

TECHNOLOGY SOLUTIONS CASE STUDY



Skidmore College Transitions to Oracle Fusion Cloud Financials, HCM, and Payroll

SKIDMORE COLLEGE

Skidmore College (the “College” or “Skidmore”) was founded in 1903 and is an independent, not-for-profit, nonsectarian, four-year coeducational and predominantly residential college. With approximately 2,500 full-time equivalent undergraduate students and with approximately 300 full-time equivalent faculty, Skidmore is known as a highly ranked, residential liberal arts college and is consistently acclaimed in national rankings.

The College is located on approximately 1,500 acres in Saratoga Springs, New York, a bustling small city with nightlife, galleries, shops, parks, coffeehouses and restaurants. Dubbed the “Spa City,” it is known for its focus on health, its history and its horses—at the nation’s oldest operating thoroughbred racecourse. The College is an integral part of

the local artistic and cultural community, including the Saratoga Performing Arts Center, which serves as the summer home to the New York City Ballet, Philadelphia Orchestra and a performing venue for top rock and jazz musicians. Saratoga Springs is also home to the National Museum of Dance. Located on the College campus are the Tang Museum, which is recognized nationally for its creative programs, and includes major exhibition galleries and event space in addition to serving as a teaching museum, and the Arthur Zankel Music Center, recognized for its acoustically tuned 600-seat performance hall with a unique glass wall, and its programs.

Skidmore offers more than sixty degree programs, including majors in both traditional liberal arts disciplines and pre-professional areas. The College has identified English, business, psychology, political science, economics, studio art, theater, biology and environmental science as the most popular majors. Most majors have corresponding minors. There are also minors in arts administration, intergroup relations, Chinese, Italian, Japanese, Black studies, Latin American and Latinx studies, and media and film studies.

INITIAL CHALLENGES AND SELECTION

Dwane Sterling, Chief Technology Officer at Skidmore College, reports that upon arriving at Skidmore College in June 2019, the institution was using Oracle's legacy E-Business Suite for financial management (finance), human capital management (HCM), and payroll. The system was heavily customized, paper intensive, and maintaining it was highly resource intensive. The system also lacked flexibility and support for a modern user experience (mobile and social).

When Sterling joined Skidmore, the College was already starting to think about cloud modernization. It was apparent that Skidmore was ready to move to a modern cloud solution to achieve the College's technology vision of openness and versatility, using modern processes, workflow, and automation. Key factors that influenced the transformation were the need for a modern user experience, to move away from customizations to configurations that would be more manageable to maintain, and to modernize and streamline business processes.

Skidmore published an RFP in 2019 for modern, cloud-based finance, HCM, and payroll systems and received bids from several vendors. Then Sterling and the team narrowed the selection to three vendors and ultimately selected Oracle's Fusion Cloud suite of finance, HCM, and payroll applications. Skidmore was drawn to the Oracle Fusion Cloud solution because the applications are functionally strong, the product suite is broad and deep for a feasible total cost, and it integrates with Skidmore's existing technology environment. Skidmore signed a contract with Oracle in 2019 and also contracted with Drivestream to provide implementation services.

Initial challenges found the legacy system was heavily customized, paper intensive, highly resource intensive to maintain, and lacked flexibility for a modern user experience.



IMPLEMENTATION

Skidmore began implementation in January 2020 and went live with Oracle Fusion Cloud Financials, HCM, and Payroll in January 2021. The Skidmore team worked closely with partners Oracle and Drivestream to implement the platform. At the beginning of the implementation, Drivestream provided Skidmore with a project manager supported by a team of stateside subject-matter experts and augmented by Drivestream's offshore technical team. Internally, Sterling hired a full-time project manager who was devoted to the implementation. Sterling also assigned an existing IT Manager and Skidmore's Senior Database Administrator to work full time on the Oracle Fusion Cloud implementation. Finance and Human Resource staff members dedicated an extraordinary amount of time to this project while still performing their regular duties. Sterling reports that while he was initially wary of the idea of working with two different companies, he was pleasantly surprised to find that Drivestream and Oracle had a tight synergy and constantly communicated behind the scenes. Oracle tracked the project and worked directly with Drivestream to address concerns, ensuring the College hit milestones in alignment with the agreed-upon timeline.

