

BUSINESS CASE SUBMISSION

Project Name		Student Success Programme	
Sponsoring Department		Vice-Chancellor's Office	
Project Sponsor		Wendy Larner	
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Proposed Start/End Date		Start: 28/9/2020	End: 16/12/2022
Estimated Project Costs		Project costs are estimated at: \$6,115k Capex \$842k additional Opex	
Allowed for in Annual Management Plan budget?		No. A strategic initiative	

1 PROJECT DEFINITION

The vision of the Student Success Programme is to:

Provide a streamlined, integrated service that meets the needs of our diverse student population to support academic success.

The key goals of the project are to:

- Increase student admission and retention
- Enhance the experience throughout the student journey
- Deliver efficient and effective services that students value
- Provide clarity of role expectations and career progression for staff
- Provide us with the flexible and resilient model we need to face an uncertain future

This will require the review and redesign of student services to transform the people, policy, process and systems that work together to drive student success.

To achieve the vision and goals, the project is based on three key workstreams underpinned by the delivery of technology solutions and a new student support model:

- i. *Admission and Enrolment* - The development of a new admission and enrolment process that will enable students to apply for admission all year round, reduce manual processes and improve application turnaround times. This will involve the separation of the admission process from the enrolment process, the centralisation of the admission functions and the provision of digital tools to enable students to self-manage their application to the University.

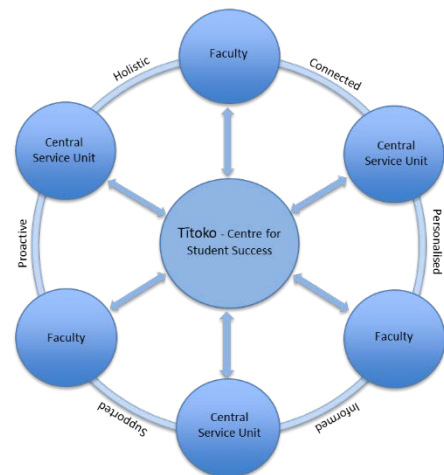
- ii. *Student Retention* – The establishment of a shared student success framework (Appendix 1) which presents a co-ordinated and sustainable approach to connecting students with support to help them navigate academic and university life. This will involve the creation of a student retention data model which identifies at risk students, a reporting framework that is timely, accurate and can measure effectiveness, and an advisory model that is informed by meaningful student data and is sensitive to the needs of each student cohort.

- iii. *Multi-channel Student Service Centre* – The creation of a centralised, efficient and professional student service centre where students can access consistent help and advice across multiple channels. This will involve the standardisation and centralisation of non-specialist services from faculties, schools and central service units. It will also contribute to self-service capability through the digitisation and automation of relevant services via a student portal.

- iv. *Enabling Technology* – The implementation of technology solutions that will capture the student journey, provide accurate and meaningful data, streamline and automate processes and procedures and enable students to self-manage relevant services. The core technology will be the implementation of a new CRM that will record student transactions and enable a holistic 360-degree view of student interactions with the University. This will also require integration with key student systems as well as providing requirements for a student portal to increase self-service.

- v. *A different way of working* – To move from operating within silos to become a truly integrated University where we are able to use our resources - people and systems - wisely and flexibly to best serve our students (i.e. able to quickly adapt to both internal and external influences) will require a new approach in how we work. Subject to business case approval, Titoko – Centre for Student Success will be established, and further detail about this is provided in the update paper.

This will involve centralising the core student administrative functions including exams and a holistic student advising service (the hub) with links back to the faculties and CSUs (the spokes and rim). The hub will be efficient, effective and digitised and the spokes will be proactive, personalised and informed by rich meaningful student data. Initially the size of the Titoko - Centre for Student Success is approximated at 100 staff currently fulfilling these functions within the University. The final shape and size of the Centre will be determined based on the feedback from the update paper, efficiencies gained from centralising and digitising processes and the formal change proposal.



Work has already been undertaken for each of the workstreams to define and understand the current processes and user experience. This work will be used to inform the desired user experience and the required technology, process and organisational change needed to support the desired future state.

Workstreams	
Admission and Enrolments	<i>Conceptual phase</i> – Documentation of the current processes and pain points has been completed. The development of an Admission Proof of Concept within the CRM has been scoped and agreed.
Student Retention	<i>Pilot Phase</i> - Review of current state and pain points completed. A Trimester 1 2020 pilot has been conducted in the Faculties of Science and Commerce with an expanded Trimester 2 Pilot underway The Development of the Student Success Framework and Advisory model in progress
Multi-Channel Student Service Centre including exam centralisation	Conceptual Phase – Review of current state, proposed SSTP Target Operating Model and pain points completed. Trimester 1 Hub Pilot for “one-stop-shop” completed with Trimester 2 Hub Pilot underway. Staffing and process analysis and recommendations for centralisation in progress
Enabling Technology	<i>Student Portal – Conceptual Phase</i> – A design sprint has been completed and over 250 students interviewed to develop requirements. RFI being developed for vendor proposals. <i>CRM - Conceptual Phase</i> - A vendor (Fusion5) has worked with Digital Solutions and SSP to develop a CRM strategy and high-level roadmap, with a two-year phased implementation approach proposed. The key out of scope dependent projects, such as the OES remediation and early student identity have been scoped and time lined to meet the requirements of SSP. Analysis of key system integrations in progress
A different way of working	<i>Conceptual Phase</i> – A briefing document outlining recommendations for the establishment of Titoko - the Centre for Student Success has been prepared and reviewed by SLT. Any subsequent change proposal will follow standard process.

