California Community Colleges

Welcome!

Statewide Common Technology Platform
Task Force

May 9th, 2024

Executive Summary

On May 9th, 2024, the Statewide Common Technology Platform (SCTP) Task Force met in person 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 goals of the session included: Task Force members providing feedback on SCTP Guiding Principles; members understanding the features of Modern SaaS ERP systems; members understanding the four Landing Point options (including pros and cons); members achieving a high comfort level with sharing with their statewide associations, the Landing Point options, pros and cons, and their Landing Point option preference.

Key Takeaways:

1. Task Force members added new Guiding Principles for choosing a solution, which included: Equity across districts in decision-making and support; Solution cost-effectiveness; Implementation feasibility; and Robust governance.
2. Task Force members expressed that the Modern ERP Primer provided a good overview of the technical considerations and helped give more context for the Landing Point selection process.
3. Most Task Force members aligned on Landing Point 4 (Statewide HR/Finance/ESSR/Data Management Transformation) as a preferred direction. A few of members were receptive to Landing Point 4, but also saw value in only pursuing Landing Point 1 (Statewide Data Management Transformation).
4. Task Force members have a stronger understanding of the Landing Point options. The next step is to develop that understanding into a compelling, more accessible story for pursuing each of the two options.

California Community Colleges

May 9th Session Attendees

California Community Colleges

Name	Stakeholder Group	Role	College/Org
Alex Adams	RP / 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
Sharlene Coleal	ACBO / Finance	Assistant Superintendent and Vice President, Business Services	College of the Canyons / Santa Clarita CCD
Shawn Domingo	CCCSFAAA / ESSR*	Director of Financial Aid & Scholarships	San Joaquin Delta College
Ann-Marie Gabel	ACBO / Finance	Vice Chancellor, Business Services	South Orange County College
Barry Gibbons	CEOCCC / All	President	LA Valley College
John Hetts	CCCCO	Task Force Co-Chair / Executive Vice Chancellor for the Office of Innovation, Data, Evidence and Analytics Office	CCCCO
Chris McDonald	CISOA / IT	Vice Chancellor of Educational & Technology Services	South Orange County CCD
Kate Mueller	CALCSSO / ESSR*	Vice President of Student Services	Coastline College
Jason Parks	CCCCIO / ESSR*	Vice President of Instruction	Rancho Santiago College
Michelle Smith	CCCCO	Visiting Assistant Vice Chancellor	CCCCO
Gina Browne[1]	CCCCO	Asst. Vice Chancellor, Office of Equitable Student Learning, Experience & Impact	CCCCO
Michael Dear[1]	CCCSFAAA / ESSR*	Director of Financial Aid	MiraCosta College
Victor DeVore[1]	CALCSSO / ESSR*	Dean, Student Services	San Diego CCD
Wrenna Finche[1]	CCCCO	Vice Chancellor of Fiscal Health and Accounting	CCCCO
Kevin Ruano Hernandez[1]	Student Senate / ESSR*	Region III Regional Affairs Director	Contra Costa College
Todd Hoig[1]	CCCCO	Director, Management Information Systems	CCCCO
Jacob Hurley[1]	ACHRO / HR	Associate Vice Chancellor, HR	Yuba CCD
Valerie Lundy-Wagner[1]	All	Vice Chancellor, Digital Innovation & Infrastructure	CCCCO
Rian Medlin[1]	ACHRO / HR	Assistant Superintendent and Vice President	College of the Canyons / Santa Clarita CCD
Char Perlas[1]	CEOCCC / All	Superintendent / President	College of the Siskiyous
Erick Ramirez (Wrenna proxy)[1]	CCCCO	Community College Program Assistant	CCCCO
Don Daves Rougeaux[1]	CCCCO	Sr. Advisor to the Chancellor on Workforce Development & Strategic Partnerships	CCCCO
Alisa Shubb[1]	Academic Senate / ESSR*	Academic Senate President	American River College / Los Rios CCD

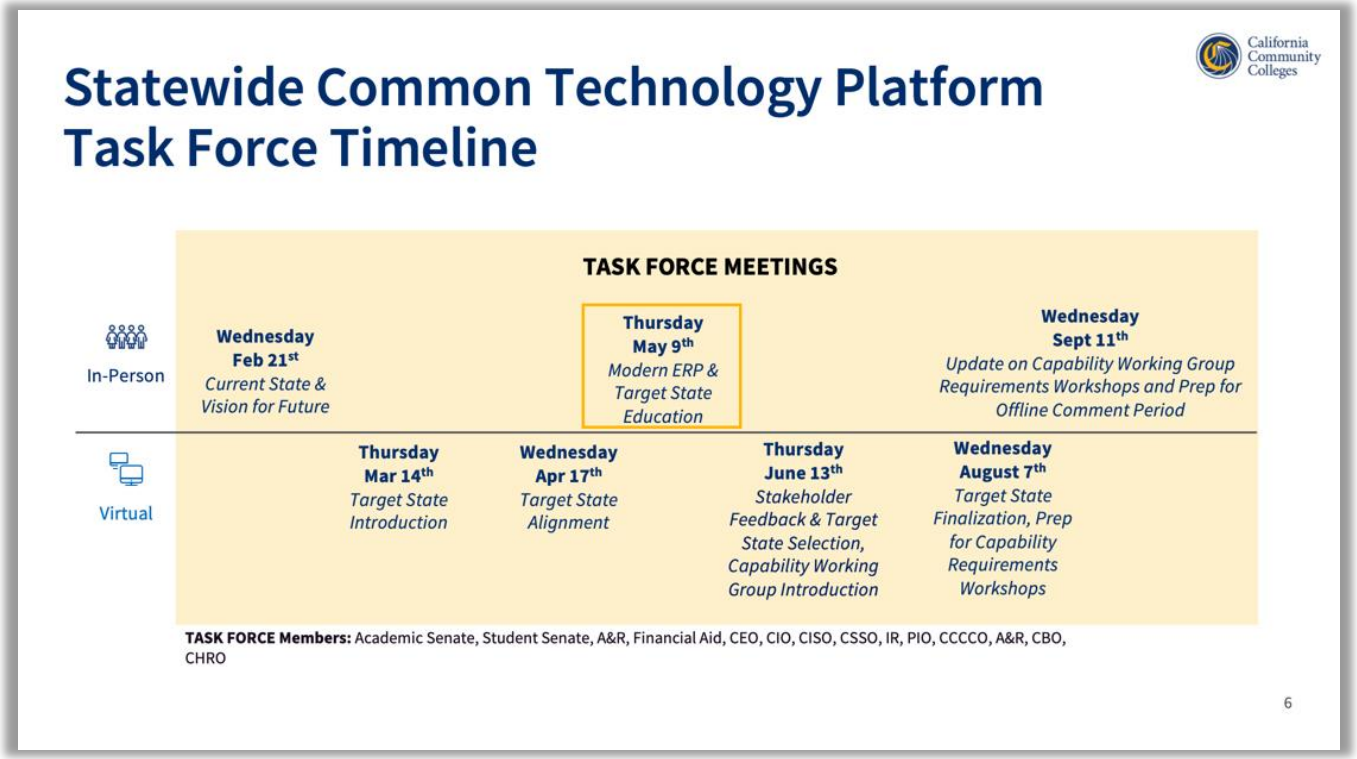
Name[1] = Could not attend

**ESSR - 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.*

Welcome and Purpose

Discussion Points:

- The day's meeting outcomes:
- ✓ Task Force members had an opportunity to suggest refinements to the Vision Statement
- ✓ Members provided feedback on the SCTP Guiding Principles and Outcomes
- ✓ Members understood the features of Modern SaaS (Software as a Services) ERP systems
- ✓ Members understood the pros and cons of the Landing Point options, including what benefits their associations might be excited about, what challenges they may be nervous about, and what questions they anticipate from their associations' colleagues when they present to them
- ✓ Task Force members articulates what landing point(s) resonate(s) with them and why, what resources they need to share landing points info with their associations, and any outstanding questions the Task Force members have
- Future meeting dates were presented:
  - June 13th (Virtual)
  - August 7th (Virtual)
  - September 11th (In-Person)

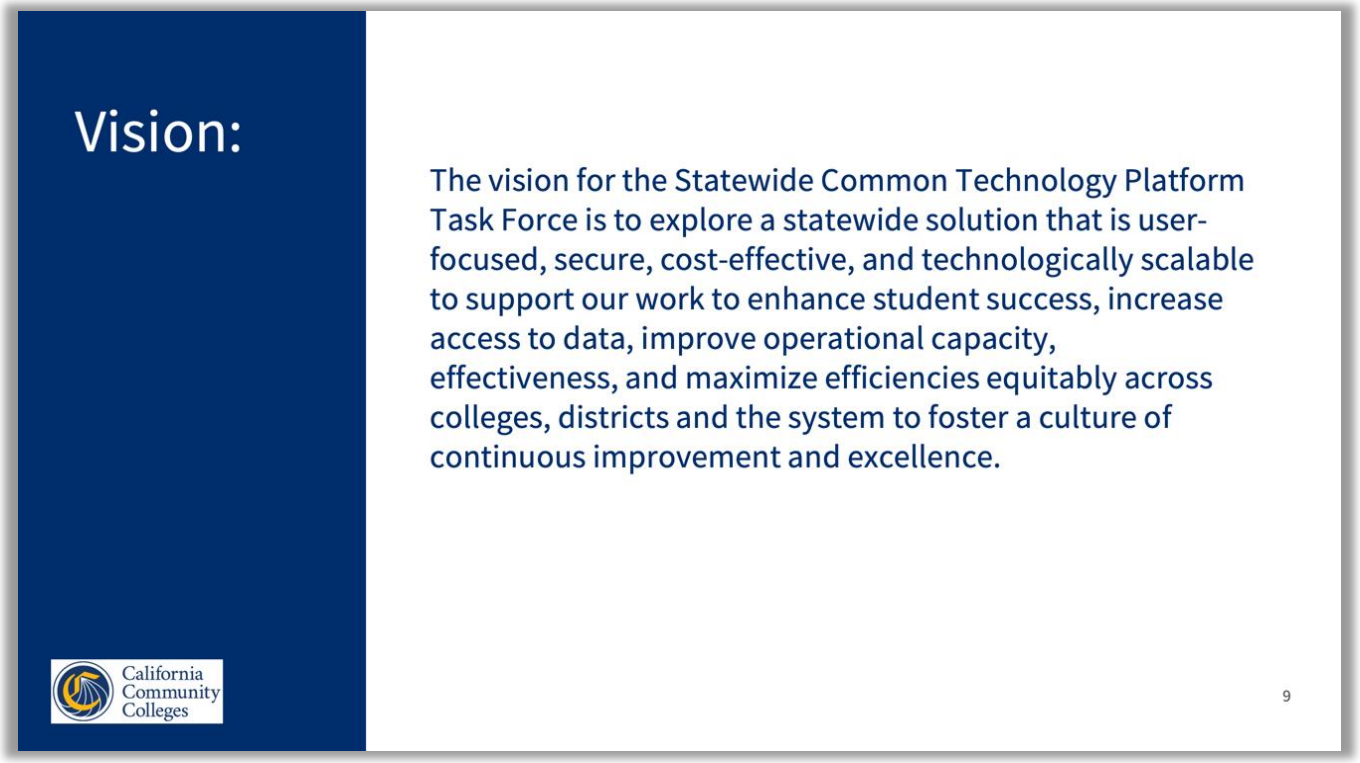


Vision Statement

An invitation to Task Force attendees to further refine the Vision Statement

Discussion Points:

- The SCTP vision statement was updated offline by the SCTP Project Team based on feedback from the April 17th Task Force meeting
- A poster version of the vision statement was posted in the meeting and Task Force Members were invited to add further refinements throughout the day
- No additional feedback was added to the vision statement poster

