Outcomes / Outline

• HESS Consortium Goals
• Process of Launching a Multi-Institutional/Multi-Vendor Collaborative Consortium from Grassroots
• Foster ideas for collaborations among participants and informing future collective work
• Value of external partnerships
• Share lessons learned
Let’s begin with some quick poll questions

When poll is active, respond at http://tinyurl.com/GOHESS
Text KEITHFOWLKES823 to 22333 once to join
Institutional Challenges

• Financial Realities
  – Rising costs
  – Fixed or reduced budgets and staffing
  – Shifting demographics

• Worthy (yet Contradictory!) Institutional Goals
  – Providing the best student learning experience
  – Reducing costs to families
  – Managing continuing increase in institutional operating expenses
  – Continuing to approach problems alone rather than collaborating with other similar institutions
HESS: The Higher Education Systems & Services Consortium

A grassroots collaboration of institutions and people committed to working together to collaborate and lower technology costs for private, nonprofit colleges and universities.

- Belief that strategic collaboration and buying agreements can help private institutions have a larger collective voice with technology vendors and partners
- Focused specifically on ERP and ancillary software and services across multiple solutions
- Enhanced cooperation between CIOs and CFOs in information technology and services
HESS Consortium Goals

• Foster Collaborations to Achieve:
  – Group buying collaboration
  – Shared services between institutions
  – Collective voice to inform vendors of our needs
  – Solidified and deepened relationships between our institutions and vendors
  – Increased collaboration within institutional-member ERP cohort groups
In 32 months, HESS has grown from 12 institutions to 100 private colleges and universities across the U.S. (and growing!)
100+ private, nonprofit colleges and universities and growing quickly

Represents over 185,000 student FTEs

10 affiliated state and regional partners

ERP Partners: Campus Management, Ellucian, Jenzabar, Oracle, Unit4, Workday
What Makes HESS Distinctive?

- Opportunity to create shared alliances with other members and vendors
- HESS shared, collaborative software contracts for member private, non-profit institutions
- An annual “HESS Report” on the higher education ERP industry with vendor profiles and survey data results from private, non-profit member institutions
- Listservs for our ERP and ancillary software member community
- Forum access to collaborate with other private, non-profit institutions using the same software solutions
- HESS software cohorts who work directly with top software executives on industry-shaping discussions on campus needs, licensing, pricing and support issues
- An annual conference featuring concurrent demo sessions with all major ERP and ancillary software partners
- Strategic partnership with E&I Cooperative Services
ERP and LMS Cohorts

• Member institutions belong to ERP cohorts
  – Current ERP cohorts include: Campus Management, Ellucian, Jenzabar, Unit4 & Workday (Oracle is also a HESS partner but has no cohort group at this time)
  – Recently added a Learning Management Systems (LMS) Cohort and RFP solicitation
  – Provides a common platform to promote collaboration and sharing

• Member institutions also form ad-hoc groups based on common needs
• Other areas of interest include CRM, credit card, one card/dining systems and more…
Annual HESS Consortium Conference

• Includes:
  – Town Hall meeting with executives from seven major ERP vendors
  – Concurrent demo sessions with all ERP providers
  – Opportunity to meet with ancillary software providers
    • examples: Blackboard, Canvas, BitDefender, Hobsons, etc.
  – Networking with peers
    • especially outside your usual peer groups

Conferences:

June 2014 – Bellarmine University, Louisville, KY
May 2016 – Nashville, TN
June 2017 – Lexington, KY
June 2018 – (in planning, location TBD)
Questions about HESS or our Cohorts?

- The need for help in contracts and negotiations
- Coming Up: the E&I Partnership
The HESS Consortium needed contract expertise to be able to develop, negotiate and manage standards-based, competitive contracts with the host of ERP and ancillary software and service providers. Through a new connection with E&I Cooperative Services, it was a natural partnership.
• Keith Fowlkes, former Centre College CIO and HESS co-founder became the new E&I Vice President for Technology Contracts.

• HESS Consortium signed an MOU in April 2017 with E&I Cooperative Services to help standardize and formalize HESS’s informal company agreements into fully collaborative contracts.

• E&I is the largest, member-owned, not-for-profit purchasing cooperative serving the needs of higher education in the U.S.
  - Founded in 1934 by a group of higher educational institutions
  - Currently includes 4,000+ member educational institutions
  - Contract categories include: technology, facilities, scientific, athletics, furniture, office supplies, travel, medical equipment/supplies, and more.

The source for higher education contract expertise...
Cooperative Services

The source for contract expertise...

...and over 100 more major contracts
• The HESS / E&I Cooperative Services MOU allows the two organizations to collaborate on new and existing contracts.

• All current E&I contracts are available to institutions

• **NEW E&I / CDW-G contract** gives HESS institutions deep aggregate group discount pricing previously only available to larger institutions

• **NEW collaborative contracts for Learning Management Systems (LMS) and ERP consulting** set for release in early 2018

• The 2018 E&I / HESS Enterprise Resource Planning Contract will be the first national ERP software and services cooperative contract… ever.
A new approach to group cloud ERP contracts

Multi-instance software approach where institutions have flexibility to create and share new processes unique to their campuses.

Centralized application management (Virtual Environment)

Separate Database Instances so institutions can feel confident their data is not co-mingled or shared outside the institution.
Hosted Software-as-a-Service

Multi-instance software approach where institutions have flexibility to create and share new processes unique to their campuses

A new approach to group cloud ERP contracts

Ability to easily connect to other SaaS software options by a common set up API connections between “cloud applications”
Contracts that we are working together on currently:

- Learning Management Systems (LMS) contract(s) – release Jan 1, 2018
- IT & ERP Independent Consulting contracts – release before May 1, 2018
- Enterprise Resource Planning (ERP) contract(s) – release early 2018
- Audio/Video installation services for classrooms/meeting rooms – early 2018

Other planned contract projects for 2019:

- Admissions/Alumni/Development CRM contract(s)
- Alumni / Development CRM contract(s)
- Security / Identity Management
- VR / AR Development
Paper Exercise

• Write down ERP, LMS, CRM(s), Admissions, Advancement applications
• What challenges do you have with integrations, vendors, cloud implementation, etc.
• What issues are most important to your institution? (should we give examples such as budget, staffing, retention, enrollment?)
• Compare and discuss with those around you
Roundtable Discussion Topics

A. Your experience with shared IT services collaborations?
B. What parts of the HESS model will be most successful in reducing costs?
C. Which parts of a collaborative contract with other institutions would most interest you:
   1) Features
   2) Pricing
   3) Services
D. What are obstacles and how could they be addressed?
E. What are the most important benefits of organizations such as the HESS Consortium and E&I Cooperative Services?
Discussion Summary

• Conclusions?
• Insights?
• Questions?
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Lessons Learned & Next Steps

• IT organizations at similar institutions are eager to collaborate
• CIOs and CFOs have different perspectives
• Some vendors sometimes prefer apples-and-oranges
• Partnerships with state associations, and fostering those relationships, are important
• Strategic partnerships and collaborative contracts are beneficial to more deeply engage software providers and discuss solutions to long-standing challenges
Thank you for your participation today!

Carol L. Smith, CIO, DePauw University, clsmith@depauw.edu
Keith Fowlkes, VP, Technology Contracts, E&I Cooperative Services, keith@eandi.org
Penny Evans-Plants, CIO, Berry College, peplants@berry.edu
Fred Miller, CIO, Wofford College, millerfm@wofford.edu

HESS Consortium – www.hessconsortium.org
E&I Cooperative Services – www.eandi.org