Two Year Project:

The SSP is a two-year transformational project and will require a high level of organisational involvement and change management. It will be delivered using a phased approach which breaks the project into manageable components for implementation, reduces the risk to current service delivery, enables the required changes to be managed over time and delivers incremental benefits throughout the life of the project. The approach and timeline are based on similar size projects undertaken by other universities in New Zealand.

This Business Case is for the full implementation of the project with the high-level deliverables for each phase are as follows:

Phase 1 - Establish (Oct 2020 – Dec 2021)	Phase 2 - Develop (2022)
<ul style="list-style-type: none"> • New admission system and process implemented • Retention framework operational utilising agreed data model • Titoko - Centre for Student Success established including centralised exam function, Multi Channel Service Centre and initial advisory model • Student Portal • CRM foundations implemented including key integrations 	<ul style="list-style-type: none"> • New enrolments system implemented • Retention framework fully operational & integrated with CRM • Titoko - Centre for Student Success advisory model optimised • New support channels implemented • Student self service offerings expanded • Student Portal & CRM functionality expanded along the student journey

There will also be six monthly “Review Gates” for the project to report back to SLT. This is to ensure the project it is on track and delivering as promised and will also provide the project with clear decision points at key parts of the project. `

Project Review Gates:

Review Gate 1 April 2021	Review Gate 2 December 2021	Review Gate 3 April 2022	Review Gate 4 December 2022
<ul style="list-style-type: none"> ✓ Analysis/design complete for Phase 1 ✓ Titoko - Centre for Student success change proposal ready 	<ul style="list-style-type: none"> ✓ Phase 1 implementation review ✓ Phase 2 detailed scope and plan 	<ul style="list-style-type: none"> ✓ Analysis/design complete for Phase 2 	<ul style="list-style-type: none"> ✓ Phase 2 implementation review ✓ Project close out

2 STRATEGIC RATIONALE

The Student Success Programme is one of the key strategic projects that will deliver against the university strategy.

Education preparing students for an extraordinary life

The Student Success Programme will transform the way students connect and engage with the University. This starts with nurturing students from admission through to enrolment, providing personalised advice which will follow them throughout their journey, the early identification and intervention of students who require complex support and the delivery of services that students value. This will create an environment from which students can achieve their educational aspirations.

Equitable outcomes for all

The implementation of a holistic student advisory model will enable targeted and differentiated support for each cohort of students and ensure that the support provided is timely and sensitive to the specific needs of each student.

Transforming the way we work

The standardisation and centralisation of core student services underpinned by technology will transform the delivery of student services. It will remove duplication and manual processes and enable students to self-manage appropriately. This will provide the foundation for the holistic student advisory service that will enable staff to focus on services that students value.

3 TARGET OUTCOME AND BENEFITS

Target Outcome:

The target outcomes of the Student Success Programme are:

- Students will access services that they value at a time, place and channel that works for them, and can expect consistency of experience - irrespective of where and how services are delivered.
- Service offerings will be substantiated with rich data about students and their needs to pair individuals with the right services and interventions. This includes providing a comprehensive student advising service within and across faculties with centralised administration and support, leading to academic success for our students.
- Our staff will benefit by being provided clear and consistent pathways for career development and progress across the university.

Benefits:

The strategic benefits to the University from the Project are:

1. **Increased student enrolments** – The separation and centralisation of the admissions function will improve efficiency, increase “inquiry to enrolment” conversion and enable student admission all year round.
2. **Improved student performance and retention** – Proactive monitoring of student engagement and performance will enable early intervention of at risk and underperforming students.
3. **Connected and engaged students** – The development of a personalised and supportive environment through a student advisory model will ensure students are more connected and engaged with the University.
4. **A holistic view of students** – The creation of a 360-degree view of student interactions will better inform the delivery of student services and future decision making.
5. **Improved student experience** – The provision of intuitive and personalised digital tools will enable students to access services when and where they want.
6. **Improved efficiency and productivity** - The removal of paper forms, manual processes and duplication will improve the delivery of student services and enable staff to focus on services that students’ value most.
7. **Cost savings** - A reduction in the cost of service delivery through the standardisation and centralisation of student services functions and processes will improve cost efficiency.
8. **Staff development** – The establishment of a defined career path for staff who support and advise students will provide opportunities for career development and advancement.
9. **Continuous improvement** – The establishment of systems, processes and operating model will provide agility and enable ongoing improvements to be realised.
10. **Risk reduction** – Reducing the risk of lost revenue through the low conversion rate and early exit of students.

The realisation of the key benefits will be measured as follows (refer Appendix 1 for full list of benefits):

Benefits are realised when:	Measure
Students can apply for admission to programmes when they want	<ul style="list-style-type: none"> The admissions process is separated from the enrolments process Student applications for admission are received all year round
Students receive offers of admission in a timely manner	<ul style="list-style-type: none"> 90% of undergraduate students receive offer of admission in < 2 days
There is an increase in completed student applications	<ul style="list-style-type: none"> Improved conversion rate leads to an increase in enrolments by 1.0% annually which equates to \$1.2 million per year. (the current conversion rate of international students is approx. 50%)
Data model and early alerts system identifies 'at risk' students	<ul style="list-style-type: none"> 24% reduction in number of students suspended or excluded from the University
There is an increase in student retention rates	<ul style="list-style-type: none"> 2% increase in the retention rate from 2022 onwards (the current attrition rate for new students is 19%) This equates to approximately 486 EFTS, and \$7.1 mil over 3 years. This number excludes any measures for international students
All relevant interactions are captured throughout the student lifecycle	<ul style="list-style-type: none"> 100% of agreed student interactions recorded in the CRM
There is a demonstrable improvement in the delivery of student services	<ul style="list-style-type: none"> 90% resolution of enquiries at first point of contact Student satisfaction with Service Centre is improved to 90% satisfaction
The cost of provisioning student services is reduced	<ul style="list-style-type: none"> Number of service points (including counters, emails and phone numbers) reduced by 50% Number of appointments booking systems reduced by 80% Number of reporting lines for client services roles consolidated

4 OPPORTUNITY AND BACKGROUND

Background

The Student Success Programme (SSP) is responsible for reviewing and redesigning student services at Victoria University of Wellington so they are streamlined, integrated and meet the needs of our diverse student population to support academic success.

