

Action Project Status Report for “Knowledge Management System- II”

AQIP Category 8 Planning Continuous Improvement

Project Kickoff: 10-15-2010
Target completion date: 11-15-2011
Status Report: 8-15-2011

Describe the accomplishments to date and the current status of this Action Project:

Year two of the Knowledge Management System (KMS) – Part II Action Project saw the completion of version one of the NMU Executive Dashboard, a tool that will be used to monitor Key Performance Indicators (KPIs) and identify operational issues. The Dashboard presents KPIs in the areas of Enrollment, Student Success, Finance, Human Resources and Diversity. Located at the NMU AQIP action project page webb.nmu.edu/aqip/SiteSections/ActionProjects/KMSpartII/KMS_PartII.shtml is a snapshot from the Enrollment page of the Dashboard.

Specifically, the following tasks were completed during year two of this project:

- Upgraded existing Cognos software to take advantage of enhanced charting capabilities.
- Purchased additional software tool to enhance metrics and trending capabilities (Metric Studio was purchased, IT staff received training).
- Refined the Enrollment and Student Success Key Performance Indicators (KPI) that were identified in year one of this project.
- Developed KPIs for Financial Resources and Human Resources.
- Added a Diversity KPI category to support the Roadmap’s endorsement of diversity for students and employees.
- Developed the underlying database to support the KPIs.
- Developed a prototype dashboard page for each area.
- Held stakeholder review meetings and revamped the financial and human resource indicators.
- Identified the optimal ‘drill down’ for presenting additional levels of data.
- Tested and verified data for all Financial KPIs (Revenues and Expenses, Grants, Healthcare Costs and Utilities Expenses).

The Action Project will be closed and work on this project will continue within the regular duties of IT.

Describe how the institution involved people in work on this Action Project:

The team working on the KMS project was made up of eight staff members that included the Vice President of Finance and Administration, the Associate Vice President of Institutional Research, the Dean of Graduate Studies, a special project consultant who was working for the President and several Information Technology (IT) staff members, each with data expertise and knowledge. This KMS Team identified and monitored the overall KMS implementation strategy – the first dashboard would be used to identify issues that may need further investigation and action.

The IT staff members met several times each month to review progress and identify the next set of goals. Three overall progress review meetings were held with the KMS team during the year. When the financial KPIs were identified, the IT team worked with the University’s Budget Director and a Senior Financial Analyst to review, test and validate the financial data. The IT team also met with the Director of Human Resources to gather input regarding Human Resource KPIs.

The final dashboard review meeting with the Vice President of Academic Affairs and the Vice President of Finance and Administration is scheduled for August 15, 2011. The rollout of the Dashboard will be discussed with the Vice Presidents and a plan will be identified.

Describe your planned next steps for this Action Project:

The official Action Project will be concluded by September 1, 2011 once the final dashboard review meeting is held with the Vice Presidents and the roll out plan is discussed and identified, but there is much more work to be done in this area. The next dashboard development will be in the area of benchmarking. A plan and timeline for creating a benchmarking dashboard is being developed and will be established by September 30, 2011. Data from the Higher Education Institutional Data Inventory (HEIDI) will be used to present information that shows how NMU compares to its Michigan peers.

Describe any "effective practice(s)" that resulted from your work on this Action Project:

- Spend the most time developing the key performance indicators – they are the basis for what you want to measure.
- Prototype dashboard pages should be created to present a starting point to work from.
- Standards for presenting the data on dashboard pages were identified and are now part of NMU’s Dashboard Best Practices.
- Although IT has the software expertise to build a KMS, the data subject matter experts should be involved from the beginning of the project to assist with testing and data validation.

What challenges, if any, are you still facing in regards to this Action Project? If you have already fashioned strategies to deal with any challenge you face, share both the challenge and your strategy for meeting it.

One challenge that will be faced regarding this action project is meeting the demand for enhancing NMU’s Knowledge Management System. Many benchmarks identified in a 2008 Benchmarking Action Project are to be reviewed for inclusion as a KPI in this dashboard system. It is an ongoing process.

