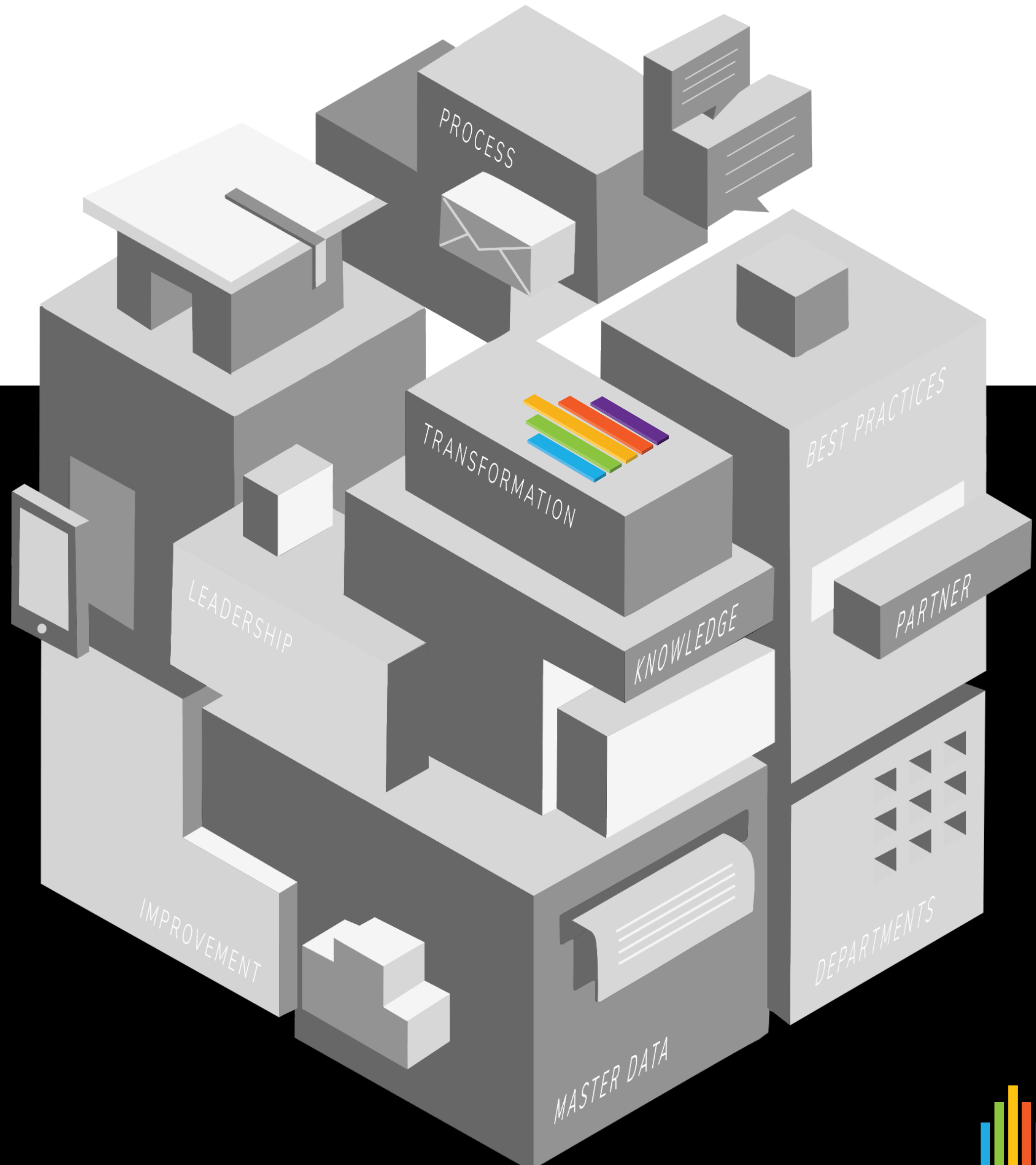
Driving Transformational Change in Higher Education