The SSP was established to replace the Student Services Transformation Programme (SSTP). The SSP has built on the work achieved by the previous project, including:

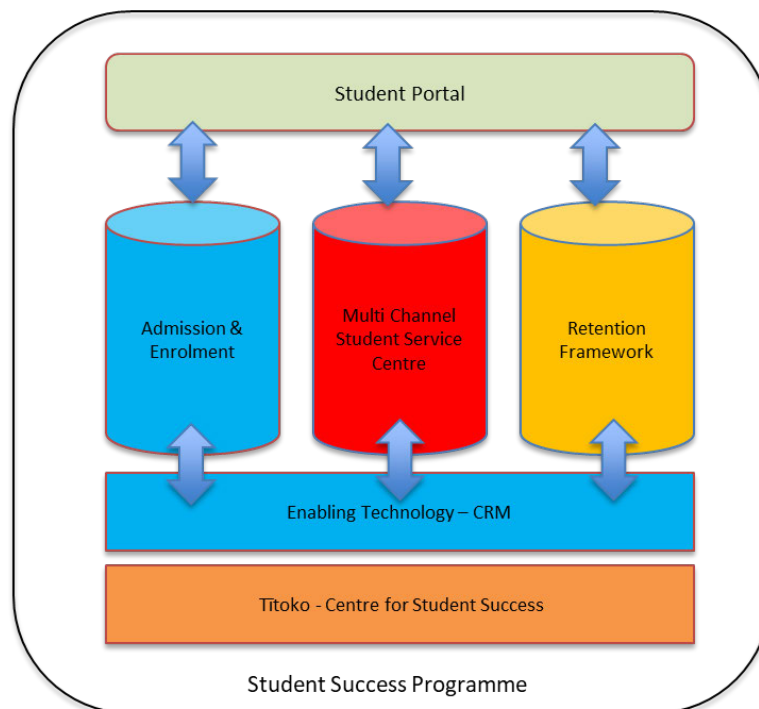
- Vision and strategy for improving student services

- Engagement with staff and students
- Analysis and design work

It has also taken on board the recommendations from the KPMG and PWC reviews. This has led to a re-focusing and re-shaping of the project to clearly define the scope, deliverables, costs and timeline. The project has overall responsibility and oversight of three workstreams:

- Admissions and Enrolments
- Multi-channel Student Service Centre
- Student Retention

The project's work also includes implementing enabling technology centred around the implementation of a student portal and new CRM solution. A new student support model that will recommend pan-University organisational change for a hub, spoke and rim student support and advising model operating from Titoko - the Centre for Student Success. This will involve centralising the core student administrative functions (the hub) and a holistic student advising service based in the faculties (the spokes). The hub will be efficient, effective and digitised and the spokes will be proactive, personalised and informed by rich meaningful student data.



Opportunity to improve the student enrolment experience and University's competitive position

The problem is that students find it difficult to access the right information, systems and services they require to apply, enrol and manage their studies, at the right time. In the most recent student survey only 69% of new domestic students expressed satisfaction with their enrolment experience. This provides an opportunity to

- Update the admission and enrolment processes to enable the university to compete in a complex and competitive environment.
- Centralise the admission and enrolment teams and the decision-making authority to provide faster turnaround of student applications.

- Removal of required manual intervention related to the application and enrolment process freeing up staff to focus on value-add tasks.
- Provide international students and agents the ability to manage their admission and enrolment process online, rather than by paper submission.
- Remove the requirement for domestic students to apply and enrol in one single process which will eliminate the current administrative bottle neck.
- Provide earlier and richer pipeline reporting thereby enabling the University to make some informed and tactical recruitment marketing decisions.

Opportunity to deliver services that students value

The problem is that services for students are delivered from siloed teams across multiple locations which results in an inefficient and inconsistent service to students; bouncing them between teams with no coherent view of what they need. This provides an opportunity to:

- Establish a centralised and cross-trained team who can consistently and professionally deliver administrative and student services across channels and locations without unnecessary referrals. Capture university knowledge and student services data centrally to enable a consolidated view of each student and inform service delivery processes.
- Provide automated processes for staff and self-service options for students, removing manual processes and workarounds wherever possible.

The problem with the current examination model is process inconsistencies, unnecessary duplication of effort with limited opportunities for efficiency gains and benefits that could be gained through systemising processes. Centralisation of the team would provide an opportunity to:

- Efficient utilisation and training of staffing resources including invigilators;
- Embed best practice to meet the needs of the student body in particular disabled students;
- Provide greater opportunity to fully utilise functionality of current timetabling systems;
- An ability to roll out digital examinations.

