



California Community Colleges

Welcome!

**Statewide Common Technology
Platform**
Task Force
(Deliberative)

February 21, 2024

Executive Summary

On February 21, 2024, the California Community Colleges and Accenture kicked off the first Statewide Common Technology Platform (previously called Common ERP) Task Force in Sacramento. This Task Force will play a crucial role in providing guidance on priorities, a two-way conversation with statewide constituents, and coalescing toward a path for a Statewide Common Technology Platform.

The session began by sharing the reasons for the Task Force and grounding attendees in the purpose and work that has been completed to date. The group discussed the current state of the organizations, process, policies, and technology connected to student, finance, and human resources systems and developed an understanding of current capabilities, strengths, and challenges of each functional area. Possible solutions to address the key statewide challenges were brainstormed. In addition, the group was introduced to a metaphor/mental model of an orchestra to depict how a Common Technology Platform (people, process, policies, and technology) and the inter-relationships would work. The day ended with a visioning exercise, which included identifying constraints, support, future risks and potential solutions to those constraints.

Key Takeaways:

1. This project has the support of the Governor and Chancellor's Office. Even though there is no funding to implement in Fiscal 2025, the System needs to be **ready with a comprehensive plan once funding is available**.
2. A Statewide Common Technology Platform is important for creating an **equitable and consistent digital experience for students** and improving **efficiencies for support personnel**, such as **streamlined processes, automated workflows, and data standards for MIS, 320, and other reporting requirements**.
3. Districts share many **common challenges** that can be addressed through **common solutions**.
4. The Statewide Common Technology Platform Task force wants to have a **voice in long-term decision making and managing change**.

49
Solution Ideas
Identified

18
Task Force
Participants

Session Attendees

Name	Stakeholder Group	Role	College/Org
John Hetts, Co-Chair	CCCCO	Executive Vice Chancellor for the Office of Innovation, Data, Evidence and Analytics Office	California Community Colleges Chancellor's Office
Chris Blackmore, Co-Chair	CISOA / IT	Associate Vice Chancellor, Information Technology & Learning Services	Riverside CCD
Alex Adams	RP / ESSR*	Senior Director, Institutional Research, Planning, and Effectiveness	Fresno City College
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
Victor DeVore	CALCSSO / ESSR*	Dean, Student Services	San Diego CCD
Wrenna Finche	CCCCO	Vice Chancellor of Fiscal Health and Accounting	California Community Colleges Chancellor's Office
Ann-Marie Gabel	ACBO / Finance	Vice Chancellor, Business Services	South Orange County College
Todd Hoig	CCCCO	Director, Management Information Systems	California Community Colleges Chancellor's Office
Jacqueline Lau	CACCRAO / ESSR*	Assistant Director, Admissions and Records	Bakersfield College
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	CALCSSO / 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
Alisa Shubb	ASCCC / ESSR*	Academic Senate President	American River College
Michelle Smith	CCCCO	Visiting Assistant Vice Chancellor	California Community Colleges Chancellor's Office

Agenda

Time	Activity
10:00 AM	Welcome, Intros, and Agreements
	Connection
	Purpose & Project Timeline
	Capabilities & Processes
11:25 AM	Break
	Strengths & Challenges
	Orchestra Mental Model
12:35 PM	Lunch
	Solutioning Ideas
	Headlines of the Future/Vision
2:45 PM	Break
	Future Casting Sailboat Exercise
3:40 PM	Wrap-Up & Next Steps

Why Do You Think This Effort is Important?

Discussion Points:

- Students, faculty, and staff don't have the technology platforms that other higher ed systems have; students deserve to have a platform that enables them to succeed
- The Task Force seeks digital equity and a consistent experience for students
- A Common Technology Platform would create uniformity in reporting and processes to improve efficiencies for support personnel
- Standardization of ways of working to enable accurate and meaningful statewide analysis
- The Statewide Common Technology Platform Task force wants to have a voice in long-term decision making and managing change.



Project and Task Force Purpose

Discussion Points:

- We have renamed this project from “Common ERP” to “Statewide Common Technology Platform”
- This name change reflects the potential for a common statewide technology platform that includes one or more ERP systems, select ancillary systems, and a statewide data platform.
- The work represented by this project has the support of the Governor and Chancellor. The goal is to develop a comprehensive plan with the collective support of the system to organize our statewide effort and advocacy.
- This Task Force plays a crucial role in providing guidance on priorities, maintaining a two-way conversation with statewide constituents, and coalescing toward a path for a Statewide Common Technology Platform.

Vision 2030 + Digital Equity

Anyone in California seeking a postsecondary education, regardless of what they look like, where they live, time since high school, and their preferred education modality should have on-demand access.

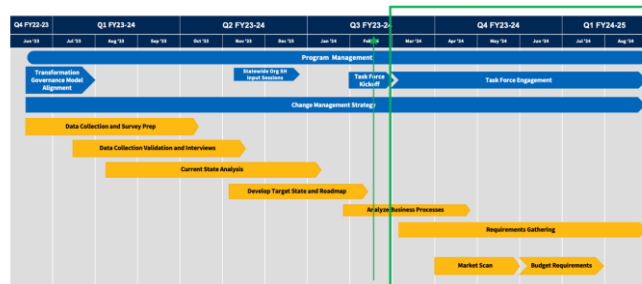


Five Key Statewide Challenges

Through interviews with the students, faculty, and staff, the following key challenges emerged:

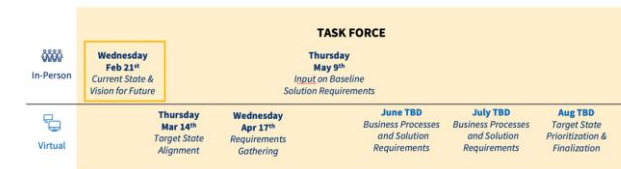
1. Disparate processes, procedures, and systems lead to **manually intensive work**, significantly **hindering the colleges' ability to focus on strategic activities**
2. **Inconsistent** management of data and **inaccurate** reporting limit our **ability to serve students and faculty**
3. Current landscape **exacerbates** existing **hiring and retention challenges** for statewide staff.
4. Students, faculty, and staff face **inequitable experiences related to technology**, which **reduces institutional mobility, limits visibility** into data, **hinders communities of practice**, and **increases barriers** to success
5. **Slow adoption of modern technology** systemwide contributes to **security vulnerabilities** for students, faculty, staff, and institutions, impacting continuity of delivery of education and services.

Where the Project is Headed



Statewide Common Technology Platform Task Force

Task Force participants have been selected by their state organization to join the Task Force in February 2024. The Task Force will create a vision for a Common Technology Platform, align on a target state, gather and give input on requirements, and assist in the RFP selection process.



TASK FORCE Members: Academic Senate, Student Senate, AAR, Financial Aid, CIO, CISO, CSO, IR, PIO, CCCCC, AAR, CBO, CHRO

Understanding Common Capabilities & Processes

Discussion Points:

- Capabilities and Processes are the muscles an institution builds
- These Capabilities and Processes may be named slightly differently across the 73 districts, but they are largely common across all the districts
- Creating a common naming convention will help to create alignment across the districts

D. Education Services & Support and Institutional Research Process Inventory (1/3)

The following are key Education Services & Support and Institutional Research Process Inventory (ESSR) processes.