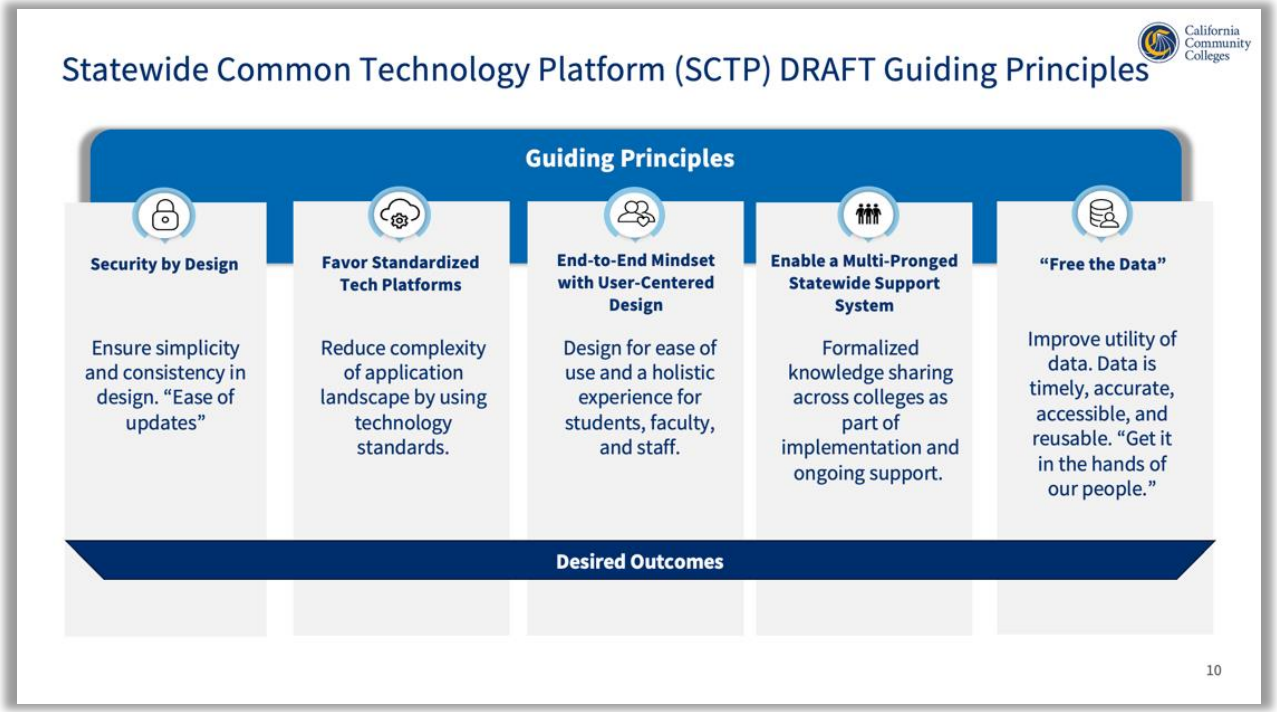


Statewide Common Technology Platform (SCTP) DRAFT Guiding Principles

An invitation to Task Force attendees to further refine the Guiding Principles and Desired Outcomes

New Guiding Principles and Outcomes:

- **Equity in decision-making and support:** Smaller, rural, or less-resourced districts have voice in decisions and are not disproportionally impacted by the change; CCC system takes on resource burdens for implementation and ongoing support
- **Cost-effective solution:** No increase to ongoing costs; reduce or eliminate consultant dependencies
- **Feasible implementation:** Common technology platform can be attained given the available cloud solutions
- **Governance:** Clear process for evaluating and deciding process, policy, and tech changes during and after the initial implementation



Outcomes added for Existing Guiding Principles:

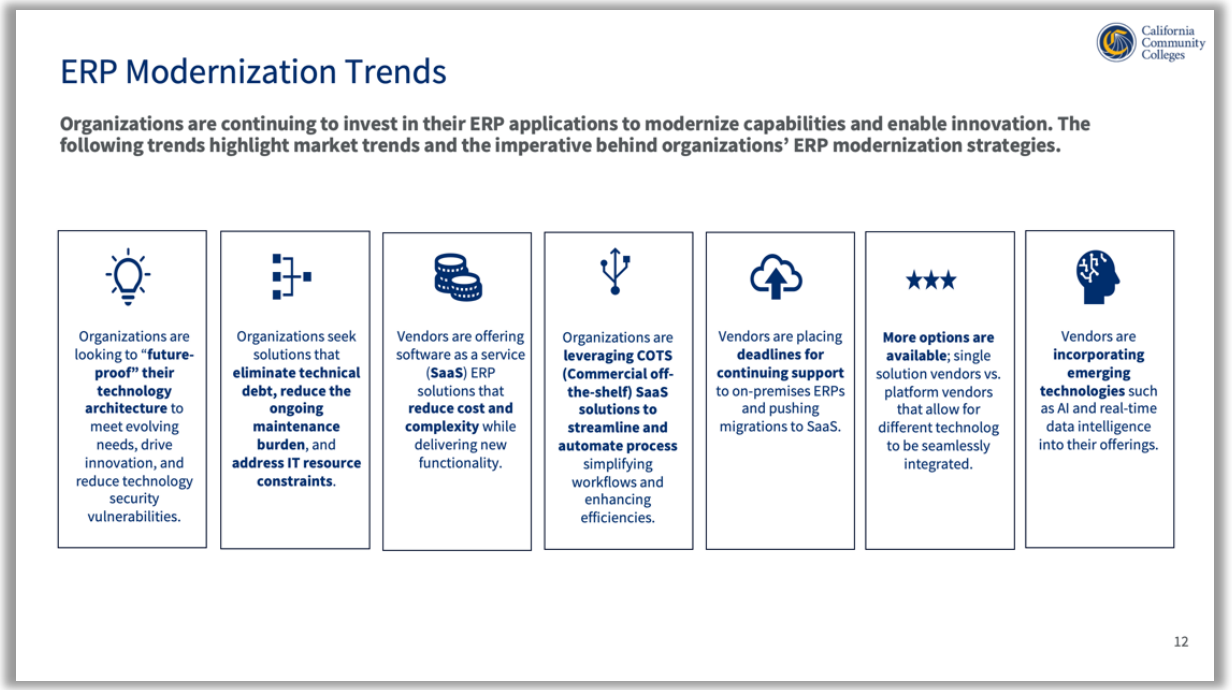
- **Standardized Tech Platforms:** Consistent and robust online experience for students across the system; tech platforms are scalable
- **"Free the Data":** Better decision-making; application-related data more available for students; automated transmission to post-secondary partners to accelerate transfers; increased data access for small colleges; fewer surveys because Chancellor's Office pulls data; less staff time on routine data-oriented tasks

Modern ERP Primer (1 of 8)

Discussion Points:

ERP Modernization Trends: Organizations continue to invest in their ERP apps to modernize capabilities and enable innovation

- **"Future-proof" tech architecture**: Meet evolving needs, drive innovation, and reduce security vulnerabilities
- **Eliminate technical debt:** Reduce the ongoing maintenance burden and IT resource constraints associated with highly customized ERPs
- **SaaS (Software as a Service)**: Reduce cost and complexity while delivering new functionality
- **COTS (Commercial Off-The-Shelf) SaaS solutions:** Leverage COTS SaaS solutions to simplify workflows and enhance efficiencies
- **Vendor-imposed deadlines for On-Premises support:**
    - Districts with on-premises solutions will eventually need to migrate to cloud-hosted SaaS solution
    - Creates an opportunity to collectively define needs, seek funding from the state for the necessary support, and implement a statewide solution
- **Options for single-solution and platform vendors:** Large landscape of technology vendors, including ones that focus on a specific functional capability or process area and others that offer a more comprehensive end-to-end solution
- **Incorporation of emerging technologies:** Vendors are building Artificial Intelligence (AI) and real-time data intelligence into their ERP solutions

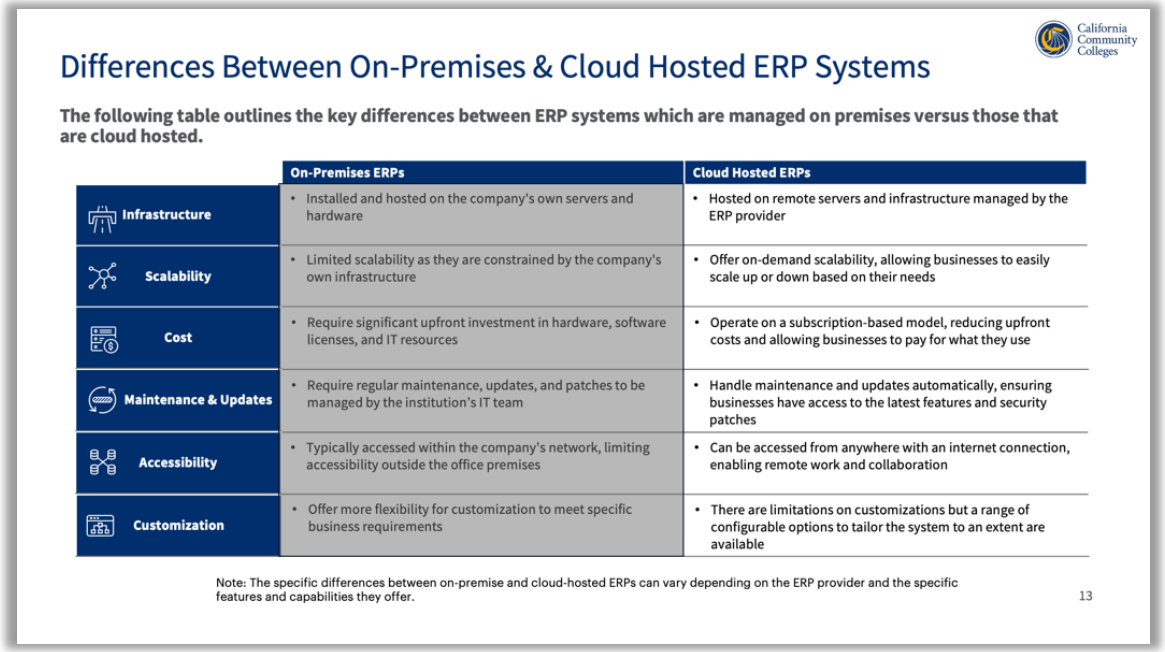


Modern ERP Primer (2 of 8)

Discussion Points:

The task force and project team further defined the capabilities of modern ERPs, reviewing the **differences between On-Premises and Cloud Hosted ERPs**

- **On-Premises ERPs**: Installed and hosted on the institution's own servers and hardware
  - Limited scalability as they are constrained by the institution's infrastructure
  - Requires significant upfront investment in hardware, software, licenses, and IT resources
  - Require regular maintenance, updates, and patches to be managed by the institution's IT team
  - Typically accessed within the institution's network, limiting accessibility outside the office premises
  - Offer more flexibility for customization to meet specific business requirements
- **Cloud Hosted ERPs**: Hosted on remote servers and infrastructure managed by the 3rd party provider. May be only infrastructure services or both infrastructure and software services provided by the 3rd party provider.
  - Offers on-demand scalability, allowing institutions to easily scale up or down
  - Operate on a subscription-based model, reducing upfront costs and allowing institution to pay for what they use
  - Handle maintenance and updates automatically, ensuring institutions have access to the latest features and security patches
  - Can be accessed from anywhere with an internet connection, enabling remote work and collaboration
  - Limitations on customization, but offers a range of configurable options



California Community Colleges

Differences Between On-Premises & Cloud Hosted ERP Systems

The following table outlines the key differences between ERP systems which are managed on premises versus those that are cloud hosted.

	On-Premises ERPs	Cloud Hosted ERPs
Infrastructure	• Installed and hosted on the company's own servers and hardware	• Hosted on remote servers and infrastructure managed by the ERP provider
Scalability	• Limited scalability as they are constrained by the company's own infrastructure	• Offer on-demand scalability, allowing businesses to easily scale up or down based on their needs
Cost	• Require significant upfront investment in hardware, software licenses, and IT resources	• Operate on a subscription-based model, reducing upfront costs and allowing businesses to pay for what they use
Maintenance & Updates	• Require regular maintenance, updates, and patches to be managed by the institution's IT team	• Handle maintenance and updates automatically, ensuring businesses have access to the latest features and security patches
Accessibility	• Typically accessed within the company's network, limiting accessibility outside the office premises	• Can be accessed from anywhere with an internet connection, enabling remote work and collaboration
Customization	• Offer more flexibility for customization to meet specific business requirements	• There are limitations on customizations but a range of configurable options to tailor the system to an extent are available

Note: The specific differences between on-premise and cloud-hosted ERPs can vary depending on the ERP provider and the specific features and capabilities they offer.