Opportunity to improve student retention

The problem is that there is no clear student success model that addresses the changing nature of student preparedness for university study and this impacts the University's ability to retain students and provide a consistent high-quality student learning experience. The first year attrition rates for all new students is 19% and 24% for Maori and Pasifika. This provides an opportunity to:

- Utilise data pertaining to each student, throughout the student's journey, to proactively identify when a student is at risk of failure, rather than wait until the end of a trimester or when the student withdraws from the University
- Provide University wide tools and systems to define and evaluate student success, provide success measures and support activities to support the student at each stage of their learning journey
- Provide a consistent holistic advising model across the university to all students providing value add services

Consultation Undertaken

- PAMI was consulted to provide market and enrolment information; retention information and at-risk data modelling
- SSTP Design Sprints with students and staff on desired future states for student services and student success
- Reference Groups established for consultation and validation of current and future state designs
- Student feedback from retention pilots and HUB service centre pilots

- Regular presentations and feedback from monthly faculty manager meetings
- Collaboration with DVC Maori and Āwhina on the development of the holistic student advising model
- Ongoing engagement with student services on development of Titoko - the Centre of Student Success and how it would collaborate with other services
- One to one meetings throughout the university

5 RELEVANCE TO MĀORI

The office of the Deputy Vice-Chancellor (Māori) was consulted in preparing the business case and the following considerations/inclusions have been incorporated:

- Under the Tiriti Statute there is the principle of kōwhiringa - this principle acknowledges Māori rights to pursue their own personal direction, whether that be in accordance with tikanga Māori or not. As part of the holistic student advising model Māori students will choose if their primary adviser is an Āwhina adviser or from Tītoko - the Centre for Student Success. Advisers will be aware of what is on offer at Āwhina and refer Māori students to these services when they are relevant for the student. Regardless there will be an adviser in the Centre that will be allocated to each student should a need arise where the Āwhina adviser needs to refer the student.
- Under the Tiriti Statute there is the principle of mahi tahi – this stipulates that the University values and supports internal Māori entities that represent Māori interests including Āwhina. Tītoko - the Centre for Student Success will work closely with Āwhina to ensure that the student advisory model acknowledges the role of Āwhina and how both teams can work together to best meet the needs of Māori students.

6 OTHER OPTIONS CONSIDERED

The following options were considered in addition to the Proposal (Option 1):

Option 2: Ad-hoc implementation

- Ongoing ad-hoc operational initiatives focused at the faculty, school and central service unit level. This is a continuation of the current approach to student service improvements within the University.

Option 3: Big Bang implementation

- Implementation of all changes at once, delivering the full suite of improvements to student services. This introduces a large element of risk and requires a strong degree of change management and support across the whole University for both students and staff.

The relative merits of the options are shown in the table below

Criteria Considered	Option 1 (Proposal)	Option 2	Option 3
	Phased implementation	Ad-hoc implementation	Big Bang Implementation
Improve the student admission process	New admission process delivered as part of phase 1	Improvement to admission requires integrated strategic approach	New admission process delivered as part of full project

Improve student retention	Student retention improved, matured and benefits realised over each phase	Long term benefits difficult to maintain from ad-hoc pilot initiatives	Benefits from retention delayed until full implementation of the project
Improve the student experience	Clear and measurable improvements to the student experience from each phase	Difficult to deliver a holistic student experience from Ad-hoc approach	Improvements to student experience delivered as part of the project
Improve the efficiency & effectiveness of student services	Targeted incremental improvements to student services realised from each phase	Minor improvements made from each ad-hoc project	Service efficiency and effectiveness gains released from the project
Ability to realise financial benefits	Financial benefits from each phase are stand alone and compounding	Some savings derived through separate project deliverables	Benefits not realised until implementation of full project
Risk to current service provision	Service continuity maintained through phased delivery	Low risk to service continuity from small ad-hoc initiatives	Risk to service continuity from big-bang implementation
Ability to manage level of required organizational change	Phased delivery enables change to be managed overtime	Small level of change required from small ad-hoc initiatives	Large scales change difficult to manage which increases risk of failure

7 SCOPE & QUALITY

Project Description

The SSP is a two-year project and will be delivered using a phased approach. The project will:

- Simplify the admission process, delivering new admission and enrolment systems, enabling potential students to apply online (removing the need for paper applications from international students) at any time in the year and decoupling the admission and enrolment process.
- Centralise student support services with standardised and streamlined processes providing consistent help to students and the provision of online services such as self-service and appointment booking.
- Implement a holistic student adviser model that supports students at risk of failing or dropping out of University to achieve academic success.
- Implement a student portal providing a consistent and digital point of entry to student services that will enable students to easily find information, stay informed about their study and request services online.
- Maintain a centralised record of the student's interactions with the University by implementing a CRM. This will provide a 360-degree view of the student and enable the provision of better and consistent support.
- Establish a new organisational unit, Titoko - the Centre for Student Success based on a hub and spoke support model. This will initially focus on reporting line changes to minimise the

risk of change and ensure continuity of service is maintained with further consolidation of services as the support model and processes are embedded.

Project Scope

IN SCOPE - Phase 1 (2021)	IN SCOPE - Phase 2 (2022)	OUT OF SCOPE
Admission and Enrolment		
Separation of admission and enrolment systems and processes for domestic students	Provision of new enrolment system	Non degree teaching (including micro credentials)
Centralisation of the admission and enrolment process and teams (domestic & international)	Decommissioning of OES	Changes to the current curriculum
Provision of online admission	Admission and enrolment for PhD students	
Proof of Concept for the new Admission Process		
Remediation of current online enrolment systems and processes		
Multi-Channel Service Centre		
Establishment of a centralised multi-channel student service for general enquiries i.e. email, telephone, face to face	Titoko - Centre for Student Success advisory model expanded to include new services	
Development of a knowledge base to enable self-service	Introduction of additional support channels	Changes to the provision of specialist support
Cross training of staff to support the multi- channel student service centre	Introduction of further self-service offerings for students	
Standardisation and streamlining of processes using best practice principles	Rationalisation and streamlining of processes using best practice principles	
Student Retention/Student success framework		
Identification, monitoring and support of 2021 new students and 2020 at risk students	Inclusion of year 2 students into the retention framework	
Provision of a holistic view of students by implementing an advising model	Retention framework fully integrated with the CRM	An overall data governance model for the University
Changes to the student advisory model and processes to include implementation of consistent processes to meet best practice	Further continuous refinement of the retention data model	
Creation of a retention data model and development of automated reporting to identify at risk students		

