Statewide Common Technology Platform Task Force

August 7, 2024

Executive Summary

On August 7, 2024, the Statewide Common Technology Platform Task Force met to continue the conversation on a shared technology platform to meet student, faculty, and staff needs and what it would take to achieve it. The meeting goals were:

- Review Business Process Analysis activities, timeline, and roles and responsibilities.
- Reflect on the progress to date and explore the road ahead, including key decision points and dependencies.

Key Takeaways:

1. Task Force members reiterated the strong preference for Option 1 (Statewide Data Management Transformation) and raised concerns about the business process analysis (BPA) effort that would support further exploration of a full transformation inclusive of a Common ERP (Option 2).

2. BPA effort details were reviewed, and Task Force members voiced concerns about district and college availability and resources to support the BPA effort.

3. Task Force members reflected on the last seven months of work, including exploration of challenges and potential solutions, and narrowing future state landing points with input from associations. Initial questions about funding, incentives for districts, and viability of options remain.

4. There is a strong inclination to continue with Option 1 and despite the need in the system, concern about continuing with exploration of Option 2 via the business process analysis effort.

August 7 Session Attendees (1 of 2)

Name	Stakeholder Group	Role	College/Org
Alex Adams	RP Group / ESSR*	Senior Director, Institutional Research, Planning, and Effectiveness	Fresno City College
Chris Blackmore	CISOA / IT	Task Force Co-Chair / Associate Vice Chancellor, Information Technology & Learning Services	Riverside CCD
Rebecca Bocchicchio	CCCCIO / ESSR*	Vice President of Instruction	Sierra College
Roengsak Cartwright	CISOA / IT	Director, Information Technology	Copper Mountain CCD
Michael Dear	CCCSFAAA / ESSR*	Director of Financial Aid	MiraCosta College
Victor DeVore	CACCRAO / ESSR*	Dean, Student Services	San Diego CCD
Shawn Domingo	CCCSFAAA / ESSR*	Director of Financial Aid & Scholarships	San Joaquin Delta College
Wrenna Finche		Vice Chancellor of Fiscal Health and Accounting	CCCCO
Ann Marie Gabel	ACBO / Finance	Vice Chancellor, Business Services	South Orange County College
Barry Gribbons	All	President	LA Valley College
John Hetts	All	Task Force Co-Chair / Executive Vice Chancellor for the Office of Innovation, Data, Evidence and Analytics Office	CCCCO
Todd Hoig		Director, Management Information Systems	CCCCO
Valerie Lundy Wagner	All	Vice Chancellor, Digital Innovation & Infrastructure	CCCCO
Chris McDonald	CISOA / IT	Vice Chancellor of Educational & Technology Services	South Orange County CCD
Rian Medlin	ACHRO / HR	Assistant Superintendent and Vice President	College of the Canyons / Santa Clarita CCD
Kate Mueller	CSSO / ESSR*	Vice President of Student Services	Coastline College
Jason Parks	CCCCIO / ESSR*	Vice President of Instruction	Rancho Santiago College
Char Perlas	CEOCCC / All	Superintendent / President	College of the Siskiyous
Jerry Reyes		Region V Regional Affairs Director – Student Senate for California Community Colleges	Reedley College
Alisa Shubb	ASCCC / ESSR*	Academic Senate President, Los Rios CCD	American River College, Los Rios CCD
Michelle Smith	CCCCO	Visiting Assistant Vice Chancellor	CCCCO

*ESSR (Educational and Student Services & Institutional Research) - Stakeholder groups that interact with the student information system including Instructional Services, Counseling, Admissions, Financial Aid, Student Accounts/Bursar, Student Records, Student Support & Engagement Programs, and Institutional Research.

