Launching the ASDT strategic plan

By Barry Coulson, Sector Executive Lead, ASDT

With 2016/17 well underway, it seems an ideal time to update you on implementation of the first year of the ASDT 3-Year Strategic Plan (Charting Our Course), including “ASDT 2.0” – a review of decision-making, funding and stewardship of the ASDT Program – plus the Centre of Expertise (CoE) concept.

In the last issue of ASDT Update, I outlined the CoE concept, emphasizing that CoEs would be launched when there are sufficient opportunities and interest from the sector, and that the structure of the CoE will vary depending on the opportunities. As an example, the Procurement CoE was initiated in April 2015, when the Joint Procurement Operations Team (JPOT) and Joint Procurement Committee (JPC) were established and then transitioned into BCNET as the newly branded BCNETSource in April 2016.

The second CoE – Finance – was launched in June 2016. It is composed of sector volunteers (finance subject matter experts) supported by the ASDT Collaboration Office for project management, coordination, analysis and communications. I am currently the Finance CoE business champion and we hope to be able to announce an executive sponsor from the ASDT Steering Committee soon. The initial work of the group will be to identify several collaborative finance opportunities based on sector priorities, with the intent of selecting two or three to pursue this fiscal year.

The ASDT Collaboration Office has been consolidating a database of opportunities across all administrative functional areas that have been submitted through past Partnership Forums and other avenues. The list is quite extensive, so our shared challenge with our sector stakeholders and partners will be to effectively triage, prioritize and resource them moving forward.

While the current focus is on building momentum by pursuing opportunities through two or more CoEs, plans are taking shape to use the Fall Partnership Forum (scheduled for Dec. 1, 2016) as a springboard for conversations and input around the future of the ASDT Program and the increased role and leadership of the sector, setting the stage for ASDT 2.0 and the ongoing drive to deliver value to the sector.

As always, I welcome your thoughts, questions or ideas to help us move forward and respond to sector needs.
Driving toward innovation, value and savings

By Dennis Silva, Chief Procurement Officer, BCNET

Since the beginning of this fiscal year, BCNETSource has been setting up our systems and processes, and continuing to establish our common category approach and joint procurement services.

The BCNETSource Services Committee held its inaugural meeting on June 22. Co-chaired by Gayle Gorrill, UVic’s Vice-President Finance and Administration, and Greg Condon, UNBC’s Chief Information Officer, the committee will guide the BCNETSource work plan and objectives for the sector.

In June we introduced our new Category Manager, Loretta Lau, opened the member’s intranet page (wiki) to keep us connected, and began using a BCNETSource-identified email distribution service to stay engaged and keep you updated on the latest news.

BCNETSource is also making progress in establishing our common category groups (CCGs), with our third CCG, Travel, coming on line in July. In addition, we will be setting up seven working groups to tackle various procurements over the next few months.

As I have shared before, the foundation we are building will enhance our collaboration and deepen our connections. The programs we are putting in place are linking us together across all disciplines to innovate, deliver value and drive savings.

Employing these systems and processes will help us support the ongoing collection of insights and observations, and will direct our work to meet the sector’s needs. Additional information on current projects is available on the BCNET Member Intranet (click the logo below).

Travel Management Program takes flight

Two post-secondary institutions – Capilano University and Selkirk College – have launched their Travel Management programs under the new ASDT Travel Management agreement with UNIGLOBE One Travel.

The Travel Management program will provide:
- a full-service travel management company providing 24/7 agent services;
- a customized online booking portal (Concur);
- change management support;
- a full suite of institutional reporting;
- opportunities for financial savings; and
- risk management services (including tracking travellers in relation to global events).

The lift-off of Capilano’s program was communicated to staff internally through an email notification and supported by online training for the Concur travel booking tool used for booking flights, accommodations, and other modes of travel. Additional online training is being scheduled in late August when faculty and staff return from their summer breaks.

Capilano has mandated that all institutional travel be booked through UNIGLOBE One, except for their Athletics department (which has pre-existing contracts with bus companies and hotels), and several other departments that have complex group booking requirements.

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Travel Management Program takes flight (cont’d from p. 2)

Paul Gruber, Capilano’s travel implementation lead, reports that staff are beginning to feel comfortable with the changes, and there has been positive feedback about UNIGLOBE One’s customer service.

“We’re looking forward to having the ability to know where all of our travellers are at any given time,” said Gruber.