Featuring Lancaster Bible College



anthology
Advancing Knowledge

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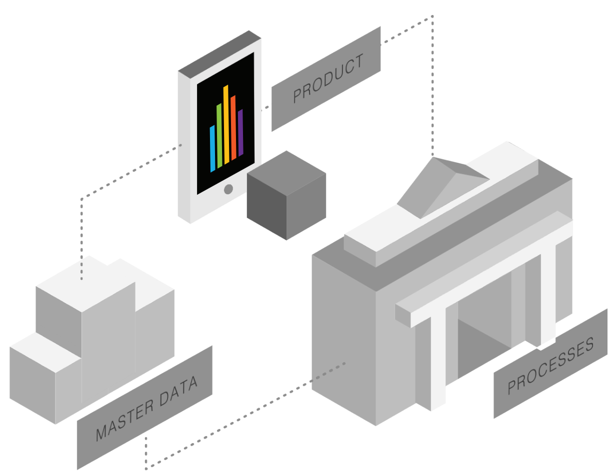
Vincent Johnson, vice president of campus strategy at Anthology, previously served as chief information officer/vice president of information systems at Lancaster Bible College | Capital Seminary (LBC.edu)

To put this idea of driving transformation in perspective, let's look at another industry first: residential construction. Engaging in a major home renovation can be a significant undertaking and a capital investment. A lot rides on the vision of the architect and the quality of the contractor. In the pre-sales stage, the homeowner may spend a couple of months vetting these professionals and looking at other homes they have built or remodeled before signing on the bottom line. Before handing over the keys to the homeowner, the contractor will have discussed price, revised blueprints, coordinated third-party vendors, integrated products, secured permits, supervised implementation, and performed quality assurance. This could just as easily describe the stages leading up to a higher education institution going live with a new solution. But should it? Is this an accurate analogy? Here's the main difference:

> ***The construction contractor is neither responsible for helping the homeowner move possessions, nor are they vested in helping the homeowner use the newly renovated home in the most productive and efficient manner.***

The mindset in higher education is often that the product or platform is the foundation. In a certain sense it is, in that the software solution can be the catalyst that will drive the transformation. But this is where the similarity to residential construction ends. Putting this much focus on the product ignores two other critical factors for success across the institution with any new solution: processes and master data.

Processes refer not only to the unique workflows among departments and constituents but the culture of the institution, its people, and their expectations and willingness to commit to the transformation. By extension, this involves adopting best practices to encourage this commitment and acceptance. Master data is the tremendous challenge of preparing the legacy data before it's migrated over to be fully leveraged in the new system.



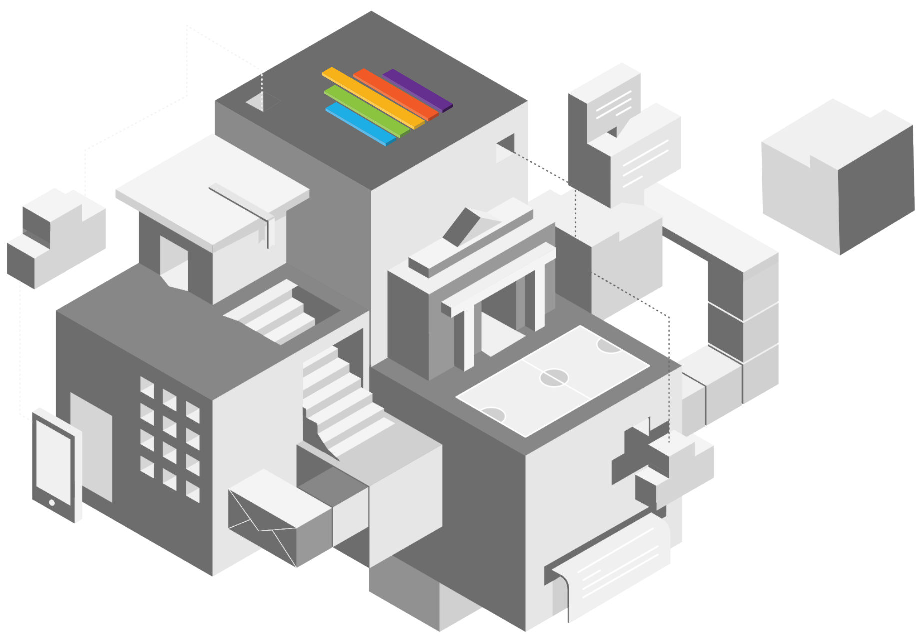
All too often in the pre-sales cycle, solution providers will emphasize the value innovation will bring in terms of driving success across the student lifecycle and the institution. This is a shared goal among higher education executives today, so this pitch resonates with them. Even in the pre-sales stage, however, vendors should be familiar with the legacy processes in place and the integrity of the master data as they make assertions regarding the solution's viability for the institution.