■ = In attendance

□ = Not in attendance

August 7 Session Attendees (2 of 2)

Name	Stakeholder Group	Role	College/Org
Gina Browne	CCCCO / ESSR*	Asst. Vice Chancellor, Office of Equitable Student Learning, Experience & Impact	CCCCO
Sharlene Coleal	ACBO / Finance	Assistant Superintendent and Vice President, Business Services	College of the Canyons / Santa Clarita CCD
Don Daves-Rougeaux		Senior Advisor to the Chancellor on Workforce Development & Strategic Partnerships	CCCCO
Jeff Dorsz		Executive Director, IT and Security	South Orange County CCD
Kevin Ruano Hernandez	SSCCC/ ESSR*	Region III Regional Affairs Director	Contra Costa College
Jacob Hurley		Associate Vice Chancellor, HR	Yuba CCD
Erick Ramirez		Community College Program Assistant	CCCCO

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Landing Point Discussion

California Community Colleges

✏️ **Discussion Points:**

- Feedback thus far demonstrates a **stronger inclination** for **Option 1**.

  - **Option 1: Statewide Data Management Transformation** - Implementation of a statewide data strategy, governance framework, and a Statewide Data Platform (SDP) that enables existing ERPs, ancillary, and third-party systems (e.g., CDE) to interoperate and to provide a unified view of the data that is intended to be shared across the system.

  - **Option 2: Full ERP Transformation + Statewide Data Management Transformation -** Modernization and enhancement of systems and operations related to Finance, HR, and Student Information. The transformation requires the pursuit of foundational initiatives such as statewide standard chart of accounts, operating model, business processes, and common course numbering, in addition to a statewide cloud-based ERP for Student, HR, and Finance systems and a Statewide Data Platform (SDP).
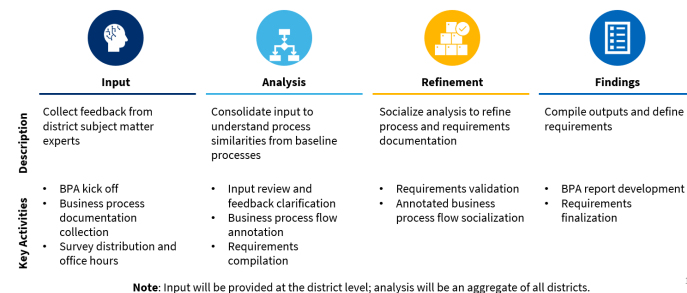
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Business Process Analysis Plan

California Community Colleges

✏️ Discussion Points:

- **More details and time are needed to make an informed decision** and Business Process Analysis aims to help answer these questions:
  - How are districts performing in relation to baseline processes?
  - What would it take for each district to move to a SaaS ERP?
  - What variations of Option 2 are possible?
  - What are the requirements for a common ERP?

- BPA will require input from district subject matter experts across **~270** HR, Finance, IT, and ESSR **business processes.** Experts would participate in surveys and have the option to submit documentation and participate in virtual office hours.
  - SMEs will reference baseline process flows to explain how their institutions differ or are similar. Baseline processes will incorporate Community Colleges contexts.

- The following was input provided on the approach:
  - The BPA effort may require more time and resources than estimated; LACCD underwent an effort to document processes and required outside support that took over a year.
  - Business processes are continuously evolving as regulatory requirements are changing. BPA will capture business processes at districts for this specific point in time.
  - If there is an assumption that colleges will adjust their business process to the baseline, it is important to note the magnitude of this effort would be.
  - Districts may not have availability to support with effort given competing priorities deadlines, and limited resources. There need to be incentives for participation.
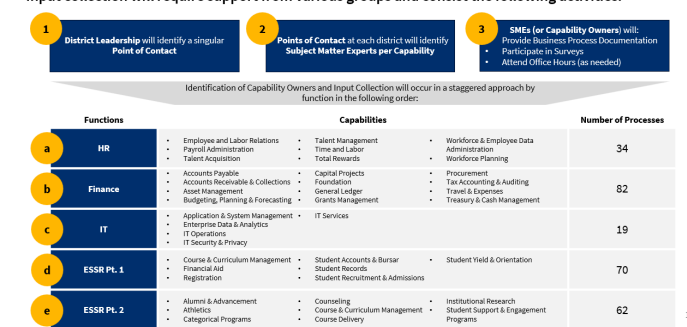
BPA Overview and Approach

