



## Meeting Presentations April 19-20, 2022

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# Winona State University

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PRESIDENT: SCOTT OLSON

ASSOCIATE VICE PRESIDENT: JONATHAN LOCUST JR.

# BIPOC Student Headcount at WSU

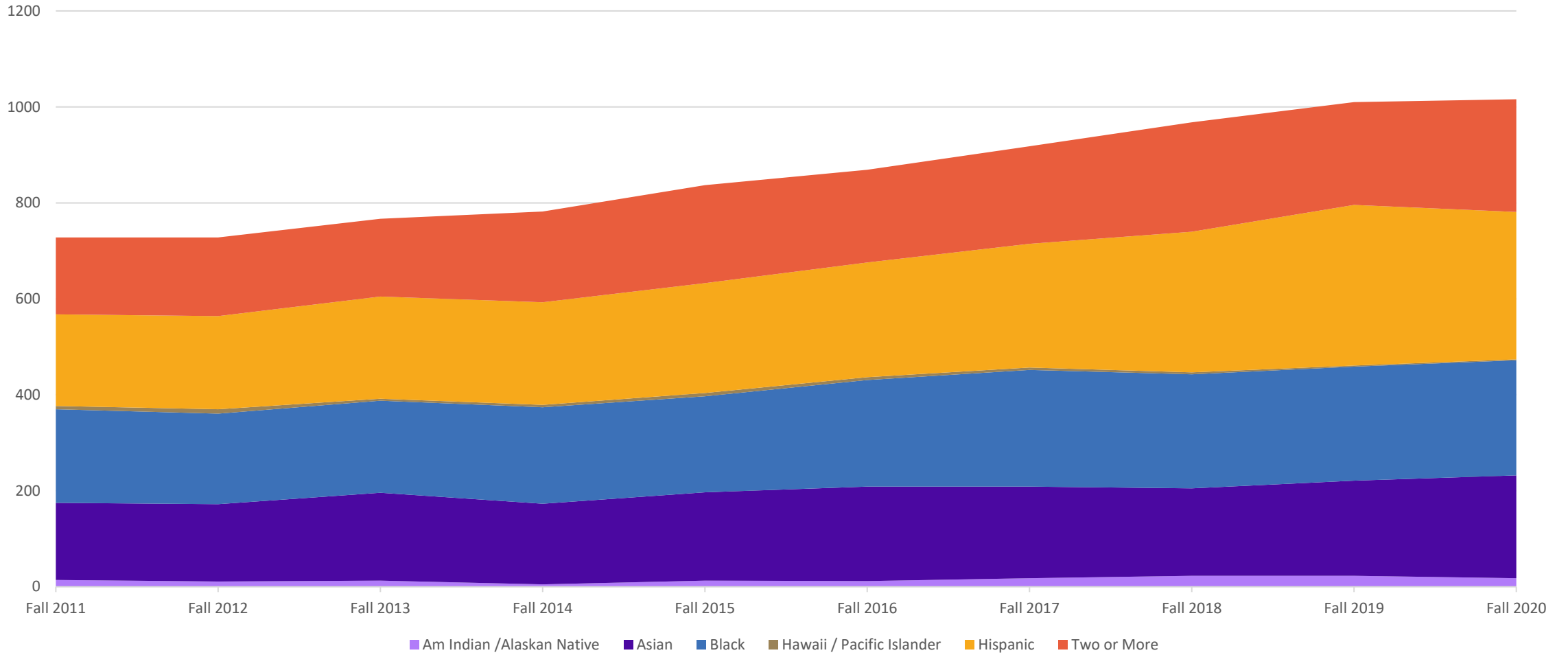


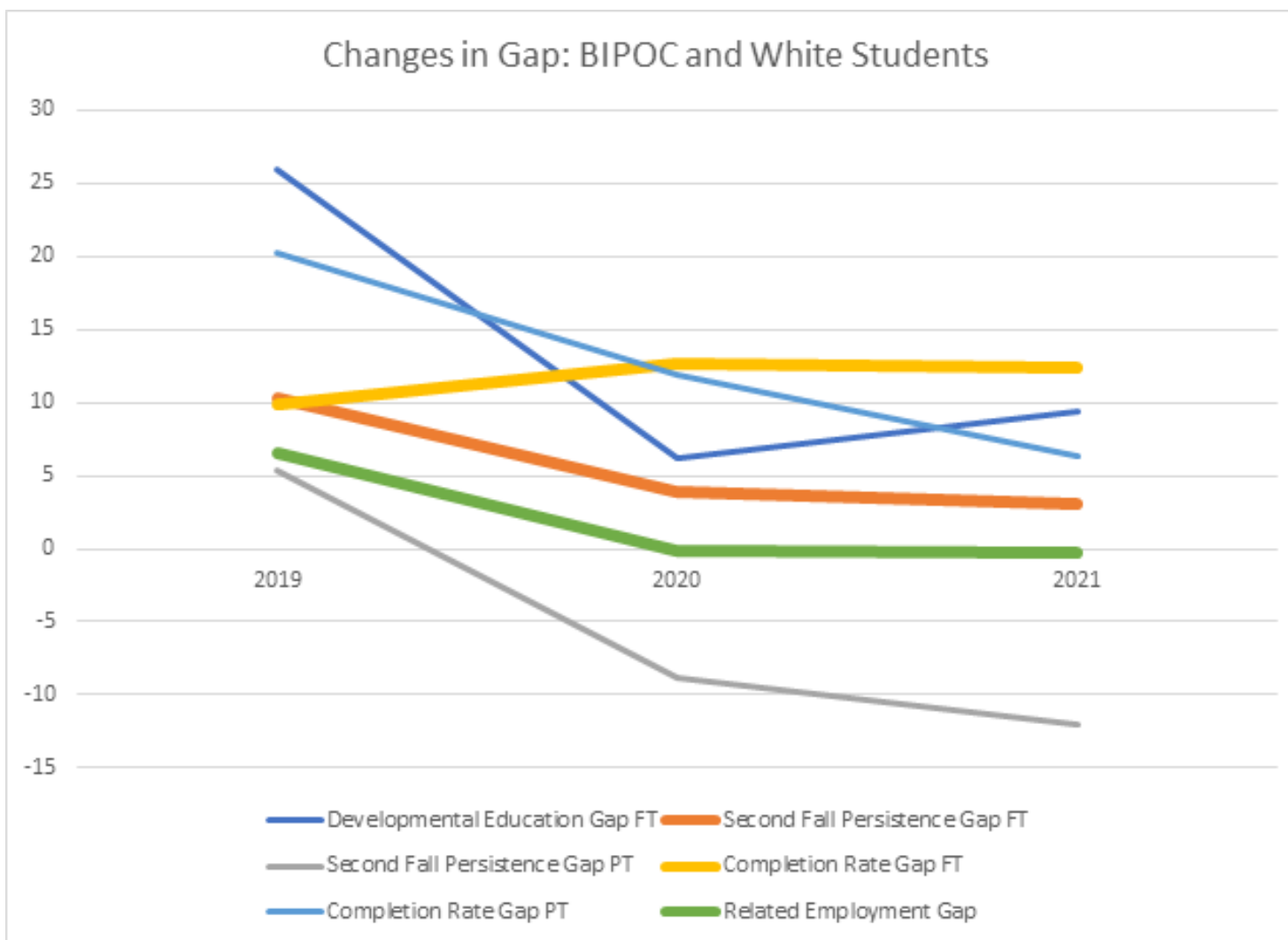
Chart Area

## % Students of Color in Total Enrollment (Fall 30th Day)

16%  
14%  
12%  
10%  
8%  
6%



### Changes in Gap: BIPOC and White Students



# Wrap-Around Services

- Advising - Academic, financial, and personal
- Bridge Programs
  - HOPE Academy
  - Family Ties
- TRIO
  - Current: SSS & SSA
  - In-Progress: McNair
- Mentoring programs
- Tutoring - \$10,000 Innovation Grant
- Counseling - In person, group, and tele counseling
  - JED Campus (Mental Health Counseling)
- Health Services – CV19 testing, vaccines, and boosters
- Warrior Cupboard - Addresses food insecurity