Transformation at Lancaster Bible College | Capital Seminary (LBC.edu)

Lancaster Bible College | Capital Seminary (LBC) offers lessons learned around transformation. For years, LBC's objective has been to grow enrollments at their main campus in Pennsylvania and satellite locations in Philadelphia and Washington DC as well as online. As a faith-based institution, the goal is to recruit students who align with that mission and provide students with the program flexibility they need to achieve their academic goals.

LBC eventually reached a point where they weren't set up for sustainable growth. With aging infrastructure, they needed new solutions that could scale to serve all locations and provide greater visibility and agility across the institution. As a result, they would not only need to invest in a major transformation in a technology foundation, but also ensure that their platforms enabled the institution's unchanging mission.

As most IT and business executives already know, selling transformational change can be a challenging odyssey of its own. Moving users out of their comfort zones and into new systems and processes remains a potential obstacle to the success of even the most proven solutions on the market.
Over the years, working in IT leadership at LBC and as a CIO in the corporate world implementing ERPs, I have adopted best practices based on lessons learned that help ensure that new solutions have every chance of succeeding during and after implementation and living up to their potential over the long term.



Lesson 1:

It begins and ends with leadership

The executive leadership team of the institution must actively participate in promoting a culture of change when driving transformation through new technology and systems. This includes clearly communicating the vision, benefits, project scope, and status of the project, as well as allocating resources, incentivizing employees, and funding the project.

TIP: Be intentional when assigning an executive sponsor and granting them the necessary authority to set prioritization and allocate resources. They should exude capability in clearly communicating the strategic vision at a high level across the institution while being empathetic to the daily operational transactional burden of allocated resources, ensuring collaboration, and avoiding potential collision of transactions vs. transformation.

> **The institution's leadership needs to recognize that this is a strategic priority. To allocate the necessary resources, we may need a moratorium on other legacy-related change requests to focus on optimizing our resources around transformation across the institution.**

Lesson 2:

Process owners must drive the implementation

Implementing new systems is ultimately a process improvement project not a technology project. This is not only true with the initial implementation but after go-live. The change associated with a new system can be overwhelming, so IT needs to communicate with other departments using more process-related language, and less technical jargon.

The CIO is likely not the executive sponsor, but their role is critical as an enabler of project success with their comprehensive understanding of infrastructure, integration, business continuity, disaster recovery, and legacy configuration. Effective CIOs are known for collaboration with other senior leadership at the president, CFO, and provost level, as well as the admissions director, the registrar, and the financial aid manager to ensure project success.

Oftentimes, IT leads the technical components of implementation, but there needs to be a bridge from IT infrastructure and security initiatives into processes and workflow across all of the business units.
Part of the appeal to these departments and process owners should be that the new solution will free them from the back-end administrative burdens that pull them away from student engagement. The new solution initiative recognizes that they are the relational heroes at the institution, and that the more they embrace the new solution and adopt best practices the more time they have to help students succeed, which is their ultimate goal and how their performance is measured.

> **AT LBC, the president's Leadership Team meets every Monday morning for several hours to discuss institutional progress, challenges, and strategic planning initiatives. The discussion is guided by the president and includes the executive leadership team.**

Lesson 3:

Select an implementation "partner"

Institutions continue to face budget constraints as they focus on improving student retention and success. To channel more resources toward student facing initiatives and less on the development process, they need to engage vendors who exude the character and qualities of being a strategic partner in the development process and over the life of the solution.