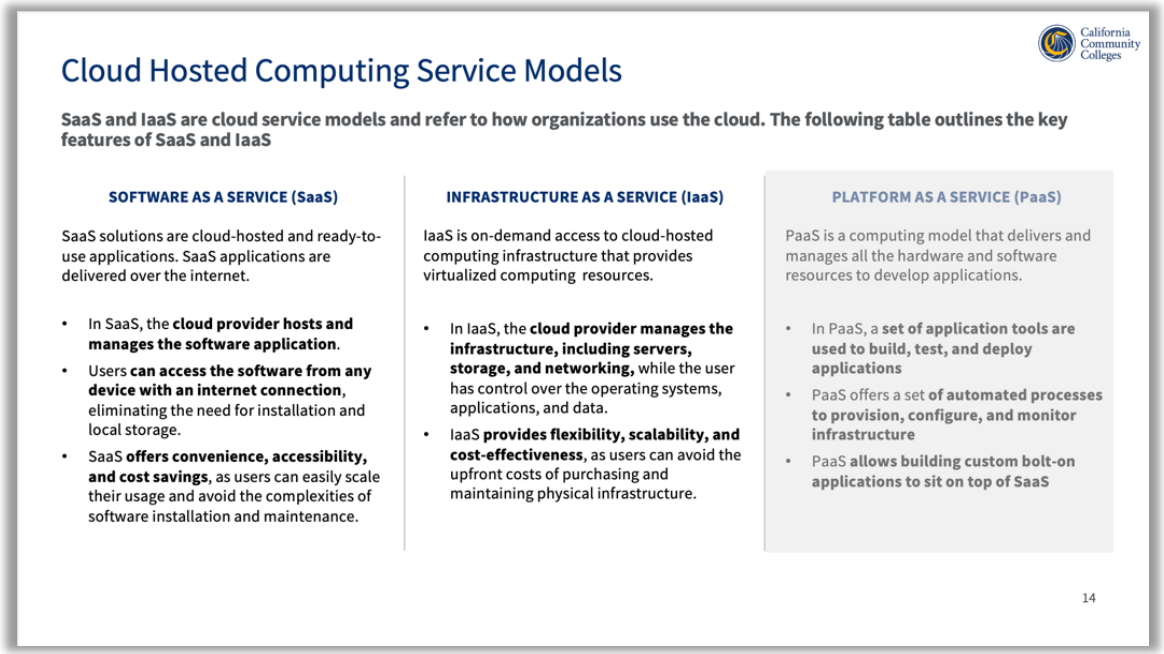
13

Modern ERP Primer (3 of 8)

Discussion Points:

Cloud-Hosted Computing Service Models: SaaS (Software as a Service) and IaaS (Infrastructure as a Service) are two cloud service models that define how an organization uses the cloud

- **SaaS**:
  - Provides organizations **ready-to-use applications** that are hosted in the cloud and delivered over the internet to users, eliminating the need for installation and local storage
  - Offers convenience, accessibility, cost savings, and the ability for organizations to scale (e.g., increase) functionality usage as needed
- **IaaS**:
  - Provides on-demand **access to a cloud-hosted infrastructure (e.g., servers, storage, networking)** and allows an organization to have control over the operating systems, applications, and data.
  - IaaS is flexible, scalable, and cost-effective, as organizations do not incur upfront costs to purchase and maintain physical infrastructure.



California Community Colleges

Cloud Hosted Computing Service Models

SaaS and IaaS are cloud service models and refer to how organizations use the cloud. The following table outlines the key features of SaaS and IaaS

SOFTWARE AS A SERVICE (SaaS)

SaaS solutions are cloud-hosted and ready-to-use applications. SaaS applications are delivered over the internet.

- In SaaS, the **cloud provider hosts and manages the software application**.
- Users **can access the software from any device with an internet connection**, eliminating the need for installation and local storage.
- SaaS **offers convenience, accessibility, and cost savings**, as users can easily scale their usage and avoid the complexities of software installation and maintenance.

INFRASTRUCTURE AS A SERVICE (IaaS)

IaaS is on-demand access to cloud-hosted computing infrastructure that provides virtualized computing resources.

- In IaaS, the **cloud provider manages the infrastructure, including servers, storage, and networking,** while the user has control over the operating systems, applications, and data.
- IaaS **provides flexibility, scalability, and cost-effectiveness**, as users can avoid the upfront costs of purchasing and maintaining physical infrastructure.

PLATFORM AS A SERVICE (PaaS)

PaaS is a computing model that delivers and manages all the hardware and software resources to develop applications.

- In PaaS, a **set of application tools are used to build, test, and deploy applications**
- PaaS offers a set **of automated processes to provision, configure, and monitor infrastructure**
- PaaS **allows building custom bolt-on applications to sit on top of SaaS**

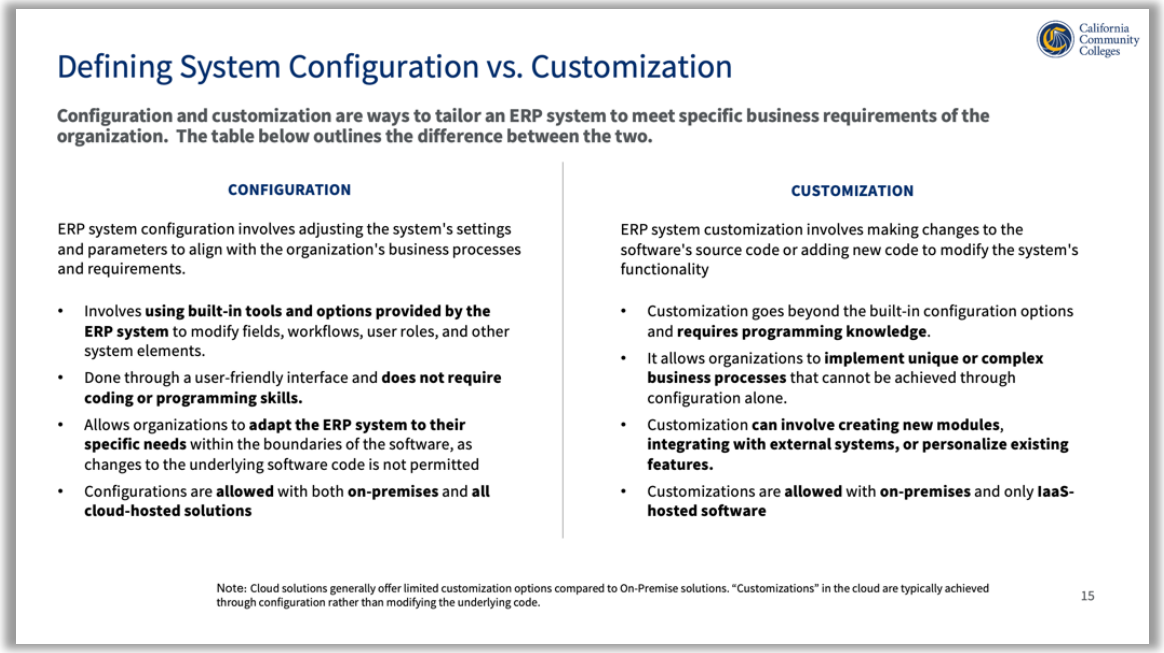
14

Modern ERP Primer (4 of 8)

Discussion Points:

Configuration vs. Customization: These are two ways to tailor an ERP system to meet an organization's business needs

- **Configuration**: involves **adjusting** the system's **settings and parameters using built-in tools and options** to align with the organization's business processes and requirements
    - Coding or programming skills are not required
    - Allowed for on-premises and all cloud-hosted solutions
- **Customization**: involves **changing** the software's **source code** or **adding new code** to modify the system's functionality
    - Programming knowledge is required
    - Allows organizations to implement unique or complex business processes, create new modules, integrate with external systems, or personalize existing features
    - Allowed with on-premises and only IaaS-hosted software (not SaaS)
    - More customizations create a more complex and fragile system
    - Each new feature, patch, or upgrade requires extensive testing to ensure system isn't broken
    - Invariably, deployment of patches and upgrades may be delayed, which creates security vulnerabilities



California Community Colleges

Defining System Configuration vs. Customization

Configuration and customization are ways to tailor an ERP system to meet specific business requirements of the organization. The table below outlines the difference between the two.

CONFIGURATION

ERP system configuration involves adjusting the system's settings and parameters to align with the organization's business processes and requirements.

- Involves **using built-in tools and options provided by the ERP system** to modify fields, workflows, user roles, and other system elements.
- Done through a user-friendly interface and **does not require coding or programming skills.**
- Allows organizations to **adapt the ERP system to their specific needs** within the boundaries of the software, as changes to the underlying software code is not permitted
- Configurations are **allowed** with both **on-premises** and **all cloud-hosted solutions**

CUSTOMIZATION

ERP system customization involves making changes to the software's source code or adding new code to modify the system's functionality

- Customization goes beyond the built-in configuration options and **requires programming knowledge**.
- It allows organizations to **implement unique or complex business processes** that cannot be achieved through configuration alone.
- Customization **can involve creating new modules, integrating with external systems, or personalize existing features.**
- Customizations are **allowed** with **on-premises** and only **IaaS-hosted software**

Note: Cloud solutions generally offer limited customization options compared to On-Premise solutions. "Customizations" in the cloud are typically achieved through configuration rather than modifying the underlying code.

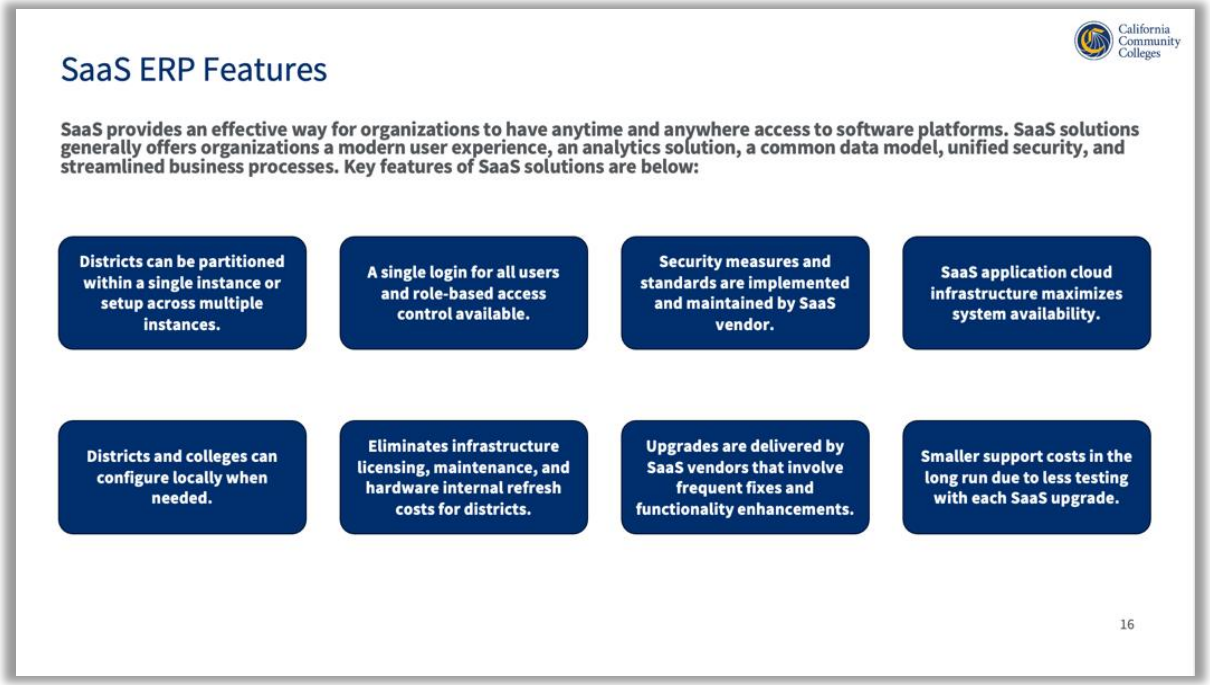
15

Modern ERP Primer (5 of 8)

Discussion Points:

SaaS ERP Features: SaaS provides an effective way for organizations to have anytime and anywhere access to software platforms. SaaS solutions generally offers organizations a modern user experience, an analytics solution, a common data model, unified security, and streamlined business processes.