Selkirk College is starting with a ‘soft launch’ of its new Travel Management program, with hands-on training on the Concur booking tool for administrative assistants who do most of the institution’s travel bookings.

Questions about the alignment of the new program with the institution’s existing travel policies are leading to policy adjustments prior to a ‘staged launch’ this fall.

Justine Jarret, Selkirk’s travel implementation lead, said that while the institution is not mandating the use of the new booking system, the intent is to get everyone using it.

A total of 18 public post-secondary institutions were part of the original RFP for Travel Management Services, leading to the contract award to UNIGLOBE One Travel in December 2015.

Kwantlen Polytechnic University and Northern Lights College plan to launch this summer. University of British Columbia (UBC), Simon Fraser University and University of Victoria (UVic) plan to launch this fall (Simon Fraser and UVic will start with a pilot). In addition, the Justice Institute of BC and UVic have started booking travel under the terms and benefits of the new agreement with UNIGLOBE One.

The ASDT Travel Implementation Leads from the participating institutions have been regularly meeting to share their planning and implementation experiences and learnings.

This update is distributed to:
- PSI Presidents
- VPs of Finance and Administration
- Directors of Finance (FinWizards)
- Directors of Facilities (FDBC)
- Procurement Professionals
- ASDT Steering Committee
- BCNETSource Services Committee
- BCAIU, RUCBC, and BCC Presidents
- ASDT Leads and Teams
- BCcampus
- Post Secondary Employers’ Association
- BCNET
- BC ELN
- Ministry of Advanced Education
- Ministry of Education

ERP project shifting from strategy to tactical focus

Following the delivery of the Enterprise Resource Planning (ERP) Strategy in April and approval at that time by the ASDT Steering Committee to proceed with a planning phase, the ERP Project has shifted its focus on the steps that will facilitate institutional ERP strategic alignment.

The ERP Strategy document, based on input from interviews of the CFOs and CIOs (or delegates) from all 25 post-secondary institutions, describes the current state of ERP use in BC’s post-secondary sector, articulates the key drivers for a sector-coordinated ERP approach, and provides a vision and a set of strategic objectives for moving forward.

The ERP project is now in a Tactical Planning phase that runs to the end of September. Work is underway on a project charter that will outline the scope, approach and resources for a Business Engagement phase planned for October 2016 to April 2017.

The Business Engagement phase will build on the ERP Strategy by providing a more in-depth assessment of priority areas and facilitating deeper engagement with BCNET, sector and Ministry stakeholders. The key outcome of this phase will be a Business Engagement Report.

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ERP project shifting from strategy to tactical focus (cont’d from p. 3)

The Business Engagement phase will also provide the opportunity to plan for alignment with key Ministry and sector strategic initiatives such as EducationPlannerBC, Procure-to-Pay and the Administrative Systems Consortium (representing nine post-secondary institutions that use the Colleague administrative system).

Parallel to this project activity, Vancouver Island University (VIU) and Selkirk College recently released a Negotiated Request for Proposals (NRFP) for a replacement of their aging customized systems. Although specific to the immediate requirements of these two institutions, the NRFP includes clauses to encourage potential vendors to align their proposed solutions with the sector strategy, and to provide an opportunity for other institutions to leverage the selected solution. The results of the VIU/Selkirk NRFP and the findings of the Business Engagement Report have the potential to inform strategy implementation options and sector investment decisions.

Barry Coulson, ASDT Sector Executive Lead and the vice-chair for the ERP initiative, said the ERP Project is a high-profile sector priority; with the upcoming Business Engagement phase, the project is entering an exciting and pivotal stage.

“The ASDT Collaboration Office, the ERP Working Group and our BCNET partners look forward to continued collaboration with sector and Ministry stakeholders,” said Coulson.

Alberta report cites ASDT as a successful collaboration

The ASDT initiative has been cited as “a successful partnership example to save on administrative costs” in a new benchmarking report by Grant Thornton for Athabasca University’s Business and Student Services Administrative Practices Review.

The 11-page report, released May 13, 2016, highlights some of the successful collaborations in BC’s public post-secondary sector to reduce the cost of administrative services and improve non-academic service delivery.

“Campus Alberta (which was created to formalize and encourage such collaboration and cooperation between the province’s 26 publicly-funded post secondary institutions) may be able to leverage this example in addition to its other initiatives (e.g. Apply Alberta portal),” says the report.