# Race Matters Study Group (RMSG)

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Formed after surveying our George Floyd listening session attendees

41 total participants

ALL UNION representation

Complete cross section of Winona State University

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# RMSG Video



# Equity by Design Framework

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Advanced  
HU TIEN TSING  
China Inland Mission,  
Auking, China

*"Blew in from the rice fields to get his final polish here, and we were proud and glad to have him."*

- WSU History Project
  - Ex. First ethnic student from China graduated in 1915
- Equity Lens Policy to Review
  - Policies include gender inclusive language
  - Collections Policy

Collaborations with:

- Finance Dept.
- Accounting Dept.
- Financial Aid
- Startup Winona

Attended by students, employees and retirees

Discussions on:

- Investing
- Cryptocurrencies
- NFT's (Non-Fungible Tokens)
- Stock Market
- Foreign Exchange Market

# WEALTH BUILDING SERIES

4:30PM | KEAP Center  
(Kryzsko 162)



**Mon, Jan 31**  
(Zoom only)

## **BASICS**

*Dr. Jonathan Locust*  
Associate Vice President of Office of Equity & Inclusive Excellence



**Tues, Feb 8**

## **CREDIT**

*Dr. Jodi Olson*  
Assistant Professor of Accounting



**Thur, Feb 24**

## **INVESTING**

*Dr. Robert Wolf*  
Associate Professor of Finance



**Mon, Mar 14**

## **PAYING OFF DEBT**

*Ben Sturomski*  
Assistant Director of Financial Aid



**Wed, Mar 30**

## **BUDGETING**

*Scott Ellinghuysen*  
Vice President for Finance and Administration



**Tues, Apr 12**

## **ENTREPRENEURSHIP**

*Marshall Erickson*  
Director of Innovative Community Engagement and StartUp Winona



Zoom option is available.  
To join via Zoom, please scan QR code or by copying the following link:  
<https://minnstate.zoom.us/j/6050735916>

Brought to you by the Office of Equity & Inclusive Excellence, KEAP Council, Financial Aid, Finance Dept, Accounting Dept, & StartUp Winona





# Innovative Scholarships

- **George Floyd Scholarship**
  - Cabinet Rotational Program
- **Pathways to more African American male teachers**
  - Full academic scholarship
  - Graduation from Rochester Public School
  - 2 years at Rochester Community & Technical College
  - 2 years at Winona State University
  - Return to Rochester Public Schools to teach

Uncle Gil's Cutz hopes to build community in Winona



# Equity & Economic Development

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Students driving to Rochester for haircuts

WSU's Barbershop Program

Community requests for haircuts

Uncle Gil's Barbershop in Winona



April 19, 2022

Joint Diversity, Equity and Inclusion and Workforce and  
Organizational Effectiveness Committees

# Board of Trustees – Campus Climate Assessment

Board of Trustees

MINNESOTA STATE

# System-wide Campus Climate Assessment

## Overview

- Further building on existing & past efforts
- Campus Climate Proposal Workgroup

## Importance of assessing climate

- Employee retention & recruitment
- Compositional diversity - students & employees
- Student success
- Community relations
- Strategic continuous improvement

# Description of Campus Climate

Campus climate is the reflection of our stakeholders' sentiments and experiences regarding an institution. Climate reflects interpersonal interactions, experiences, and sentiments with facets, processes, or constituencies of the institution, which impact the stakeholder's wellbeing, success, or ability to exist in campus settings.

Hurtado (1992) and Rankin (2001) assert, a climate study is a measure of the real or perceived quality of interpersonal, academic and professional interactions on a campus and consists of “the current attitudes, behaviors and standards of faculty, staff, administrators and students concerning the level of respect for individual needs, abilities and potential.”

# Workgroup's Efforts to Develop Climate Proposals

1. Environmental scan of existing assessments of student & employee campus climate experiences
  - Need for explicitly assessing climate experience; going beyond general stakeholder engagement & experiences
2. Identifying key conceptual domains salient to campus climate
3. Outlining elements of framework for system-wide assessment processes
4. Review of potential assessment tools & discussion with vendors to determine suitability of services



# Core Requisite Elements of Climate Assessment:

1. Provide insight into climate conditions - institutional level
2. Provide useful, digestible, & disaggregated information
3. Support campus strategic continuous improvement processes & monitoring progress
4. Inform consultative process between system office & campuses
5. Support & align to system EDI priorities; Equity 2030 & Equity Scorecard
6. Be pragmatically implementable by campuses
7. Ensure anonymity & confidentiality of respondents

# Priority Campus Climate Conceptual Domains

## Student Related

1. Sense of belonging/Sense of inclusion
2. Safety – Physical
3. Safety – Psychological (emotional/mental)
4. Discrimination, harassment, & bias experiences
5. Accessibility & facilities

## Employee Related

1. Sense of belonging/inclusion & psychological safety
2. Sense of safety & security
3. Discrimination, harassment, & bias experiences
4. Multicultural competency of employees/leaders/supervisors
5. Peer/Team/Supervisor relationships & effectiveness

# Climate Assessment Framework – Key Elements

1. First Assessment Wave: 3 years phased approach - FY's 23, 24, 25
2. Administer both student & employee climate assessments
3. Institution will coordinate administration directly with vendors
4. Campuses provide to system office specified campus climate indicators & data points
5. Campus leadership to share results with their stakeholders
6. Engage system office in consultative process to determine needs & directions of climate improvement efforts
7. Leverage results to develop & implement strategies to improve climate
8. Reassess climate at a minimum of every 3 years

# Identifying Climate Assessment Tools & Recommendations

1. Workgroup is reviewing assessment options & approaches
  - Must provide necessary information relevant to assessing campus climate and be customizable as needed
  - Provide useful analysis & reports
  - Readily deployable, cost-effective, & pragmatic
  - Resourcing commitments & requirements
2. Multiple options for employee & student facing assessments
3. Campus selects an option(s) which serves their needs and relevant to on-going efforts
4. Campuses (tentatively) to be slated for assessments within 3-year window for first assessment wave

# Next Steps

1. Campus climate assessment proposal work continues to review options
  - Assess tool's coverage of priority domains & customization
  - Master contracts & cost structure
2. Present recommendations to Chancellor and Vice-Chancellors
3. Engage stakeholder groups and constituent audiences to share assessment framework & get feedback
4. Communicate campus climate assessment process to campus level leaders
5. Aiming to have some options available for Fall 2022

# Further Considerations for Developing Climate Assessment Process

1. Integration of climate assessment results into Equity Scorecard
2. Develop guidance for campus preparations for assessment
3. Develop mechanism for campus to share results with system office
4. Cultivate formative consultative process for campus and system office to identify climate related areas of need, responses, & activation strategies
5. Create process for on-going monitoring of climate improvement efforts



# MINNESOTA STATE

30 East 7th Street, Suite 350  
St. Paul, MN 55101-7804

651-201-1800  
888-667-2848

[www.MinnState.edu](http://www.MinnState.edu)

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April 19, 2022

Office of Internal Auditing

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# Audit Committee

**Federal Compliance Testing Over Student Financial Assistance and  
Higher Education Relief Fund Programs**

MINNESOTA STATE





# Minnesota State Colleges and Universities Audit Presentation

Year Ended June 30, 2021

WEALTH ADVISORY | OUTSOURCING | AUDIT, TAX, AND CONSULTING

Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor

# Agenda

Scope of Audit Responsibilities

Timeline of Testing

Audit Approach

Results



# Scope of Audit Responsibilities

Contracted by Minnesota State to perform the compliance testing over the Student Financial Assistance Cluster (SFA) and Higher Education Emergency Relief Programs (HEERF)