IN SCOPE - Phase 1 (2021)	IN SCOPE - Phase 2 (2022)	OUT OF SCOPE
Student success framework. Building the foundations for a student success framework		
Technology		
Implementation of a Customer Relationship Management tool (CRM) to capture and maintain the student journey	Additional functionality added to Student Portal and CRM to support student journey	Specialist technology required to deliver specialist support
CRM integration with VUW systems	Further integrations of VUW systems with the CRM	Integration will all student systems
Migration of data from current CRMs to new CRM		Roll-out of digital exams solution
Implementation of a Student Portal		Training technology required to train end users in the new systems, processes
Implementation of an appointment booking solution		Upgrade to the IPFX Contact Centre system. This is currently being undertaken by Digital Solutions
Digitisation of paper forms		
Organisational design		
Changes to support new / changed technologies and processes	Rationalisation and streamlining to support new processes	Organisational change, this will form part of the University's organisational change proposal
Change proposal for the establishment of Titoko - the Centre for Student Success		Other student services
Centralisation of core functions – exam management, faculty advising, admission & enrolment, client services		
Policy Changes		
Recommendation of policy change to support changes to process and implementation of new/changed technologies	Continued recommendation of policy change to support changes to process and implementation of new/changed technologies	
Change management		
Change management associated with the implementation of new/changed technologies and processes	Continued change management associated with the implementation of new/changed technologies and processes	
Change management associated with the establishment of Titoko – the Centre for Student Success	Continued change management associated with the establishment of Titoko - the Centre for Student Success	

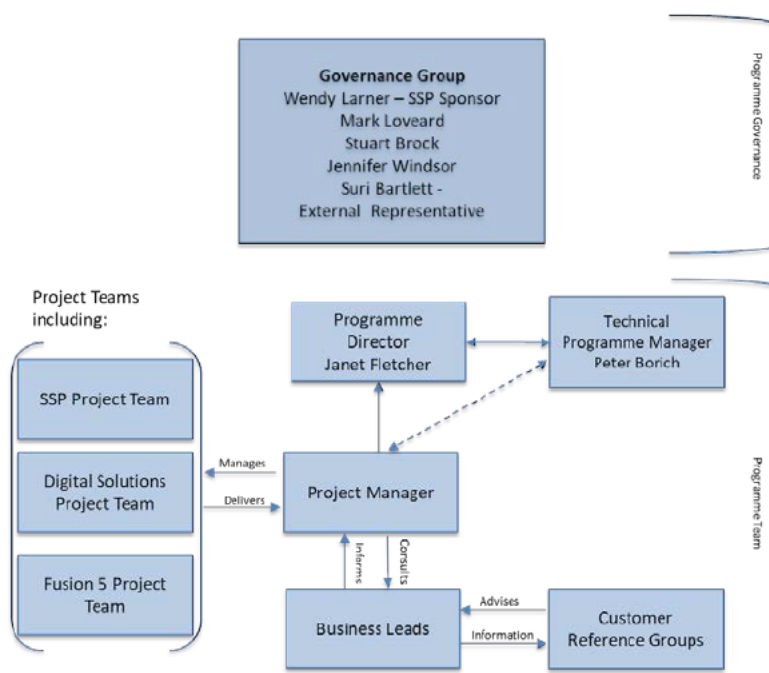
IN SCOPE - Phase 1 (2021)	IN SCOPE - Phase 2 (2022)	OUT OF SCOPE
Training		
Training tools to enable upskilling of staff and students to use the new/changed technologies and processes	Ongoing training for Phase 2 deliverables	

Project Governance

The governance group will hold the project manager accountable, provide guidance and resolution of escalated issues.

The project will be managed by a dedicated project manager reporting to the Programme Director with a dotted line to the Associate Director, Digital Portfolio Implementation. The Student Success Programme is very much business focussed with the student at the forefront of all deliverables, however SSP is dependent on technology to deliver to the scope and reap the benefits.

The programme manager role is not a full-time role however it is required to ensure the successful delivery of all interconnected projects. Given the high dependency on technology it is recommended that the Associate Director, Digital Transformation performs the role of Technical Programme Manager as he currently acts as programme manager for the delivery of the Digital Roadmap. This provides alignment for SSP with the digital road map and ensures that dependent projects are fully understood, and the prioritisation of delivery and resources are aligned to ensure the successful delivery of SSP.



Technology Architecture

Digital Solution is working with PwC on the development of an Enterprise Architecture Framework for the university. This is in its early stages however the following architecture principles have been applied to the technology components of the project to ensure they are fit for purpose, future proofed, scalable, easy to maintain and cost effective:

- *Clear responsibility* – Systems will address business needs that they are designed for and not try and do functions that they are not designed for e.g. the CRM will not do financial calculations

- *Configure vs customisation* – We will always configure where possible. If configuration is not possible then we will look to change business processes with customisation the last resort
- *Reusable components* – similar system functions will be standardised as much as possible and reused as much as possible
- *Data replication* – data will not be stored from another system unless it needs to be actioned e.g. the CRM will only store data from another system if it is using that data to action a request
- *User experience* – design principles will be based on providing a consistent user experience
- *Total cost of ownership* – technology choices and adoption will be based on a total cost of ownership model over the usable life of the technology

8 PROJECT DELIVERABLES & TIMELINE

The below are the key deliverables and milestones for the project. Please refer to Appendix 1 for the high-level implementation plan.

