Key Milestones | |
| 1/2017 | 3/2017 | Completion of Strata Information Group (SIG) assessment and delivery of report | |
| 3/2017 | 4/2017 | Review Strata Information Group report. | |
| 5/ 2017 | 5/2017 | Development of project strategy, including structure, timeline and resources | |
| 5/ 2017 | 5/2017 | RFP for Professional Services /Implementation Support | |
| 6/2017 |  | Project Kick-off | |
|  |  | (Milestones will be updated after Banner projects have been determined by Steering Committee) | |
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| **Approvals** – Executive Sponsors | | |
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