Compliance requirements tested under the Uniform Grant Guidance (SFA and HEERF)

CLA's report will be included as part of the State of MN's Single Audit Report



# Timeline for Testing in FY21

SFA

Business as usual – completed by November 2021



HEERF

Final guidance released:  
December 2021

Sampling and planning:  
December 2021

Samples sent out:  
December 2021 and  
January 2022

Testing completed:  
February and March 2022



# Audit Approach - SFA

- Rotation of internal control policies and procedures

- Random sample of students selected from ~125,000 students within the system

- Other samples selected (e.g. Reporting, Cash Management, Perkins testing)



# Audit Approach – HEERF

- Questionnaire sent to all colleges and universities to understand internal controls

- Disbursement testing (student and institutional) selected from entire system but several samples due to populations of differing internal controls

- Other samples (procurement and reporting) selected from entire system



# Audit Results

- Opinion
- Unmodified Opinion on Compliance



# Audit Results – SFA

No Material Weaknesses

Three Findings Considered to be Significant Deficiencies

- National Student Loan Database System Enrollment Reporting
- Perkins Recordkeeping
- Student Refund Checks Outstanding Greater than 240 Days





# Audit Results – HEERF

## One Material Weakness

- Reporting

## Two Findings Considered to be Significant Deficiencies

- Allowable Student Costs
- Allowable Lost Revenue



# Fiscal Year 2022 Compliance Audit

## SFA

- No changes in timeline for testing

## HEERF

- Start time is unknown



# Questions and Feedback

We welcome any questions pertaining to the audit, governance communication letter, management letter or other matters related to the engagement

We appreciate the opportunity to serve as the auditors for the Minnesota State Colleges and Universities system and welcome any feedback relative to our performance



**Don Loberg, CPA**

Principal

Ph. 612/397-3064

Don.Loberg@CLAconnect.com

**Brenda Scherer, CPA**

Signing Director

Ph. 612/376-4626

Brenda.Scherer@CLAconnect.com

**Liz Cook, CPA**

Manager

Ph. 612/867-4542

Liz.Cook@CLAconnect.com



CLAconnect.com



WEALTH ADVISORY | OUTSOURCING | AUDIT, TAX, AND CONSULTING

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30 East 7th Street, Suite 350  
St. Paul, MN 55101-7804

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April 19, 2022

Board of Trustees Update

# NextGen | April 2022 Update

Imagine the Possibilities

MINNESOTA STATE

# Agenda

- Monthly Status Update
- Internal Audit Report
- Organizational Change Management Activities
- Opportunities for End-User Engagement
- Workday Student Update – Research Takeaways
- Questions





# Monthly Status Update

PREPARED BY: Melinda Clark

REPORT DATE: March 21, 2022

## PHASE 2 HEALTH STATUS

	OVERALL	SCOPE	SCHEDULE	BUDGET	RESOURCES
CURRENT STATUS	OFF TRACK	ON TRACK	OFF TRACK	ON TRACK	AT RISK
LAST STATUS	AT RISK	ON TRACK	AT RISK	ON TRACK	ON TRACK

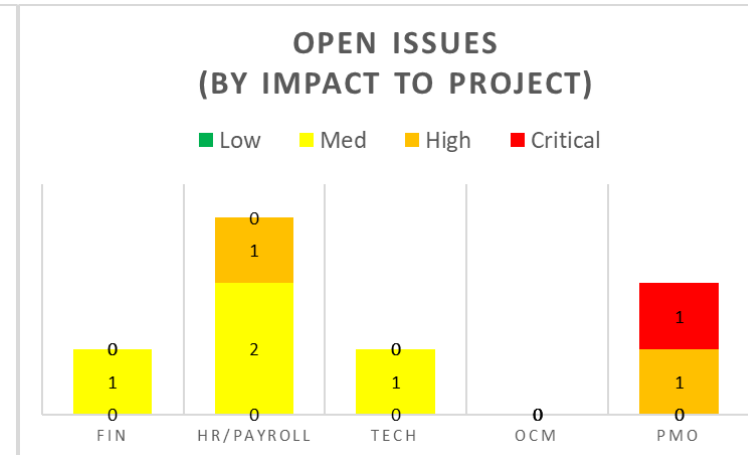
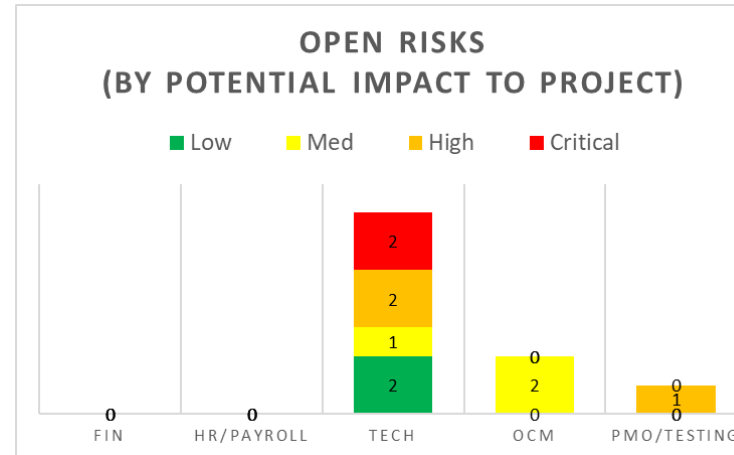
### Project Revenue & Expenses

State Appropriations	\$ 32,000,000.00
Campus/System Office Contributions	\$ 45,500,000.00

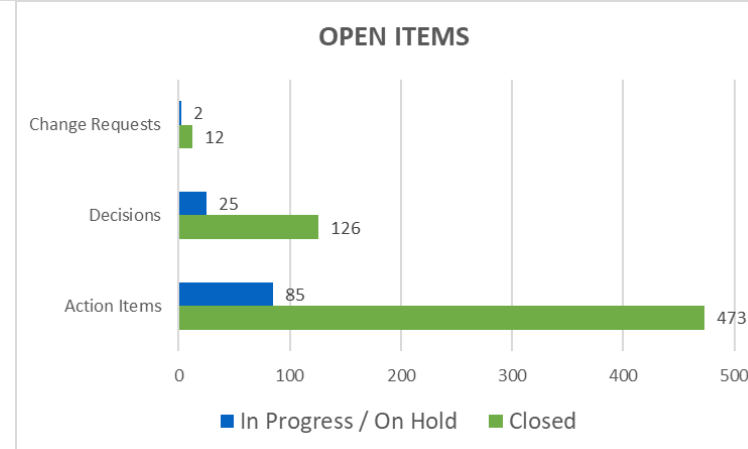
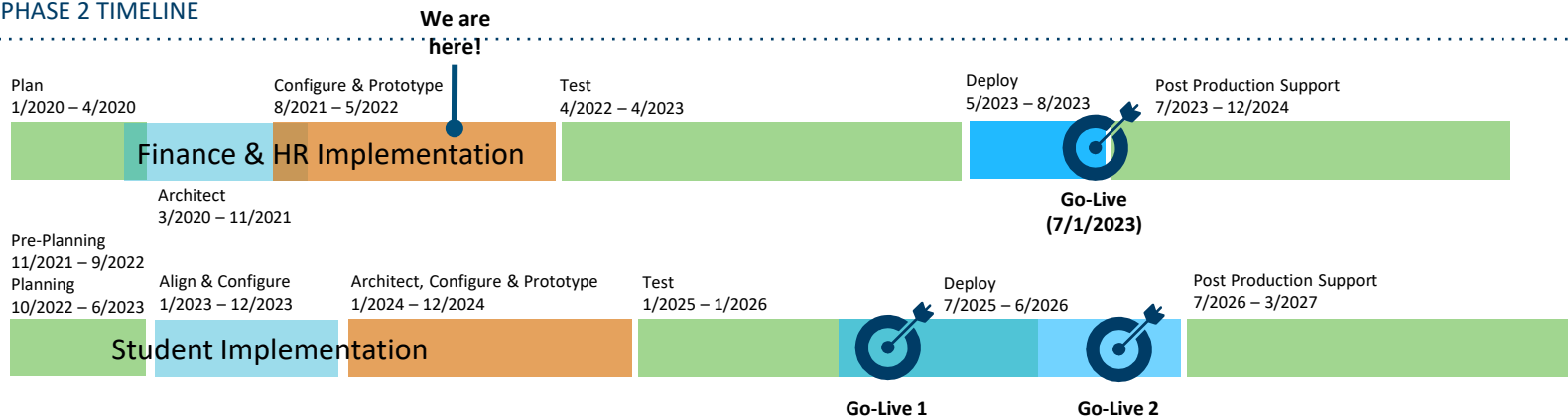
### Total Funding Sources