Key Deliverable	Date
Business case signed-off	September 2020
Centre for Student Success	
Multi-Channel Service Centre Hub Pilot complete	October 2020
Establishment Director – Centre for Student Success appointed	December 2020
Titoko - Centre for Student Success formal change proposal released	April 2021
Titoko - Centre for Student Success formal change proposal complete	July 2021
Titoko - Centre for Student Success established	August 2021
Titoko - Centre for Student Success fully operationalised	December 2022
Retention Framework	
Retention 2020 T3 Pilot complete	February 2021
2021 T1 retention programme complete	June 2021
2021 T2 retention programme complete	October 2021
Retention model built into CRM	July 2022
Retention framework expanded for year 2 and 3 students	July 2022
Admission	
Admission Proof of Concept – Statement of Work signed-off	September 2020
Admission Proof of Concept completed	December 2020
New admission system and process implemented	November 2021
New enrolment system and processes implemented	November 2022
OES decommissioned	December 2022
CRM Implementation	
Fusion 5 Statement of Work sign-off	October 2020
Future state requirements completed	March 2021
Solution architecture and design delivered	April 2021
CRM Build complete	August 2021
Train the trainers complete	September 2021
CRM phase 1 integrations complete	September 2021
User acceptance testing complete	October 2021
New CRM implemented	November 2021
CRM additional functionality implemented	November 2022
CRM phase 2 integrations complete	November 2022
Digitisation of student services complete	November 2022

Student Portal	
Analysis and RFI to select student portal vendor	December 2020
Student Portal vendor selected	December 2020
Student Portal implemented for current students	June 2021
Student Portal implemented for future students	November 2021
Student Portal implemented for post graduate students	November 2022

Dependencies:

The key project dependencies are:

- *Early identity* – Currently student identity is provided at enrolment. To enable admission at any time, student identity will need to be extended out to the point of application for admission, scholarship or accommodation. Digital Solutions is implementing an early identity solution in line with SSP requirements
- *OES remediation* – For Phase 1, the separation of the admission function will require the remediation of the Online Enrolment System (OES) which currently performs both the admission and enrolment function. This has been scoped as three months' work and will be delivered by Digital Solutions
- *Digital Solution resources* – Access to Digital Solution resources is critical for implementation of the SSP technology components. SSP timelines and resource commitments have been factored into Digital Solution resource plans.
- *Integration platform* – the ability to integrate required systems and data points as and when expected utilising the Digital Services integration platform.

9 PROJECT COMPLETION CRITERIA

Project Completed (“Done”):

The project will be regarded as “completed” when

- The new admission and enrolment processes is in place enabling students to apply at anytime
- Titoko - the Centre for Student Success is established
- The retention framework is identifying at risk students
- The CRM is being used by staff to record and reference student interactions with the university
- The portal is implemented for future and current students

Project Successful (“Won”)

The project will be regarded as “won” when

- International and domestic students are using the new admission and enrolment process to apply to the University
- Students are referring to Titoko - the Centre for Student Success for support and are being delivered a consistent level of service through multiple channels
- Students are utilising the portal to find information, track their progress and request services
- Students identified as being at risk are identified early and supported to succeed through the use of the adviser model
- Student interactions are captured within the CRM and providing meaningful data about the student journey to enable informed decision making.

10 FINANCIAL ANALYSIS

The following table outlines the Capex costs of the full project.

i. Project Budget (\$,000k) Capex from inception to completion

Project Budget	Q4-20	Q1-21	Q2-21	Q3-21	Q4-21	2020	2021	2022	Total
Cost categories:									
External Staff									
Vendor (Fusion 5)									
Technology									
Contingency									
Total Project Cost	477	855	855	805	805	477	3320	2318	6115

Total Project Capex cost is \$6,115k. This consists of:

- [REDACTED] for external project staff. This is calculated as a mix of Fixed Term and Daily rate contracts, with the assumption that Fixed Term contracts is the preference:
 - Full time Project Manager to manage the project
 - Full time Business Analyst for Admission Requirements
 - Full time Business Analyst for CRM requirements
 - Full time Data Analyst to develop a retention data model and automated reporting. This resource will be part of the PaMI team, but funded by SSP
 - Full time Change Manager for process and system changes
 - Technical Business Analysts, developers and testers. These will be sourced from the Digital Solutions Application Team and will be capitalised to the project
- Vendor Costs are estimated at:
 - [REDACTED] Fusion 5 costs to deliver the CRM and separate admission process
- [REDACTED] of technology costs:
 - [REDACTED] to implement the student portal
 - [REDACTED] to deliver an appointment booking system
 - [REDACTED] for system integrations
- [REDACTED] of contingency cost based on an average of 20% of the vendor & technology costs

ii. Project Budget Opex

Project additional Opex cost is \$842k.

