

# NHED

NORTHEAST HIGHER EDUCATION DISTRICT

A member of the Minnesota State Colleges and Universities System



## **Plan for Shared Business Services October, 2010**

**Presented to Northeast Higher Education District**

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## Contents

College Locations

Introduction.....Tab 1

Purpose of NHED.....Tab 2

Project Scope and Process.....Tab 3

Staff Overview.....Tab 4

Findings..... Tab 5

Recommendations .....Tab 6

Creating an Opportunity.....Tab 7

Recommendation overview..... Tab 8

Summary and stages for implementation..... Tab 9

Charts.....incorporated throughout study

- Thirtieth Day Headcount and FYE
- Select College Profiles
- Advantages of a VP of Finance and Operations
- Proposed Organizational Chart for business services
- Proposed Centers of Excellence
- Proposed Pilot Project
- Proposed NESU changes
- Mesabi Range business services recommendation
- Future shared services

**\*\*All MnSCU data used in the study or provided by CFO's**

*“Change is the law of life and those who look only to the past or present are certain to miss the future.”  
John F. Kennedy*

## **Northeast Higher Education District Business Services Project**

### Introduction

The Northeast Higher Education District (NHED) as part of the Minnesota State Colleges and Universities (MnSCU) has an outstanding reputation for offering high quality educational options for students in the Northeastern region of Minnesota. The economic challenges that face the state of Minnesota and the nation have created budget challenges for the five colleges that make up the Northeast Higher Education District. Recent retirements of two finance leadership positions as well as key business office personnel have created an opportune time to review how the financial services are delivered and to seek new ways of delivering services by utilizing the staff’s talents and expertise in the best possible way throughout NHED.

As President Collins stated in the 2010-2015 Northeast Higher Education Strategic Action Plan we must, “identify specific strategies to work better, closer and more efficiently as five colleges that are interdependent, who have the capability thanks to regional alignment, to share services, programming and opportunities while collectively addressing the needs and aspirations of a region that depends on education for a competitive advantage.” Because of ever mounting fiscal realities, President Collins commissioned a study to identify specific strategies that can enhance reporting relationships, increase accountability and collaboration among the colleges using the latest technologies available with the goal to share services where most feasible at the five colleges business services offices.

The focus of this study supports the District Strategic Action Plan.....

#### Strategy 1: Affirm and Strengthen District Alliance

- Align resources and priorities that drive cross-college improvements and increased efficiencies

#### Strategy 4: Innovate for a Changing World

- Share resources to capitalize on economies of scale using the principle of “interdependent service organizations”
- Target emerging technologies and optimize utilization and coordination across NHED

## **Purpose of the Northeast Higher Education District**

The NHED will create an environment that:

- Increases access and improved learning opportunities for students
- Focuses presidential leadership at both the regional and community levels
- Increases coordination and joint planning among institutions
- Improves alignment with regional businesses, industries, organizations, and education providers
- Ensures full, independent North Central Association accreditation for each of the member colleges

Note: Separate accreditation does not dictate that business services functions cannot be shared

## **Northeast Higher Education District Members**

- Hibbing Community College, Hibbing
- Itasca Community College, Grand Rapids
- Mesabi Range Community and Technical College, Virginia and Eveleth
- Rainy River Community College, International Falls
- Vermilion Community College, Ely

## **Business Services Project Scope**

The focus of the study was to assist the Northeast Higher Education District better serve students and staff and to better serve the Northeast Higher Education District in the coming years by eliminating duplication of services and utilizing systems to effectively manage and process day to day activities of the 5 college's business offices. The study included:

- Meeting with CFO/CFFO and business office staff at each college
- Assessing and identifying main business office functions at each college
- Assessing staff time dedicated to business office functions at each college and college priorities
- Identifying best practices and identifying district experts in strategic areas for the colleges, ex. grant management, financial reports, capital bonding project request and project budget monitoring, purchasing, etc.
- Identifying ways to streamline functions where possible
- Identifying common ISRS reports and enhanced uses of technology
- Identifying training needs and the venue for training
- Evaluating college procedures and suggested standardization where possible
- Interviewing other MnSCU institutions where shared services/streamlined functions are in place
- Reviewing the peer review report, audits and other relevant college data and information
- Making recommendations that are realistic to implement and support in a reasonable time line.