Spent to Date	\$ 36,503,346.54
Encumbrance	\$ 20,793,520.21

**BALANCE AS OF 3/21/2022** \$ 20,203,133.25



## PHASE 2 TIMELINE



**G On track;** no impact to Stage end dates or to the go-live date

**Y At Risk;** potential impact to milestones, but no impact to Stage end dates or to the go-live date

**R Off track - high criticality;** impact to Stage end dates and / or the go-live date

# Internal Audit

## Project Risk Review (PRR) Checkpoint 8 Results

# NextGen PRR – Background

- **Approved as part of the annual Audit Plan**
- **Provides ongoing and objective assessments of NextGen for two purposes:**
  1. Providing assurance to the Board on project risk management
  2. Providing assurance and advisory guidance to the project Steering Committee on project risk leading practices

# NextGen PRR – Risk Areas Reviewed

## Project governance and management

Leadership, oversight, guidance, and decision-making over the project

## Organizational change management

Planning, communications, training, support related to the successful transition and adoption

## Stakeholder involvement

Participation of key business process and control owners in definition and validation of requirements

## Project execution

Evidence of all implementation activities, including operational, technical, and compliance controls

# NextGen PRR – Leading Practices Board’s Role

## Project governance and management

- Approve upcoming key milestones as recommended by the Steering Committee
- Monitor project risks (via regular project team updates and PRRs)

## Organizational change management

- Promote and support the project goals
- Direct any individual wanting to provide feedback to the project team

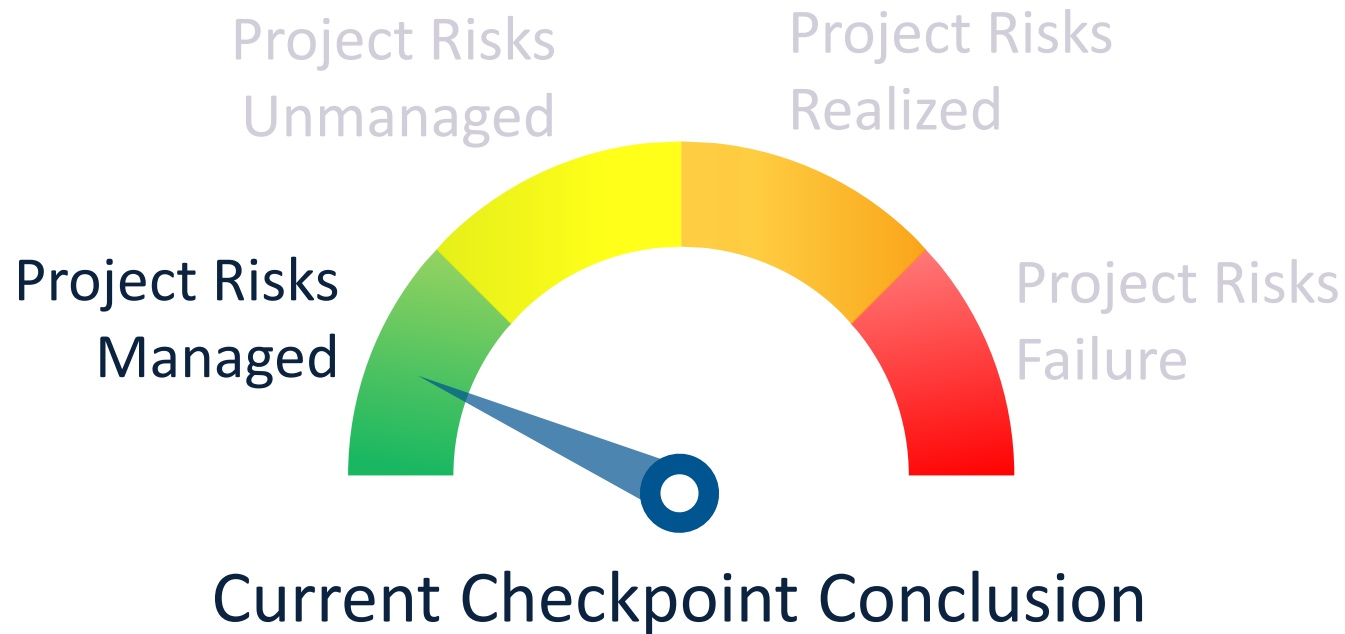
## Stakeholder involvement

- Promote and support the participation of key stakeholder constituencies in the project

## Project execution

- No board role in project execution

# NextGen PRR Checkpoint 8 – Conclusion

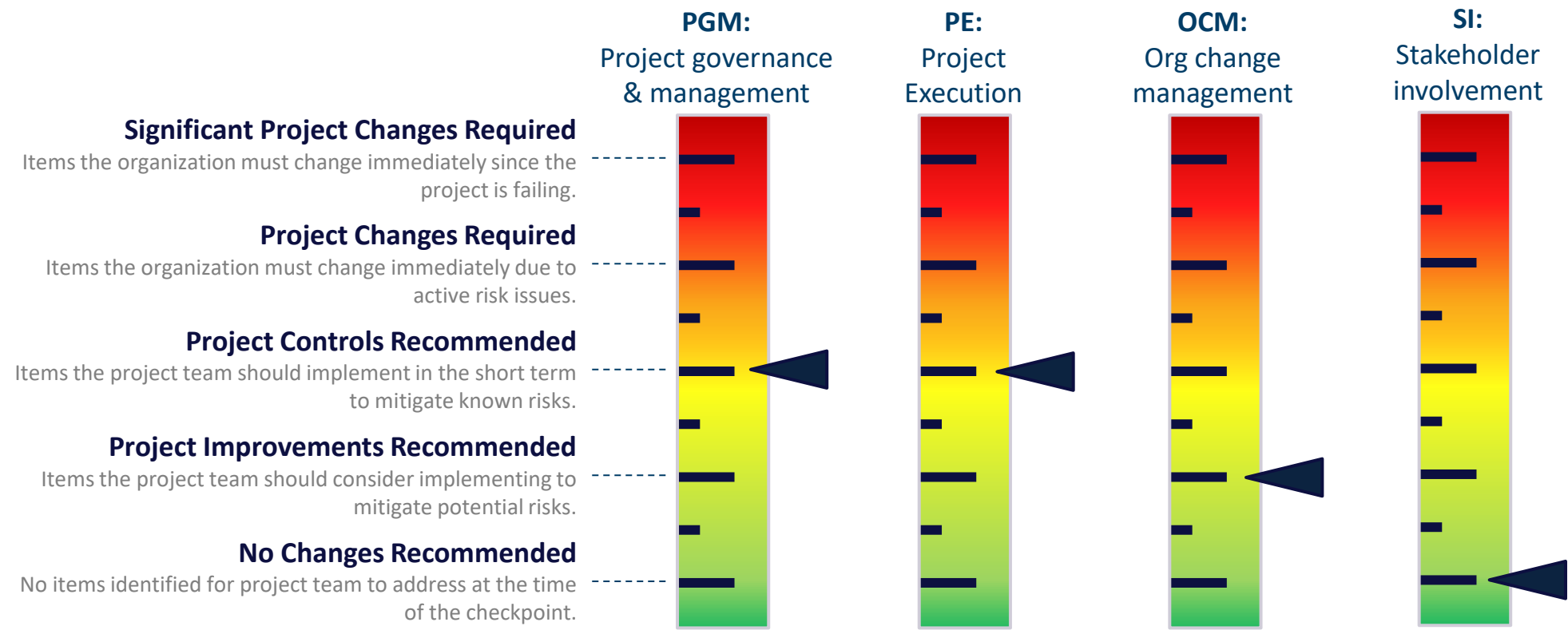


- Current stage of NextGen Phase 2 is the configure and prototype of Workday for finance and HR
- Appropriate project risk management practices are functioning as designed and have identified critical risks and issues, which are actively being resolved
- Overall risk of not achieving success for Phase 2 is elevated due to active risks and issues, which are being managed

*Note: Conclusion is based on the information available to Internal Audit and analyzed as of March 31, 2022.*

# NextGen PRR Checkpoint 8 – Current Results

Internal Audit noted one new recommendations to project activities.