BPA builds on SCTP Task Force efforts and aims to deepen our understanding of business processes to inform requirements for the statewide common technology platform. BPA will occur in four stages:

	Input	Analysis	Refinement	Findings
Description	Collect feedback from district subject matter experts	Consolidate input to understand process similarities from baseline processes	Socialize analysis to refine process and requirements documentation	Compile outputs and define requirements
Key Activities	• BPA kick off • Business process documentation collection • Survey distribution and office hours	• Input review and feedback clarification • Business process flow annotation • Requirements compilation	• Requirements validation • Annotated business process flow socialization	• BPA report development • Requirements finalization

Note: Input will be provided at the district level; analysis will be an aggregate of all districts.

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Input Phase - Details

Input collection will require support from various groups and consist the following activities:

1	**District Leadership** will identify a singular **Point of Contact**
2	**Points of Contact** at each district will identify **Subject Matter Experts per Capability**
3	**SMEs (or Capability Owners)** will: Provide Business Process Documentation Participate in Surveys Attend Office Hours (as needed)

Identification of Capability Owners and Input Collection will occur in a staggered approach by function in the following order:

	Functions	Capabilities			Number of Processes
a	HR	• Employee and Labor Relations • Payroll Administration • Talent Acquisition	• Talent Management • Time and Labor • Total Rewards	• Workforce & Employee Data Administration • Workforce Planning	34
b	Finance	• Accounts Payable • Accounts Receivable & Collections • Asset Management • Budgeting, Planning & Forecasting	• Capital Projects • Foundation • General Ledger • Grants Management	• Procurement • Tax Accounting & Auditing • Travel & Expenses • Treasury & Cash Management	82
c	IT	• Application & System Management • Enterprise Data & Analytics • IT Operations • IT Security & Privacy	• IT Services		19
d	ESSR Pt. 1	• Course & Curriculum Management • Financial Aid • Registration	• Student Accounts & Bursar • Student Records • Student Recruitment & Admissions	• Student Yield & Orientation	70
e	ESSR Pt. 2	• Alumni & Advancement • Athletics • Categorical Programs	• Counseling • Course & Curriculum Management • Course Delivery	• Institutional Research • Student Support & Engagement Programs	62

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Test Survey (1 of 2)

California Community Colleges

✎ Discussion Points:

- A **test survey** was distributed to **17 participants across** the state. Feedback is being given on survey structure, flow, and relevance and refinements will be made in preparation for statewide distribution.

  - Initial input from Task Force members who participated noted survey completion is a **low effort request.**

- Survey participants access a link to the survey and have a reference guide with baseline processes. They follow these steps for each relevant process:

  - Select process flows steps that apply to their college or district.

  - Provide input on the sequencing of these steps at their college or district.

  - Identify groups involved in this process and which steps they support at their college or district.

  - Note which technologies may be used in these steps if they are different from the baseline.

  - Mark automated vs. manual steps.

Test Survey

A test survey was sent to a select group of participants across various colleges on August 2 to gather feedback to confirm surveys are concise and intuitive before statewide distribution.

Overview		
Participants focused on reviewing surveys for: • Functionality and flow are easy to follow • Content is relevant and understandable	**Four (4) surveys** covering eight (8) processes across functions: • HR: Talent Acquisition • Finance: Accounts Payable • IT: IT Services • Educational Services (ESSR): Admissions	**17 participants** from these districts and colleges: • Fresno City College • Riverside Community College and District • San Diego Community College District • State Center Community College District

Thank you to Task Force members who helped identify test survey participants!

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Test Survey Demo

7

Test Survey (2 of 2)

✎ Discussion Points:

- Overall, there was **some** support for the **survey**, but there are **concerns** about the **level of detail and complexity** colleges have and the **effort needed from SMEs** to capture this information. Task Force member feedback on the survey also included:

  - Task Force members would benefit from seeing surveys that apply to their specific area.

  - Process flows need to be further refined to include additional community college nuances.

  - Consider reframing the question about automated vs. manual steps as there may be nuanced situations and participants may be unable to answer it.