Situations have occurred in both higher education and in the corporate world where the solution deviated from best practices and leaned toward custom code that resembled the legacy process. All too often, institutions end up paying for the solution twice: once to implement the custom code and once to eventually remove it to replace it with a best practice. The value proposition of a strategic partner is when they bring maturity and best practices around the product to align the solution with the institution and provide an expedited pipeline for enhancements.

After all the vetting and reference calls, it always comes down to the individuals the vendor assigns to your project. The vendor should offer an agile methodology and subject matter experts who can assess your current system and future needs, communicate best practices, and offer a very robust, easy-to-use support system.

> **LBC is a small faith-based institution. One of the early assessments performed was to ensure that the solution vendor aligned with the existing team. LBC is not large enough to be a development shop, so they rely on the vendor to have a robust development team with a clear product roadmap, along with an aggressive production, deployment, and quality assurance cycle. This was key in enabling enrollment growth while maintaining relatively the same-sized budget and IT staff.**

Lesson 4:

Maximize and promote the solution's best practices

Enforce repeatable best practices for the solution that enable your faculty, staff, and administration to have the necessary time to be that relational hero. Let team members know that they can gain incredible flexibility through configuration versus customization.

Advocate for what can be configured within the system, avoid customizations, and keep the scope as focused as possible. There are always processes that are distinctive about your institution but try to sort out those that may be based on entrenched behavior and thinking of staff members, or even fear of learning something new.

When implementing a new module, LBC ensured that a subject matter expert from the vendor was closely collaborating with one of the LBC team members. When staff members actively participate with the vendor and can easily create a form or add a workflow to improve a manual process, it goes a long way toward driving adoption. LBC welcomed the vendor's expertise in conveying the value to constituents and deploying a solution optimally configured to align with the culture and environment.

To evolve from a culture of customization, institutions and the vendor should engage in designing workflows around repeatable best practices in the system. Be intentional about finding an internal champion and in assuring team members that they can gain flexibility through configuration versus customization.

Lesson 5:

Plan for continuous change and improvement

Start every project meeting with the recognition that this project is the catalyst for change and be authentic in conveying that "change" can be very painful and intimidating for many. Create a culture that anticipates and embraces change. Most institutions have marketing resources capable of delivering creative recruiting campaigns. Engage your internal marketing team to develop and create a marketing campaign to raise awareness, build confidence, and generate excitement around this critical institutional initiative.

> ***Going live is just the beginning; continuous improvement is contingent on continuous process change.***

Lesson 6:

Develop a diverse project team comprised of the best from each department

Get a commitment from senior leadership to reserve the best department members for the duration of the implementation project. Provide temporary hires or student workers to backfill and keep the legacy system operational during the implementation. At the onset of the project, have senior leadership clearly communicate to all departments a moratorium on other change requests associated with the legacy system and processes that could result in a distraction of key resources.

Lesson 7:

Knowledge transfer is essential

Part of your training plan for your departmental leads on the project team needs to include the transfer of knowledge from your consultants or from advanced training offered by the vendor. Include one of your sharpest help-desk resources on the project team and have them sit in on blueprint/discovery sessions and be actively involved in the User Acceptance Test. With this depth of knowledge, this help-desk person creates a much-needed buffer for the rest of the IT team and prevents the team from getting distracted by the barrage of minor issues typical at go-live.

Make sure that your team members are fully engaged in the product methodology early, not just at the end of the project. They need to be engaged throughout the project lifecycle so that when they participate in the formal training phase, they have a head start on putting the solution into practice. If possible, match your best resources with the vendor's subject matter experts at the blueprint stage to drive that transfer of knowledge.