Academic Program Management	Course & Curriculum Management	Course Delivery	Academic Advising/Counseling
- Academic Program Portfolio Management - Academic Program Management - Academic Standards - Curriculum Design - Program management - Program Review - Labor Market Information - Degree/Program Regions - Supply vs. Need - Curriculum Design/Development	- Curriculum Design & Management - Course Scheduling - Course Content Management - Faculty Level Operations - Course Learning Objective Development - Course Content Design - Instructional Design - Course Analytics - Attendance Accounting - Level Management - Faculty Loading - Faculty Scheduling - FLAC & Load sheets - Course Scheduling	- Instruction - Faculty Office Hours - Grading - Course Evaluation - Learning Analytics - Facility/Classroom Management - Student Program Change - Degree Planning - Student Enrollment - Change Administration - Student Retention - Analytics - Student Retention Intervention	- Advisor Portfolio Management - Advising Appointment Management - End User Support - Service Strategy - Define Services - Service Requirements

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IT Process Inventory – Updated on 2/21

The following are key IT processes that impact districts' ERP support and maintenance including system integration, reporting, data management, and user training.

Service Operations and Support	IT Operations	Enterprise Data Analytics	Enterprise IT Infrastructure	Enterprise Systems	Procurement
- Hardware Support - Service Support (Management) - End User Support - Service Strategy - Define Services - Service Requirements	- Data and Technology Governance - Technology Financial Management - Workforce Management - IT Change Control and Management - Training	- Customer Analytics - Educational Product and Service Analytics - Insights and Reporting	- Active Directory Management - Backup Administration - Cloud Services - Database Maintenance - Data Integration - Data Management - License Management - Server Management	- Design, Build, Test, Deploy - Enterprise System and Application Administration, Development, and Support - Data Integration - Data Migration	- Procurement and Vendor Management - Contract Management - Sourcing and Procurement Analytics
Project Management	IT Architecture	Information Security	Networking & Data Centers	Web Services	College and Campus Services
- Manage Program and Projects - Project Delivery	- Enterprise Architecture - Solution Architecture - Data Architecture	- Application Security - Disaster Recovery and Data Loss Prevention - Digital Identity - Security Operations Management - Privacy	- Network Design and Configuration - Telecom - Data Center Controls	3rd Party Integrations - Web Development - Content Management - Web Application Support and Maintenance	- A/V Support - Classroom and Event Technology Setup and Support

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Finance Process Inventory

The following are key Finance processes.

Budgeting, Planning & Forecasting	General Ledger	Capital Projects	Accounts Payable
- Scenario Planning - Target Setting - Budget Development - Budget Reconciliation - Forecasting - Budget Reporting	- General Ledger Management - Journal Entry Processing - Interface Management - Month & Year End Close - General Ledger Reconciliation - Financial Accounting - Financial Statement Reporting	- Capital Planning - Capital Project Management - Project Reporting	- Invoice Receipt & Processing - Payment Processing - AP Reconciliation & Period Close - Payment Reporting
Accounts Receivable & Collections	Treasury & Cash Management	Tax Accounting & Auditing	Procurement
- Customer Data Management - Customer Contract Management - Customer Billing - Deposits & Payment Application - Collection Processing - Bank Reconciliations - Customer Inquiry & Dispute Management	- Banking Relationship Management - Banking/Payment Processing - Bank Reconciliations - Cash Position Management	- Tax Administration - Tax Accounting - Tax Processing - Tax Auditing - Tax Reporting	- Strategic Sourcing - Catalog Management - Category Management - Supplier/Vendor Management - Supplier Contract Management - Request to Buy - Rebidding Processing
Travel & Expenses	Asset Management	Grants Management	Foundation
- Travel Requests - Cash Advances - Travel Reimbursements - Petty Cash/Non-Travel Reimbursements - Card Expense Processing - Expense Auditing - Expense Reporting	- Asset Master Data Management - Asset Acquisition & Disposal - Asset & Equipment Tracking - Asset Depreciation - Lease Management - Asset Period Close - Asset Reporting	- Award Set Up - Award Modification - Award Management - Award Closeout - Grant Reporting - Sponsor Billing/Receivables - Sponsor Contract Management - Effort Certification - Grant Accounting	- Donor Set Up - Gift Processing - Gift Accounting - Endowment Accounting - Investment Accounting

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C. HR Process Inventory - Updated on 2/21

The following are key HR processes that are encompassed in the ERP. Variations by employee groups will exist for each process.

Workforce Planning	Talent Acquisition	Talent Management	Total Rewards	Employee and Labor Relations
- Organization Design - Job Catalog And Framework - Succession Planning and Forecasting - Skills and Capability Management - Annual Planning	- Talent Networking And Sourcing - Assessment And Selection (Interviewing, Interviewing, offer) - Candidate Clearance And Credentialing - Applicant Hire - Onboarding (paperwork, training, pre-employment checks)	- Learning & Professional Development Program Management - Training Program Management - Professional And Industrial Certification - Performance Management - Talent Engagement & Recognition Program Management	- Compensation (evaluating, assessing, managing, and administering compensation programs) - Benefits Management - Health & Welfare, Wellness, Retirement (401K, 403B, 457, etc.) - Leave & Absence Program Administration	- Employee Relations - Discipline Management - Grievance Management - Title III Compliance - Hazard & Incident Management - Government & Labor Relations - Health & Safety Plan Management
Time and Labor	HR Information Systems & Data Management	Payroll Administration	Workforce & Employee Data Administration	
- Scheduling - Time Tracking - Time Off & Leave	- Data Architecture - Reporting - HR Application Support	- Earnings Code Management - Deduction Code Management - Payroll Processing - Payroll Accounting - Payroll Reporting - Tax Administration	- Data Management - Position Management - Personnel Changes - Separation Processing - Offboarding - SSN Changes - Via Processing - Personal Profile Changes (Address, Name, Direct Deposit, etc.)	

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D. Education Services & Support and Institutional Research Process Inventory (1/4) – Updated 2/21

The following are key Education Services & Support and Institutional Research Process Inventory (ESSR) processes.

Course & Curriculum Management	Scheduling	Course Delivery	Academic Program Management	Counseling
- Curriculum Design & Management - Course Learning Objective Development - Course Content Design - Instructional Design - Course Analytics	- Course Scheduling - Faculty Scheduling - Faculty Load Management - Classroom Scheduling	- Roster Management - Instruction - Faculty Office Hours - Attendance Tracking - Attendance Accounting - Course Content Management - Grading - Grade Management - Course Evaluation - Student Learning Objective Assessment - Learning Analytics	- Program/Degree Demand Research - Labor Market Research - Academic Program Portfolio Management - Academic Standards - Academic Progress - Program Management - Level Management	- Counselor Portfolio Management - Counseling Appointment Management - Student Counseling - Student Education Plan Management - Student Program Change Administration - Student Enrollment Change Administration - Student Retention Analytics & Reporting - Student Retention Risk Intervention

D. Education Services & Support and Institutional Research Process Inventory (2/4) – Updated 2/21

The following are key Education Services & Support and Institutional Research Process Inventory (ESSR) processes.