- CCC districts can be partitioned in a single SaaS instance or multiple SaaS instances. District or colleges can be configured locally when needed.
- Simplified user login and role-based access control for users
- SaaS vendor maintains security measures and frequent fixes/functionality enhancements; SaaS cloud infrastructure maximizes system availability
- Smaller support costs due to less testing because of SaaS software updates are developed and tested in a standardized and controlled environment before rolling out changes to customers

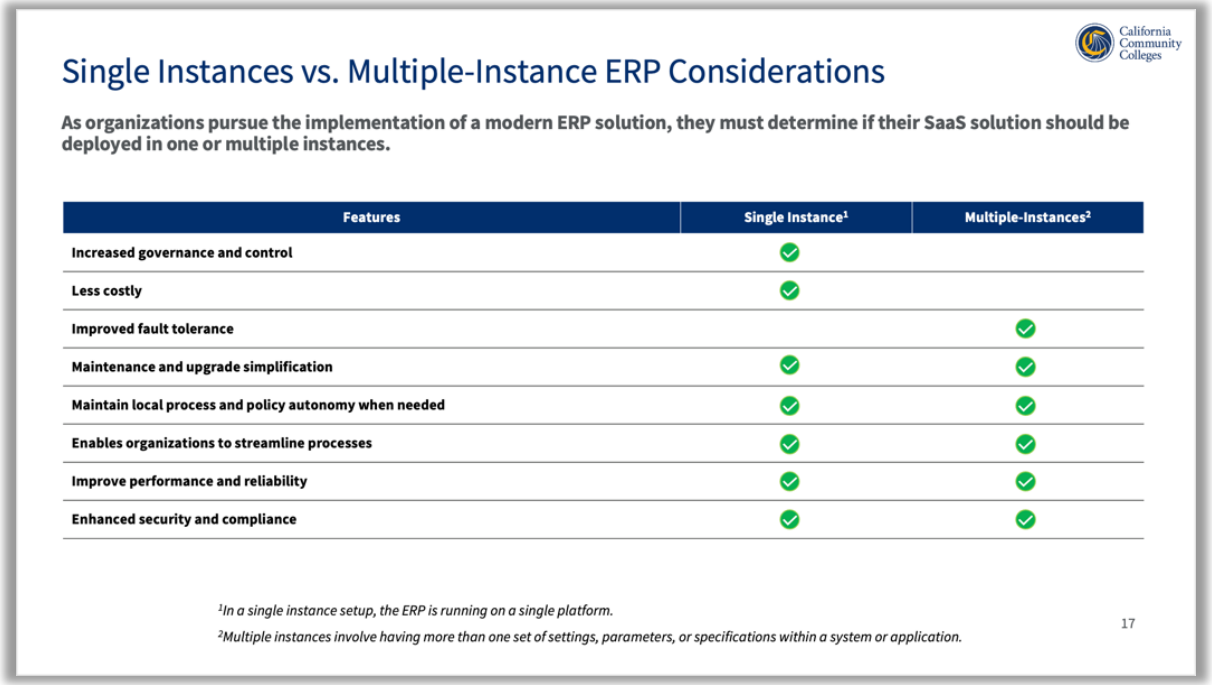


Modern ERP Primer (6 of 8)

Discussion Points:

Single Instance vs. Multiple Instance ERP: As organizations plan for implementing a modern ERP solution, they must determine if the SaaS solution should be deployed with a single instance or multiple instances

- Single Instance ERPs increase governance and control
- Single Instance ERPs are less costly to maintain
- Multiple Instance ERPs may have greater fault tolerance (i.e., if a component of the SaaS solution fails, the ERP can still operate) because the infrastructure supporting those instances may be spread out geographically
    - In all cases, there are back-up systems and disaster recovery plans that minimize downtime during a critical event
- Both Single and Multiple Instance ERPS share these features: simplified maintenance and upgrades; ability to maintain local process and policy autonomy when needed; enables process streamlining; improves performance and reliability ; enhances security and compliance



Single Instances vs. Multiple-Instance ERP Considerations

As organizations pursue the implementation of a modern ERP solution, they must determine if their SaaS solution should be deployed in one or multiple instances.

Features	Single Instance[1]	Multiple-Instances[2]
Increased governance and control	✓	
Less costly	✓	
Improved fault tolerance		✓
Maintenance and upgrade simplification	✓	✓
Maintain local process and policy autonomy when needed	✓	✓
Enables organizations to streamline processes	✓	✓
Improve performance and reliability	✓	✓
Enhanced security and compliance	✓	✓

[1] *In a single instance setup, the ERP is running on a single platform.*

[2] *Multiple instances involve having more than one set of settings, parameters, or specifications within a system or application.*

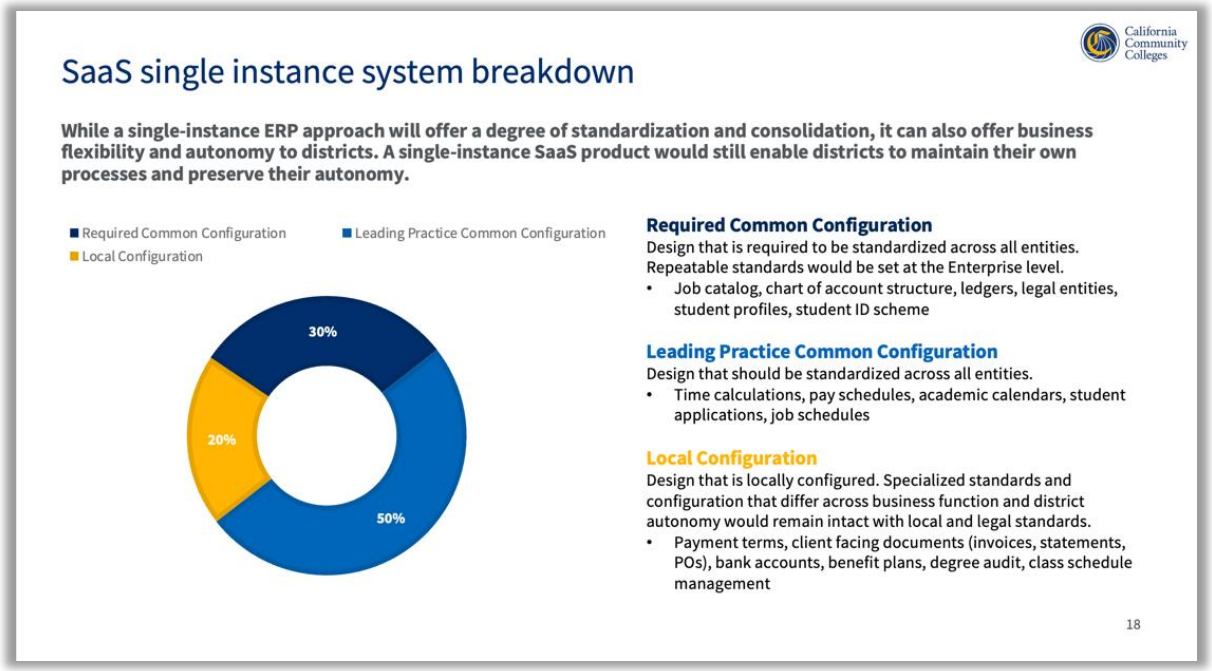
17

Modern ERP Primer (7 of 8)

Discussion Points:

SaaS single instance system breakdown: While a single-instance ERP approach will offer a degree of standardization and consolidation, it can also offer business flexibility and autonomy to districts. A single-instance SaaS product would still enable districts to maintain their own processes and preserve their autonomy to a certain degree.

- Approximately 30% of the configuration would be required to standardize across the CCC system. Examples: Legal entities, chart of accounts structure, ledgers, job catalog, student profiles, student ID scheme.
- Up to 50% of the configuration would be recommended (a.k.a., "Leading Practices") to standardize across the CCC system, but not required. Examples: Time calculations, pay schedules, student applications, job schedules.
- Approximately 20% of the configuration would align with district, college or business function needs. Examples: Payment terms, client facing documents (invoices, statements, POs), bank accounts, benefit plans, degree audit, class schedule management.
- While the final split between common and local configuration will be determined during the statewide design (post-vendor selection), local configuration could end up anywhere between 20-70% of the total configuration

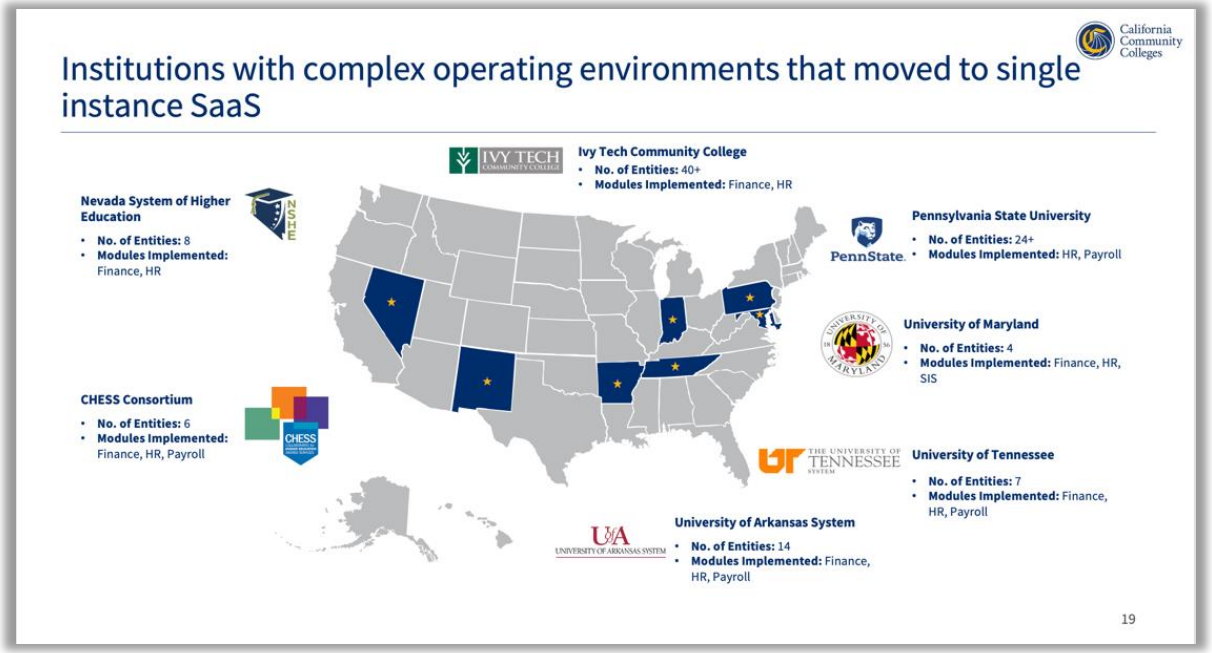


Modern ERP Primer (8 of 8)

Discussion Points:

Institutions with complex operating environments that moved to single instance SaaS:

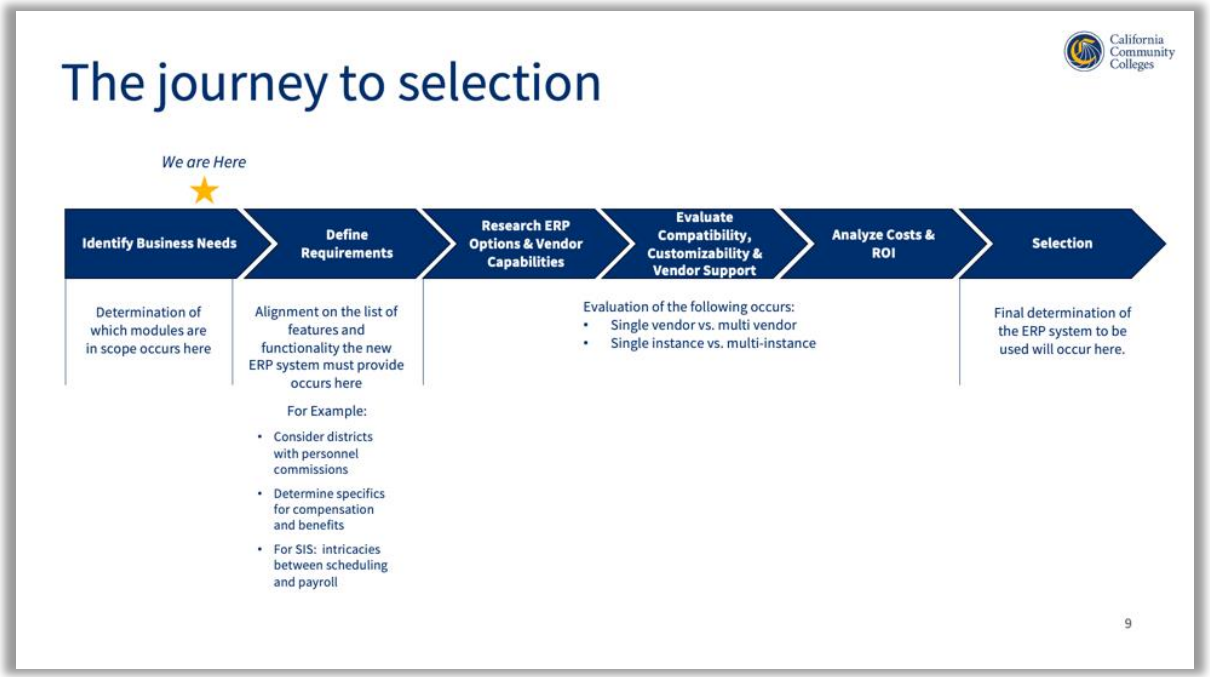
- This map shows higher ed institutions with multiple entities (i.e., locations, campuses, 2-year colleges, 4-year universities) that moved to single instance SaaS across combinations of Finance, HR, Payroll, and SIS
- None of these examples from higher ed institutions exactly match the three-tier model (State, District, College) that exists in the CCC system
- There are examples of organizations outside of higher ed that have implemented a three-tier or greater single instance ERP. The capability exists, but CCC would likely be the first in higher ed.



