



## Furman University

Contract Negotiation and Advisory Services: Licensing and Implementation Services for Finance, Human Resources, Payroll, and Student

*“Working with The Tambellini Group helped us achieve our goal of balancing significant opportunity with the appropriate level of risk management. Between the avoided costs and lowered fees from our partners, the savings were substantial. Furman’s risk is also lowered and the institution has protections that may not have otherwise been obtained.”*



Furman University in Greenville, South Carolina, has been the recipient of numerous prestigious awards for academic excellence. Ninety-six percent of Furman's faculty hold the highest degree in their field. As one of the nation's premier liberal arts and sciences universities, Furman is accredited to award bachelor's, master's, and education specialist degrees by the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC). Furman has an enrollment of 2,700 undergraduates.

## THE CHALLENGE

Embodied in the university's new strategic vision—called The Furman Advantage—is the commitment to provide students with an unparalleled education. The vision, as articulated by Furman, "is an overarching approach to education that promises every incoming student the opportunity for an engaged learning experience that is tracked and integrated with their academic and professional goals." The Furman Advantage includes a personalized, four-year pathway to graduation guided

by a team of advisors and mentors and enhanced by high-impact, engaged learning through research, internships and study away.

The ambitious goals of Furman require an equal level of excellence in the university's academic and business processes. The Information Technology Services (ITS) Department is a vital contributor to Furman's success. A study by the Art & Science Group identified core threshold issues to "be in the game" of the increasingly competitive higher education marketplace. ITS is one of the threshold issues, and the department has stepped up to the challenge. In Furman's 2016 University IT Strategic Plan, "Prepare to Win," the department identified vital expectations that must be met: "Our community expects quality Internet and WIFI services, seamless administrative transactions, superior web services, and modern technology supporting teaching, learning, and research."

The ITS 2016 strategic plan stands as Furman's "technology game plan" that will take the university into the year 2021.



It consists of the following broad goals:

- Enhance IT communication and collaboration services
- Offer “One Furman” administrative and instructional software suite
- Partner to advance teaching, learning, and research
- Lead a “cloud-first” strategy
- Ensure appropriate IT staffing and governance

It was clear to administrators that for Furman to be among the winners in the higher education market, it would need to completely overhaul its approach to digital information systems. Furman’s administrative IT ecosystem for student information, finance, financial aid, and human resources was a tangled weave comprised of an aging legacy system (licensed in 1996) that was highly customized to compensate for its shortfalls, and had custom-built interfaces to 40 related systems. Admissions used a cloud system, and Development used a combination of cloud and on-campus systems. Furman’s IT ecosystem was plagued by shadow systems, duplication and redundancy, and excessive customizations to make information available. With information stored in functional silos, staff expended a great deal of time moving data between systems. This is not an uncommon scenario in higher education today; it is indicative of the evolving technology landscape. Those colleges and universities that are and will be most competitive in the market are working to clean house and create integrated, unified IT platforms.

Furman ITS took an interesting approach to its IT strategy. Department leaders asked their IT governance group to view IT projects like investment portfolios. In financial investment it is necessary to take some risks if you are to make significant gains in the payback. An overly conservative approach will consistently deliver underwhelming returns. Furman pinpointed identity management and information security as critical risk issues to be mitigated. Centralizing support and contract approval within the IT department would better enable Furman to balance reward and risk across all departments and services.

One of Furman’s most significant decisions was to replace its aging legacy system with a cloud solution. The core functional areas of finance, human resources, payroll, and student systems were targeted. Furman selected Workday for its cloud solution and Sierra-Cedar as their implementation partner.

## THE SOLUTION

The question remained of how to best balance the opportunities afforded by a unified cloud solution with its inherent risks. One important step taken by Furman was to engage the services of The Tambellini Group to provide advisory and contract negotiation services for this major technology investment.

The Tambellini Group brought in its partner and top legal advisor in IT contracting, Leslie Spasser, Attorney at Law at Bodker, Ramsey, Andrews,





Winograd & Wildstein, P.C., to participate in the contract review and negotiations. The two firms worked diligently with Furman ITS to review all contract specifications from both Sierra-Cedar and Workday. Furman was intent on maintaining amicable relationships with its future vendors, knowing this would benefit the university in the long run. Vicki Tambellini served as lead advisor and negotiator, enabling Furman IT to focus on building the productive vendor relationships it desired.

## THE BENEFITS

Given the core business areas affected of finance, human resources, and student services, the interests and contractual issues were complex. Negotiations took place over a ten-week period. The Tambellini Group was able to identify nearly \$2 million in savings in the first five years through avoided costs and lowered fees from Sierra-Cedar and Workday. Furman's risk is also lowered and the institution has business and legal protections that may not have otherwise been obtained. Today, Furman is poised to become a cloud-first leader in the higher education market.

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## ACKNOWLEDGMENTS

The purpose of this case study is to provide higher education institutions with information about strategic sourcing, contract negotiations and advisory services available from The Tambellini Group.

The report is based on the experience of The Tambellini Group and Furman University.

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