Student Recruitment & Admissions

- Recruitment Strategy
- Student Recruitment Marketing
- Student Pipeline Development
- Student Intake Management
- Lead Management
- Recruitment Event Management
- Application Management
- Admissions Communications
- Admissions Counseling & Support
- Application Processing
- Student Pathways Management
- Student Transfer
- Admissions Fraud Management & Mitigation

Student Yield & Orientation

- Yield Communications
- Yield Management
- Melt Communications
- Melt Management
- Orientation Management
- Orientation Communications
- Orientation Registration
- Yield Reporting
- Melt Reporting

Financial Aid

- Financial Aid Budget Management
- Financial Aid Application Management
- Financial Aid Counseling & Support
- Financial Aid Communications
- Financial Aid Application Processing
- Financial Aid Eligibility Management
- Financial Aid Award Packaging
- Financial Aid Disbursements
- Financial Aid Adjustments
- Federal Work Study Program Management
- Federal Work Study Eligibility Management
- Federal Work Study Budget Management
- Federal Work Study Reconciliation
- Financial Aid Compliance
- Financial Aid Reporting
- Financial Aid Fraud Management & Mitigation
- Title IV Management

Student Accounts & Bursar

- Student Account Set Up
- Student Account Changes
- Tuition & Fees Management
- Employer Tuition & Fee Discounts Management
- Student Billing
- Payment Plan Management
- Payment Management
- Non-Payment Management
- Collections Management
- Refund Management
- Balance Sheet Maintenance
- Financial Hold Management
- Debt Aging Management
- 1098T Administration
- Student Accounts & Bursar Support
- Student Accounts & Bursar Reporting

D. Education Services & Support and Institutional Research Process Inventory (3/4) – Updated 2/21

The following are key Education Services & Support and Institutional Research Process Inventory (ESSR) processes.

Student Records

- Student Record Set Up
- Student Record Maintenance
- Medical Verification
- Transfer & Advanced Placement Credit Evaluation
- Student Placement Assessment Administration
- Transcript Administration
- Grades & Academic Standing Administration
- Degree/Certificate Audits & Award Management
- Degree/Certificate & Enrollment Verification
- Student Records Support
- Student Records Reporting
- FTE Reporting

Registration

- Academic Calendar Management
- Term Scheduling
- Course Catalog Management
- Registration Management
- Withdrawals/Leaves of Absence Administration
- Diploma/Certificate Administration
- Commencement Operations
- Registration Support
- Registration Reporting

Student Support & Engagement Programs

- Service/Program Administration
- Service/Program Communications
- Service Request Processing
- Service/Program Registration/Intake
- Service/Program Delivery
- Service/Program Use/Attendance Tracking
- Service/Program Evaluation
- Services/Program Reporting

Categorical Programs

- Categorical Program Administration
- Categorical Program Communications
- Service Request Processing
- Categorical Program Registration/Intake
- Categorical Program Delivery
- Categorical Program Use/Attendance Tracking
- Categorical Program Evaluation
- Categorical Program Reporting
- International Tracking

D. Education Services & Support and Institutional Research Process Inventory (4/4) – Updated 2/21

The following are key Education Services & Support and Institutional Research Process Inventory (ESSR) processes.

Athletics

- Intercollegiate Athletic Program Management
- Student-Athlete Recruitment
- Student-Athlete Eligibility
- NJCAA Compliance & Governance
- Coaching & Athletic Staff Development
- Team Roster Management
- Athletic Training & Physical Therapy
- Athlete Academic Support
- Athletics Fundraising & Sponsorship
- Athletic Program Analytics
- Intramural Program Management
- Recreational Program Management
- Recreational Facilities Management
- Equipment Management

Alumni & Advancement

- Alumni Database Management
- Alumni Records Management
- Alumni Engagement Strategy
- Alumni Engagement Communication
- Alumni Network Management
- Alumni Engagement Events
- Advancement Strategy
- Major Gifts/Principal Giving
- Planning Giving
- One Time Gifts
- Annual Giving
- Foundation Giving
- Corporate Giving
- Receipt & Processing

Institutional Research

- Institutional Analytics
- Institutional Strategic Planning Support and Assessment
- Resource Request & Allocation
- Programmatic Research
- Academic Program Review
- Student Services Program Review
- Program Review Tracking
- Accreditation Reporting & Management
- Federal Reporting
- State Reporting
- County Reporting
- District Reporting

IT Process Inventory – Updated 2/21

The following are key IT processes that impact districts’ ERP support and maintenance including system integration, reporting, data management, and user training.

Service Operations and Support • Hardware Support • Service Support (Management) • End User Support • Service Strategy • Define Services • Service Requirements	IT Operations • Data and Technology Governance • Technology Financial Management • Workforce Management • IT Change Control and Management • Training	Enterprise Data Analytics • Customer Analytics • Educational Product and Service Analytics • Insights and Reporting	Enterprise IT Infrastructure • Active Directory Management • Backup Administration • Cloud Services • Database Maintenance • Data Integration • Data Management • License Management • Server Management	Enterprise Systems • Design, Build, Test, Deploy • Enterprise System and Application Administration, Development, and Support • Data Integration • Data Migration	Procurement • Procurement and Vendor Management • Contract Management • Sourcing and Procurement Analytics
Project Management • Manage Program and Projects • Project Delivery	IT Architecture • Enterprise Architecture • Solution Architecture • Data Architecture	Information Security • Application Security • Disaster Recovery and Data Loss Prevention • Digital Identity • Security Operations Management • Privacy	Networking & Data Centers • Network Design and Configuration • Telecom • Data Center Controls	Web Services • 3rd Party Integrations • Web Development • Content Management • Web Application Support and Maintenance	College and Campus Services • A/V Support • Classroom and Event Technology Setup and Support

Finance Process Inventory – Updated 2/21

The following are key Finance processes.

Budgeting, Planning & Forecasting

- Scenario Planning
- Target Setting
- Budget Development
- Budget Reconciliation
- Forecasting
- Budget Reporting

Accounts Receivable & Collections

- Customer Data Management
- Customer Contract Management
- Customer Billing
- Deposits & Payment Application
- Collection Processing
- Customer Inquiry & Dispute Management

Travel & Expenses

- Travel Requests
- Cash Advances
- Travel Reimbursements
- Petty Cash/Non-Travel Reimbursements
- P-Card Expense Processing
- Expense Auditing
- Expense Reporting

General Ledger

- General Ledger Management
- Journal Entry Processing
- Interface Management
- Month & Year End Close
- General Ledger Reconciliation
- Financial Accounting
- Financial Statement Reporting

Treasury & Cash Management

- Banking Relationship Management
- Banking Payment Processing
- Bank Reconciliations
- Cash Position Management

Asset Management

- Asset Master Data Management
- Asset Acquisition & Disposal
- Asset & Equipment Tracking
- Asset Depreciation
- Lease Management
- Asset Period Close
- Asset Reporting

Capital Projects

- Capital Planning
- Capital Project Management
- Project Reporting

Tax Accounting & Auditing

- Tax Administration
- Tax Accounting
- Tax Processing
- Tax Auditing
- Tax Reporting

Grants Management

- Award Set Up
- Award Modification
- Award Management
- Award Closeout
- Grant Reporting
- Subawards
- Sponsor Billing/Receivables
- Sponsor Contract Management
- Effort Certification
- Grant Accounting

Accounts Payable

- Invoice Receipt & Processing
- Payment Processing
- AP Reconciliation & Period Close
- Payment Reporting

Procurement

- Strategic Sourcing
- Catalog Management
- Category Management
- Supplier/Vendor Management
- Supplier Contract Management
- Requisition to PO
- Refund Processing

Foundation

- Donor Set Up
- Gift Processing
- Gift Accounting
- Endowment Accounting
- Investment Accounting

C. HR Process Inventory - Updated 2/21

The following are key HR processes that are encompassed in the ERP. Variations by employee groups will exist for each process.