# NextGen PRR Checkpoint 8 – Project Strengths

- Project team has proactively identified and started resolving risks that are impacting the project schedule and resources; the various project risk management practices are working as expected
- Project leadership started pre-planning activities on the student module ahead of the schedule start of that project phase and have used the third-party owner's rep to gather lessons learned from other higher education institutions that have implemented Workday's Student solution

# NextGen PRR Checkpoint 8 – Review Activities

- Conducted interviews of project team workstream leads and project managers to assess risks and issues at the tactical levels of the project
- Conducted periodic check-in meetings with the NextGen program manager to stay engaged and up-to-date with project activities
- Reviewed certain project documentation and deliverables
- Participated in steering committee meetings as an ex-officio member and multiple Chancellor and Trustee information sessions, providing guidance and insights
- Provided on-going feedback to project leadership

# NextGen PRR Checkpoint 8 – Recommendations

- Project team should continue addressing the identified risks and issues with their stated plans for these areas:
  - Project management function and resources
  - System integrations scoping, decisions, and division of labor
- Project leadership should complete the review and design of an appropriate sustainment model for supporting NextGen post go-live
- Note: One prior recommendation remains open, the project team is addressing now during the configuring and prototyping of the system configuration implementation

# NextGen PRR Checkpoint 8 – New Recommendations

Recommendation	Impact	Status
<p>PGM-08-01: The project team should continue and complete its review of the project management structure and resources needed for NextGen; specifically, assigning additional resources to project management roles for the overall project, current technology workstream, and future Student module phase.</p>	<p>Project team proactively identified these risks/issues, then developed an approach to resolve.</p>	<p><i>In Progress</i></p>
<p>PE-08-01: The project team should continue and complete its plan to resolve open configuration and integrations decisions; specifically, prioritizing the critical path decisions and integrations needed to meet the project schedule.</p>	<p>Internal Audit agrees with the project team’s current approach and believes it will</p>	
<p>OCM-08-01: The project team should continue and complete its plan to develop a proposed sustainment model for supporting NextGen after the go-live; specifically, identifying and designating/hiring the critical resources needed to staff the sustainment team prior to and immediately after go-live.</p>	<p>adequately address the risks/issues if completed successfully.</p>	

# NextGen PRR Checkpoint 8 – Prior Open Recommendation

Recommendation	Impact	Status
PE-02-01: Finance and HR workstream teams should identify internal control activities (e.g., approvals, reviews, reconciliations) as part of business process configuration and prototyping.	Internal controls, both automated and manual, are critical to effective and compliant business processes that are implemented with the new system.	<i>In progress</i>

# NextGen PRR Checkpoint 8 – Recommendation Tracker

Internal Audit will continually track all checkpoint recommendations and report on the status of each during every checkpoint report. The summary of the recommendations is reflected in the table below. The specific details of the prior recommendations are included on the following pages.

PRR Process Area	Recommendations			
	Resolved	In progress	Unresolved	Total
Project governance and management [PGM]	8	1	0	9
Project Execution [PE]	2	2	0	4
Organizational change management [OCM]	6	1	0	7
Stakeholder involvement [SI]	3	0	0	3
<b>Totals</b>	19	4	0	23

# Organizational Change Management

## Activities

# NextGen OCM | Upcoming Activities: TMTs

These highlighted TMT activities will assist with increasing buy-in, organizational readiness, and communications of the Workday implementation in early 2022. This is not an exhaustive list of all TMT activities as other activities and project plans will contribute to supporting the adoption of Workday.

## Follow-Up Connection Meetings

The second meetings with TMT Liaisons **will introduce the OCM Team's Change Readiness Liaisons who will support the TMTs going forward.** The OCM Team will review the TMT structure and members; share the 16-month project roadmap; discuss Regional TMT Labs that will occur in May.

## Implementation Project Plans

The OCM Team will provide TMTs with individual campus project plans that detail the implementation and change activities that campus representatives will need to participate in. Change Readiness Liaisons, TMTs, and Workday Implementation project teams will support and guide institutions through these activities.

## Workday Readiness Survey

The **second end-user survey that will assess how prepared your institution is to adopt Workday at this point in the project.** TMT Liaisons will receive sample communications to distribute the second survey to assess the degree of readiness of end users impacted by the HR and Finance Workday implementation.



# NextGen OCM | Upcoming Activities: Communications

These highlighted Communications activities will assist with increasing buy-in, organizational readiness, and communications of the Workday implementation in early 2022. This is not an exhaustive list of all Communications activities as other activities and project plans will contribute to supporting the adoption of Workday.

## Launch of Connect Site

The Project's Friends of NextGen site has moved to Students Connect site and is now more visually appealing, more user friendly, and easier to navigate. The site will serve as a central hub for the latest news and updates on the Workday implementation.