The Journey to Selection (1 of 2)

Discussion Points:

- These are the key steps to take in the journey to selecting the ERP vendor(s) to support a Statewide Common Technology platform
- Last summer and fall, the project team focused on a current state analysis of participating districts through the lenses of people, process/policy, and technology
- So far in calendar year 2024, the task force and project team have created target state landing point options that would meet some or all the identified business needs. The group fleshed out the foundational initiatives, recommended initiatives, and technology solution for each landing point option.
- Once a target state landing point option has been selected, the project team will work with the Task Force and participating districts to gather the detailed requirements needed to align on a vendor or vendors
- Many of the existing parking lot items from April and May will be addressed during requirements gathering. Business process analysis has begun and will continue in the "Define Requirements" step.
- The requirements will be used to create a Request for Proposal (RFP) or possibly a Request for Information (RFI) before an RFP
- In today's Modern ERP Primer, the task force and project team spent time discussing the meaning and pros and cons of Single vs. Multiple instance. The group will dig deeper into evaluating Single vs. Multiple instance and Single Vendor vs. Multiple Vendor in the "Evaluate Compatibility, Customizability & Vendor Support" step.



The Journey to Selection (2 of 2)

We are Here

Determination of which modules are in scope occurs here

Alignment on the list of features and functionality the new ERP system must provide occurs here

For Example:

- Consider districts with personnel commissions
- Determine specifics for compensation and benefits
- For SIS: intricacies between scheduling and payroll

Evaluation of the following occurs:

- Single vendor vs. multi vendor
- Single instance vs. multi-instance

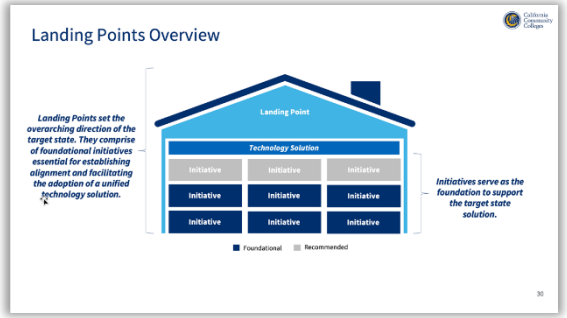
Final determination of the ERP system to be used will occur here

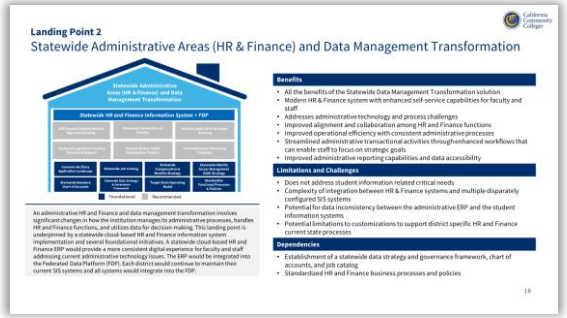
Target State Landing Points – Learning Activity

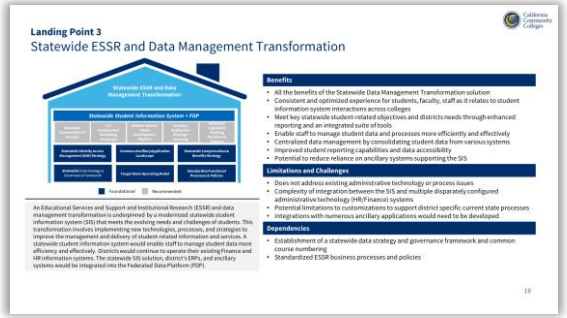
Task Force attendees discussed what benefits, challenges, and questions their associations might express about this Landing Point

Discussion Points:

- A Target State Landing Point sets the overarching direction of the target state and is comprised of foundational and recommended initiatives to support the adoption of a unified technology solution
- The four Target State Landing Points are: 1) Statewide Data Management Transformation, 2) Statewide Administrative Areas (HR & Finance) and Data Management Transformation, 3) Statewide ESSR* and Data Management Transformation, and 4) Statewide Administrative Areas, ESSR*, and Data Management Transformation
- Task Force attendees rotated through "Education Stations" for the Landing Point options where they could ask clarifying questions, discuss which benefits would resonate with their associations, highlight challenges their associations might encounter, and name the questions they might receive when presenting to their associations
- At the end of the day, the group spent time discussing which Landing Point(s) they believe their associations would favor and what the Task Force members would need to successfully present the options to their associations







* Educational Services & Support & Institutional Research includes: Instructional Services, Counseling, Admissions, Financial Aid, Student Accounts/Bursar, Student Records, Student Support & Engagement Programs, and Institutional Research.

Target State Landing Point 1: Statewide Data Management Transformation (1 of 2)

Task Force attendees discussed what benefits, challenges, and questions their associations might express about this Landing Point

- A **data transformation** improves how data is collected, stored, organized, analyzed, and utilized
- Underpinned by implementation of **Federated Data Platform (FDP)**
- FDP allows systems, applications, and data to interoperate by connecting and accessing data from multiple sources and provides unified view of data shared across the system
- Requires building a statewide data management strategy and governance framework to define data ownership and standards
- Each district would continue to maintain their current ERP systems and integrate into the FDP

Benefits

- Data consistency standards across districts addressing key reporting needs
- Improved data quality through standardized formats and consistent data definitions
- Unified view of datasets
- Improved reporting capabilities and reduced reporting burden for staff
- Interoperability between data producers and consumers helping eliminate data siloes
- Integrations to other statewide longitudinal data systems; enables data to travel with the student across CCCs and beyond (e.g., Cradle to Career)
- Improved data accessibility and retrieval of district and ecosystem-wide data
- Enhanced analytics through AI/ML algorithms that uncover patterns, correlations, and actionable recommendations

Limitations and Challenges

- Does not address any of the non-data and reporting related critical needs
- Integrations with multiple ERP systems and numerous ancillary applications would need to be developed
- Cost to build a statewide data platform may outweigh the benefits
- Significant resources would be required to develop/maintain the federated platform

Dependencies

- Statewide data governance framework would need to be established
- Successful integration with existing ERPs and third-party systems

Target State Landing Point 1: Statewide Data Management Transformation (2 of 2)

Task Force attendees discussed what benefits, challenges, and questions their associations might express about this Landing Point

Discussion Points:

Resonating benefits:

- Surveys would not need to be sent out because Chancellor's Office can access data
- Access to financial and other data as frequently as needed
- Connection to longitudinal data
- Common business intelligence tools
- Predictive analytics using Machine Learning
- Streamlined training for districts on a common reporting tool

Highlighted Challenges:

- Time and Cost (implementation and maintenance) may not be worth the benefit
- May be perceived as primarily benefiting the Chancellor's Office
- Change fatigue from FDP implementation may impact districts' appetite to move to statewide common technology platform

Possible Questions from Associations:

- Does an FDP fully solve the reporting burden?
- With all the districts dependent on the FDP, what if it fails?
- What other technology solution options are available besides an FDP?

Benefits

- Data consistency standards across districts addressing key reporting needs
- Improved data quality through standardized formats and consistent data definitions
- Unified view of datasets
- Improved reporting capabilities and reduced reporting burden for staff
- Interoperability between data producers and consumers helping eliminate data siloes
- Integrations to other statewide longitudinal data systems; enables data to travel with the student across CCCs and beyond (e.g., Cradle to Career)
- Improved data accessibility and retrieval of district and ecosystem-wide data
- Enhanced analytics through AI/ML algorithms that uncover patterns, correlations, and actionable recommendations

Limitations and Challenges

- Does not address any of the non-data and reporting related critical needs
- Integrations with multiple ERP systems and numerous ancillary applications would need to be developed
- Cost to build a statewide data platform may outweigh the benefits
- Significant resources would be required to develop/maintain the federated platform

Dependencies

- Statewide data governance framework would need to be established
- Successful integration with existing ERPs and third-party systems

Target State Landing Point 2: Statewide Administrative Areas (HR & Finance) and Data Management Transformation (1 of 2)

Task Force attendees discussed what benefits, challenges, and questions their associations might express about this Landing Point

- An administrative **HR** and **Finance** and **data management transformation** significantly changes how the institution manages administrative processes, handles HR and Finance functions, and uses data for decision-making
- Provides a more consistent digital experience for faculty and staff addressing current administrative technology issues
- Underpinned by statewide cloud-based HR and Finance information system implementation and several foundational initiatives such as the development of a statewide standard chart of accounts, compensation and benefits strategy, operating model, and business processes
- ERP integrated into the Federated Data Platform (FDP)
- Each district would continue to maintain current SIS systems and all ancillary systems would integrate into the FDP

Benefits

- All the benefits of the Statewide Data Management Transformation solution
- Modern HR & Finance system with enhanced self-service capabilities for faculty and staff
- Addresses administrative technology and process challenges
- Improved alignment and collaboration among HR and Finance functions
- Improved operational efficiency with consistent administrative processes
- Streamlined administrative transactional activities through enhanced workflows that can enable staff to focus on strategic goals
- Improved administrative reporting capabilities and data accessibility

Limitations and Challenges

- Does not address student information related critical needs
- Complexity of integration between HR & Finance systems and multiple disparately configured SIS systems
- Potential for data inconsistency between the administrative ERP and the student information systems
- Potential limitations to customizations to support district specific HR and Finance current state processes

Dependencies

- Establishment of a statewide data strategy and governance framework, chart of accounts, and job catalog
- Standardized HR and Finance business processes and policies

Target State Landing Point 2: Statewide Administrative Areas (HR & Finance) and Data Management Transformation (2 of 2)

Task Force attendees discussed what benefits, challenges, and questions their associations might express about this Landing Point

Discussion Points:

Resonating benefits:

- Common tool and process for background checks
- Patches, upgrades applied across all districts
- Streamlined statewide training on a common HR/Finance system

Highlighted Challenges:

- Increased complexity because the finance, HR and student information systems would still be separate and require integration and data reconciliation
- Not a full solution
- Creates a more disjointed student experience

Possible Questions from Associations:

- Why would the statewide system only upgrade HR/Finance systems and not SIS?
- How would existing finance and student information system connections be unwound?
- How would integrations look with districts that use the County Office of Education for payroll?
- How does this solution support our students and create a better more equitable experience?

Benefits

- All the benefits of the Statewide Data Management Transformation solution
- Modern HR & Finance system with enhanced self-service capabilities for faculty and staff
- Addresses administrative technology and process challenges
- Improved alignment and collaboration among HR and Finance functions
- Improved operational efficiency with consistent administrative processes
- Streamlined administrative transactional activities through enhanced workflows that can enable staff to focus on strategic goals
- Improved administrative reporting capabilities and data accessibility

Limitations and Challenges

- Does not address student information related critical needs
- Complexity of integration between HR & Finance systems and multiple disparately configured SIS systems
- Potential for data inconsistency between the administrative ERP and the student information systems
- Potential limitations to customizations to support district specific HR and Finance current state processes

Dependencies

- Establishment of a statewide data strategy and governance framework, chart of accounts, and job catalog
- Standardized HR and Finance business processes and policies

Target State Landing Point 3: Statewide ESSR and Data Management Transformation (1 of 2)

Task Force attendees discussed what benefits, challenges, and questions their associations might express about this Landing Point

- An Educational Services and Support and Institutional Research **(ESSR) and data management transformation** implements new technologies, processes, and strategies to improve management and delivery of student-related information and services
- Staff can manage student data more efficiency and effectively
- Underpinned by modernized statewide student information system (SIS) and several foundational initiatives such as the development of common course numbering, a target state operating model and the standardization of business processes
- Each district would continue to operate their existing Finance and HR information systems
- The statewide SIS solution, district's ERPs, and ancillary systems would be integrated into the Federated Data Platform (FDP)

Benefits

- All the benefits of the Statewide Data Management Transformation solution
- Consistent and optimized experience for students, faculty, staff as it relates to student information system interactions across colleges
- Meet key statewide student-related objectives and districts needs through enhanced reporting and an integrated suite of tools
- Enable staff to manage student data and processes more efficiently and effectively
- Centralized data management by consolidating student data from various systems
- Improved student reporting capabilities and data accessibility
- Potential to reduce reliance on ancillary systems supporting the SIS

Limitations and Challenges

- Does not address existing administrative technology or process issues
- Complexity of integration between the SIS and multiple disparately configured administrative technology (HR/Finance) systems
- Potential limitations to customizations to support district specific current state processes
- Integrations with numerous ancillary applications would need to be developed

Dependencies

- Establishment of a statewide data strategy and governance framework and common course numbering
- Standardized ESSR business processes and policies

Target State Landing Point 3: Statewide ESSR and Data Management Transformation (2 of 2)

Task Force attendees discussed what benefits, challenges, and questions their associations might express about this Landing Point

Discussion Points:

Resonating benefits:

- Common financial aid rule management
- Ability to better manage student data
- Transcript evaluations across colleges and districts
- Minimizes most of the current SIS customizations across districts
- Allows HR/Fin to continue with localized configuration

Highlighted Challenges:

- Not integrating student information, finance, and HR systems is problematic
- Increases integration complexity
- Does not help with data variance and reporting
- Not a full solution

Possible Questions from Associations:

- Why would the statewide system only upgrade SIS and not HR/Finance?
- How will this impact single ERP colleges?
- How will this impact 3rd party integrations?
- How will colleges maintain these integrations?

