

MINUTES
Task Force on Reporting Strategies

Old Alumni Building, Room 103

Columbia, MO

May 8, 2003

11:00 a.m. – 2:30 p.m.

Attendees: Attendees: Ben Phelps, Linda Koch, Cindy Martin, Bob Mullen, Bonita Lenger, Bonnie Bourne, Jennifer Doll, Donna Johanning, Kandis Smith, Mardy Eimers, Randy Sade, Steve Graham, Michael Ray, Barb Breen, Mike Nolan, Pat Morton, Pat Schwartz, Art Brooks, Cynthia Clements, David Saphian, Laura Stoll, Debbie Braun, Karen Kirkwood, Larry Westermeyer

Vice Presidents: Ralph Caruso, Ken Hutchinson, Nikki Krawitz, Steve Lehmkuhle, Ron Turner

Review of informal meetings with Vice Presidents

Bob reported on meetings held with each Vice President, and noted the attendees as follows:

Meeting with Vice President Krawitz – attendees were Bob and Bonnie

Meeting with Vice President Lehmkuhle – attendees were Bob, Bonnie, and Kandis

Meeting with Vice President Turner – attendees were Bob, Bonnie, and Cindy

Meeting with Vice President Caruso – attendees were Bob, Bonnie, and Mardy

Meeting with Vice President Hutchinson – attendees were Bob, Bonnie, and Linda

A common theme discovered was that they are all very concerned about resources, but realize there will be costs to this and it is a job well overdue.

Final review of Recommendations

Larry questioned the inclusion of “Data” in the cover page statement “Developing a University-wide Data and Reporting Strategy.” It was decided that the statement would be removed from the cover page. With that change, the recommendations are final.

The task at hand with the Vice Presidents will be to get the “buy in” of the Task Force recommendations, and then the next steps will be how the recommendations will be met.

Regarding the “dedicated sponsor/point person,” Bonnie reported that it was stressed at all stops that we cannot take staff that are already stretched to do this. Not knowing exactly how the organizational structure will evolve, we should not commit to a number during today’s discussions.

Hopefully the outcome of today’s meeting is that we will be able to move forward with something stable.

Walk through of presentation to Vice Presidents

Bob reviewed the presentation, noting the portions that he/Bonnie would cover. Task Force members were encouraged to be vocal and share information during the discussions with the Vice Presidents.

Introductions

Vice Presidents joined the meeting and were introduced.

Presentation to Vice Presidents

Bob reviewed the process completed by the Task Force, highlighting the strategies and outcomes, and reviewed the four inter-related dimensions of Technology, Organization, People, and Processes. Discussion/comments regarding the four dimensions were as follows:

Technology: Information repository

- Information Repository –existing systems versus what we will have in the future: Art reported that the University already has a base reporting instance from PS and a data warehouse. The data warehouse will grow with time and expand with our needs. At the University we are currently not sharing, which is what the library will allow us to do. Data marts would contain special formatting of data in the data warehouse, providing a means to make it easier to understand the reports to which users will have access. This would be a tool to extend the reporting capability beyond those that write the reports by making them available in a library. Larry added that PeopleSoft is optimized for transaction processing, but reporting is much more complex. Jennifer explained that we are currently operating in “silos” for each application, and there is a need to gather the most common variables from each application, and that is not possible today.
- Is there any downside to going in this direction? Although we are not sure of what the investment will be, the only downside would be not going in this direction.
- Consensus was that recommendations regarding technology were good.

Organization

- Executive Sponsor/Primary Point Person: There would be a similar model on each campus/business unit. The Point Person’s responsibility would be to determine the needs and the Executive Sponsor should have the authority to make things happen. The Point Person must be totally dedicated to this role.
- Information Repository – giving end users data to pull for reporting needs: Point Person will be a specialized person on each campus that will be familiar with the needs and resources of the various units to create those tools needed to pull the data. Repository allows campuses to share information.
- Executive Sponsor: This individual, or collaboration, for the System will be a decision made by the Vice Presidents.
- Marketing aspect will be critical and require coordination at college, campus and system levels.

People

- Four-campus work groups that are currently in place will continue and be the functional knowledge. There is a need for a dedicated central unit, but have a virtual group throughout the system to create the repository.

Processes

The process has mostly been covered by previous discussion. It will be important to have continuous improvement or a way to evaluate and determine if what we are doing is working.

Questions, discussions, and comments

Next Steps

- Vice Presidents/General Officers need to meet and determine how they will identify the single sponsors and point persons. Hopefully this can happen within the next couple of weeks.
- Define resource scale and timeline.
- A subset of this group will be needed to flush out this plan and determine how quickly we need to get this done.
- Start working on quick wins (that don't require anything else to happen).

Task Force Wrap-up