There is also a requirement for additional operating costs to support this project. This consists of:

- [REDACTED] for additional licensing costs for CRM and Portal

- [REDACTED] for the new Director of Titoko Centre for Student Success
- [REDACTED] for External Governance Representation

The project will also make use of Internal resources from within the university (included as part of the NPV analysis below):

- Programme Coordinator
- Business leads for retention, admission and enrolment and exam centralisation
- CRM Specialist
- Organisational Change manager
- Communication Manager
- Trainer

Project Value

Student Success Programme		2020	2021	2022	2023	2024	2025	Total
Total EFTS	#	0	0	0	0	0	0	
EFTS Revenue	\$,000							
Other Revenue	\$,000							
People and Operating	\$,000							
Occupancy Costs	\$,000							
Capital Expenditure	\$,000							
Terminal Value	\$,000							
Net Cash Flow	\$,000							
NPV of Net Cash Flow at 6%								
NPV (Incremental Basis)								
Net Profit/(Cost)	\$,000							

The financial analysis reports that the proposal has the highest incremental value and will provide a positive return at a discount rate of 6%, making it a compelling investment opportunity/option.

The key assumptions are:

- The Student Success Programme will not begin to realise benefits until 2022 when a complete year of retention and admission initiatives have been in place
- As a result of the retention workstream, there will be an increase of 2% of first and second year at risk students retained from 2022 onwards
- For retention, the revenue has been calculated using the attrition rate on the basis that a 1% decrease in attrition equates to a 1% increase in retention
- The numbers for retention only focus on the retention of domestic students as the attrition rate for international students significantly lower at 6%
- As a result of separating the admission and enrolment processes, there will be an increase of 1% to the conversion rate from admission to enrolment
- The impact of Covid-19 will not materially impact domestic enrolments
- The increase in revenue numbers have been provided by PaMI based on the above assumptions.
- At this stage, no estimate about staff reductions undertaking transactional work has been made. This will become clearer during 2021

- It is recognised that efficiencies with digitations of processes and centralisation of services will reduce headcount in some areas resulting in costs savings. The level of reinvestment to high value services will be a decision for the University
- An annual CPI adjustment of 1.5% has been used for the NPV.

11 RISKS

The following table identifies key risks to the success of the proposal and how these risks are intended to be mitigated. The residual risk is considered to be medium by the project team.

Description of Risk	Inherent Risk Level Likelihood x Impact	Mitigation Strategy	Residual Risk Likelihood x Impact
Resistance to change impacts and delays the establishment and effectiveness of Titoko - the Centre for Student Success	High likelihood and moderate impact	Ensure early communication clearly stating the benefits and key drivers. Open consultation and feedback around proposed changes Leadership and championship from senior leaders	Moderate likelihood and low impact
Resistance to change reduces the effectiveness of the project goals and objectives	High likelihood and moderate impact	Effective governance and project championship from senior leaders Fostering of key stakeholders to be champions for the project Strong change management encompassing all of the University. Consistent and ongoing communication and messaging highlighting the benefits and key drivers for the project	Low likelihood and low impact
There may be resistance to the adoption of new technology and processes limiting the success of the programme	Moderate likelihood and moderate impact	Customer led design involving key stakeholders throughout the university and utilising their expertise Fostering of key stakeholders to be champions for the project Full user acceptance testing and training	Low likelihood and low impact

		programme as part of implementation	
The degree and complexity of system integrations required could delay the project delivery	Moderate likelihood and high impact	Integrations for each phase have been identified and are clearly understood SSP chosen technology aligns with the digital roadmap and the University's IT architecture The integration requirements have been costed as part of this project	Low likelihood and low impact
Under estimation of the complexity of the admission processes may lead to an increased timeline for the development of the required technology and process changes	Low likelihood and high impact	The current admission and enrolment processes have been fully documented and agreed with the admission and enrolment teams Early proof of concept to confirm understanding of the scale of the complexity	Low likelihood and moderate impact
The project exceeds forecast budget	Low likelihood and moderate impact	Closely monitor budget via monthly governance and quarterly reporting Early identification of significant budget overrun to be mitigated by reviewing scope and/or change request Contingency included in budget Working with all vendors as partners to ensure outcomes are achieved within agreed budget	Low likelihood and low impact
The project is perceived as excessive by university staff given the financial impact of Covid-19 on the university	High likelihood and medium impact	Effective governance and project championship from senior leaders The project will clearly articulate the benefits and value derived from the project through communication, change management process	Moderate likelihood and low impact

		and the value proposition.	
Covid-19 may impact the benefits realised by this programme	Moderate likelihood and moderate impact	Accept the risk. The retention numbers only consider the domestic market which should not be materially impacted by Covid-19 The benefits realised from increased admissions have not been considered until 2022	Moderate likelihood and low impact

12 BUSINESS CASE SUBMISSION SIGN-OFFS

Project Manager

Confirm to best of my knowledge this business case is complete and accurately captures all costs, benefits, risks and other aspects pertaining to this investment decision.

Name: Corinne Smail

Signature: 

Date: 16/9/2020

Sponsor

Confirm that I have reviewed and support this business case and will take accountability for monitoring the project execution and the realisation of the anticipated project benefits and outcomes.

Name: Wendy Larner

Signature: 

Date: 16/9/2020

13 BUSINESS CASE ASSESSMENT SIGN-OFFS

Project Owners are encouraged to informally discuss the business case early in the process and throughout with Finance, but the formal receipt date will not commence until Submission sign-offs above have been completed).