  - An additional option is to take inventory of existing systems and software and how they are used to inform the possibility of integrations.

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Test Survey Demo

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Progress To Date and the Road Ahead (1 of 2)

✏️ **Discussion Points:**

- Since the first Task Force meeting in February 2024, members furthered the discussion on the Statewide Common Technology Platform; key highlights include:

  - Identified current challenges and potential solutions.

  - Defined a vision and target state options.

  - Explored options in more detail and helped refine the business process inventory.

  - Narrowed options to a Statewide Data Management Transformation or Full ERP transformation (HR, Finance, IT, ESSR, Data) with direct association feedback

- The **group reflection** noted the following **key markers of success** and **accomplishments:**

  - The program helped explain the scope and activities needed to adopt a common ERP and the complexities of such project; it also helped explored the pros and cons of current processes and systems.

  - Detailed communication about business processes is significant.

  - The process has included robust input and feedback.

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Progress To Date and the Road Ahead (2 of 2)

California Community Colleges
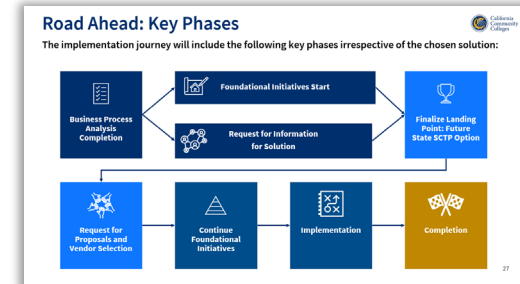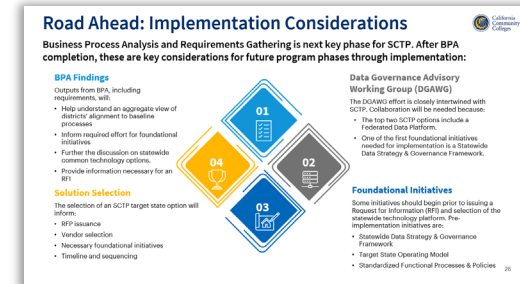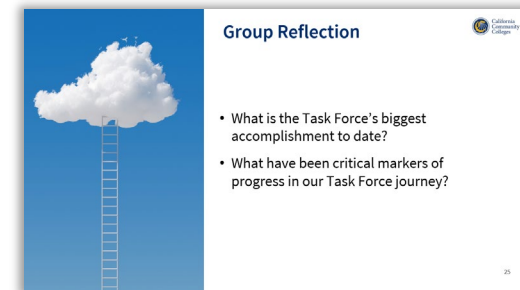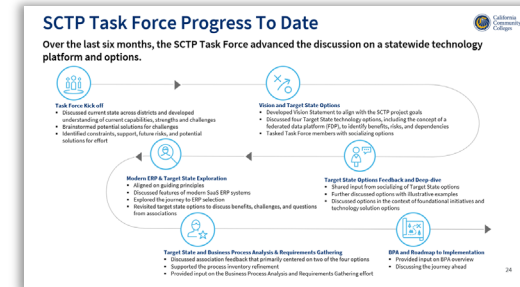
✎ ## Discussion Points:

- The conversation on the road ahead highlighted previous concerns about **remaining questions regarding viability, funding,** and **incentives for districts.**

  - To garner support from districts, they may need additional signs of commitment given funding is currently unavailable.

  - Support from districts is needed to inform the future state landing point selection, but districts may want decisions or more detail to support.

  - Questions about one instance versus 73 instances of an ERP remain.

  - While there is some support for a common ERP, more alignment is needed on the pathway to make progress.