## **Process used for the Study**

Methods used to conduct the study included in-person interviews with business office staff at each college including Sally Thompson at the NESU, Emily Ahrens at Rainy River and Nicole Squires at Vermillion for a total of 20 business office staff; interviewed the 3 CFO/CFFO's, Keith Harvey, Mesabi Range; Pat Leistikow, Itasca; Bill Manney, Hibbing. Conducted phone interviews with NHED internal auditor, Kim McLaughlin; IT Director at Mesabi, Shelly McCauley Jugovich; Bill Maki, V.P., Bemidji State University /Northwest Technical College. Interviewed in person at their respective colleges Lori Voss, V.P. Minn West; Pat Nordick, V.P. Minnesota State Community and Technical College; Karen Kedrowski, MnSCU System Budget Director. Also, met with the Provosts and President of NHED. The findings were augmented with a review and analysis of MnSCU data and college information. College data used in the study was provided by MnSCU.

## Staffing overview at NHED

The five colleges employ very knowledgeable business office personnel who have, on average, many years of service with the district. The employees wear many hats and perform a variety of functions not only in the business office, but for some, duties also include bookstore operations, mail room, switchboard, housing, incident reports, ordering supplies, etc. Except for the chief financial officer at each college including Rainy River and Vermilion and the NESU service unit, employees are represented by the AFSCME bargaining unit. The most common classifications for personnel in the business services units are account clerk, account clerk sr., accounting technician and customer service specialist.

The employees at each college are very knowledgeable about the day to day business office operations and seem eager to learn and use technology that is available if it can improve their daily work responsibilities. Employees are receptive to training even though their days are busy with day to day operations. In describing their work duties, employees exuded pride in their work and the work of the college and enjoyed helping students as part of their job responsibilities.

In addition to general work load issues and the ability to spend time on task, the most immediate staffing issue that surfaced during the meetings with employees is the imminent retirement of the .75 FTE position held by the experienced and long term employee, Sally Thompson in the Northeast Service Unit (NESU).

A decision by leadership needs to be made regarding the NESU position. The discussion should include the identification of functions currently provided by the NESU position and the best possible way to ensure, at a minimum, that those functions continue.

Through the interviews with staff that were conducted as part of this study, a recommendation will be presented for consideration that includes ample training time for whoever will assume the functions currently provided by NESU.

(Refer to thirtieth day headcount and college comparison profiles)

## Summary of staff at NHED

The following is the current full time equivalency (FTE) staff at each college business office including the bookstore (excludes time spent on other duties ex. library tech)

<b>College</b>	<b>FTE</b>	<b># of staff</b>
Hibbing	5.45	6
Mesabi	3.80	4
Itasca	3.30	4
Vermilion	2.25	3
Rainy River	2.25	3
NESU	<u>.75</u>	<u>1</u>
Total	17.80 FTE	21 business services staff

\*\* Does not include the 3 CFO's@ Itasca, Hibbing, Mesabi

### NHED Comparison to other Colleges interviewed for the study.....

As shown below, the business office FTE staffing level at NHED does not exceed the FTE staffing level at Minnesota State Community and Technical College or Minn WEST, both located in rural Minnesota and similar in size to the combined NHED colleges.

The employee classifications in the business offices are comparable to Minnesota State Community and Technical College except at the supervisory and managerial level. The two rural colleges with shared services employ a single Vice President who represents all the campuses and serves as the chief financial officer with campus assistance from managerial staff that are classified at the Business Manager or equivalent level. In contrast NHED employs 3 Chief Financial Officers, one business manager, and one accounting supervisor senior.

#### Total Business Office Staff FTE comparison

Northeast Higher Education District  
(5 colleges)

17.80 Plus 3 Chief Finance Officers

Minn State Community & Tech College  
(1 college: 4 campuses)

19.00 Plus 1 VP Fin & Facil & 3 Bus. Managers

Minn West CC & TC  
(1 college: 5 campuses, 3 centers)