Benefits

- All the benefits of the Statewide Data Management Transformation solution
- Consistent and optimized experience for students, faculty, staff as it relates to student information system interactions across colleges
- Meet key statewide student-related objectives and districts needs through enhanced reporting and an integrated suite of tools
- Enable staff to manage student data and processes more efficiently and effectively
- Centralized data management by consolidating student data from various systems
- Improved student reporting capabilities and data accessibility
- Potential to reduce reliance on ancillary systems supporting the SIS

Limitations and Challenges

- Does not address existing administrative technology or process issues
- Complexity of integration between the SIS and multiple disparately configured administrative technology (HR/Finance) systems
- Potential limitations to customizations to support district specific current state processes
- Integrations with numerous ancillary applications would need to be developed

Dependencies

- Establishment of a statewide data strategy and governance framework and common course numbering
- Standardized ESSR business processes and policies

Target State Landing Point 4: Statewide HR, Finance, ESSR and Data Management Transformation (1 of 2)

Task Force attendees discussed what benefits, challenges, and questions their associations might express about this Landing Point

- A statewide **administrative area and ESSR and data management transformation** refers to modernizing and enhancing systems and operations related to Finance, HR and student information
- Provides a more consistent digital experience for students, faculty, and staff, and facilitates frictionless access to data
- Underpinned by implementing a statewide cloud-based ERP for Student, HR, and Finance systems provided by a single vendor or by a selection of "best of breed" platforms from multiple vendors
- Transformation involves several foundational initiatives such as the development of a statewide standard chart of accounts, compensation and benefits strategy, operating model, business processes, and common course numbering
- Requires integration of the technology solution into the FDP

Benefits

- All the benefits of the Statewide Data Management Transformation solution
- A consistently uniform experience for all constituents across colleges
- Provides a comprehensive solution for district ERP needs
- Streamlined workflows automated tasks, and reduced manual data entry
- Streamlined integration for HR, Finance, and Student systems
- Improved reporting capabilities and data accessibility
- Improved data security and operational recovery
- Increased cross functional collaboration
- Increased system scalability which could absorb increases in workload, transactions, and users

Limitations and Challenges

- Requires the longest implementation timeline and highest implementation resource burden
- Potential limitations to customizations to support district specific current state processes
- Integration complexity across existing systems, customizations, legacy systems, etc. during implementation of a SaaS-based solution

Dependencies

- Establishment of a statewide data governance framework, chart of accounts, job catalog, and course numbering
- Standardized HR, Finance, and ESSR business process and policies

Target State Landing Point 4: Statewide HR, Finance, ESSR and Data Management Transformation (2 of 2)

Task Force attendees discussed what benefits, challenges, and questions their associations might express about this Landing Point

Discussion Points:

Resonating benefits:

- Lots of value in statewide data governance
- Districts will save money and time
- Staff to focus on strategic work
- Better reporting standards
- Common Course numbering
- Cleaner student experience
- Easier to detect fraud
- Access to procurement data across districts
- Easier systemwide training and tech support
- Easier to upgrade a common system
- Standardized costs will make cost analysis easier

Highlighted Challenges:

- Aligning on which policies and processes to standardize
- Defining what configurations will be local vs. at the system level
- How to standardize paying employees while factoring pay rates

Possible Questions from Associations:

- How can the statewide system standardize payroll, academic calendars, and statewide chart of accounts?
- How much autonomy (systems/integrations) must districts give up?
- Are all districts and functional areas forced to get on board, and who will manage that process?

Benefits

- All the benefits of the Statewide Data Management Transformation solution
- A consistently uniform experience for all constituents across colleges
- Provides a comprehensive solution for district ERP needs
- Streamlined workflows automated tasks, and reduced manual data entry
- Streamlined integration for HR, Finance, and Student systems
- Improved reporting capabilities and data accessibility
- Improved data security and operational recovery
- Increased cross functional collaboration
- Increased system scalability which could absorb increases in workload, transactions, and users

Limitations and Challenges

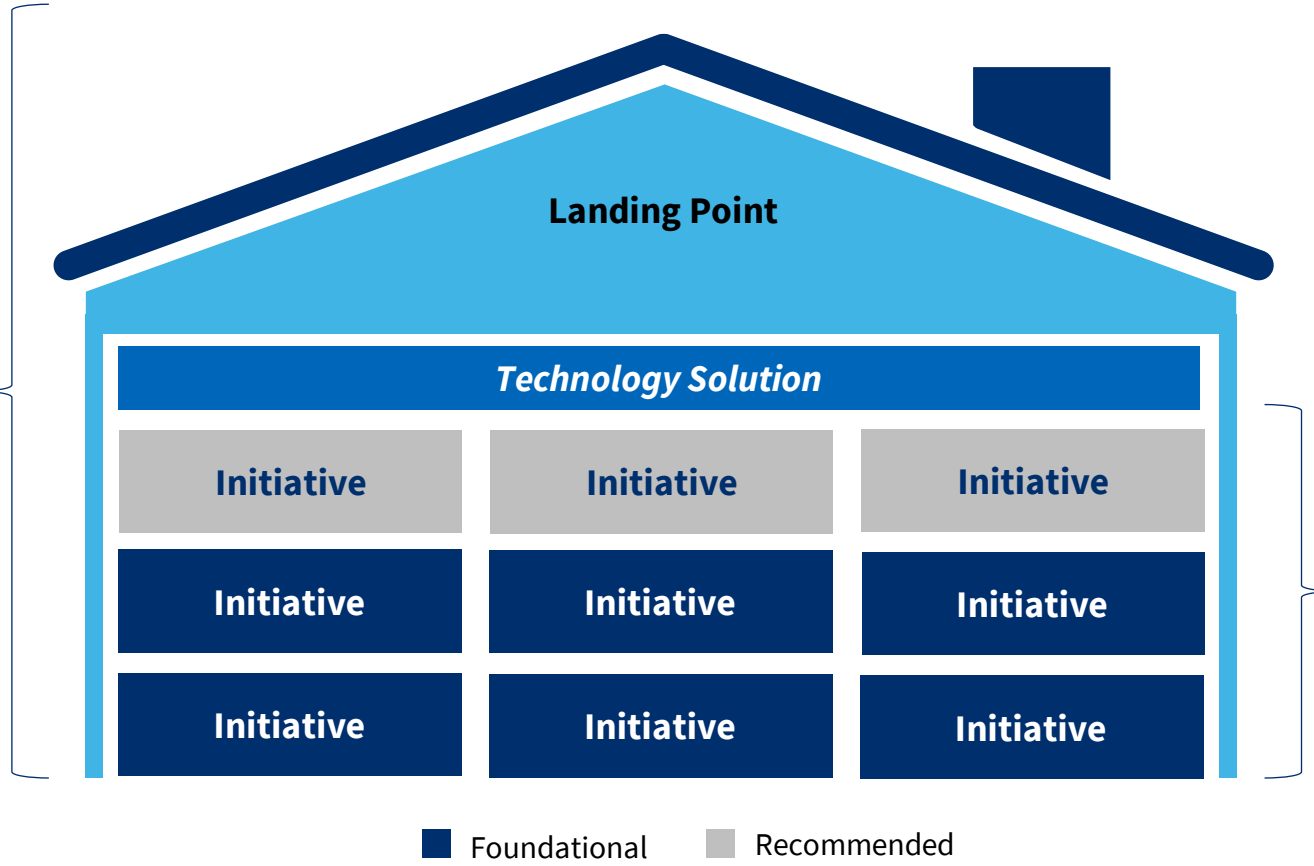
- Requires the longest implementation timeline and highest implementation resource burden
- Potential limitations to customizations to support district specific current state processes
- Integration complexity across existing systems, customizations, legacy systems, etc. during implementation of a SaaS-based solution

Dependencies

- Establishment of a statewide data governance framework, chart of accounts, job catalog, and course numbering
- Standardized HR, Finance, and ESSR business process and policies

Landing Points Overview

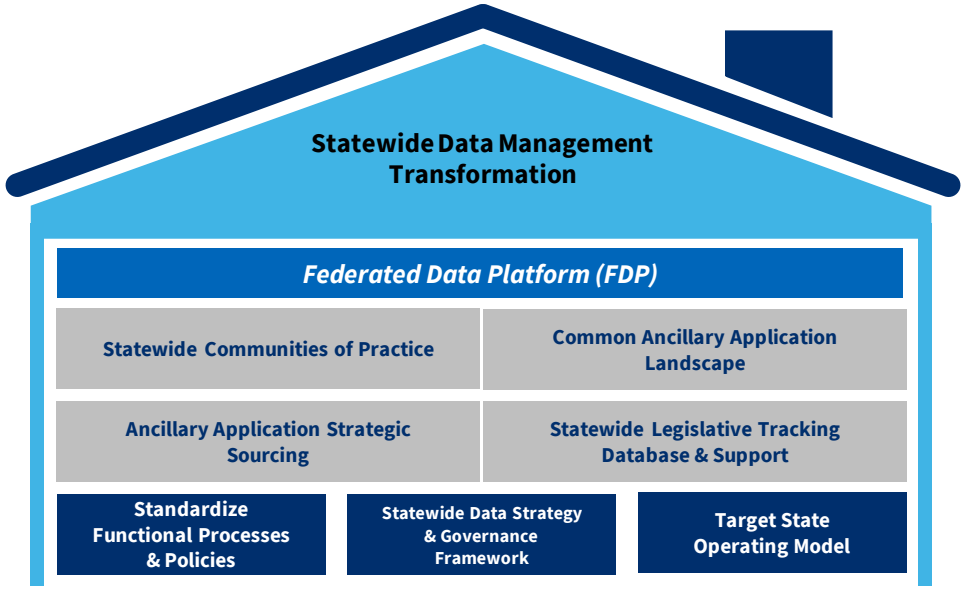
Landing Points set the overarching direction of the target state. They comprise of foundational initiatives essential for establishing alignment and facilitating the adoption of a unified technology solution.



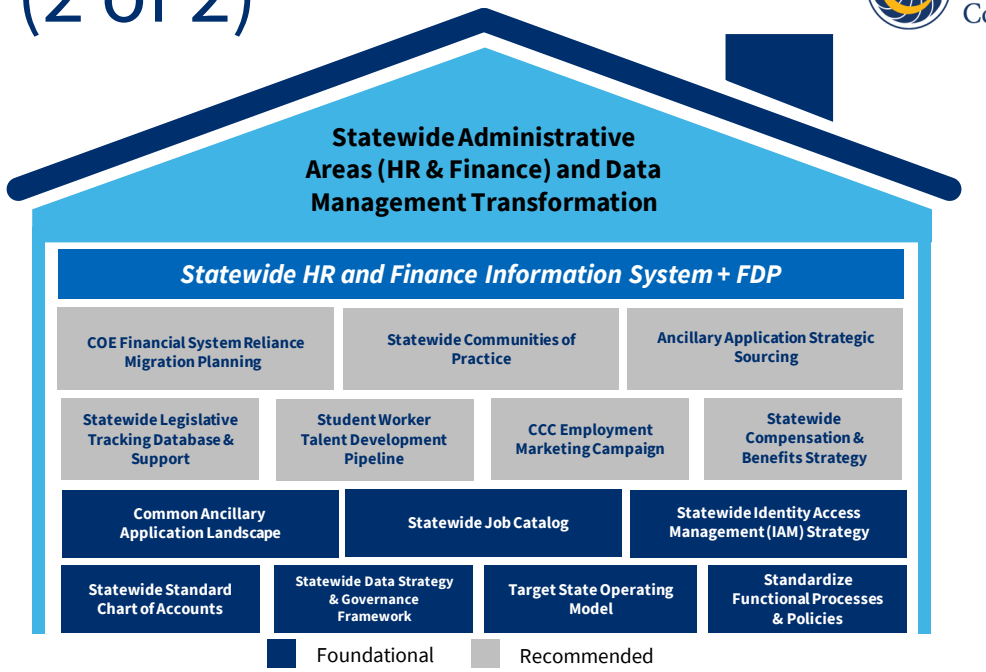
Initiatives serve as the foundation to support the target state solution.