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Takeaways and Parking Lot Items (1 of 2)

California Community Colleges
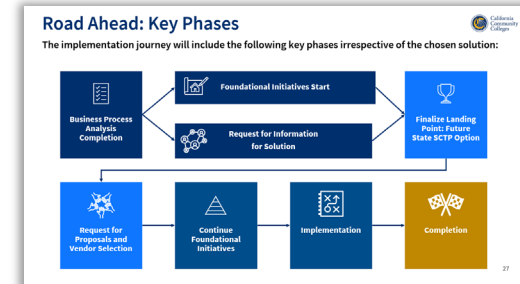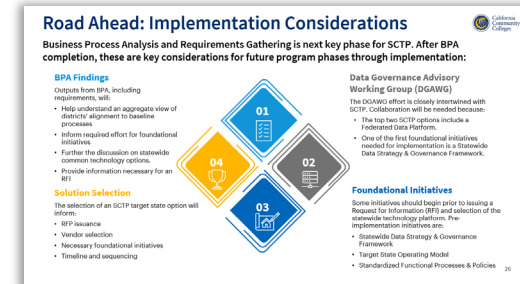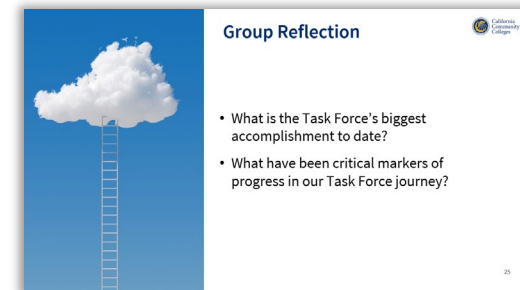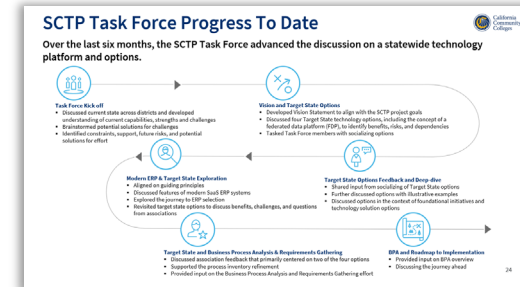
✎ Discussion Points:

Key takeaways were **reviewed**, and confirmation was received that the points accurately captured the discussion.

A discussion was held on the **Task Force's current position** to confirm there was a **common understanding** on the path forward:

- Despite the consensus about the clear needs, there is a significant amount of work still needed to determine the best pathway to make decisions.

- It's difficult for institutions to commit to the work in the absence of a decision on the direction for a statewide common technology platform. Leaving the Task Force in a difficult "chicken or egg" situation.

- The challenges discussed in previous Task Force meetings remain. Gaining buy-in from peers and associations is challenging without committed funding; however, a plan needs to be defined for when funding becomes available.

- College and district involvement requires additional incentives.

- Additional information is needed on how much may need to be standardized versus what can remain localized regardless of the landing point.

- The status quo is not an option; eventually, colleges will be forced to move to SaaS by vendors and customizations will not be available. Some districts have already started preparing, and the SCTP project would enable statewide collaboration.

Takeaways and Parking Lot Items (2 of 2)

California Community Colleges

Takeaways:

- There is a preference for Option 1 (Statewide Data Management Transformation).

- BPA will help answer open questions about how much work colleges may need to do for Option 2 (Full Transformation) and provide input into the questions about unique ERP instances.

- There is concern about the 'ask' for the BPA work and participant availability given competing priorities with tight timelines, and the overall inclination for Option 1.

- BPA would help us understand where districts differ from a set of baseline processes and can be used to help districts with SaaS implementations, whether it is done together through a common ERP or independently.

- Feedback on the survey example noted that there will be more complexity than what is documented in the baseline process flows. Being able to document this complexity and detail their processes will be difficult given limited resources and may require external support. Business processes continuously evolve because of shifting requirements.

- Baseline process flows and surveys need to be further refined to better capture community college nuances and context.

- Task Force feedback included the need for a clear option or selection, signaling of Chancellor's office commitment, and clarity on funding. Selecting an option needs more clarity on open questions.

- The current discussion is helping answer the key questions, pros, and cons. Our goal is to have a plan in place for when funding becomes available.

Parking Lot Items:

- Consider adjusting BPA approach to focus on the software colleges use and their purpose.