> ***You need to establish that rapport phase between vendors and your departments early to build that trust, collaboration, and foundation for knowledge transfer.***

Lesson 8:

The integrity of the master data is critical

Be aware that ensuring the integrity of the Master Data can be a major project by itself. Often, the best place to scrub the data is in your legacy system before you migrate it. Assign internal subject matter experts who understand the nuances and anomalies of the data in your legacy system. Only they understand the status codes that evolved over the years and the presence of potential duplicate data. This could be an opportunity to honor those few folks who have deep institutional knowledge of the data in the legacy system and provide them a window to clean it up in the legacy system prior to the migration to the new platform.

Even though your intentions from an IT and departmental perspective were to clean up the data for the past several years, it likely never became a critical priority to warrant assigning your limited resources. Your IT folks have been asking for the time and budget to clean the data for years. Pre-implementation is an ideal time to accomplish this, rather than having them try to fix it in the new system. Be aware that if you wait to clean up the data post implementation, suspect data can erode confidence in the new system. It can also be a challenge for your IT folks to scrub the data in the new system with new table structures and improved security authorizations enforced by the system.

I recommend that CIOs build data scrubbing into the scope of the project as a planned task prior to implementation. Reserve consultants for implementation of strategic initiatives and instituting best practices, rather than scrubbing zip code fields that need to be specifically formatted and mapped within the new system. Be prepared that early in the implementation there will be a schedule of Data Spins to migrate the data using scripted processes that are highly orchestrated by the vendor. Any legacy cleanup will need to be aggressively pursued prior to the Data Spins.

> ***Use the project as the catalyst to assign the appropriate resources to scrub the data wherever possible. This task will pay dividends in ensuring a successful implementation. Trust and confidence in high integrity data is a key success factor.***

Lesson 9:

Provide user training for the transaction and the "process"

I often refer to ERP systems as Rubik's Cubes. One change of interaction or workflow between departments directly impacts other departments. What may appear to be a simple configuration change for one specific side/department, can have a profound impact on the other sides/departments. If you update a student record, that data also could impact enrollment, admissions, financial aid, and many other departments.

The right training can bring many of these complexities to the forefront early in the transformation. Institutions should develop an internal training program focused on the process level as well as the transactional level. If your vendor does not offer a catalog of advanced training courses, you may want to develop online training scenarios using samples of master data that are meaningful and familiar to your users. Prior to go-live, leverage your online education and marketing department to create a series of basic-training videos with your screens, data, and processes and make them available on your media channels.

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Lesson 10:

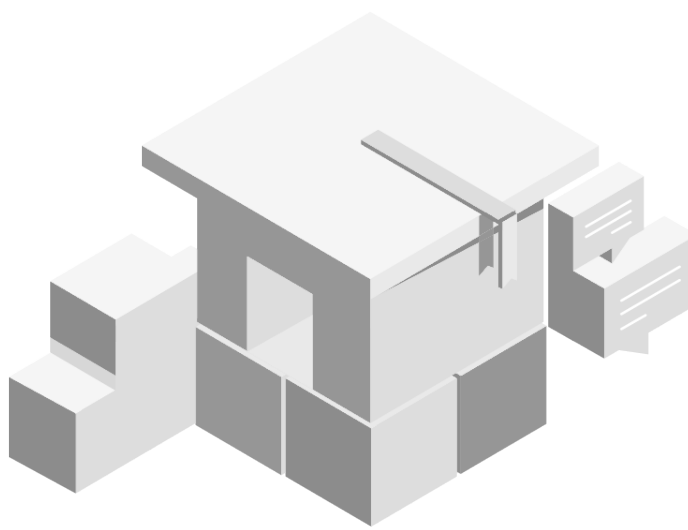
Set clear expectations

A key driver in the selection of a new system is typically a broad recognition that your legacy system was not capable of supporting sustained growth. Institutions should ensure that these projects become the catalyst for adopting new best practices on a platform that is repeatable and sustainable. One of the main challenges will be around the management of cultural change the new system will create within your institution.

Institutions need to be intentional at the onset of projects to create a culture of positive change.

When necessary, caution team members who cling to legacy processes and consult individually with those who are determined not to accept change. Above all, set clear expectations about the level of change and communicate constantly throughout the lifecycle of the project.