According to Sterling, data conversion was the most challenging part of Skidmore's Oracle Fusion Cloud system deployment, and institutions deploying a new enterprise system should focus on data conversion as early as possible. In Skidmore's experience, the migration process involved heavy manual labor as data migration automation tools were less helpful due to the age and customization of the College's legacy system. The Skidmore team migrated approximately six months of transactional data and two years of aggregate data to the Oracle Fusion Cloud systems. Skidmore continues to run its legacy E-Business Suite platform in an unsupported capacity to provide access to historical legacy data.

LESSONS LEARNED AND BEST PRACTICES

Sterling recommends that other institutions pursuing a similar journey invest in change management and prioritize the marketing and socialization of the new system across the institution by starting early in the project. He underscores that staff begin technology projects with varying levels of preparation for change, and it is up to campus leaders to set expectations on the level of change and disruption that staff will experience when transitioning to a new system. It is important to communicate the long-term vision of the project and delineate what tools and functionality will be available to staff. This enables them to begin learning the new tools as soon as possible. The more information staff have, the sooner they will envision the types of opportunities and benefits the technology will provide.

Sterling notes that deploying new enterprise administrative applications requires staff with different backgrounds to work together. For example, staff members who have deep expertise in process development need to work closely with technical and functional subject-matter experts. Project leaders should forewarn staff of difficulties that can occur when deploying a new enterprise system. When enterprise applications are initially deployed, processes may slow due to the learning curve and associated mistakes as staff learn what works best for them. Sterling points out that since cloud solutions are configurable and not customizable, Skidmore was not able to translate all its previous customizations to the new system, which has led to some required process changes.

Investing in change management and prioritizing the marketing and socialization of the new system early in the project is strongly recommended.

Sterling also warns that managing resources for an enterprise-wide system implementation can be challenging. He encourages leaders to thoroughly analyze their staff and skillsets during the early planning stages to evaluate which existing employees can take on project work and which positions will need to be acquired. Sterling notes that while his implementation team began the Oracle Fusion Cloud deployment with optimism, staff understandably started to experience burnout over the course of the year. The final months before go-live were the most stressful, and institutions should plan for an intensive all-hands-on-deck effort in the last few months before the go-live date.

Finally, Sterling reports that a new system will not be 100 percent perfect on day one of go-live. He sees go-live as an initial state that the institution continues to improve upon and enhance. Skidmore went live with a base set of functionalities and over the past year has continued to enhance existing functionality and add new functionality. He notes that there will still be

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significant work required after going live with a new ERP as the system requires ongoing adjustments and enhancements. An ERP system is actively changing by the second, and the longer a problem exists, the more complicated it will be to resolve it. Thus, it is crucial to prioritize and correct any issues as soon as they are identified. To bolster Skidmore's capacity to support its staff as they transition to the new system, the College has extended its support contract with Drivestream for another year. As of January 2022, Sterling reports that his team meets with its Drivestream Support Lead weekly.

BENEFITS

According to Sterling, the most significant benefit of the Oracle Fusion Cloud solution suite is its versatility and ability to scale with the thought processes of its functional users. Staff members are no longer working with manual paper-intensive processes or confined in their abilities to make operational decisions, update processes, and create efficiencies. As functional staff learn and grow more accustomed to the platform, they gain more control over their workflows and can more flexibly create changes in the system without relying on IT expertise.

Sterling also reports that because Oracle rolls out quarterly updates, Skidmore has transitioned to a regular cadence of updating the Oracle Fusion Cloud system. In the past, Skidmore often put off updates because they were too disruptive to implement. In turn, staff now benefit from an up-to-date streamlined user experience that allows them to incorporate workflow and automation into their processes. Skidmore is also benefiting from the native integration and unified data model between modules within the Oracle Fusion Cloud suite. The deployment fits into Skidmore's overall effort to declutter its environment by identifying inefficiencies and centralizing processes within less systems.

REFERENCES

As part of this research, Tambellini briefed with Dwane Sterling, Chief Technology Officer at Skidmore College. Tambellini also used publicly available information for this study.

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