Date business case received for assessment: 3/9/2020

Date Finance Review completed: 10/9/2020

Signed: Clinton Jenkins, Associate Director, Planning and Performance Management

14 APPROVALS

Confirm that the Business Case (including the one-page Finance review) have been considered and approved by the applicable approvers as detailed below:

	Applicable	Date Approved
Individual Authorised by the Delegations Statute: Name:	Y/N	
SLT	Y/N	22/09/2020
Finance Committee	Y/N	
Council	Y/N	

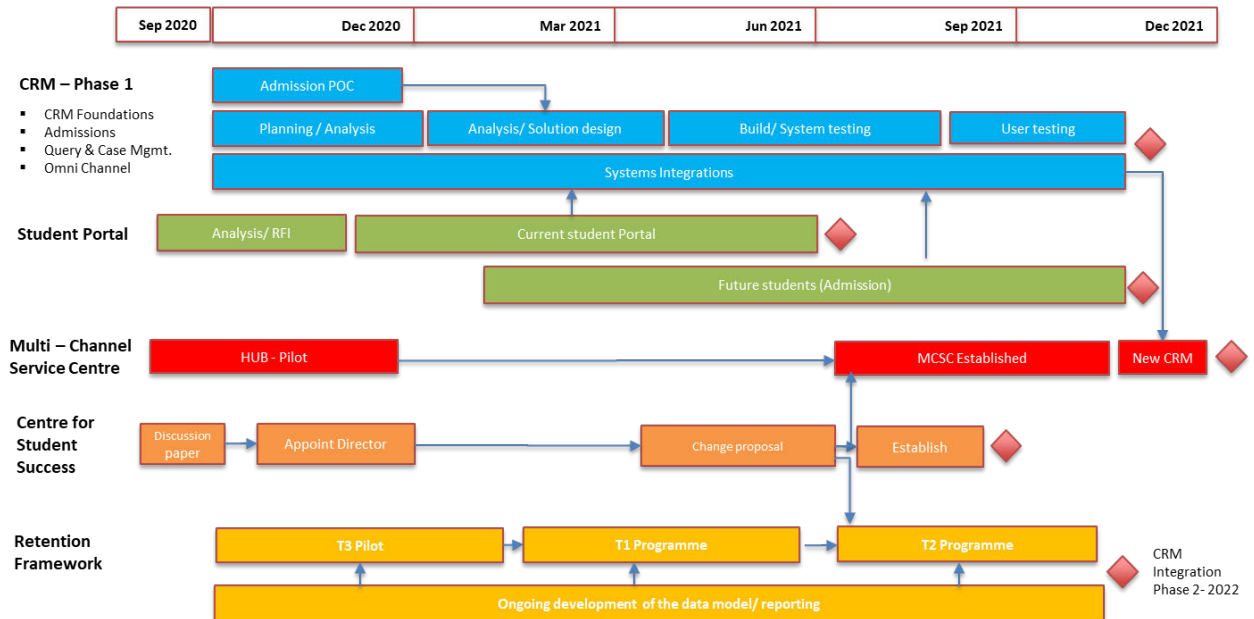
15 APPENDIX 1 – BENEFITS

Benefits are realised when:	Measure
Students can apply for admission to programmes when they want	<ul style="list-style-type: none"> • The admissions process is separated from the enrolments process • Student applications for admission are received all year round
Students receive offers of admission in a timely manner	<ul style="list-style-type: none"> • 90% of undergraduate students receive offer of admission in < 2 days
Students and Agents utilise the online admission process	<ul style="list-style-type: none"> • 100% of admissions able to be received online • 100% of enrolments able to be received and processed digitally
Students are satisfied with the admission and enrolment process	<ul style="list-style-type: none"> • Student Voice response to “I felt the enrolment process went well for me” stabilised at 75% • Student Voice response to “Enrolment was well coordinated across the whole university” is raised from 61% to 70%
There is an increase in completed student applications	<ul style="list-style-type: none"> • Enrolments increase by 1.0% annually which equates to \$1.2 million per year
Data model and early alerts system identifies 'at risk' students	<ul style="list-style-type: none"> • 24% reduction in number of students suspended or excluded from the University
Retention model is sensitive to specific needs of each student cohort (e.g. Pasifika and Maori)	<ul style="list-style-type: none"> • Targeted and differentiated support for each cohort of students is provided
There is an increase in student retention rates	<ul style="list-style-type: none"> • 1% increase in retention rate (both first year and overall). This equates to approximately 243 EFTS, and \$4.0 mil over 3 years.
All relevant interactions are captured throughout the student lifecycle	<ul style="list-style-type: none"> • 100% of agreed student interactions recorded in the CRM
Students know about and can access the services and support available	<ul style="list-style-type: none"> • Reduction in general information enquiries by 20% <ul style="list-style-type: none"> ○ Reduction in face to face enquiries ○ Reduction in email enquiries
There is a demonstrable improvement in the delivery of student services	<ul style="list-style-type: none"> • 90% resolution of enquiries at first point of contact • Student satisfaction with Service Centre is improved to 90% satisfaction
Students can request services online using self-service portal	<ul style="list-style-type: none"> • All in scope student administration forms are online • All student services are able to offer online appointment booking
The cost of provisioning student services is reduced	<ul style="list-style-type: none"> • Number of service points (including counters, emails and phone numbers) reduced by 50% • Number of appointments booking systems reduced by 80% • Number of reporting lines for client services roles consolidated
Students are satisfied with the service and support they receive	<ul style="list-style-type: none"> • Student satisfaction on advising is improved

Benefits are realised when:	Measure
Staff value their role in supporting students	<ul style="list-style-type: none"> • Staff satisfaction >85%
The foundations for a continuous improvement programme are established	<ul style="list-style-type: none"> • Student CRM implemented to manage the student journey • Titoko – the Centre for Student Success established, and core functions centralised e.g. exams • Core student processes are digitised and streamlined

16 APPENDIX 2 – HIGH LEVEL IMPLEMENTATION PLAN

The following is the high level implementation plan for Phase 1 of the project.



Note: The implementation plan for Phase 2 of the project will be included in the Business case update in late 2021.