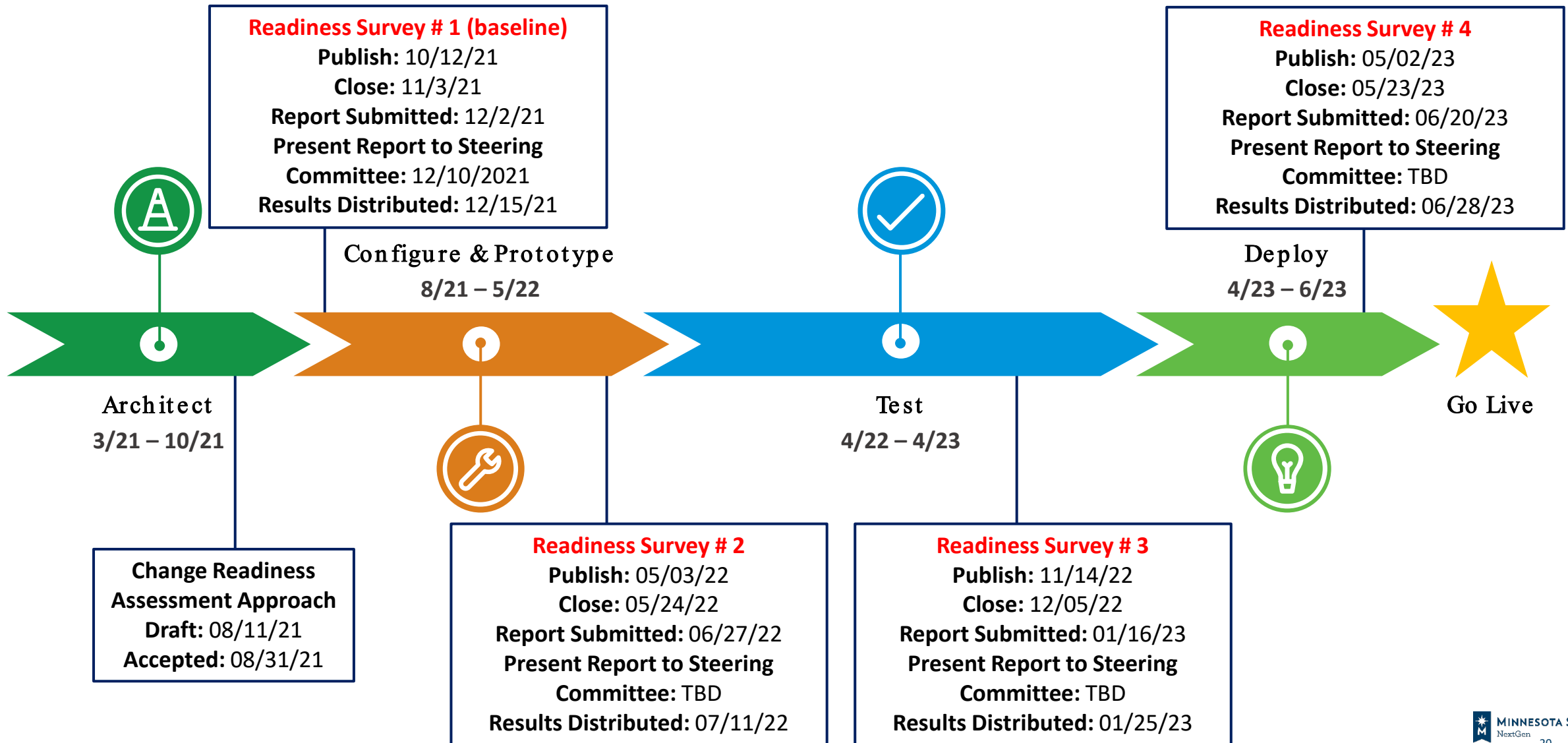
## Workday Terminology Survey

The OCM Team will support the development of end users through the Workday Terminology Series. The series will consist of activities such as Supervisor/TMT town hall forums, a Workday Glossary, and the "Word on Workday" series in the *UpNext* newsletter which will all support the introduction and reinforcement of key Workday terminology.

## Marketing Plan

The OCM team has developed a marketing plan to provide insight for key stakeholders into the NextGen Project and Workday implementation. Information will be provided through several avenues such as the Friends of NextGen Connect Site, the *UpNext* newsletter, and direct communication with TMTs.

# NextGen OCM | Timing of Workday Implementation Readiness Surveys



# NextGen OCM | High-Level Results of the 1st Change Readiness Assessment

The majority of results from the first Workday Implementation Readiness Survey fell into the Monitor and Address categories, which is expected at this stage of implementation as end users have had little to no interaction with Workday. These results provide a baseline which will be used in future surveys to assess how end users are transitioning to Workday.

## Key Data by Numbers

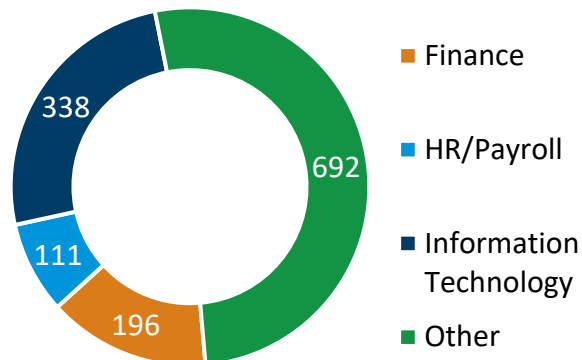
**1339**

Total survey responses

**100%**

Of institutions and the System Office had at least one survey response

## Participant Count by Functional Area\*



\*Respondents self described their functional area.

## Overall Survey Results

	Prepared 1.0 – 2.0	Monitor 2.1 – 3.0	Address 3.1 – 5.0	Overall	
<b>BUY-IN</b>					
I understand the mission, vision, and objectives of the Workday implementation at Minnesota State.	2.3	2.2	2.5	3.2	2.8
I actively support and promote the Workday implementation.	2.1	2.0	2.3	2.7	2.4
I believe my leadership listens to my concerns about the Workday implementation.	2.4	2.3	2.5	2.8	2.6
<b>ORGANIZATIONAL READINESS</b>					
I believe Minnesota State can successfully implement Workday.	2.3	2.4	2.4	2.7	2.6
I believe I have a good understanding of the benefits of Workday.	2.8	2.7	2.8	3.4	3.1
I believe there will be adequate training and preparations for Workday.	2.7	2.7	2.7	3.0	2.8
I feel prepared to use Workday for my work tasks.	3.3	3.3	3.3	3.6	3.4
<b>COMMUNICATIONS</b>					
I know where to find the most up-to-date information about the Workday implementation (news and events).	3.0	2.8	3.1	3.6	3.3
The NextGen project communications are simple and easy to understand.	2.8	2.6	2.7	3.2	3.0
I am able to provide feedback regarding the Workday implementation.	2.8	2.7	2.9	3.3	3.1
I am receiving the right amount of information about the Workday implementation.	3.0	2.8	3.2	3.5	3.3

# NextGen OCM | Change Impact Assessment

The goal of the CIA will be to categorize and prioritize the changes and impacts captured in order to develop effective strategies and actions to manage the impact of the transition to Workday for Minnesota State end-users. These changes and impacts will help inform communications, training, and future OCM activities.

## **Functional Area Follow Ups – April and Beyond:**

- After submitting the first iteration in April, OCM team will develop a timeline in collaboration with the functional areas for the best touch points to add to/iterate on changes and impacts previously captured

## **Institution Focus Groups – July and Beyond:**

- The OCM team will work with TMTs to decide the most effective way to capture institution-specific changes and impacts
- Over the summer, the OCM team will hold focus groups to review and capture institution changes and impacts

# Measuring Temperature and Tone of Project

## Fatigue and Moral:

- Continuous assessment of resources and project timeline
  - Recently hired a project coordinator and placement of PMs on larger project task items
- Change Management Readiness Survey feedback from project constituents
- Feedback from Program Manager and other Project Leads (both on Minnesota State and Team Workday sides)
- Change Impact Assessments
- Team Workday Quality Assurance Readouts
- Listening to feedback from stakeholders such as Steering Committee, Advisory Teams, and Leadership Council

## Risk:

- Utilize risk mitigation strategies and governance structures that are in place to bring challenges and risks to the right project team members, at the right time
- Internal Audit Reports and Insights
- Proactive approach at varying levels

# Upcoming Activities: Education & Training

These highlighted Education & Training activities will assist with increasing buy-in, organizational readiness, and communications of the Workday implementation in early 2022. This is not an exhaustive list of all Education & Training activities as other activities and project plans will contribute to supporting the adoption of Workday.

## Early Learning Videos

In collaboration with the Communications Team, the Training Team will create and launch an Early Learning Video Series. This series is **designed to provide a foundational understanding to end-users who are just at the beginning of their Workday learning journey** and to prepare viewers to meaningfully participate in more in-depth learning opportunities such as Workday Wednesdays.

## Training Needs Assessment

The Training Needs Assessments acts as a guide to **decide what training is needed and for whom**. Through activities such as interviews, surveys, and focus groups from Minnesota State, the NextGen Training Team will identify the target training audience groups and corresponding training requirements and assess the existing infrastructure at Minnesota State to support training efforts.

## End-User Training Curriculum

The Training Team will begin developing the Training Curriculum (= course descriptions and target audiences). This will **build on the Training Needs Assessment** and emphasize input from functional leads and Minnesota State training professionals.