10.00 Plus 1 VP of Administration

**Findings:**

1. A lack of a unified, overall leadership in the finance area of the Northeast Higher Education District (NHED) is apparent and can put NHED and its colleges at risk especially in the areas of financial planning, forecasting, fiscal monitoring and data driven decision making.
2. The Northeast Service Unit (NESU) is important to NHED as a focal point for centralized services.
3. Duplication of college Chief Financial Officer efforts at the largest colleges in NHED can be better addressed by establishing Centers of Excellence at Hibbing, Itasca and Mesabi Range Colleges by better utilizing the skills and abilities of each Chief Financial Officer.
4. Rainy River and Vermilion staff in key areas of operation should work as a team to decrease duplication of effort and help each other in critical areas of operation.
5. NESU services can be provided by existent college personnel at a proposed Center go Excellence.
6. The Northeast Higher Education District employs many talented and knowledgeable staff in the business services area.
7. Duplication of duties currently exists at the Eveleth and Virginia campus of Mesabi Range College.
8. NHED is behind other MnSCU colleges and needs to implement existent technology that is available within MnSCU to help ease the work load and provide effective work efforts in the business services area of operations.
9. NHED needs to implement other technologies throughout the district in addition to the business services area of operations.
10. A strong partnership with the Northeast Higher Education District IT departments at each college and the district wide HR department should be established to help implement and share duties.
11. NHED needs to continue a systematic effort to drive out duplication of effort.

**Recommendations:**

1. Re-open the search for a Northeast Higher Education Vice President of Finance and Operations as a direct report to the President of the Northeast Higher Education District.
2. Retain the Northeast Services Unit as an operational unit for the President, Vice President of Finance and Operations, Administrative Assistant, Institutional Research, and Human Resources.
3. Implement a shared services concept within NHED by assigning the Chief Financial Officers at each of the three largest colleges to manage a Center of Excellence.
4. Create a shared business office pilot project at Rainy River and Vermilion.
5. Distribute and assign the current NESU duties to the Itasca business services department.
6. Provide outstanding business services employees with opportunities for career advancement.
7. Transfer an employee and merge existing bookstore and business office functions performed at the Eveleth campus to the Virginia campus of Mesabi Range College.
8. Many systems and procedures are currently available within MnSCU that can be implemented and shared throughout NHED.
9. NHED should expand its shared services beyond the business services area of operation.
10. Some functions that the business services area handles can be transferred to other college areas of operation.
11. The new Vice President of Finance and Operations can provide leadership to continue to expand the shared services concept in the operations areas for the colleges and continue with the phasing in of shared services.

## Creating an Opportunity at NHED

The study supports the general observations of President Collins that there are ways to develop "**Economies of Skill**" at the colleges and establish a **distributive way** to perform some business office functions.

Economies of Skill does not suggest that fewer staff can handle business services functions, but instead, a shared services model can capitalize on the skills and abilities of current staff and create opportunities for increased efficiency. The value of having one person responsible for a specific function for the District provides a trained employee quality time on a specific job function instead of several employees in the District all trying to learn the same function and find time to perform that function along with their many other job responsibilities.

## WHY SHARE SERVICES

NHED is behind other colleges in using the current technology already available within MnSCU. Other colleges in outstate Minnesota and some in the Metro area are already sharing services as a way to effectively perform and deliver business office functions for students and staff. NHED needs to implement Best Practices, LEAN systems and efficient ways of providing shared services, using current technology if the NHED colleges are to continue to operate effectively and serve students needs in the future.

NHED needs to train staff to use current technology to help improve performance in future audits and reduce manual and redundant data entry.

- ***The goal for the Northeast Higher Education District should be to work like a District especially in "back office" operations and to focus on:***
  - ***Using a phased approach to sharing services allowing for time to evaluate and assess how progress is being made at the colleges.***
  - ***Employing a unified, steady implementation of existent technology modules that are available within MnSCU for the college business offices using target dates to implement and train employees.***
  - ***Utilizing current employees at each college within NHED to be experts at each college, decrease duplication, employ the latest technologies and generally provide more efficient services for students and staff.***

*(Refer to organizational flow charts for more detailed operational recommendations)*

## Findings and Recommendations overview

**A lack of unified, overall leadership in the Finance area of NHED is apparent and can put NHED and its colleges at risk especially in the areas of financial planning, forecasting, fiscal monitoring and data driven decision making.**

**Recommendation 1.** Re- open the search for a NHED Vice President of Finance and Operations as a direct report to the President of NHED.

Interviews with well over twenty staff at the five colleges helped solidify the need for a Vice President of Finance and Operations for NHED. A Vice President in this position will bring the overall management and supervision for the budget, finance and facility operations for the five colleges. To make this as effective as possible the Chief Finance Officer at each college should report to the Vice President instead of the Provost at each college. (Refer to chart)

This position will provide oversight and expertise for financial administration and help safeguard the assets of the five colleges. The Vice President will help ensure there are proper internal controls and procedures and adequate training for staff, will analyze financial information, summarize current and projected financial positions and prepare budgets and reports for administration. The Vice President will represent NHED to the MnSCU Finance Division and other Departments as one voice for the five colleges.

