Action Project Final Report for
“Knowledge Management System-Part II”

AQIP Category 8 Planning Continuous Improvement

Project Kickoff: 10-15-2010
Target completion date: 11-15-2011
Final Report: 11-1-2011

1. What is the primary reason for closing this project?

The official Knowledge Management System (KMS)- Part II Action Project is being concluded. While there is much more work to be done in this area, the majority of the goals of this multi-year, multiple phases Action Project are fulfilled. “Knowledge management system –Part II will conclude a 2009 Action Project through the systems development, pilot testing, training and implementation phases of a new information system. In this follow-up action project, the KMS dashboard design must be finalized, the system fleshed out from the prototype and pilot tested by users to evaluate and modify the system. Developing key performance indicators and trend information for financial metrics identified in KMS-Part I will be the focus of the pilot.” The annual report for this project lists accomplishments and reviewers’ comments indicate fulfillment – “The university should be acknowledged for seeing this project through from inception to its closure and forethought given to potential iterations for future development.”

We feel confident that the KMS development will continue within the normal workload of the Information Technology Department. Now that the Financial Key Performance Indicators (KPI) segment was piloted and implemented, the next dashboard development will pursue Michigan peer benchmarking using the Higher Education Institutional Data Inventory (HEIDI). As a first step with HEIDI, staff in the IT division are working with staff in the Finance division to report indicators on overall and category expenditures per FYES in comparison to state averages. Many other identified HEIDI indicators will be included as we progress. A plan and timeline for creating a benchmarking dashboard is being developed by Financial Planning and Information Technology units; it will be established by November 30, 2011.

2. What aspects of this project would you categorize as successful?

Presenting data in this way is very desirable because it provides a simple, quick picture of very important data. A snapshot from the Enrollment page of the Dashboard is located at the NMU AQIP action project page webb.nmu.edu/aqip/SiteSections/ActionProjects/KMSpartII/KMS_PartII.shtml. The continued expansion of the Dashboard has the potential to aid all Categories’ results and analyses.

During the pilot and to assess outcomes upon conclusion, the Action Project team verified generated results to ensure correct computations and that all data assumed to be in the dataset actually were included. The presumption that the ability to drill down from highly summative data into its components was confirmed as useful, but not necessarily to the smallest particle. Context remains important for KPIs. The importance of evaluating pilot tests and analyzing results were lessons learned applicable to all major projects.
Further staff professional development training was done at the 2011 Cognos Conference, “Information On Demand.” By completing the KMS Action Project, a great deal of expertise was developed in use of the software tools, presentation of the data and identifying KPIs. This expertise provides the foundation for expanding NMU’s KMS to meet future demand and opportunities. A successful process is in place allowing us to move forward on the next round of key performance indicators incorporation into the KMS – that of Michigan peers benchmarks.

In comments to the Annual Update, reviewers suggested obtaining external input and use of a Michigan peer as an external consultant. In developing its own dashboard and KPIs, NMU looked at what other organizations display as dashboards – specifically the State of Michigan and Eastern Michigan University. Prior to AQIP submission, the Assistant Vice President & Executive Director of Institutional Research & Info Management at Eastern Michigan reviewed the NMU Action Project Proposal. The reviewers’ suggestion for further consulting and collaboration is appropriate and achievable. NMU has begun to share its experiences on knowledge management systems. Since the initial KMS Action Project in 2009, NMU administrators of Finance and Information Technology delivered two presentations at national conferences: “Building a Smarter Campus” at Educause and “Our Journey from Reporting to Business Intelligence” at SunGard Summit. Talks with Lake Superior State University and Michigan Technological University representatives on the subject of IT and KMS were initiated in 2011 and continue with the intent to help and collaborate with them. This cooperation relates to both Categories 8 and 9.

3. What aspects of this project would you categorize as less than successful?

Some KPIs still must be mapped to the Road Map to 2015 (strategic plan) benchmarks and external reporting requirements, and finalized by the data advisory board. Information Technology (IT) progressed steadily on this very large system. However, the complexity of the software, the retirement of a key IT staff member, and the limited schedules of administrators needed for key decisions slowed the Action Project timetable. It is a slower process than anticipated to develop and verify all data before making them available for decision-making. Perhaps by definition it is critical that key indicators are scrutinized for accuracy and understanding their impact and implication; this inevitably takes time.