# Workday Student Update

## Research Takeaways

# Market Landscape

## SIS vendors in Higher Education





## **System Office, Regional University, Community Colleges, and Private Institution**

- **University of Arkansas System** with 16 campuses and approximately 70,000 students
- **Fort Hays State University (KS)** with approximately 14,000 students
- **Hamline University (MN)** with approximately 3,100 students
- **Aims Community College (CO)** with 4 campuses and approximately 7,000 students
- **Broward College (FL)** with 8 campuses and approximately 60,000 students
- **University of Rochester (NY)** with 7 campuses and approximately 12,000 students



# Preparing for Change

## ▲ 01 Workday Product Development

- Advocate for MN State requirements
- Active involvement in Workday Student advisory
- Confirm multi-institution functionality

## ▲ 02 System Office Priorities

- Continue business process analysis
- Determine preferred data strategy
- Deploy change management

## ▲ 03 Campus Engagement and Change

- Inventory existing third-party software
- Prepare for student administration process changes
- Manage expectations



# MINNESOTA STATE

30 East 7th Street, Suite 350  
St. Paul, MN 55101-7804

651-201-1800

888-667-2848

[www.MinnState.edu](http://www.MinnState.edu)

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# Appendix

# NextGen Guiding Principles

10 Guiding Principles to help drive project implementation decisions

1. Start with leading practices

6. Operate as a system

2. Challenge the status quo

7. Work collaboratively and transparently

3. Design solutions for the end user

8. Communicate frequently

4. Minimize manual processes

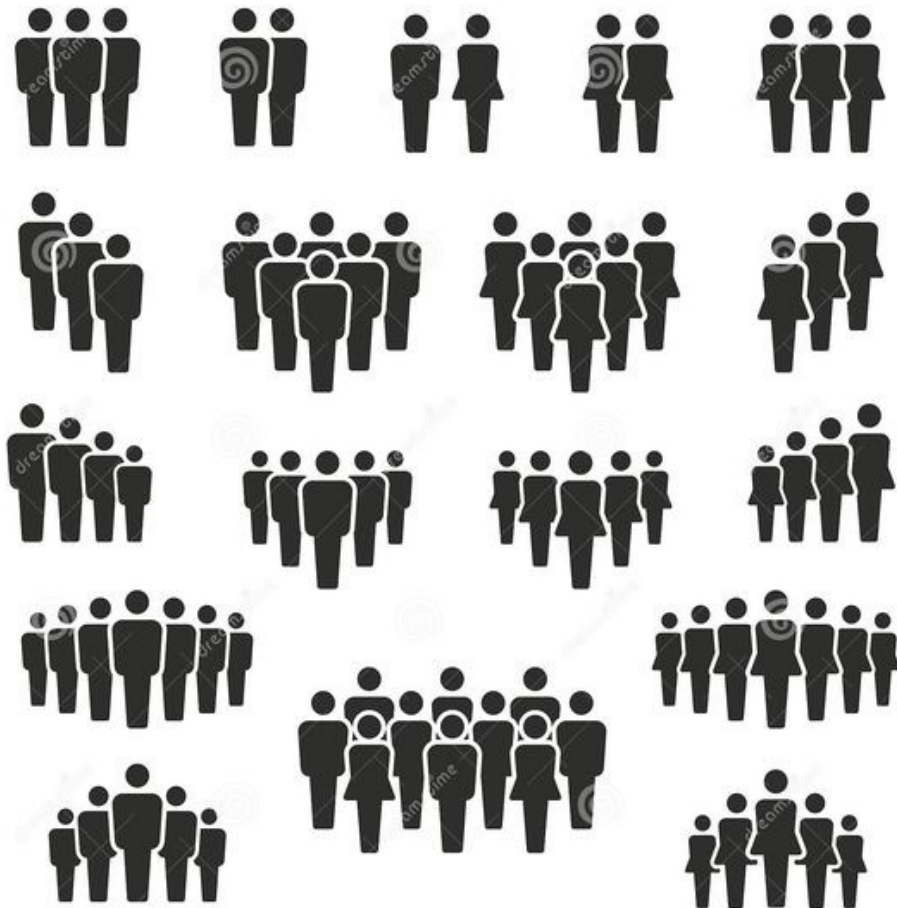
9. Engage institutions early and often

5. Simplify when possible

10. Maintain a single system of record

# NextGen OCM | Transition Management Teams (TMTs)

The TMTs are the NextGen and Workday implementation partners at Minnesota State institutions. They are a select group of individuals who represent those impacted by the change at their institutions, provide a voice for and feedback from end-users, champion the project, and help drive key implementation activities at the institution and campus level .



30 Teams across Minnesota State

330+ Team Members representing HR, Finance, IT, and Academic & Student Affairs

# NextGen End-User Engagement Summary

## Project Team Engagement

- Discovery and Design sessions
- Configuration Playback sessions
- End-to-End Testing
- Cross-Functional Advisory Team
- Functional Advisory Teams
- Campus Data Tech Team

## OCM Team Engagement

- Communications from the Project (e.g., *UpNext* etc.)
- Engagement with/participation on campus TMTs
- Focus group participation (e.g., Change Impact Assessment, Stakeholder Analysis, Training Needs Assessment)
- NextGen updates at conferences and functional area meetings
- NextGen updates at Meet & Confers
- End-User Training (coming in 2023)



**April 20, 2022**

Finance Division

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# **2024 Capital Program Guidelines**

**Joint Finance and Facilities Committee**

MINNESOTA STATE



# Capital investment avenues

## Capital bonding:

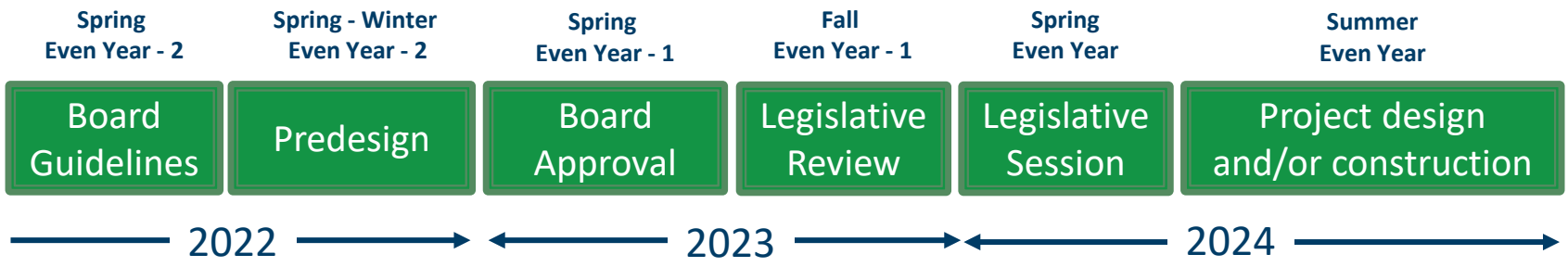
- Academic facilities
- State of Minnesota bonding
- Competitive, legislative process – ‘even years’
- 1/3 debt responsibility

## Revenue Fund bond sales:

- Revenue generating/auxiliary facilities
- Minnesota State bonding authority – ‘odd years’
- Full debt responsibility

# Capital bonding timeline

## Capital Bonding:



# 2024 Capital Program Guidelines

- **Adapting and modernizing academic and support spaces critical to student success**
- **Facilitate fulfilling the vision of Equity 2030**
- **Advancing resilience and environmental sustainability**
- **No net increase in academic footprint**



# Influencing factors

- **Aging facilities**
- **Enrollment declines**
- **Financial and environmental sustainability**
- **State support in higher education and asset preservation**
- **Increasing project size**
- **Disruptive nature of the COVID-19 pandemic**

# Scoring framework

Two separate “scoring streams”:

## **Small Project:**

*Total cost \$15 million or less*

- Design and construction funded in one biennium
- Simplified scoring criteria; focus on essential success factors
- Energy use reduction strongly encouraged but not required
- No net new square footage

## **Large Project:**

*Total cost over \$15 million*

- Design and construction funded in different biennia
- Highly competitive scoring process
- Energy use reduction required
- Net new square footage only in exceptional circumstances

*Regardless of project size, each candidate project must be included in a current campus Comprehensive Facilities Plan to be considered for scoring.*



# Timeline

<b>Nov 2021-Jan 2022</b>	<b>Constituent input</b>
<b>March 2022</b>	<b>Board First Reading</b>
<b>Apr 2022</b>	<b>Board approval</b>
<b>May – Nov 2022</b>	<b>Predesign development</b>
<b>Jan/Feb 2023</b>	<b>Capital bonding Scoring</b>
<b>Apr 2023</b>	<b>Chancellors recommendation</b>
<b>May/June 2023</b>	<b>Board review and approval – capital budget request</b>
<b>Jun 2023</b>	<b>Submission to Minnesota State Management and Budget</b>

# Discussion





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# Southwest Minnesota State University Online Partnership

Finance Committee

Minnesota State Board of Trustees

April 20, 2022

# SMSU Contract Overview

**Partner with an Online Program Management (OPM) provider to do the following:**

- Increase recruitment, enrollment, and graduation of students in undergraduate and graduate online programs.
- Assist with the launch of new online programs.