The interviews also revealed that it is imperative the Vice President have significant experience with MnSCU systems and policies and the State of Minnesota policies, procedures and financial systems especially since the recent retirements of long serving employees in leadership positions have created an ***“experience gap”***.

- **The Northeast Service Unit is important to NHED as a focal point for centralized services.**

**Recommendation 2.** The Northeast Service Unit should be retained as an operational unit for the President of NHED, V.P. of Finance and Operations, Administrative Assistant, Institutional Research and Human Resources since Human Resources and Institutional Research are existent central services for the five colleges. Retain the Northeast Service Unit for those personnel assigned to serve the District but assign a majority of the current functions of the NESU Business Manager to the Itasca Community College business office.

**Duplication of college Chief Financial Officer efforts at the three largest colleges in NHED can be better addressed by establishing Centers of Excellence at Hibbing, Itasca and Mesabi Range Colleges by better utilizing the skills and abilities of each Chief Financial Officer.**

**Recommendation 3.** Implement a shared services concept by using the current Chief Financial Officer at each of the three colleges to manage a Center of Excellence. By establishing Centers of Excellence at Hibbing, Itasca and Mesabi it offers an opportunity to capitalize on the strengths of the respective college business service leaders and to effectively manage and share business services in a unified approach throughout NHED.

### **Proposed Centers of Excellence**

A center of Excellence located at each of the three largest colleges within NHED provides an opportunity for the college Chief Financial Officer to take the lead in establishing the college as a central location for specific functions to take place in NHED.

The proposed Centers of Excellence would have district wide responsibility for three general areas of operation:

Hibbing --banking and business expenses, collaborative purchasing  
 Itasca-- grants and MAPS reconciliations and former NESU functions  
 Mesabi Range-- facilities management and planning.

Other Chief Financial Officer duties at the Center of Excellence, in addition to day to day college operations, should include District wide responsibility to implement current technologies that have not yet been implemented throughout NHED.

The Chief Financial Officer at each college will have responsibility to **train and employ existent MnSCU technology making sure** each college uses those technologies that can be best utilized throughout NHED. It is apparent that NHED must employ existent technologies within MnSCU to stay current and effective in its business services operations. Implementation of existent technologies should help resolve current and future audit issues by eliminating duplication of entries, etc. (refer to flow chart)

According to the U.S. Department of Labor, Monthly Labor Review, the skill most sought after in individuals and highly desirable in the business office/accounting field are those who are *technology savvy* especially since the business office areas use technology, in most cases, more than most other departments.

### **How Centers of Excellence can be accomplished**

Under the Leadership of a Vice President of Finance and Operations, the three Chief Financial Officers will be afforded more time to focus on the district wide shared services Center of Excellence concept. They will continue to handle the day to day college business services operations but with less time needed on financial reporting and budget development and forecasting work that the Vice President will assume for the colleges and district.

A review of the current position descriptions for the Chief Financial Officer's indicates for example that Bill Manney can be freed from, at least, a 20% obligation to provide NHED fiscal support; Pat Leistikow can have 20% time freed up from the Rainy River responsibility in addition to a percentage of time that was dedicated to facilities at Itasca. Keith Harvey can have at least 20% time freed up from overall fiscal responsibilities at Mesabi Range.

The Minnesota Department of Employment and Economic Development (DEED) reported that a new emphasis for employers is matching certain skills to employees as the most effective way to deliver services.

**Rainy River and Vermilion staff should work as a team to decrease duplication of effort and help each other in critical areas of operation.**

**Recommendation 4.** Create a shared business office Pilot Project at Rainy River and Vermilion using the skills and abilities of staff at those colleges to perform certain business office functions for both colleges.