This observation is followed by recommendations in the report to “broaden internal and external partnership discussions to generate cost savings through joint procurement opportunities..., ensure that value/benefits/impacts on all stakeholder groups are communicated for all proposed changes to get buy-in, and establish how changes are going to be measured at the onset.”
Effective April 1, 2016, the sector’s joint procurement service transitioned into BCNET for a two-year pilot. Meet the new BCNETSource team!

**Dennis Silva, Chief Procurement Officer**, will continue to develop and guide strategies to help achieve the sector’s collaborative procurement objectives of reducing costs and improving administrative efficiencies.

**Bernice Ellis, Procurement Officer**, is responsible for providing procurement and supply chain guidance in the development of collaborative procurement projects including the development of the RFx process, including evaluation, recommendation and award.

**Loretta Lau, Category Manager**, is responsible for leading cross-functional teams to manage the development and implementation of various sector category procurement strategies.

**Kenny Leung and Yihang Xu, Category Analysts**, share responsibility for providing administration support for procurements and various stakeholder groups as well as providing research, data analysis and benefits tracking in line with the sector procurement and category strategy.

**New ASDT 3-Year Strategic Plan charts course for the future**

Following an extensive round of consultation within the sector last fiscal year, a new ASDT three-year strategic plan was approved by the ASDT Steering Committee in March 2016.

Entitled *Charting Our Course: A Three-Year Strategic Plan for Collaborative Administrative Service Delivery in the BC Post-Secondary Sector*, the 10-page document seeks to establish a common understanding of the strategic direction and priorities for the ASDT Program.

The Plan includes a Strategy Map (right) that shows the five strategic priorities and actions that align with the values, goals, mission and vision established for the ASDT Program.
## ASDT Initiative Progress Summary – Q1 2016/17

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<th>INITIATIVE</th>
<th>PROGRESS HIGHLIGHTS</th>
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<td><strong>Strategic</strong></td>
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<tr>
<td>Travel Management</td>
<td><em>See feature article in this issue.</em></td>
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<tr>
<td>Sector Print Strategy</td>
<td>On hold pending Multi-Function Devices (MFD) contract award. (See below.)</td>
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<tr>
<td>In-House Booklet Printing</td>
<td>2016/17 proposal for pilot in development.</td>
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<td>Digital Learning Resource Network</td>
<td>DLRN business case under development.</td>
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<tr>
<td>Enterprise Resource Planning (ERP)</td>
<td><em>See feature article in this issue.</em></td>
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<tr>
<td>Vending Services</td>
<td>Continue working with vendor on execution of implementation plan. Completed assignment of vendor contract to BCNETSource. Benefits tracking under development.</td>
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<tr>
<td>Facilities: Fire Extinguishers</td>
<td>Business case approved; working group being formed.</td>
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<tr>
<td>Logistics: Customs Brokerage</td>
<td>Business case approved; working group being formed.</td>
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<tr>
<td>Office Supplies</td>
<td>RFP development underway through BCNETSource.</td>
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<td>Natural Gas</td>
<td>Work has continued on tasks from the Natural Gas 2016/17 Operational Plan.</td>
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<td>Cylinder Gas</td>
<td>Praxair was the successful proponent and was awarded the Master Agreement.</td>
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<td>Multi-Function Devices</td>
<td>The MFD Team has completed the evaluation process and has selected the lead proponent. Lead proponent selected and in contract negotiations.</td>
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<tr>
<td>Courier Services</td>
<td>TRU contract signed. No implementation WG required. Benefits reporting process to be established.</td>
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<td><strong>Joint Procurement</strong></td>
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<td>Commercial Card</td>
<td>Twelve institutions participating, with six additional PSIs in progress.</td>
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<td>Central Deposit Program</td>
<td>All 25 PSIs have deposited and received increased interest revenue from the program.</td>
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<td>Reduced Merchant Fees on Credit Cards</td>
<td>Three PSIs have moved to the provincial agreement; one PSI is in progress.</td>
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<td>Procure-to-Pay (P2P)</td>
<td>ASDT SC approved a 3-month Wrap-up and Reposition phase whereby two lead institutions will complete costs and savings templates by end of August, and P2P will be integrated into the ERP project beginning in Fall 2016.</td>
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<tr>
<td>BC Electronic Library Network</td>
<td>Published the 2015 Arca Actions &amp; Achievements Report. Online training sessions being developed and delivered. Arca project was presented to the provincial, national and international digital repository communities.</td>
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<td>ASC (Colleague) Consortium</td>
<td>Final report for 2014/15 funding presented at May 2016 ASDT Steering Committee meeting.</td>
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