Target State Landing Points Overview (2 of 2)

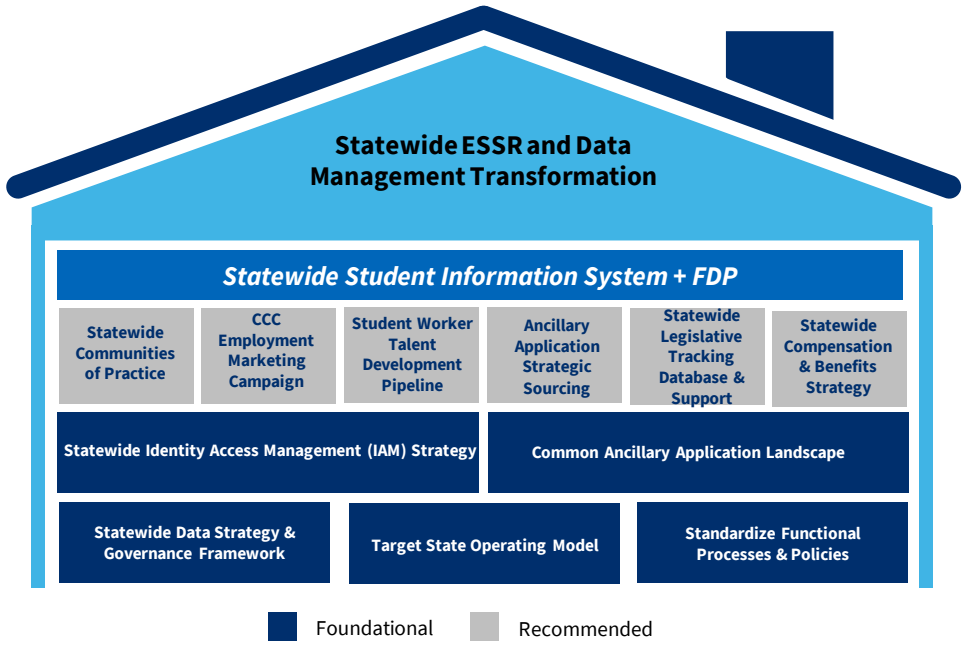
1



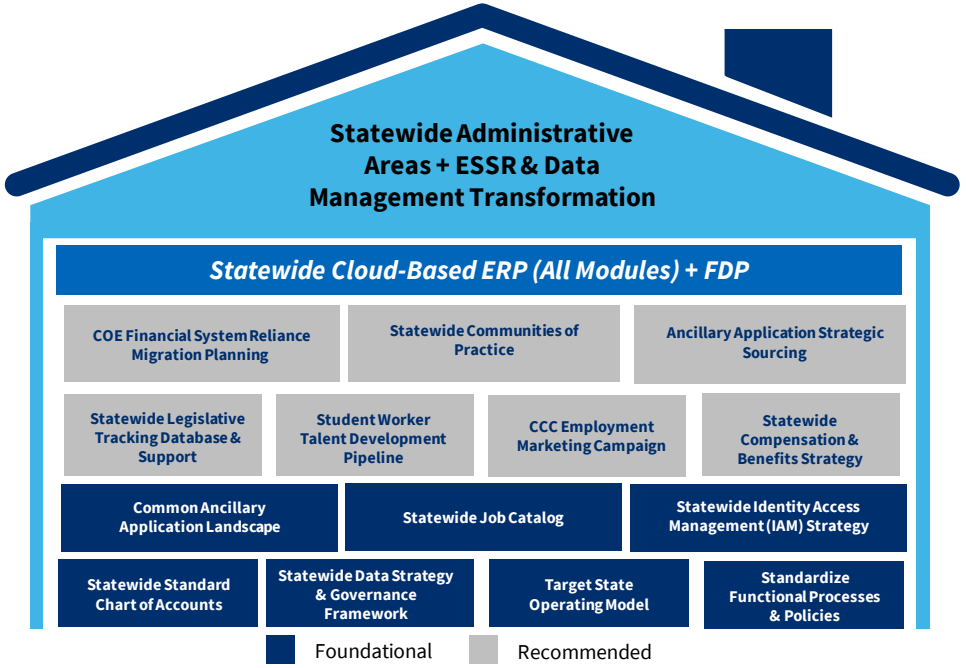
2



3



4



Target State Landing Points – Reflection and Key Takeaways (1 of 4)

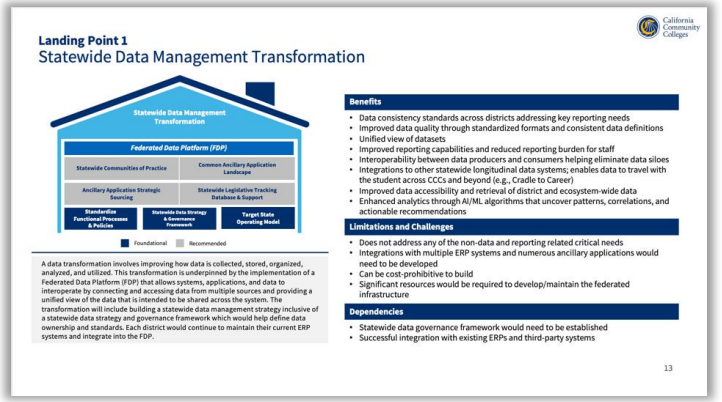
Task Force attendees convened after the Landing Points Learning Activity to share their views on the four possible Landing Points

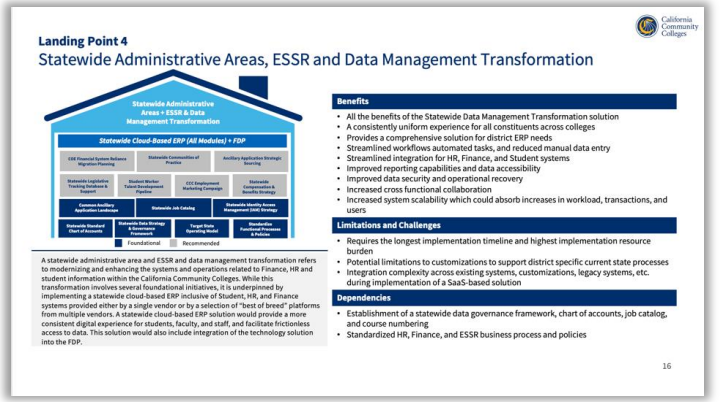
Discussion Points:

Each Task Force attendee spent time reflecting on which of the landing point(s) would most resonate with their association's members, what they need to most effectively share landing point information with their association, and any outstanding questions they have. After the self-reflection, they broke into pairs to share their views. Finally, the members reconvened for a group share-out and discussion.

Key Discussion Takeaways:

- A few members believed their associations would lean towards either Landing Point 1 or 4, but the rest of the Task Force members believed their associations would prefer Landing Point 4
- None of the Task Force members advocated for socializing Landing Point 2 or 3 because neither option offers an integrated solution and meets the full spectrum of critical needs. Task Force members agreed NOT to pursue Landing Point 2 or 3
  - Landing Point 2 requires common HR and Finance system to integrate with 73 separate Student systems
  - Landing Point 3 requires common Student system to integrate with 73 separate sets of HR and Finance systems
- Task Force members will focus on socializing Landing Points 1 and 4 with their associations





Target State Landing Points – Reflection and Key Takeaways (2 of 4)

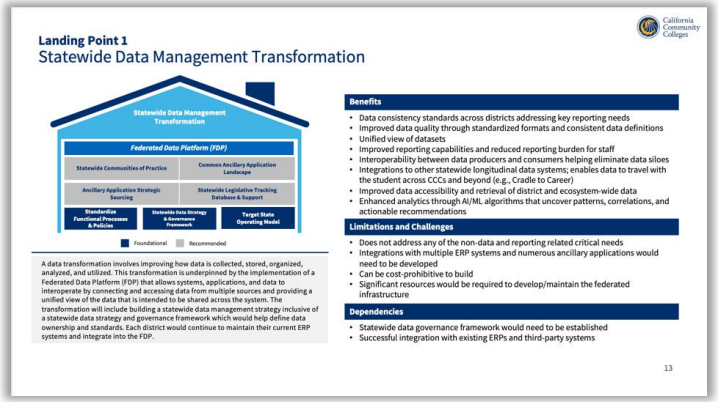
Task Force attendees convened after the Landing Points Learning Activity to share their views on the four possible Landing Points

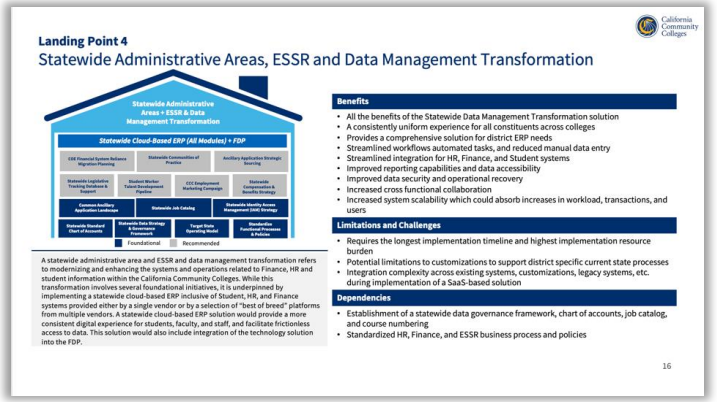
Discussion Points:

Each Task Force attendee spent time reflecting on which of the landing point(s) would most resonate with their association's members, what they need to most effectively share landing point information with their association, and any outstanding questions they have. After the self-reflection, they broke into pairs to share their views. Finally, the members reconvened for a group share-out and discussion.

Key Discussion Takeaways:

- Landing Point 1 seen as viable due to relatively cheaper and shorter implementation with less impact to college and district operations than Landing Point 4
- Landing Point 4 addresses full spectrum of critical needs:
  - Consistent and optimized experience for students, faculty, staff
  - Reduced reporting burdens, greater data access and utility, stronger data governance
  - Better system integration across functional areas
  - Support for resource-constrained districts
  - Future-proofing of statewide technology architecture
  - Mitigate cybersecurity and fraud vulnerabilities





Target State Landing Points – Reflection and Key Takeaways (3 of 4)

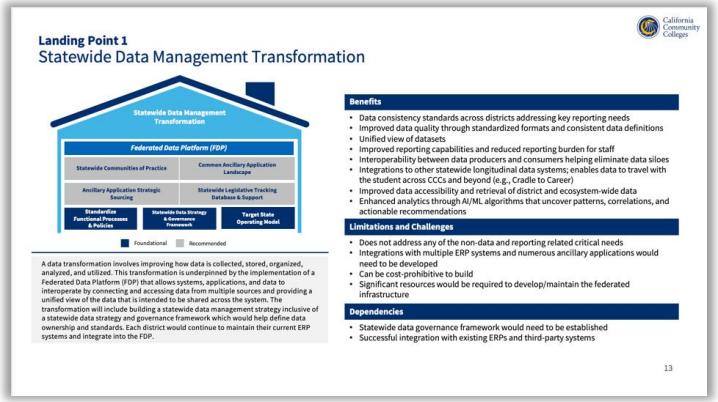
Task Force attendees convened after the Landing Points Learning Activity to share their views on the four possible Landing Points

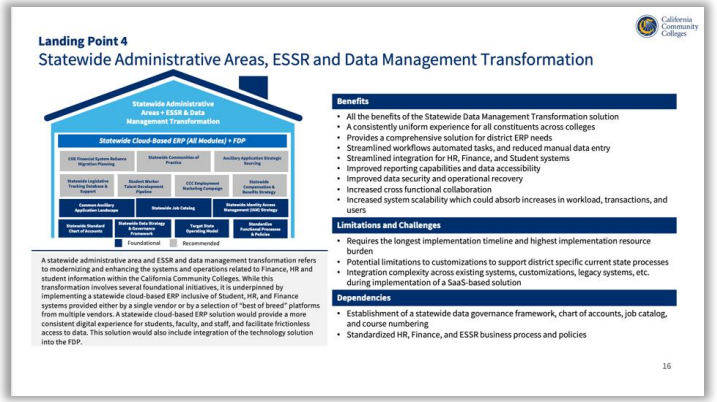
Discussion Points:

Each Task Force attendee spent time reflecting on which of the landing point(s) would most resonate with their association's members, what they need to most effectively share landing point information with their association, and any outstanding questions they have. After the self-reflection, they broke into pairs to share their views. Finally, the members reconvened for a group share-out and discussion.