#### **Why create a pilot project**

The staff at the colleges wear many hats. At times, absences for annual or sick leave create additional burdens on existent staff and the college operations. A shared services pilot project in key areas will allow for certain skilled employees to use their expertise to provide services for both colleges and to help eliminate duplication of services and provide more quality time on specific duties. The pilot provides staff an opportunity to help manage the day to day operations in a unified approach, learn from each other and provide cost savings for both colleges especially in the area of purchasing, certain business office functions and auxiliary efforts. Through the pilot collaboration and cross training of staff should increase and help provide each college back up when needed at either college. (refer to flow chart)

\*\* Another opportunity may exist by adding Mesabi Range in the pilot for certain services. If Mesabi Range is added to the pilot it would increase the headcount from 1,016 at Rainy River and Vermilion combined to 2,661 headcount for all three colleges. (MnSCU headcount figures, spring 2010)

The advantages of adding Mesabi Range to the Pilot in another phase of implementation include the following:

Merged bookstore operations and other auxiliary

Bank reconciliations                      one person assigned for 3 colleges

Financial Statements                      one person assigned for 3 colleges

Accounts payable                          one person assigned for 3 colleges

Purchasing/contacts                      one person assigned for 3 colleges

**NESU services can be provided by existent college personnel at a proposed Center of Excellence.**

**Recommendation 5.** Distribute the current responsibilities at NESU to the Itasca Community College business services staff that have the expertise and ability to perform current NESU duties. The responsibilities of the long time NESU employee who is retiring is an opportunity to use the best talent at Itasca to continue to perform these functions for the district. Itasca currently manages many grants and has MAPS reconciliation experience. Current personnel at the college who have the knowledge, skills, and abilities can provide successful district wide shared services from a location at one college. It is important to allow for enough time for transition and training.  
(refer to flow charts)

**The Northeast Higher Education District employs many talented and knowledgeable staff in the business services areas.**

**Recommendation 6.** Provide outstanding employees with opportunities for career advancement and meet together as a group annually to share best practices and increase collaboration.  
Each college has their own outstanding staff in the business office. Most have many years of service and valuable experience. As the shared services centers of excellence concept develops and more services are shared, this may provide promotional opportunities for current staff to assume greater responsibilities for advancement are developed.

**Duplication of duties currently exists at the Eveleth and Virginia campuses of Mesabi Range College.**

**Recommendation 7.** Transfer and merge existing bookstore and business office functions at Eveleth to the Virginia campus of Mesabi Range College. The merging of the bookstore and business office functions at the Eveleth campus with the Virginia campus will eliminate duplication of services for a campus that is located less than six miles from the larger Virginia campus. In addition, the Eveleth campus does not have a point of sale (POS) system for the bookstore and the Virginia campus does use a POS system. The POS system located at the Virginia campus can be used to merge the

bookstores to one site. The short distance should not present a problem especially with increased on line options that will be developed to accommodate student and staff needs.

The 1.0 FTE employee currently working on the Eveleth campus should be re-located to the Virginia campus. The re-location of the employee can be an opportunity to be assigned duties that can further advance their skills. Also, there are benefits by being in close proximity to other staff in the business services area. The elimination of duplication of work being performed at Eveleth should help with the increased work load in the business services area for Mesabi Range overall due to the more recent retirement of a senior business services employee.

Also, by merging services and staff and using their expertise and interests, the Virginia campus of Mesabi Range College should take the lead in developing a student friendly bookstore web site, provide students the option to order textbooks on-line, develop a bookstore voucher system for financial aid students, and take the lead in developing a state of the art bookstore operation throughout NHED by incorporating the best features currently in use at the NHED colleges bookstores. (refer to chart)

**NHED is behind other MnSCU colleges and needs to implement existent technology that is available within MnSCU to help ease the work load and provide effective work efforts in the business services areas.**

**Recommendation 8.** Systems and procedures are currently available that can be implemented and shared at NHED in addition to the proposed “phased approach” of implementation at the Centers of Excellence. Current technology that is currently available and should be implemented district wide in a steady phased approach include:

- Direct deposit of student payroll
- Student tuition payment on line
- Textbook orders by students online
- Student bookstore vouchers on line
- On line services for students and staff
- Automatic yearly staff payroll deduction for parking (facility access fee)
- PCI system ---purchasing on line at each college
- Unifier software to track building maintenance projects
- Image Now software at each college

- Web based security module/mitigating controls
- Collaborative purchasing for copiers, equipment and leases, residential life, bookstore, paper, etc.
- Banking services
- Grants management
- MAPS/MnSCU reconciliations

**NHED needs to implement other technologies throughout the district in addition to the business services areas of operation.**

**Recommendation 9.** NHED should use a phased implementation to increase its operations including other departments throughout the NHED the business services area.

