



ERP Systems for Higher Education:

**Evaluating and Selecting
The Best Fit
For the
Institution**

***The EduServe Administrative System Evaluation (EASE) ©
Model***

***Information Technology Services for
Colleges and Universities***

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In a recent EDUCAUSE Current Issues survey, four “key issue” questions were asked of higher education leaders related to technology. Those questions include:

- What are the key issues that need to be resolved for the Institution's Strategic Success?
- What Are The Key Issues That Have The Potential To Become More Significant?
- What Are The Key Issues That Consume The Time Of Campus IT Leaders?
- On Which IT-Related Issues Is Your Campus Spending The Most Human And/OR Financial Resources?

The most consistent response to each question was “Administrative/ERP/Information Systems,” placing this as the second most pressing issue facing colleges and universities. (“Funding IT” was ranked in the number one position.) Clearly, in terms of both fiscal resources and human resources, effectively using and maintaining institutional information systems is an extremely high and costly priority. Therefore, it is imperative that colleges and universities select the best fit for their overall situation – in terms of current functionality, future growth and total cost of ownership.

As a seasoned technology consulting firm providing technology leadership to higher education, many real life stories have been directly passed on to us. Clients and colleagues have purchased new systems based solely upon vendor demonstrations, lowest purchase price, and promises for the future. While these criteria can be considered in total, evaluating systems to meet the needs of the organization should include at least five factors:

- Strategic Vision for the College
- Objectives for a new system
- Specific Functionality Requirements
- Technical Requirements
- Total Cost of Ownership
 - Purchase Price
 - Implementation
 - Hardware Implications
 - Maintenance
 - Staffing

EduServe has developed a comprehensive, proven model and useful tools to assist colleges and universities in evaluating and selecting information systems that best fit their environment.

The EduServe Administrative System Evaluation (EASE) © Model

Moving to a new information system environment is one of the most significant changes that an institution can undertake. Therefore, the EduServe team tailors demonstrated change management techniques to ensure that the organization is ready to take on the project. The EASE© model is adapted to each institution's culture to ensure that the process fits each unique situation.

The EduServe team consists of at least three (often more) individuals with extensive experience in helping colleges and universities, evaluate and select administrative information systems. The EASE©

team are higher education professionals, typically with more than twenty years' experience. Working both onsite and remotely, the team assists in:

- Development of a comprehensive Evaluation & Selection Process
- Setting the Vision and Establishing Objectives
- Identification of Core Functionality Requirements
 - Process Documentation
- Collection and Analysis of Data
 - Compilation of Total Cost of Ownership Information
- Contract Negotiation

A brief description of the EASE© elements and the EduServe approach is described below:

Evaluation and Selection Process

The EduServe Team works closely with the administration to design a process that will fit within the university's culture and environment. It is imperative that the process be inclusive of the key users and be structured to ensure that the project remains on time and on target. The EASE© model recommends that the following elements are part of the process design and are incorporated in an agreed project plan:

- A clearly defined decision process, including roles and expectations for university constituents
- A system evaluation organizational structure, inclusive of key constituents
- A timeline and milestones for reaching objectives
- A communication plan to ensure that information flows freely throughout the process

A well-executed communication plan is critical to a successful project. Input from the key stakeholders and consistent, frequent reporting to all constituencies is demonstrated to be the most effective method to affect change.

There are a number of methods of communications utilized in the EASE© model. Those methods include surveys, focus group sessions, web site reporting, presentations and individual meetings.

Setting the Vision and Establishing the Objectives

Each organization must determine what it intends to accomplish by implementing a new enterprise information system. The new system should address pain points as well as provide for growth toward a future institutional vision. In addition, the university must determine whether it will adapt its business processes to the processes utilized in the enterprise solution. And, the university must determine its risk tolerance at this point.

Through a series of focus group meetings, surveys and individual meetings, the EduServe team assists the university in identifying its overall objective in selection of a new system. By establishing the vision and objectives, the university can more clearly communicate with many enterprise information system vendors and begin to narrow the field.

Identification of Core Functionality Requirements

Once the vision is established, the EduServe team assists the university in gathering the core functionality requirements. EduServe has developed a tool (called EASE Assist©) that aids key users in identifying core functionality requirements. The tool also helps users prioritize non-mandatory functionality.

Information collected with the EASE Assist© tool is utilized throughout the evaluation process, including gap analysis, vendor matching and functionality ranking. By utilizing the EASE Assist© tool, universities are able to make a more objective evaluation, and be able to clearly identify core requirements.

Collection and Analysis of Data

This is one of the most critical elements of the selection and evaluation process. The EduServe team assists in collecting data from the vendors and many other sources, and then provides a complete analysis of the findings for university review. Because of EduServe's experience in not only evaluating and selecting enterprise information systems, but in the EduServe team's experience in implementation and maintenance, we are able to provide a comprehensive analysis and report regarding trends, vendor stability, references, etc.

The EASE© model recommends that universities utilize a bid or proposal process to identify potential viable software vendors. Information provided through the proposal is utilized to perform functionality gap analysis, and is also negotiated into the final contract. The structure of the request for proposal is crucial in clearly communicating expectations to vendors as well as gathering usable, useful data for analysis. The EASE© Assist tool is central in framing RFP's and RFI's.