Key Takeaways from the discussion:

- Task Force participants want a compelling story to articulate that the time, effort, and tradeoffs will be worth it
- Key components of a compelling story:
    1. All districts will eventually need to move to a cloud-hosted solution because ERP vendors are planning a phase out of support for their on-premises products. Doing it together as a system would provide better leverage in negotiation and enable coordinated systemwide support for implementation.
    2. All districts need to track and report on compliance with state and federal regulations. Having 73 districts navigate that separately increases the risks of compliance not being completed accurately and in a timely manner which can be serious. Failures of Title IV compliance, for example, risk fines and potential loss of ability to grant aid.
        - Migrating to a common ERP would:
            - Enable accurate maintenance of student aid transaction records and the collection of financial aid and enrollment data
            - Timely report submissions to the U.S. Department of Education and the automation of workflows to enforce compliance
            - Tracking and reporting burden on districts could be reduced as compliance management could be done centrally





Target State Landing Points – Reflection and Key Takeaways (4 of 4)

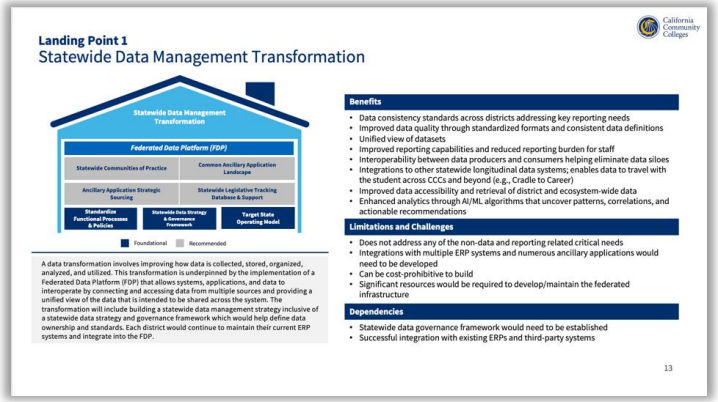
Task Force attendees convened after the Landing Points Learning Activity to share their views on the four possible Landing Points

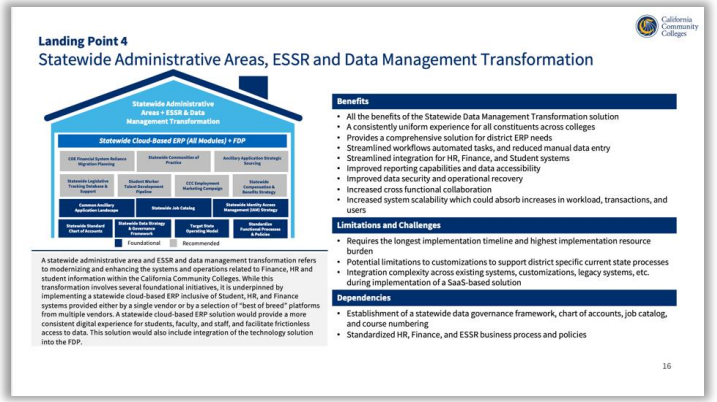
Discussion Points:

Each Task Force attendee spent time reflecting on which of the landing point(s) would most resonate with their association's members, what they need to most effectively share landing point information with their association, and any outstanding questions they have. After the self-reflection, they broke into pairs to share their views. Finally, the members reconvened for a group share-out and discussion.

Key Takeaways from the discussion:

- Building a plan together to migrate to a SaaS solution is the most powerful way to advocate with the state to get the necessary funding and resources to tackle all the challenges and create multiple avenues for potential support.
  - The statewide system has an opportunity to work together thoughtfully and at their pace to implement a statewide solution as opposed to individual districts going about it independently
  - It's important to work together to gather requirements, harmonize processes and policies, select a vendor, and design, configure, and implement a solution, to ensure that all local nuances and ways of working are considered
- Task force participants explored the idea of planning, designing and building the solution together and then allowing districts to decide whether and when to adopt
  - Appropriate statewide resources are needed to build and implement a solution, manage systemwide change, and facilitate local planning/decision making
- Other information Task Force members believe their associations will ask for (some information will not be available until later phases):
  - The extent of state funding
  - The plan for backfilling district/college resources during implementation
  - Estimate of the time commitment needed from district/college resources
  - How much autonomy the districts will maintain
  - Go-forward governance structure
  - Implementation and training support from the CCCCO
  - Rough timeline for vendor selection and implementation activities





Parking Lot Recap (1 of 3)

Identify Business Needs | **Define Requirements**

We are Here

Parking Lot Items - April

1. Is it possible to configure each college/district differently?
2. Incorporate Multi vs Single instance concepts into the Modern ERP Primer.
3. Research CSUs and other institutions regarding single vs multi-instance.

Parking Lot Items - May

1. How will CEO's and District Board of Trustees be involved in garnering support for a Statewide Common solution?

Parking Lot Items - April

1. Have we identified which **initiatives** might **require** passage of **legislation and** which **initiatives** would simply **need Office of Chancellor level approva**l? The initiatives would likely require some level of legislative approval.
2. Need more discussion on **requirements** for a **statewide compensation and benefits initiative**.
3. On the student side of things, we need to consider the **intricacies between scheduling and payroll**. Loading directly connects to payroll and payroll directly connects to scheduling. Need to flesh this out further in future discussions.
4. Need to dig deeper into **instructional policies** and **procedures** that are **different across institutions.**
5. Can **course loading** be configured for each school's specific system?
6. For the example provided in Landing Point 2, do the districts exemplified have **50% law constraints**? How have other institutions that have implemented a common technology solution accommodated the 50% law in their systems?
7. Will the **vision-aligned reporting** that districts are currently being trained on be incorporated into the Federated Data Platform?
8. Any ERP we use will need to have the capabilities to handle **73 different collective bargaining agreements** as well as additional collective bargaining units (such as those for salary schedules, leaves, pay dates, and everything involved with it).
9. Number of Instances: we should sort out if we will have **1 instance, 73 different instances, or something in-between**?
10. What are **requirements** for a common technology platform that would **support three tiers**– state, district, and college?
11. We need to consider districts with **personnel commissions** versus not.

Parking Lot Items - May

1. How are we planning to approach process standardization?
2. Who will decide required configurations?
3. What are the **process similarities?**
4. Who will do the **process mapping?**
5. Need a definition of what is **common versus configured**
6. Are there case studies where the **decision structure** of what would be common or local configuration was **consensus-driven instead of top-down?**
7. Which **customizations** can be **unwound?**
8. How will **decisions** be made and communicated?

Parking Lot Recap (2 of 3)

Research ERP Options & Vendor Capabilities → **Evaluate Compatibility, Customizability & Vendor Support** → **Analyze Costs & ROI** → **Selection**

Parking Lot Items - April

1. For Landing Point 2 scenario (**Backfill existing resource**), is it correct to assume that this **needs to be custom built by Ellucian or another vendor?** What conversations, if any, have we had with Ellucian to discuss if they can do this from a technological perspective?
2. For Landing Point 2, we need to **check if Ellucian can custom build a solution**.

Parking Lot Items - May

1. Consider a Request for Information (RFI) for ERP vendors
2. What are the limits to configurations? At what point does it become 73 instances?
3. Incorporate statewide design process in *journey to selection*
4. Vendor must understand scope (e.g. 73 District BPA)
5. Who will RFP be sent out & when will it be sent out?

Parking Lot Items - May

1. Cost of ownership: how to make it viable?
2. What is the actual cost savings?
3. Need to set expectations for timeline and estimated resource effort

Parking Lot Items - May

1. Does the state have the ability to fund? Will the state commit to funding?

Parking Lot Recap (3 of 3)

Design/Build/Test

Parking Lot Items - May

1. Need to make the ERP great with no/minimal hurdles
2. What will the go-forward governance structure look like?
3. How will MIS be maintained and managed long-term? What will local MIS operations look like?
4. Need to strike the balance of getting everyone to the table for design but not mandating adoption of the ERP
5. How will decision be made and communicated?

Deployment/Go-Live

Parking Lot Items - May

1. Who will manage the transition?
2. Need to have Materials to share with districts and colleges: trainings, webinars, newsletters

Next Steps

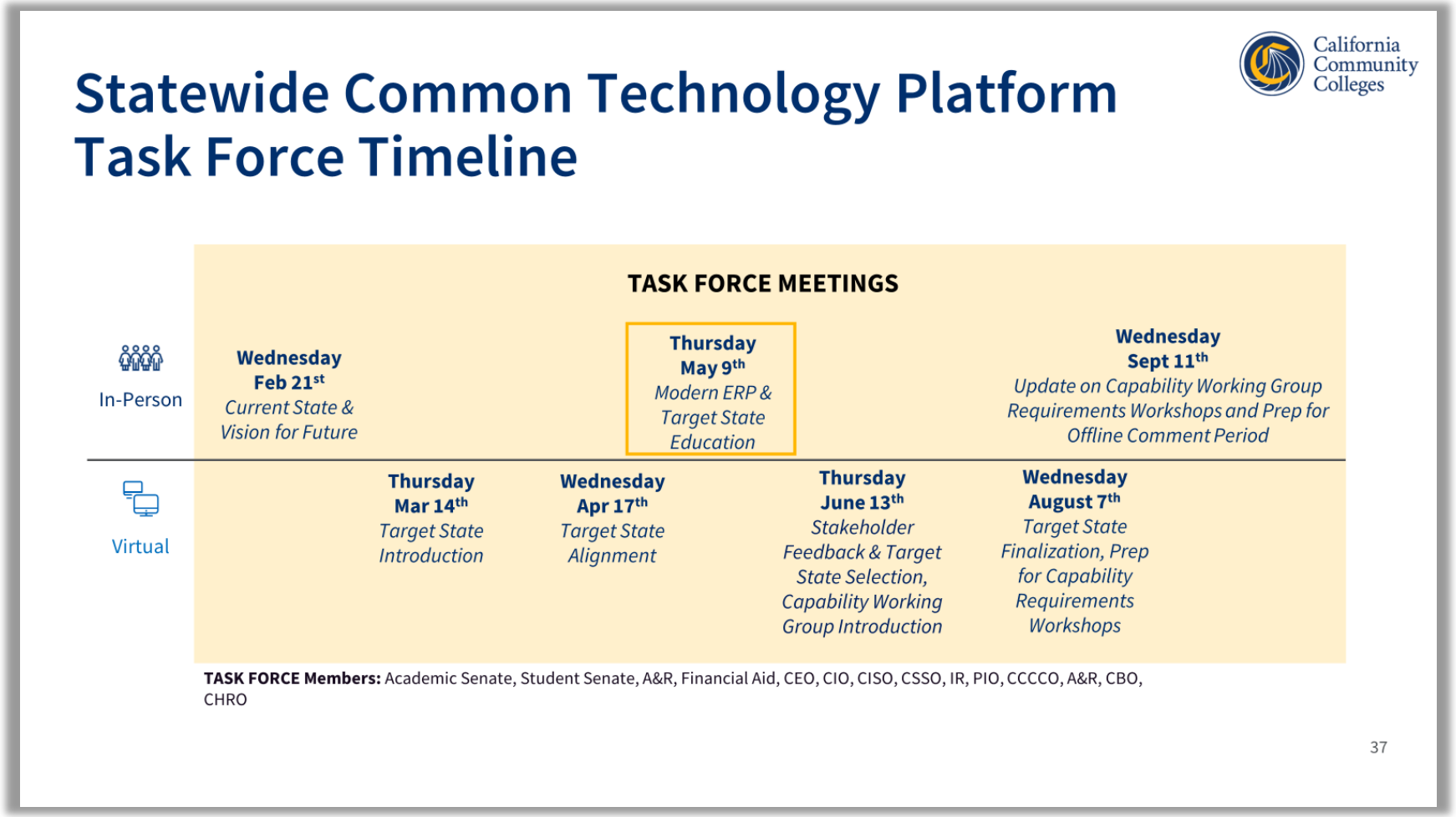
Discussion Points:

Reach out to your associations. **Present Landing Point options one and four** and gather their feedback using these questions:

1. For each of the options, would your association support it?
2. What would your association/district /college(s) need for a successful implementation of each option?
3. Of the two options, which option is your association leaning towards? (If your association needs more information to form a point-of-view, please elaborate.)
4. What outstanding questions/concerns does your association have?

June 13th Task Force – On Zoom

- Share feedback you received from your statewide association



California Community Colleges

Your Task Force Co-Chairs

John Hetts

Chancellor's Office

Chris Blackmore

Riverside CCD