Workforce Planning • Organization Design • Job Catalog And Framework • Succession Planning and Forecasting • Skills and Capability Management • Annual Planning	Talent Acquisition • Talent Networking And Sourcing • Assessment And Selection (screening, interviewing, offer) • Candidate Clearance And Credentialing • Applicant Hire • Onboarding (paperwork, training, pre-employment checks)	Talent Management • Learning & Professional Development Program Management • Training Program Management • Professional And Industrial Certification • Performance Management • Talent Engagement & Recognition Program Management	Total Rewards • Compensation (evaluating, assessing, managing, and administering compensation programs) • Benefits Management • Health & Welfare, Wellness, Retirement (CalSTR/ CALPERS), and Ancillary Benefits • Leave & Absence Program Administration	Employee and Labor Relations • Employee Relations • Discipline Management • Grievance Management • Title IX Compliance • Hazard & Incident Management • Government & Labor Relations • Health & Safety Plan Management
Time and Labor • Scheduling • Time Tracking • Time Off & Leave	HR Information Systems & Data Management • Data Architecture • Reporting • HR Application Support	Payroll Administration • Earnings Code Management • Deduction Code Management • Payroll Processing • Payroll Accounting • Payroll Reporting • Tax Administration	Workforce & Employee Data Administration • Data Management • Position Management • Personnel Changes • Separation Processing • Offboarding • SSN Changes • Visa Processing • Personal Profile Changes (Address, Name, Direct Deposit, etc.)	

Strengths, Challenges, and Solution Brainstorming

Discussion Points:

- Task force members clarified and added Strengths and Challenges
- They prioritized Challenges and brainstormed on possible solutions
- Examples of common challenges included:
 - Manual processes and duplicate data entry due to ancillary systems not being fully integrated with the ERP systems
 - Data quality and availability issues make reporting manual and time-consuming
- Examples of common solutions included:
 - Reduce number of ancillary systems and integrate the go-forward ancillary systems with the ERP systems
 - Create a common data model to improve data quality and streamline reporting

Educational Services & Support and Institutional Research Strengths & Challenges – Updated on 2/21

Self-identified Academic, Student & IR challenges, strengths, and improvement opportunity insights from the ERP current state analysis across the participatory districts.

	Strengths	Challenges
People	Many districts have governance committees and/or processes to support the identification and execution of improvement opportunities	- Most stakeholders surveyed and interviewed expressed an inability to keep pace with legislative changes, causing most work performed to be transactional in nature Wage competition, a lack of remote work policies, and challenges sourcing qualified talent with systems experience are barriers to filling vacancies
Process	A variety of tools support functional users to complete reporting processes	- Most districts interviewed do not formally measure the performance of internal or external services offered - Most processes are performed manually, contributing to resource capacity constraints Reporting such as MIS and 320 reporting is heavily manual
Technology		No student information system currently in use can support all functions needed Many ancillary systems are used to support key functions such as curriculum management - Some districts' SIS are not integrated such that data can flow from the ESSR* to other systems

*ESSR = Educational Services & Support and Institutional Research

Educational Services & Support and Institutional Research Challenges & Solutions – Updated on 2/21 (1/2)

Self-identified Academic, Student & IR challenges, strengths, and improvement opportunity insights from the ERP current state analysis across the participatory districts.

	Prioritized Challenges	Solutions
People	- Most stakeholders surveyed and interviewed expressed an inability to keep pace with legislative changes, causing most work performed to be transactional in nature Wage competition, a lack of remote work policies, and challenges sourcing qualified talent with systems experience are barriers to filling vacancies	One platform database that tracks legislation in real time and can be downloaded for college/district use Statewide task forces to recommend responses to legislative change - Clear, updated required steps Centralized support for statewide implementation Common technology solution will help us respond collectively to legislative changes Early guidance rollout Develop one mechanism that can be used for reporting (e.g., SuperGlue for MIS/320/curriculum/etc.) using API
Process		- Create pipeline for student workers to guarantee jobs Centralized tech support that pays market rate using cost savings from common system to pay more, and improve working conditions (workload, environment) - Have a state consultant and technology resource pool that handles paperwork Implement cross training on MIS & 320 corrections, state level support, webinar/ conferences/ professional development Provide incentives for employees to stay after years of experience and create a marketing campaign to generate interest in CCC employment Create statewide union contracts on benefit plans
Technology		

*ESSR = Educational Services & Support and Institutional Research

Information Technology Strengths & Challenges – Updated 2/21

Identified IT strengths and challenges from the ERP current state analysis across the participatory districts.

	Strengths	Challenges
People	15 out of 36 individual participating districts have reported some form of technology system governance, a group responsible for making recommendations, setting guidelines, and creating policies	Little training or process documentation exists to support staff since many districts have little to no training budget - Districts do not have formal delineation of roles between IT and functional areas placing a burden on IT to assume responsibility Staff are constrained from small teams, high turnover, and the inability to fill vacant positions - There is a large reliance on consultants for support - Large capacity spent on transactional activities
Process		- Most ERP support and maintenance processes utilize little automation - IT is burdened supporting MIS, 320, and building custom reports for other functional groups - IT struggles with reconciling data because of inaccuracies - Beyond help desk metrics, most districts do not measure workflows due to lack of resources
Technology	- Districts with SaaS or Cloud ERP systems generally have fewer customizations - Districts have a culture of prioritizing strong security practices by implementing a subset of protocols such as firewalls, monitoring tools, MFA, network cybersecurity, regular data backups, etc. - Over 40% of districts interviewed mentioned using a custom data warehouse	Many system customizations and ancillary systems are utilized to support the ERP systems - Lack of real-time integrations - Many districts lack of data governance structures, including defined roles and responsibilities and standards

* = prioritized by task force

Information Technology Challenges & Solutions– Updated on 2/21

Identified IT challenges, strengths, and improvement opportunity insights from the ERP current state analysis across the participatory districts.