As a part of the data collection and analysis, the EduServe team will provide a three to five year total cost of ownership (TCO) projection. This projection will take the university's current computing environment into consideration – including networks, desktops, servers, human resources, etc. Projected training costs and new staffing are considered into the TCO calculation.

These findings are invaluable to the university as it narrows its selection and begins the contract negotiation process.

Contract Negotiation

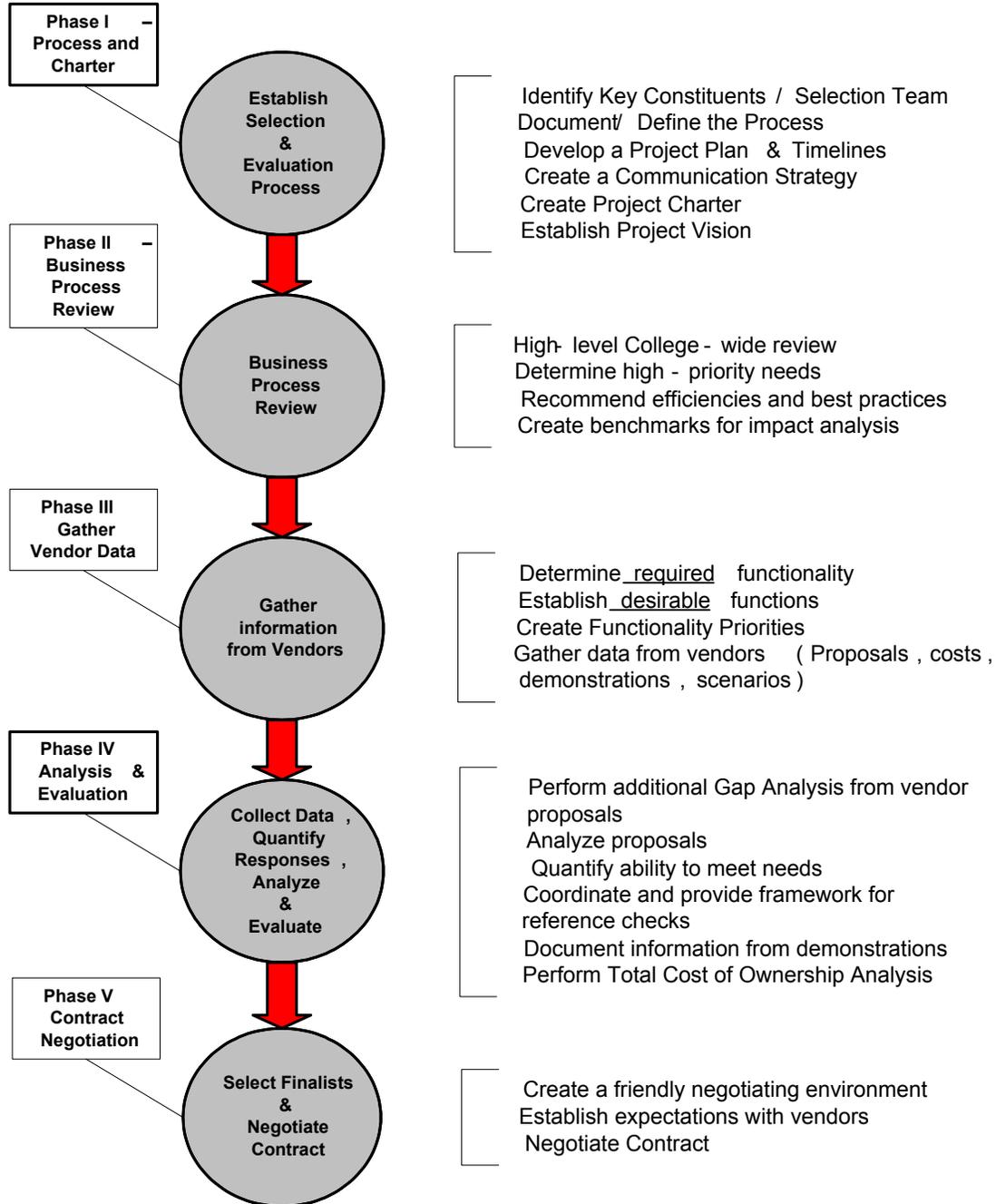
Most colleges and universities only go through this process once during the tenure of its administration. Therefore, it is rare to find on-campus staff with tremendous experience in negotiating contracts of this magnitude. Successful negotiation requires experienced attention to detail, and knowledge of software vendor practices. EduServe utilizes its contract negotiating team to provide contract review and recommendation for our clients. The contract negotiating team consists of former software vendors, current Chief Information Officers, and experienced higher education contract consultants.

The graphic below summarizes the EASE© model.

EduServe Administrative System Evaluation

EASE ©

System Selection Process



Conclusion

EduServe is a management consulting firm specializing in higher education. EduServe is dedicated to helping colleges and universities accomplish their mission through maximizing human performance and realizing technology's potential. **Our mission is to strengthen teaching and learning while improving operations while controlling costs through the application of best practices, technology and leadership.** Higher education management is our core business; as expert practitioners, EduServe consultants have an average of 20 years each serving higher education. EduServe understands the challenges you face. We guide you in the use of best practices and in adopting emerging methods for effective institutional and technology management.

Our unique blend of leadership, management and planning expertise allows us to work creatively with our clients to build workable strategies and deliver measurable results.

For more information about EduServe and our Strategic Planning Services, please contact us:

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