

MITPO Project Closeout Report

Project Name: ND SAMS (State Aid Management System)

Institutions: NDUS

Business Unit/Program Area: System Office

Project Sponsor: Brenda Zastoupil

Project Manager: Patricia Johnson

Schedule

Schedule Objectives					
Met/ Not Met	Original Baseline Schedule (in Months)	Final Baseline Schedule (in Months)	Actual Schedule (in Months)	Variance to Original Baseline	Variance to Final Baseline
Met	11	-	11	2.8% behind	-

Cost

Budget Objectives					
Met/ Not Met	Original Baseline Budget	Final Baseline Budget	Actual Costs	Variance to Original Baseline	Variance to Final Baseline
Met	\$1,197,370.36	\$1,197,370.36	\$1,180,550.51	1.4% under	1.4% under

Scope

Number of baseline deliverables.	12
Number of deliverables delivered at project completion.	12
Number of scope changes in the post-planning phases.	2

Major Scope Changes
<ol style="list-style-type: none"> The addition of the MN-ND Reciprocity program. Post-implementation & no cost. The licensing model has been revised to flat Unlimited Users, with additional cost.

Project Objectives	Met/Not met	Measurements
1.1 Deploy the ND SAMS solution	Met	1.1.1 All eight identified ND state-funded scholarships and loan repayment programs will be processed at Go Live in ND SAMS using an administrative portal.
	Met	1.1.2 The number of manual steps outside ND SAMS needed to process scholarships and loan repayments will be reduced by 75%. There are currently sixteen identified manual steps needed in other applications as part of the current process.
	Met	1.1.3 At Go Live, ND SAMS will have an integration with PeopleSoft Financials to process scholarship and loan repayment financial transactions.
	TBD*	1.1.4 Six months after Go Live, the manual file systems containing scholarship and loan repayment information will be reduced by 90%;

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		the data will be entered into the ND SAMS system or destroyed per retention guidelines.
1.2 Deploy a unified applicant portal for all programs.	TBD*	1.2.1 At Go Live, applicants can create a profile, apply for scholarships, track the status of applications, and accept offers using ND SAMS. **accept offers are later in the cycle
	TBD	1.2.2 At Go Live, applicants can upload and store required documentation such as transcripts within ND SAMS which could be used for multiple applications.
	TBD*	1.2.3 Six months after Go Live, 90% of all applicable applications are submitted via the ND SAMS portal instead of the need for manual input by NDUSFAO staff.
1.3 Deploy a unified institutional portal for all programs.	Met	1.3.1 At Go Live, institutions (11 NDUS and 19 non-NDUS) will have access via one portal for all transactions they are responsible for as part of state-funded scholarship and loan repayment programs.
	Met	1.3.2 At Go Live, institutions will have real-time access to data changes via one portal for all transactions they are responsible for as part of state-funded scholarship and loan repayment programs.
	TBD*	1.3.3 Six months after Go Live, 100% of institutions identified above will interact with the NDUSFAO using the institutional portal.
1.4 ND SAMS system will implement automated notifications based on workflows.	Not met	1.4.1 At Go Live, 80% of the NDUSFAO communications are accomplished using ND SAMS instead of sending out manual letters or emails outside ND SAMS *50% currently
	Not met	1.4.2 At Go Live, administrators will receive notifications when they have tasks to complete as part of processing applications.
1.5 ND SAMS will keep track of all payment transaction details	Met	1.5.1 At Go Live, administrators will use ND SAMS, which is integrated with NDUS PeopleSoft Financials, for all payment transactions.
	Met	1.5.2 At Go Live, NDUSFAO administrators will use ND SAMS to balance all payment transactions with the NDUS Institutions' Business Office, who will have institutional portal access in ND SAMS.
1.6 ND SAMS will contain award data for all programs, including past award amounts, and a robust reporting capability for using this data	Met	1.6.1 At Go Live, administrators will use ND SAMS to view individual student total aid awarded by year and lifetime
	TBD*	1.6.2 Within 6 months of Go Live, NDUSFAO staff will use ND SAMS to run pre-delivered (canned) reports and can create ad-hoc reports without needing CTS support.
2.1 ND SAMS allows NDUSFAO and/or CTS the ability to set up newly identified state-funded programs.	TBD	2.1.1 At Go Live, NDUSFAO and/or CTS can set up a newly identified state-funded program, or update existing ones, within two months of being notified of the changes.

Number of success measures identified in the Project Charter that were satisfied or achieved at project completion.	7 of 12* *4 @ TBD at 6 months **TBD later in the annual cycle
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The following metrics to be revisited in approximately six months:

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- 1.1.4, 1.2.1, 1.2.2, 1.2.3, 1.3.3, 1.4.1, 1.4.2, 1.6.2, 2.1.1.

Lessons Learned

In the RFP and contract development process, be very careful on wording and expectations, & include examples if needed to add clarity.

Be realistic about the time commitment. Alex, Kristin, and Brenda logged over 420 hours from October 2023 through Go-live. In addition, OT hours needed to be approved. While it was listed in the RFP response, the answer wasn't clear.

Having a strong team on both sides is critical.

It was great to have quality dedicated time for requirements gathering early in the project.

UAT was a challenge which could be attributed largely to lack of familiarity with the system.

Users of a database should be the ones to provide the extract.

Make sure the expectations of security are clear. It was explicitly expressed in the RFP and demos that Kristin, Alex, and Brenda needed the ability to make simple adjustments (i.e.-edit a letter) and to impersonate a user. This inability has drastically tied our hands.

If converting multiple programs in multiple databases, start the clean-up process years in advance of expecting a system change.

Conversion data not completed from what was provided by NDUS FAO from databases. Not sure if this is an extract issue or the data just wasn't converted.

Conversion verification was not effectively performed until post go-live, and it is great that the project team collaborated to get things cleaned up so quickly.

Data conversion was challenging, in part due to changes in vendor resources, and continues to be an issue that is being addressed post go-live.

Success Stories

I think the turn-around time for getting the system up and running was a narrow window and I think it got done quickly for implementation.

By pushing the AP vouchers into PS versus manually this should save the Accounting Team many hours of manual work.

All programs are processed within ND SAMS, and we have issued payments in all programs.

Accounting processes have been streamlined, saving time by eliminating steps & reducing manual work.

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Institutions can interact with ND SAMS, and we have not heard of major issues from institutions. We met with UND and were able to make some suggested improvements.

Enrollment verifications have been working.

The Accounting Team's processes have been reduced/streamlined.

NDCB annual verifications have started in ND SAMS and appear to be working and is a reduction in paperwork.

Overall, paper has been drastically reduced.

Applicants can apply for programs in one spot and using one process.

CTS is starting to learn the system and are making edits in ND SAMS.

There is no need for manual tracking of payments on both the FAO and Accounting side.

The system is configurable. This has been demonstrated by the changes already implemented.