	Prioritized Challenges	Solutions
People	Little training or process documentation exists to support staff Staff are constrained from small teams, high turnover, and the inability to fill vacant positions	Allocate budget for ongoing staff training - Develop statewide IT process documentation to ensure processes are standardized streamlining operations and promoting consistency - Design a common IT operating model that can optimize employee allocation, balance statewide and local needs, and ensure employees are allocated to initiatives that align with strategic goals
Process	- Most ERP support and maintenance processes utilize little automation - IT is burdened supporting MIS, 320, and building custom reports for other functional groups	- Evaluate automation solutions and capabilities to enhance overall functionality of the ERP system Leverage a cloud-based SaaS ERP solution that supports reporting and automation through centralized data, real-time reporting, customizable dashboards, etc.
Technology	Many system customizations and ancillary systems are utilized to support the ERP systems	Develop a standard data model that streamlines the reporting process, optimizes data management, standardizes reporting processes, and sets data standards to support MIS, 320, other reports Simplify MIS reporting requirements Share reporting resources and SMEs across districts Utilize a cloud-based SaaS ERP solution with "baseline" functionality that covers a wide range of business processes to minimize customizations allowing for quicker system updates and patches Implement ERP modules during solution implementation to minimize reliance on ancillary systems Develop an application inventory landscape that identifies duplicative or redundant applications

Information Technology Strengths & Challenges – Updated 2/21

Identified IT strengths and challenges from the ERP current state analysis across the participatory districts.

	Strengths	Challenges
People	15 out of 36 individual participating districts have reported some form of technology system governance, a group responsible for making recommendations, setting guidelines, and creating policies	★ Little training or process documentation exists to support staff since many districts have little to no training budget ★ Districts do not have formal delineation of roles between IT and functional areas placing a burden on IT to assume responsibility Staff are constrained from small teams, high turnover, and the inability to fill vacant positions - There is a large reliance on consultants for support - Large capacity spent on transactional activities
Process		★ Most ERP support and maintenance processes utilize little automation ★ IT is burdened supporting MIS, 320, and building custom reports for other functional groups - IT struggles with reconciling data because of inaccuracies - Beyond help desk metrics, most districts do not measure workflows due to lack of resources
Technology	Districts with SaaS or Cloud ERP systems generally have fewer customizations - Districts have a culture of prioritizing strong security practices by implementing a subset of protocols such as firewalls, monitoring tools, MFA, network cybersecurity, regular data backups, etc. - Over 40% of districts interviewed mentioned using a custom data warehouse	★ Many system customizations and ancillary systems are utilized to support the ERP systems - Lack of real-time integrations - Many districts lack of data governance structures, including defined roles and responsibilities and standards

Information Technology Challenges & Solutions – Updated 2/21

Identified IT challenges and proposed solutions from the Common Technology Platform task force session.

	Prioritized Challenges	Solutions
People	Little training or process documentation exists to support staff since many districts have little to no training budget Staff are constrained from small teams, high turnover, and the inability to fill vacant positions	Allocate budget for ongoing staff training - Develop statewide IT process documentation to ensure processes are standardized streamlining operations and promoting consistency - Design a common IT operating model that can optimize employee allocation, balance statewide and local needs, and ensure employees are allocated to initiatives that align with strategic goals
Process	- Most ERP support and maintenance processes utilize little automation - IT is burdened supporting MIS, 320, and building custom reports for other functional groups	- Evaluate automation solutions and capabilities to enhance overall functionality of the ERP system Leverage a cloud-based SaaS ERP solution that supports reporting and automation through centralized data, real-time reporting, customizable dashboards, etc. Develop a standard data model that streamlines the reporting process, optimizes data management, standardizes reporting processes, and sets data standards to support MIS, 320, other reports Simplify MIS reporting requirements Share reporting resources and SMEs across districts
Technology	Many system customizations and ancillary systems are utilized to support the ERP systems	Utilize a cloud-based SaaS ERP solution with “baseline” functionality that covers a wide range of business processes to minimize customizations allowing for quicker system updates and patches Implement ERP modules during solution implementation to minimize reliance on ancillary systems Develop an application inventory landscape that identifies duplicative or redundant applications

Finance Strengths & Challenges – Updated 2/21

Identified Finance strengths and challenges from the ERP current state analysis across the participatory districts.

	Strengths	Challenges
People	- Finance functions are largely centralized in district offices - Most districts have some form of functional governance with regular cadence and/or adequate representation	- Work is primarily transactional due to limited resource capacity and manual processes Resource capacity is limited or overburdened, resulting from large volumes of manual work and difficulty filling vacant positions - Implementing segregation of duties, especially with HR for Payroll processes, is difficult for some districts - Many districts are dependent on their county offices of education for key financial services due to the complexity and cost of becoming fiscally independent.
Process	Processes (e.g., payroll, purchasing, and accounts payable) are standardized for the majority of districts	Very few districts are measuring or using KPIs, or SLAs for process performance or efficiency The level of cost categorization which exists varies widely by district ★ For those that use county services, processes are often duplicative between county systems and district systems, resulting in manual work and re-work - Lack of system automation to contributes to manually intensive processes Responsibility for regulatory controls are currently performed by County Office of Education rather than districts ★ Districts struggle to respond to new funding reporting requirements
Technology	Data is mostly reliable and clean (e.g., fund codes, supplier data, account balances), though there are some errors that result from user error, lags in integration, and limited validation checks - Some districts can easily access data in the system, though other districts require heavier manual manipulation	★ Many districts are reliant on ancillary systems to perform finance functions (e.g., reporting, budgeting) ★ Most system integration with county systems, ancillary systems, or between ERP modules in the district are not real-time, require manual entry, and create duplicative effort and data entry ★ Local Control of Chart of Accounts creates inconsistency across districts - The inability of existing system to split pay between more than two budget accounts, limits budget operations Lack of hierarchical approval functionality in systems limits streamlining of processes

Finance Challenges & Solutions– Updated 2/21

Identified Finance challenges and proposed solutions from the Common Technology Platform task force session.

	Prioritized Challenges	Solutions
People	• <i>None prioritized</i>	• N/A
Process	• No cost categorization exists today • Difficulty responding to new funding reporting needs	• Implement cost categorization tracking • Develop and implement a statewide standardized chart of accounts; mapping and cross-referencing new chart of accounts would need to occur
Technology	• Many districts are reliant on ancillary systems to perform finance functions (e.g., reporting, budgeting) • Most system integrations with county systems, ancillary systems, or between ERP modules in the districts are not real-time, require manual entry, and create duplicative effort • Local Control of Chart of Accounts creates inconsistency across districts	• Have a systemwide IT solution that incorporates the need within it without requiring an ancillary system • Standardize data definitions and calculations • Create a systemwide entity that performs Payroll function & issue checks for all districts • Develop and implement a statewide standardized chart of accounts; mapping and cross-referencing new chart of accounts would need to occur

Human Resources Strengths & Challenges – Updated 2/21

Identified HR strengths and challenges from the ERP current state analysis across the participatory districts.