- Lumens software or some similar software for CE/CT that can provide 24/7 web based registration functionality and data security
- A robust college web sites that provides district wide information, policies, procedures and forms for employees (ex.) business office/fiscal services public intranet site
- MnSCU ISRS web based Accounting Module that allows cost center managers to access their cost center and view their budget, expenditures, encumbrances, etc. and overall budget monitoring of the cost center
- One point of sale system when feasible for the five colleges bookstore operations

**A strong partnership with the Northeast Higher Education District IT departments at each college and the district wide HR department should be established to help implement and share duties.**

**Recommendation 10.** Some functions that are currently handled by the business services area can be better managed by other departments if staffing allows.

- Transfer the fixed assets reporting to IT instead of a business office staff function. This is one of the least favorite tasks being fulfilled by business office personnel especially since approximately 90% of the assets belong to the IT area. A spreadsheet can be developed by IT that checks in equipment when received,

indicates where assets are located and moved to and from, and indicates when equipment is discarded. {Could be transferred to IT on each campus }

- Transfer business expenses to Human Resources since they are the experts regarding collective bargaining agreement provisions and what is an approved business expense. Business expenses are entered into SEMA4, a HR payroll system. If this is not feasible, business expenses should be centrally handled at Hibbing for the district as part of a center of excellence function. Hibbing currently employs a very knowledgeable employee in their business office that performs this function for the college. In addition, Human Resources for the district is located at the Hibbing campus if there are questions and interoffice transmittal of forms, etc. Hibbing and HR can partner to address specific issues if they arise.
- Transfer student payroll to Human Resources. There are no incompatibilities for auditing purposes. It is a payroll function that can be centralized if HR has staff availability.

**NHED needs to continue with a systematic effort to drive out duplication of effort.**

**Recommendation 11.** Under the leadership of the Vice President of Finance and Operations other business office functions can be shared as part of a phased implementation process.

- Bank reconciliations can be done by one person at one college for all the colleges except it can get time consuming and complicated during peak months when there are many transactions (ex.) August, September. Many days of quiet uninterrupted time with a focus on detail would be necessary for reconciliations to be handled successfully district wide.
- Financial statements are time consuming and not much purpose is seen for all the work effort from the campus staff perspective, however, it is a MnSCU requirement. A better use of staff time would be to merge the work being done at each of the 5 colleges and instead have financial statements completed by one person at one college. This employee would need to have the skill, an interest, and an ease in performing this task.

## Summary

- NHED needs to build a strong partnership with the talented Human Resources and IT staff and work as a team with Business Services to make the implementation of the recommendations successful.
- The Vice President of Finance and Facilities should serve as the point person and decision maker to lead the Business Services implementation of recommendations and serve as the person who provides the answers to questions that arise with this partnership.
- NHED can effectively use collaborative purchasing in the IT area as well as other departments as a cost savings measure as they determine what is needed on each campus.
- Mutual collaboration among departments must take place and district wide training of staff should occur as more opportunities develop at the Centers of Excellence and the Vermilion/Rainy River Pilot Project.

***The Goal for NHED should focus on.....***

***A significant involvement of all staff***

***A systematic effort to drive out duplication of effort***

***A shared way of thinking to improve work flow activities***

***A focus on staff development opportunities***

***A systematic effort to unify processes and procedures***

## **Stages of Implementation of Plan**

### **Phase 1.                    November 2010 to June 2011**

Re- open search process and fill Vice President of Finance and Operations --President

Transfer NESU duties to Itasca Community College ---- Pat Leistikow

Consolidate Eveleth/ Mesabi Range bus. service functions to one campus—Keith Harvey

Establish Vermilion/Rainy River Pilot --Squires, Ahrens, Marshall

Institute collaborative sourcing ---Bill Manney

Implement at least the following technology improvements at each college

Purchasing (PCI) module --- Pat Leistikow

Image Now software --- Bill Manney

Unifier software --- Keith Harvey

Transfer fixed assets to IT on each campus---Provosts/President

### **Phase 2.                    June 2011 --- August 2011**

Establish Centers of Excellence structure and duties

Continue technology implementation and establish target date for each college's use

Further establish Vermilion/ Rainy River Pilot

### **Phase 3.                    Fall / Spring 2012**

Intranet established

Web based standardized forms

Continued shared “back office” functions using the plan as a model for the business services team to determine

Complete and implement all Business Services Plan recommendations

[Download Referenced Charts](#)