Appendix –
Full Presentation from August 7th Task Force Meeting

California Community Colleges

Statewide Common Technology Platform Task Force

August 7, 2024

Agenda

Time	Activity
1:00 PM	Welcome and Objectives
	Business Process Analysis Plan
	Progress to Date and the Road Ahead
	Key Takeaways
	Next Steps
2:30 PM	End

Today's Objectives

1. Review Business Process Analysis activities, timeline, and roles and responsibilities

2. Reflect on the progress to date and explore the road ahead, including key decision points and dependencies

Agreements

Timeboxed
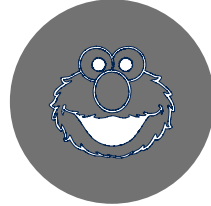
G E L M O
*"Good Enough
Let's Move On"*

**Assume Positive
Intent**

**Be present and
inclusive**
(everyone is heard)

Parking Lot
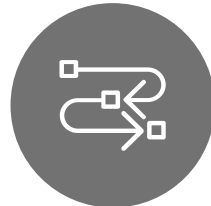
Trust the process
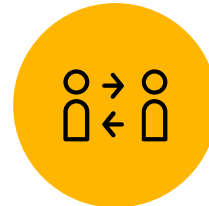
Give Grace

**Be curious and
solution-oriented**
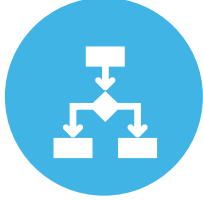
What questions or input are you hearing in your districts and colleges?

0 responses

Login to edit this Menti

Business Process Analysis Plan

BPA Overview and Approach

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California Community Colleges

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Provide Business Process Documentation
- Participate in Surveys
- Attend Office Hours (as needed)

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Roles and Responsibilities

Business process analysis requires the help and expertise of subject matter experts at colleges and support from Task Force members to increase buy-in from participants and stakeholders.

Points of Contact
- Leverage institutional knowledge to identify subject matter experts (capability owners) who can participate in BPA activities (workshops, etc.)

Capability Owners
- Participate in business process analysis activities (surveys, office hours, document submission) for their area (capability) of expertise
- Solicit and collate input from colleagues in support of BPA efforts as needed

SCTP Functional Team
- Plan and execute business process analysis activities
- Provide guidance and support to capability owners
- Compile BPA outputs and requirements

Task Force Members
- Support SCTP in getting on association agendas
- Help advocate for and encourage participation in Business Process Analysis effort
- Capture general sentiments about BPA as activities begin
- Provide input on BPA efforts in upcoming Task Force meetings
- *Optional*: Participate in BPA Kick-Off and Office Hours.

Test Survey

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Overview

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Test Survey Demo

Implementation Roadmap Review

SCTP Task Force Progress To Date

Over the last six months, the SCTP Task Force advanced the discussion on a statewide technology platform and options.

Task Force Kick off
- Discussed current state across districts and developed understanding of current capabilities, strengths and challenges
- Brainstormed potential solutions for challenges
- Identified constraints, support, future risks, and potential solutions for effort
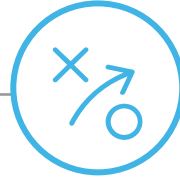
Vision and Target State Options
- Developed Vision Statement to align with the SCTP project goals
- Discussed four Target State technology options, including the concept of a federated data platform (FDP), to identify benefits, risks, and dependencies
- Tasked Task Force members with socializing options

Modern ERP & Target State Exploration
- Aligned on guiding principles
- Discussed features of modern SaaS ERP systems
- Explored the journey to ERP selection
- Revisited target state options to discuss benefits, challenges, and questions from associations
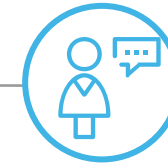
Target State Options Feedback and Deep-dive
- Shared input from socializing of Target State options
- Further discussed options with illustrative examples
- Discussed options in the context of foundational initiatives and technology solution options

Target State and Business Process Analysis & Requirements Gathering
- Discussed association feedback that primarily centered on two of the four options
- Supported the process inventory refinement
- Provided input on the Business Process Analysis and Requirements Gathering effort

BPA and Roadmap to Implementation
- Provided input on BPA overview
- Discussing the journey ahead

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Group Reflection

- What is the Task Force's biggest accomplishment to date?