	Strengths	Challenges
People	- Most HR activities are centralized Roles and responsibilities are primarily documented in formalized job descriptions - District HR offices are responsible for most HR activities - HR and IT have defined ERP maintenance responsibilities (e.g., IT provides support, implements patches/HR tests those changes)	★ Work is mostly transactional - Significant time is spent on manual processes (e.g., maintaining position control, manual and dual data entry) - Formal training documentation does not exist forcing HR to rely on informal knowledge transfer - HR struggles with talent sourcing due to pay, location, and resource constraints
Process	Most HR activities are no longer paper-based and enclosed within the ERP/ ancillary system	- HR processes are manual and time-consuming (e.g., timesheets, position control, hiring) ★ HR and Payroll processes are not segregated posing a challenge to internal controls - Most processes are not standardized or documented Reporting is manually intensive, and resources spend significant time filtering and cleaning data
Technology	HR modules generally have limited customizations; those that are highly customized are moving towards adopting a more baseline solution	- HR modules in the ERP are not being maximized ★ Districts use several ancillary systems to manage key HR functions that are not integrated forcing manual data upload across multiple systems ★ Data is generally not reliable or accessible and is entered in multiple systems forcing HR to rely on IT to access and clean data

Human Resources Challenges & Solutions – Updated 2/21

Identified IT challenges and proposed solutions from the Common Technology Platform task force session.

	Prioritized Challenges	Solutions
People	Work is mostly transactional	Increase use of automated HCM workflows to address resource constraints and transactional burden
Process	HR and Payroll processes are not segregated posing a challenge to internal controls	- There should be a segregation of duties between HR and Payroll with HR maintaining information input and Payroll processing payments both governed by necessary access privileges - Have a single system for employee pay and benefit information with a single source of truth/information - Create a systemwide entity that can perform all Payroll functions (e.g., processing, accounting, reporting, etc.) - Create a systemwide union contract to ensure consistency across districts
Technology	- Districts use several ancillary systems to manage key HR functions that are not integrated forcing manual data upload across multiple systems Data is generally not reliable or accessible and is entered in multiple systems forcing HR to rely on IT to access and clean data	Use a single HCM solution and integrate HCM modules (e.g., talent acquisition, benefits management, talent management, etc.) to provide visibility and ability to connect data cross functions Implement all necessary HR modules in a cloud-based SaaS ERP solution to minimize customizations Centralize all staff and faculty information in a single system

Educational Services & Support and Institutional Research Strengths & Challenges – Updated 2/21

Self-identified Academic, Student & IR strengths and challenges from the ERP current state analysis across the participatory districts.

	Strengths	Challenges
People	Many districts have governance committees and/or processes to support the identification and execution of improvement opportunities	★ Most stakeholders surveyed and interviewed expressed an inability to keep pace with legislative change • Most work performed to be transactional in nature ★ Wage competition, a lack of remote work policies, and challenges sourcing qualified talent with systems experience are barriers to filling vacancies
Process		• Most districts interviewed do not formally measure the performance of internal or external services offered • Most processes are performed manually, contributing to resource capacity constraints ★ Reporting such as MIS and 320 reporting is heavily manual
Technology		• No student information system currently in use can support all functions needed or support data pulling ★ Many ancillary systems are used to support key functions such as curriculum management • Some districts' SIS are not well integrated such that data does not flow automatically from the SIS to other systems or vice versa • Selection of ancillary systems and tools is not coordinated across districts

Educational Services & Support and Institutional Research Challenges & Solutions – Updated 2/21 (1/2)

Identified Academic, Student & IR challenges and proposed solutions from the Common Technology Platform task force session.

	Prioritized Challenges	Solutions
People	Most stakeholders surveyed and interviewed expressed an inability to keep pace with legislative changes	One platform database that tracks legislation in real time and can be downloaded for college/district use Statewide task forces to recommend responses to legislative change - Clear, updated required steps Centralized support for statewide implementation Common technology solution will help us respond collectively to legislative changes Early guidance rollout Develop one mechanism that can be used for reporting (e.g., SuperGlue for MIS/320/curriculum/etc.) using API
	Wage competition, a lack of remote work policies, and challenges sourcing qualified talent with systems experience are barriers to filling vacancies	- Create pipeline for student workers to guarantee jobs Centralized tech support that pays market rate using cost savings from common system to pay more, and improve working conditions (workload, environment) - Have a state consultant and technology resource pool that handles paperwork Implement cross training on MIS & 320 corrections, state level support, webinar/ conferences/ professional development Provide incentives for employees to stay after years of experience and create a marketing campaign to generate interest in CCC employment Create systemwide union contracts on benefit plans

Educational Services & Support and Institutional Research Challenges & Solutions – Updated 2/21 (2/2)

Self-identified Academic, Student & IR strengths and challenges from the ERP current state analysis across the participatory districts.

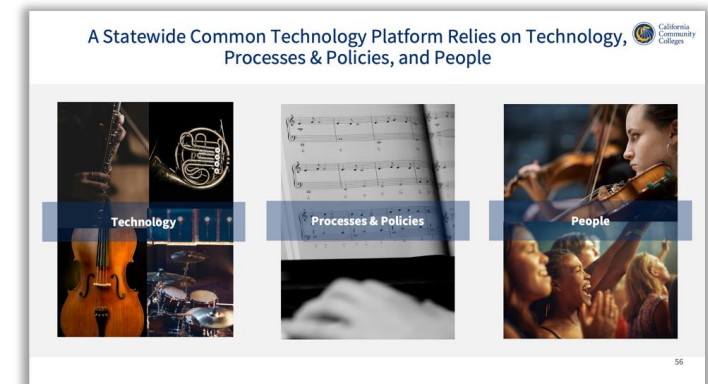
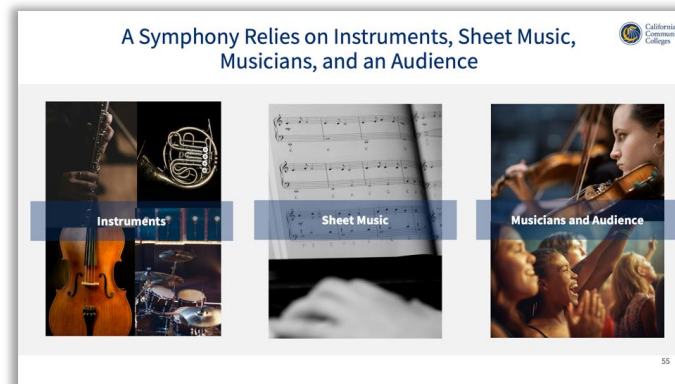
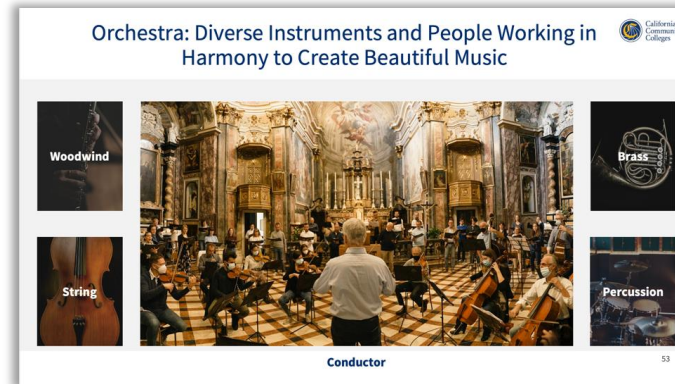
	Prioritized Challenges	Solutions
Process	Reporting such as MIS and 320 reporting is heavily manual	Create reporting data warehouse for all data, verify and complete reporting requirements automatically - Provide guidance on implementing changes on ERP; provide best practices or approaches other districts have implemented - Utilize user friendly platforms that creates one report versus multiple & redundant reports and one common system Automate reporting and coordinate data maintenance to avoid redundant reports
Technology	Many ancillary systems are used to support key functions such as curriculum management	- Create statewide report of technology tools with which functions they support well by surveying all ancillary systems across the state to identify overlapping functions and determine which ancillary system supports that function the most effectively - Implement one ERP to standardize interface (if one ERP cannot handle the functions provided by ancillary systems, then use Superglue to connect ancillary systems to the one ERP)