Prior to serving as CIO at LBC, I had the privilege of being part of the leadership team implementing a multi-million dollar ERP system in the corporate world. Our senior leadership team at the time found that some long-term employees decided this change was not for them. We honored them for their time with the organization and enabled a gracious exit. One unexpected pleasure was seeing leadership guide many employees who had initial anxiety to ultimately embracing the change and flourishing in their newly defined roles made possible by the implementation.



Creating a Culture of Change

A FEW WILL DEMAND CHANGE

Some will want to blow up the legacy processes with little sensitivity to those who are resistant to change.

MANY WILL ACCEPT CHANGE

Among the workers are those who are capable of leading change with clear vision, expectations, and the ability to coordinate, allocate, and communicate.

MANY WILL FEAR CHANGE

These workers have a high comfort level with their existing processes and structure, are threatened by a redefinition of their roles, and fear they may not survive the transition. They need a leader who is respectful of their concerns and can coach and encourage them.

A FEW WILL REFUSE CHANGE

When they are vocal, those who refuse change can be a poison to the project and need to be dealt with directly. This may include passive aggressive employees who show evidence of deep care for the institution and the students it serves and will require a clear communication that this passive aggressive behavior is not acceptable.

These Steps Are Only the Beginning

When the institution has stabilized after implementation, be mindful that you need to keep the momentum going through communication, visibility, and oversight to exploit the next wave of benefits and optimizations.

In summary, to ensure transformational change that extends across the institution and endures:

- Leverage your investment in your solutions platform
- Have senior leadership as the sponsor of ongoing optimization projects
- Allocate time for your SMEs from key departments to focus on continuous improvements
- Expand your processes to adopt best practices whenever possible
- Keep your scope narrow to create momentum and visible deliverables
- Build confidence and trust in the platform, people and processes
- Wrap your optimization initiatives in policy, procedures and training
- Find the right mix of operational and strategic initiatives for optimization
- Keep the momentum going

About the Author

Vincent Johnson is VP of campus strategy for Anthology. A technology leader, he has over four decades of IT experience in higher education and the corporate sector in all phases of application development, technical infrastructure, and project management. After a rewarding 30-year career in corporate IT leadership implementing ERPs, Johnson spent 10 years at LBC as CIO until his retirement. Johnson led the college's transition away from custom development solutions to tightly integrated/configured ERP solutions. By combining the right mix of project management, best practices, and quality assurance, he helped drive growth, student success, and new levels of accountability at the institution. While at LBC, he gained a deep appreciation for higher education and witnessed evidence of a faith-based college committed to transforming the lives of students. That impact was so profound that he readily accepted Anthology's offer of a strategic consulting role, where the focus is on enabling student success and transforming lives. His decision to be a part of the Anthology team was solidified based on his insight into their higher education solutions and a leadership team that has a proven history of exuding integrity and a culture of excellence and care.

About Lancaster Bible College

Lancaster Bible College | Capital Seminary (LBC) is a private, coeducational Bible college and seminary and graduate school in Lancaster, Pennsylvania that "exists to educate Christian students to think and live a biblical worldview and to proclaim Christ by serving him in the Church and society." In addition to its Lancaster location, LBC has urban sites in Philadelphia and Washington DC and an online program that offers accelerated undergraduate, graduate and doctoral degree programs.
TO LEARN MORE, VISIT www.lbc.edu.

About Anthology

Anthology exists to help higher education advance and thrive using modern cloud technology and services that keep the learner at the forefront. Drawing on a fully connected data experience, Anthology solutions create operational efficiencies, provide intelligence for staff and administrators, and empower institutional leaders to support and guide students on a path to success.

The full suite covers admission and enrollment management; student success and retention; institutional and learning effectiveness; alumni and advancement; and enterprise applications and infrastructure, offering solutions to the challenges facing campuses today. Working with more than 2,000 colleges and institutions in over 30 countries, Anthology is constantly discovering new ways to revolutionize higher education. Learn more about our mission at www.anthology.com.