- What have been critical markers of progress in our Task Force journey?

Road Ahead: Implementation Considerations

California Community Colleges

Business Process Analysis and Requirements Gathering is next key phase for SCTP. After BPA completion, these are key considerations for future program phases through implementation:

BPA Findings

Outputs from BPA, including requirements, will:

- Help understand an aggregate view of districts' alignment to baseline processes
- Inform required effort for foundational initiatives
- Further the discussion on statewide common technology options.
- Provide information necessary for an RFI

Solution Selection

The selection of an SCTP target state option will inform:

- RFP issuance
- Vendor selection
- Necessary foundational initiatives
- Timeline and sequencing
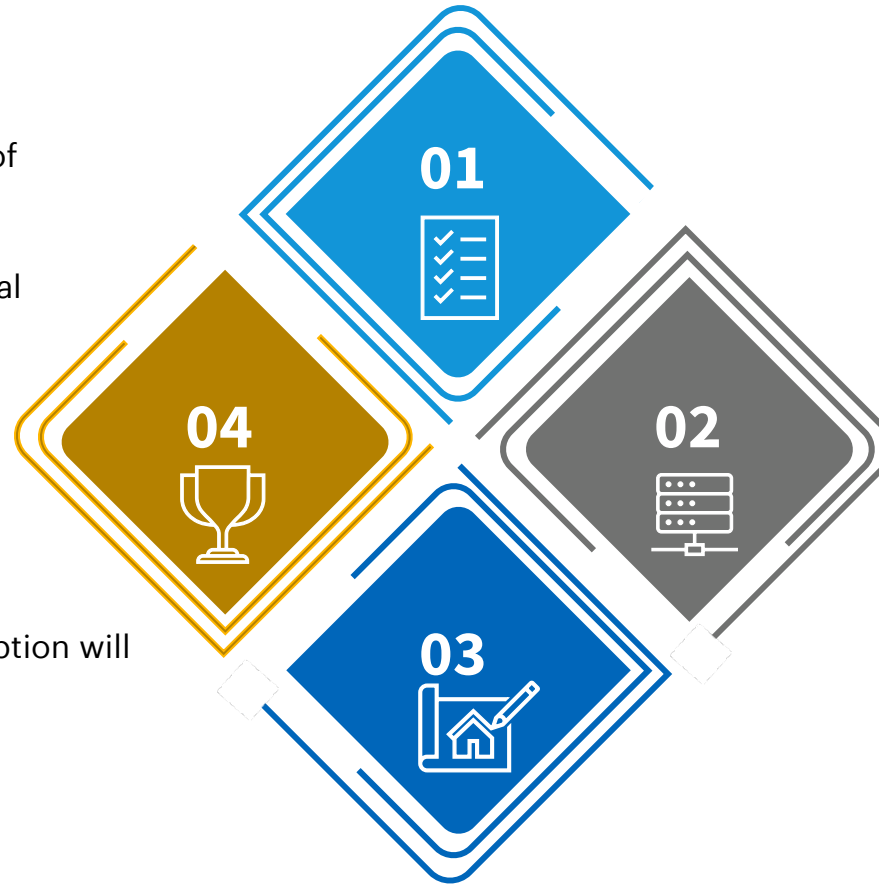
Data Governance Advisory Working Group (DGAWG)

The DGAWG effort is closely intertwined with SCTP. Collaboration will be needed because:

- The top two SCTP options include a Federated Data Platform.
- One of the first foundational initiatives needed for implementation is a Statewide Data Strategy & Gov
rnance Framework.
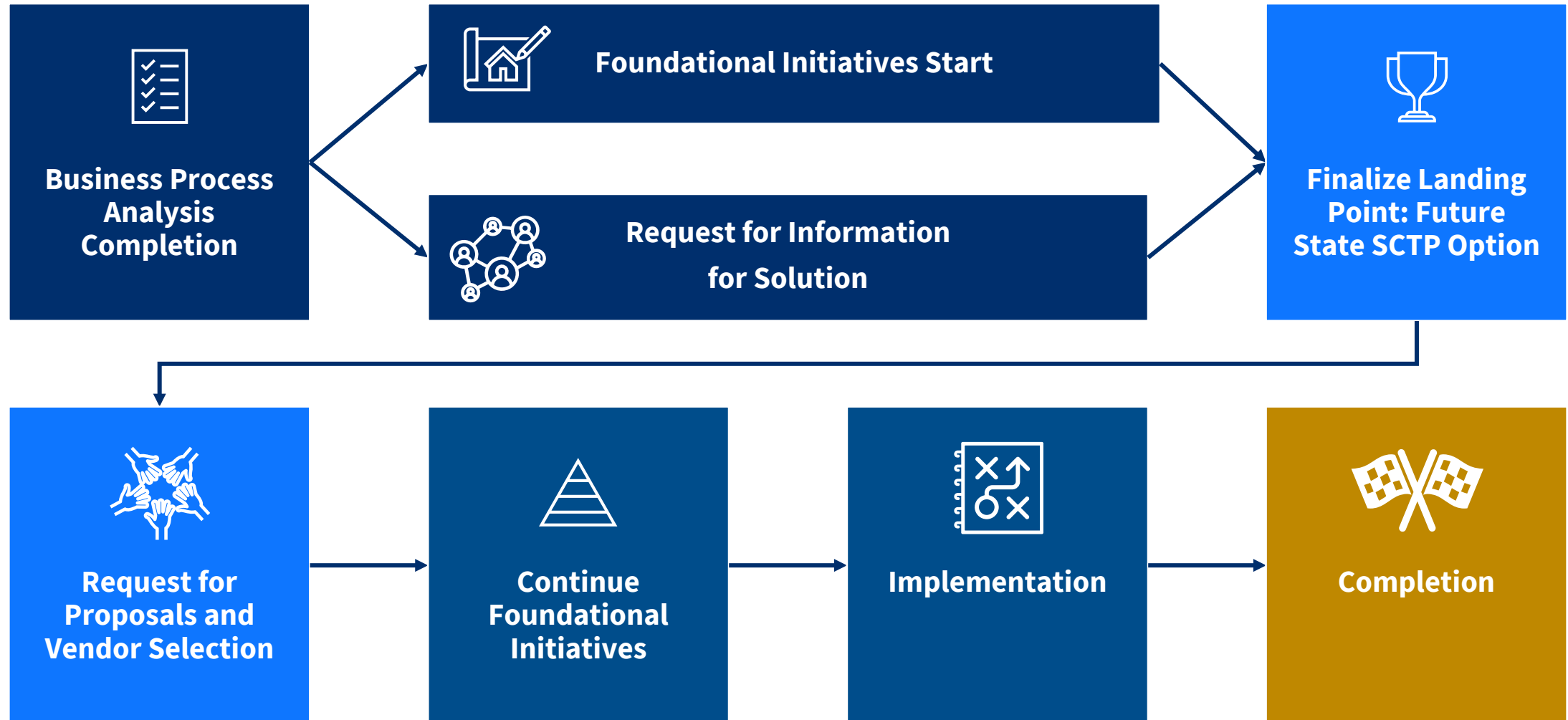
Foundational Initiatives

Some initiatives should begin prior to issuing a Request for Information (RFI) and selection of the statewide technology platform. Pre-implementation initiatives are:

- Statewide Data Strategy & Governance Framework
- Target State Operating Model
- Standardized Functional Processes & Policie

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Road Ahead: Key Phases

The implementation journey will include the following key phases irrespective of the chosen solution:

Business Process Analysis Completion

Foundational Initiatives Start

Request for Information for Solution

Finalize Landing Point: Future State SCTP Option

Request for Proposals and Vendor Selection

Continue Foundational Initiatives

Implementation

Completion

Key Takeaways

Thank You