*ESSR = Educational Services & Support and Institutional Research

Mental Model to Help Understand How a Statewide Common Technology Platform Would Work

Discussion Points:

- It's helpful to have a mental model when thinking about this work
- An orchestra has diverse instruments and people working in harmony to create beautiful music
- A common technology platform has people, processes, policies, and technology working in harmony to support students, faculty and staff
- A symphony relies on instruments, sheet music, musicians, and an audience
- A statewide common technology platform relies on people, processes, policies, and technology
- The conductor in our metaphor is this Task Force guided by their California Community College constituents.

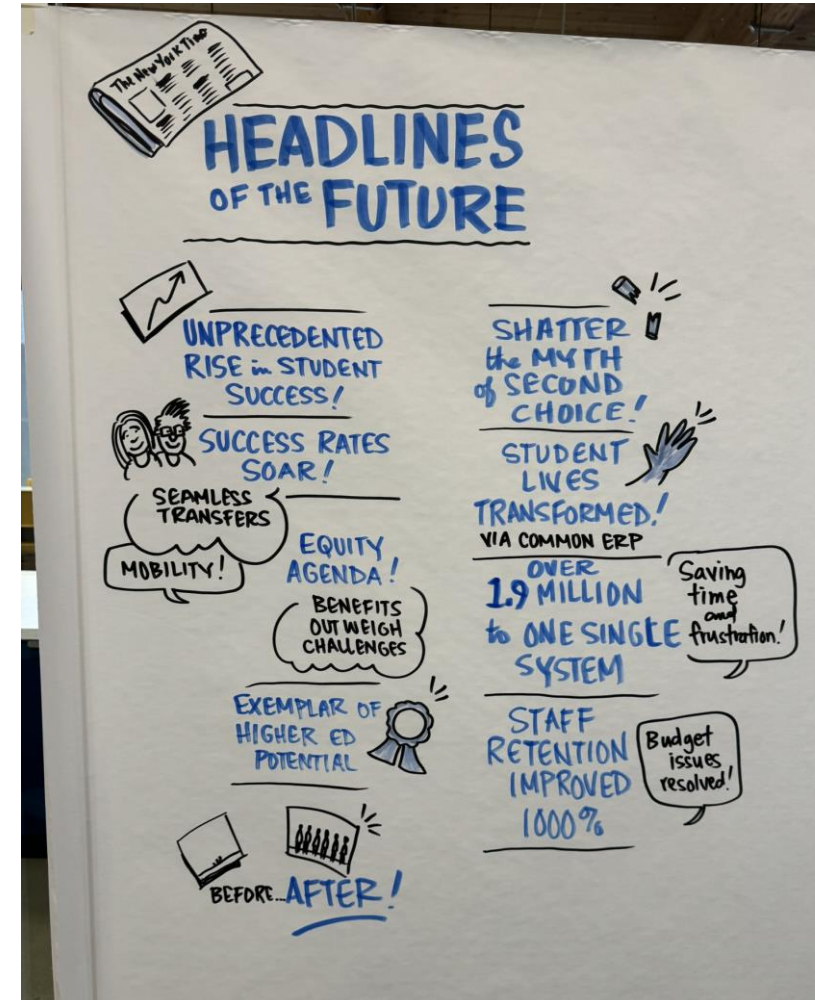


Headlines of the Future

A group exercise to begin envisioning the outcome of a Statewide Common Technology Platform

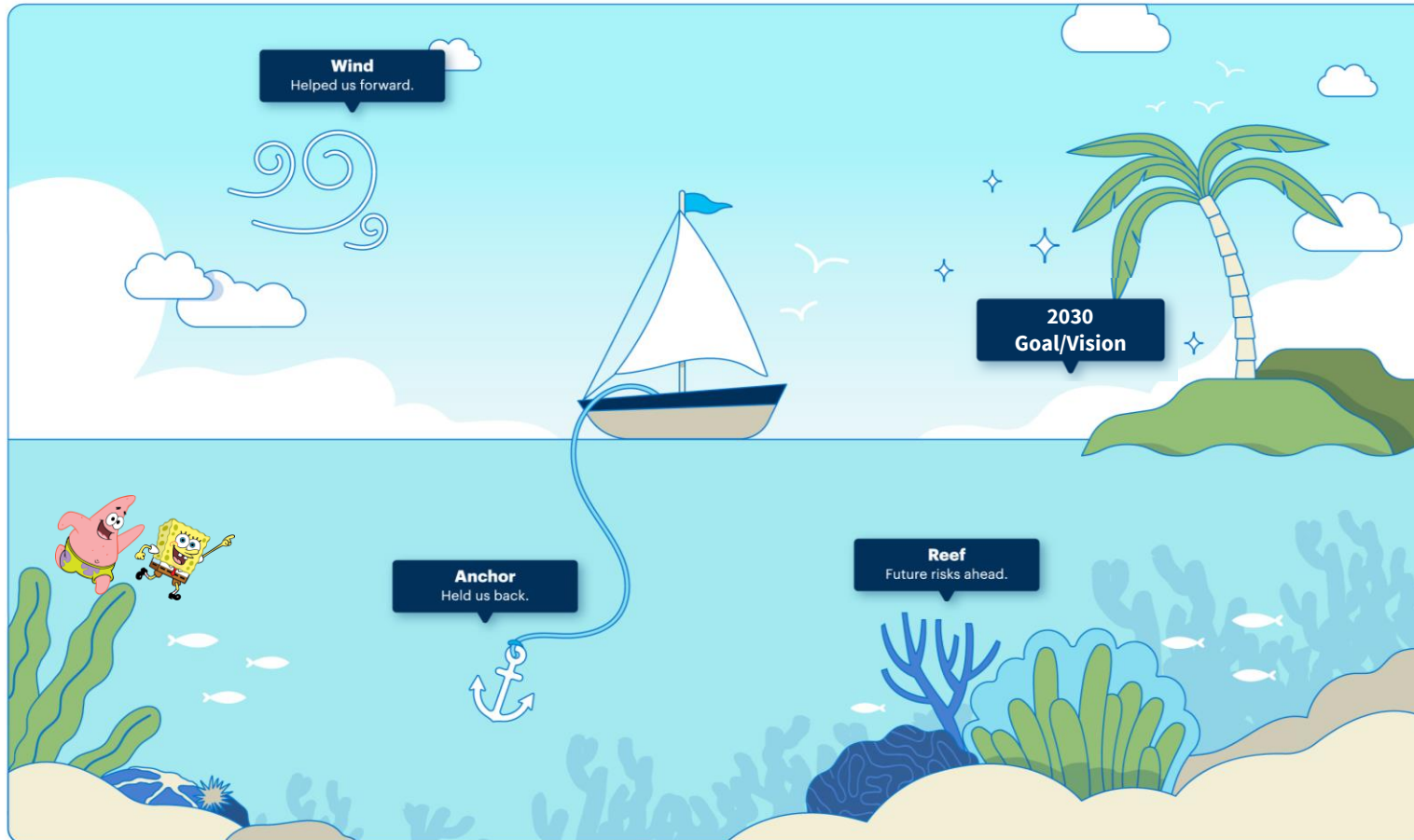
Discussion Points:

- Vision 2030 Achieved: Common ERP transforms millions of CA students' lives. A collaborative technology approach leads to elimination of equity gaps by achieving equity in success, access, and support
- Stunning Higher Ed Success Story: Technology solution supports unprecedented rise in student success. CA Community Colleges is praised as an exemplar of higher education potential and transfer, retention, and success rates soar
- California Community Colleges' Investment in its Students Pays off: Rapid return on thoughtful investment spurs meaningful improvement for students, faculty, staff, and the bottom line
- Myth Busted! New California Community Colleges Technology solution shatters the myth of community colleges being a second choice with a seamless student experience



Sailboat Exercise

A generative group exercise to start the conversation about what it would take to achieve a Statewide Common Technology Platform



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WIND

- WE CAN BE THE 800-LB gorilla UP STARTING UNPUNISHED
- System Sugar Vision Zero Emission of Sale
- Streamlined Services
- Need to save money
- WE really want to make Amazon our share is
- Streamlined Services
- Need to save money
- WE really want to make Amazon our share is

ANCHOR

- Societal Inertia
- Unwillingness to Change
- Anchor Change
- CEO/BOARD OF TRUSTEES BUY-IN
- Technology selection process
- HARDWARE
- Competition between districts

REEF

- CEO/BOARD OF TRUSTEES BUY-IN
- Technology selection process
- HARDWARE
- Competition between districts

CROSS-FUNCTIONAL OWNERSHIP & TECHNOLOGY

- ALIGN on OPERATING MODEL BEFORE IMPLEMENTATION
- OWNED PROBLEM STATEMENT for EACH STAKEHOLDER

VISION

- CROSS-FUNCTIONAL OWNERSHIP & TECHNOLOGY
- ALIGN on OPERATING MODEL BEFORE IMPLEMENTATION
- OWNED PROBLEM STATEMENT for EACH STAKEHOLDER

Anchors, Wind, and Reef Discussion Points

Anchors



What Holds Us Back?

- **Money and Resources:** lack of funding and dedicated resources; resource inequity for smaller districts
- **Resistance to Change:** fear of change and losing control; lack of cooperation, systemic inertia, suspicion of motives, doubt
- **Project Size and Scope:** sheer size of effort can lead to analysis paralysis and scope of solution needed
- **Leadership Support and Buy-In:** concerns from college and district leadership
- **Stakeholder Alignment:** yet to be developed shared vision, agreement on common terms; dissent among district constituent groups; not all colleges on board; shared governance model is generally a positive, but poses challenges for broad alignment across districts
- **Top-Down Mandates:** legislative mandates in tension with realities on the ground

Wind



What Pushes Us Forward?

- **“Necessity is the Mother of Innovation”:** limited resources require imaginative statewide solutions to achieve greater efficiency and streamlining through implementation at scale
- **Leadership Support & Buy-In:** support from the Governor, Chancellor, and statewide leadership in recognition of the critical needs identified
- **Shared Vision:** unified purpose of implementing systems and processes to meet student demand for improvements
- **Strength in Numbers:** collectively, we can be the 800 lb. gorilla to the software companies and achieve economies of scale

Reef



Future Risks

- **Stakeholder Alignment:** technology selection process will test stakeholder alignment; stakeholders may have the perception that the new system will benefit the Chancellor’s Office and not Colleges/Districts
- **Implementation Fatigue:** a drawn out, incremental implementation may prolong system angst and resource fatigue
- **Resistance to Change:** vocal nay-sayers and a concerted effort to make it fail
- **Leadership Support and Buy-in:** CCCC changes in leadership could shift goal
- **Singular Mentality:** competition between districts instead of commitment to each other

Wind in Your Sails: Compass Opportunities



Barriers:

Opportunities:

 Lack of Shared Vision, Dissent Among District Constituent Groups	Communicate the “Why” with the Shared Vision	• Provide clear communications to stakeholders, early and often • Clearly define the problems being solved • Focus on benefits when seeking buy-in and identify the “what’s in it for me” for each district
 Lack of Leadership Support and Buy-in	Co-Develop Benefits with Statewide Organizational Boards	• Push for leadership to advocate for legislation that support progress
 Size/Scope of Project can Lead to Analysis Paralysis, Unclear Requirements, and Disjointed Solutions	Develop Clear Requirements and Coherent Solutions	• Develop clear governance/decision structures first for requirements and solutioning work • Align on operating model before implementation • ESSR, Finance, and HR business and user needs should drive technology decisions • Rip off the band aid by creating a coherent solution from the start
 Resistance to Change	Create Incentives to Participate	• Secure funding to support the switch • Awards to districts for early adoption
 Implementation Fatigue	Design a Sustainable Implementation Plan	• Create a phased implementation approach providing colleges flexibility and support
 Lack of Funding and Dedicated Resources, Especially for Smaller Districts	Budget for People Resources for System Implementation and “Keep the Lights On and Doors Open” activities	• Provide enough resources to support colleges from planning, throughout implementation, and beyond

Your Facilitators & Support Team



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Executive Sponsor



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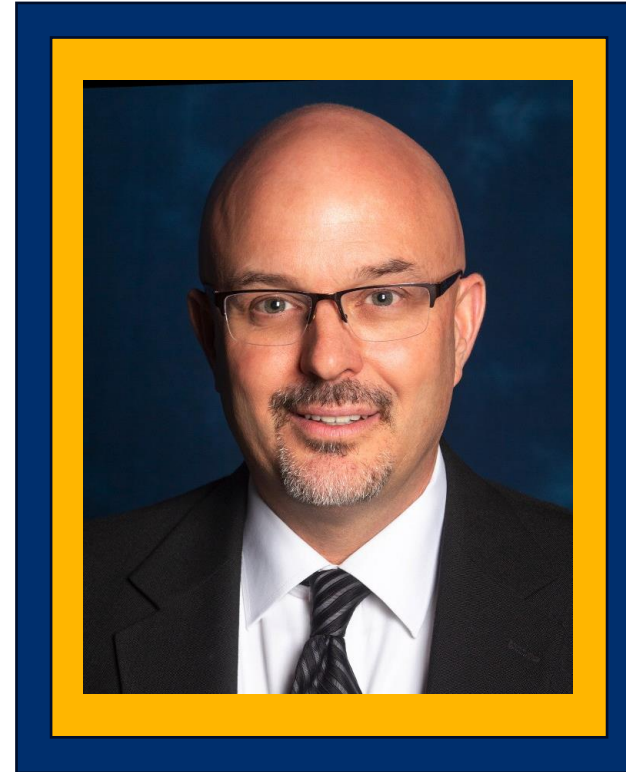


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