## **Why an OPM?**

- Provides expertise and expands capacity in key areas:
  - Market research, messaging, lead generation.
  - Recruiting and Enrollment
  - Retention and Student Support
  - Technical Support

# RFP Process

## Spring & Fall 2021

- Researched OPM industry and scope of services
- Met with four prospective OPM providers
- Discussed partnership considerations with campus community
  - President's Cabinet
  - Town Hall meetings
  - Meet and Confer – All bargaining units
  - Faculty Assembly
- Endorsement to proceed (Fall 2021)

## Spring 2022

- RFP completed
- Wiley University Services chosen

# Wiley University Services

- More than two decades of experience with strategic partnerships
- Familiarity with institutions similar to SMSU
- Strong focus on student support and engagement
- Collaborative and flexible partner
- Responsive, personable, accountable
- Favorable cost arrangement

# SMSU – Wiley Roles and Responsibilities

SMSU	Wiley
<b>Marketing</b>	
SMSU brand and communication channels.	Marketing support with all communications approved by SMSU.
<b>Recruitment</b>	
SMSU admission process, people, and standards.	Customized student experiences, digital student engagement.
<b>Enrollment Management</b>	
SMSU policies, process, and oversight. SMSU financial aid advising and scholarship disbursement.	Enrollment coordination, database and registration management, transfer credit evaluation, transcript processing.
<b>Retention</b>	
SMSU academic advising and existing student support services.	Orientation, proactive monitoring and outreach, clinical placement assistance.
<b>Program Design and Development</b>	
SMSU control of curriculum and instruction.	Consultation on program planning.
<b>Technology Support</b>	
SMSU student data and privacy protected.	Student tech support, faculty tech support, issue resolution.

# Prospective Student Audience

## Primarily non-traditional students

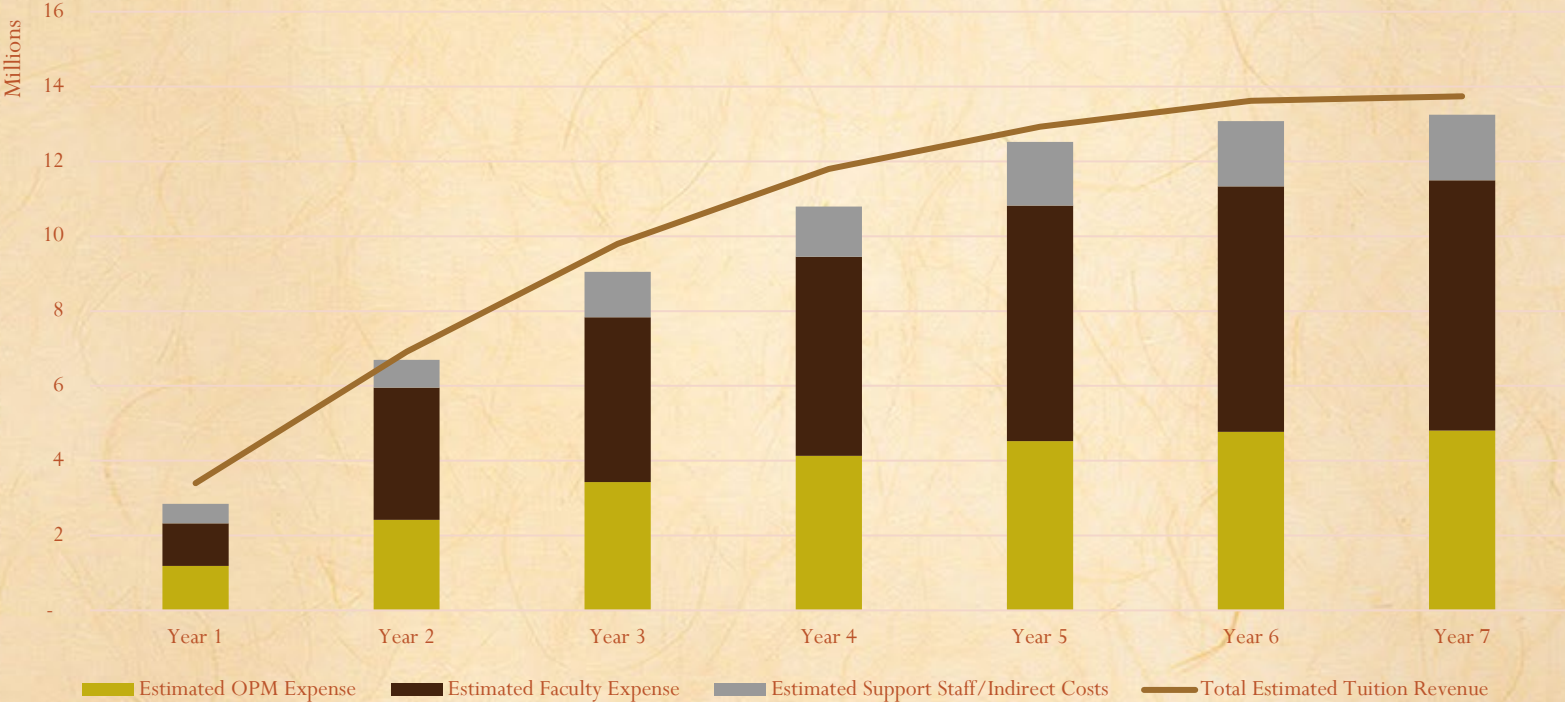
- Current SMSU online enrollment = 657 Undergraduate and Graduate Students
  - 27.3 % of total enrollment (not including Concurrent enrollment)
- Not otherwise likely to enroll as on-campus students
- Recruitment expands total SMSU enrollment

## SMSU commitment to online education

- Online course development workshops and support
- Focus on culturally-responsive pedagogy
- “SMSU students who learn online”
  - Access to support services
  - Access to clubs, organizations, activities
  - Mustang Pathway Online
  - SUCCESS Grant

# SMSU Revenue - Expenses

## OPM Estimated Revenue and Expenses





# Opportunity Cost

## Risk of not partnering with Wiley

- Increasingly competitive marketplace
  - Inability to sustain current levels of online enrollment
- Loss of current and projected revenue
  - Critical for overall institutional stability
- Inability to sustain programs
  - Online programs provide access and opportunity
  - Meet needs of state and region

# SMSU – Wiley Partnership Benefits

## → Increased visibility and branding awareness

- Expands total enrollment
- Increases brand recognition for on-campus

## → Increased capacity

- Revenue supports hiring additional faculty / staff
- Services provide additional student and technical support

## → Limited risk

- Wiley provides up-front investment to generate enrollment
- SMSU costs directly linked to resulting enrollment gains
- Ongoing assessment of program mix

# Recommended Committee Motion

The Finance Committee recommends that the Board of Trustees authorize the chancellor or the chancellor's designee to enter a contract with Wiley University Services, for a total up to \$26,000,000 over the 7 years of the contract. The Finance Committee further recommends that the Board of Trustees direct the chancellor or his designee to execute all necessary documents.