



CALIFORNIA COMMUNITY COLLEGE CHANCELLOR'S OFFICE

FINAL REPORT

Change Management and Transformation Approach, Roadmap and Budget

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Table of Contents

| | |
|---|-----------|
| EXECUTIVE SUMMARY | 3 |
| BACKGROUND / OVERVIEW | 3 |
| PROJECT SCOPE AND APPROACH | 3 |
| KEY OPPORTUNITIES | 4 |
| CHANGE MANAGEMENT AND TRANSFORMATION ROADMAP | 6 |
| NEXT STEPS | 7 |
| PROJECT BACKGROUND AND GOVERNANCE | |
| CURRENT STATE OBSERVATIONS | 8 |
| WORKSHOP: SUMMARY OF RESULTS | 9 |
| ORGANIZATIONAL RISK AND READINESS ASSESSMENT (ORRA): SUMMARY OF RESULTS | 10 |
| ADMINISTRATIVE ORGANIZATION ASSESSMENT | 12 |
| BENEFITS & OPPORTUNITIES | 12 |
| RISK MITIGATION | 13 |
| CHANGE MANAGEMENT AND TRANSFORMATION APPROACH | 15 |
| CHANGE MANAGEMENT AND TRANSFORMATION OVERVIEW | 15 |
| CHANGE STRATEGY, ROLES, AND RESPONSIBILITIES | 16 |
| PROJECT GOVERNANCE, DECISIONS, AND ISSUE RESOLUTION | 18 |
| CONCLUSION | 19 |
| ROADMAP | 20 |
| HIGH LEVEL PROGRAM TIMELINE | 20 |
| PROGRAM INITIATION READINESS PHASE | 21 |
| TIMELINE ASSUMPTIONS | 22 |
| SCOPE ASSUMPTIONS | 22 |
| SELECTION CRITERIA FOR WAVES / DEPLOYMENTS | 23 |
| BUDGET | 24 |
| CHANCELLOR OFFICE / CENTRAL PROGRAM TEAM COSTS | 24 |
| DISTRICT / COLLEGE COST MODEL | 26 |
| APPENDIX | 28 |
| A1 - ROLES AND RESPONSIBILITIES | 28 |
| ADDITIONAL RESOURCES | |
| • A.2 <i>Final Report Addendum: Workshop Themes, Takeaways and Details</i> - A detailed list of current state observations by workshop and topic. | |
| • A.2 CURRENT STATE REPORT (PRESENTED TO ADVISORY COMMITTEE, APRIL 2021) | 30 |

Executive Summary

The current state findings portray an opportunity for change within the California Community Colleges that is compelling, urgent and, for the students, essential.

As requested, this report provides a roadmap *for the change and transformational portions* of an implementation of a common ERP platform for all the California Community Colleges including the student system. It does not include the planning and effort required for the technical installation and conversion effort. It leverages observations gleaned from multiple campus and student representatives as well as lessons learned from other implementations of common platforms in the California System such as within CSU and UCPATH. This project consciously shifts focus from administrative and other efficiencies gained to an emphasis on the student experience. The data and interviews across campus indicate that no action on this front suggest multiple risks including continued disruption to the student journey.

The students and staff themselves articulated clear advantages for change:

- Ease of use and equity across systems will support all populations of students
- Cross college partnering and data exchange will facilitate student progress and facilitate state and federal reporting and compliance
- Consistent processes and self-service tools empower students to manage their academic journey
- Advisors and administrators who are better informed will support students as they move from admissions to their goals

Background / Overview

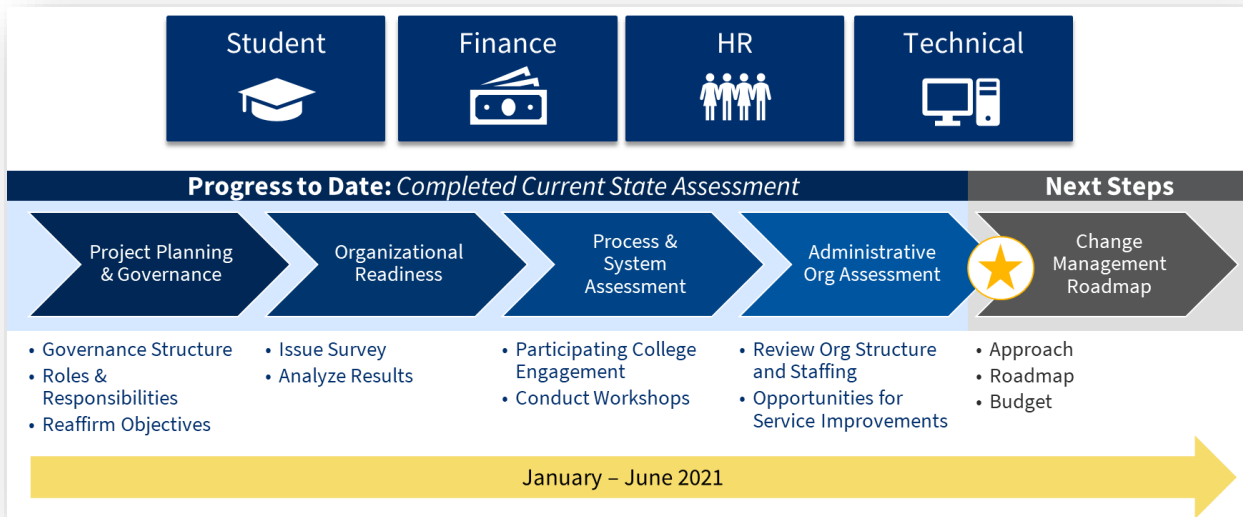
Huron Consulting Group has worked in partnership with the California Community College Chancellor's Office (CCCCO) to develop an evidence-based understanding of the change impacts and effort required for the California Community Colleges to move to a shared technology platform for ERP. Enterprise resource planning (ERP) is defined as the ability to deliver an integrated suite of business applications including Student, Finance, and HR. ERP tools are specific to transactional database systems that provide students, staff, and administration the user interface interactions for daily tasks, such as registration, advising, financial aid, billing, financial spend transactions, and HR functions. To this end, this report outlines the Change Management and Transformation Roadmap for the California Community Colleges (CCC) to move to a shared platform with the highest possible degree of acceptance, understanding, and long-term success.

Project Scope and Approach

The Change Management and Transformation Roadmap addresses the organizational change and business portions of the implementation and is distinct from the technical engineering and conversion effort required for a move to a shared ERP. The Roadmap establishes a comprehensive structure to successfully adopt change, including the leadership and operational organization and effort requirements within the CCCCCO and the colleges.

To develop this Roadmap, the team first established an evidence and fact-based understanding of the current business and organizational environment of the CCC. The team brought together a selection of eight (8) schools representing a broad topographical spectrum, including schools with varying geographic, resource, current state systems, and student population profiles to engage in workshops, interviews, and organizational readiness surveys.

The project initiative phases can be seen depicted in the graphic below:

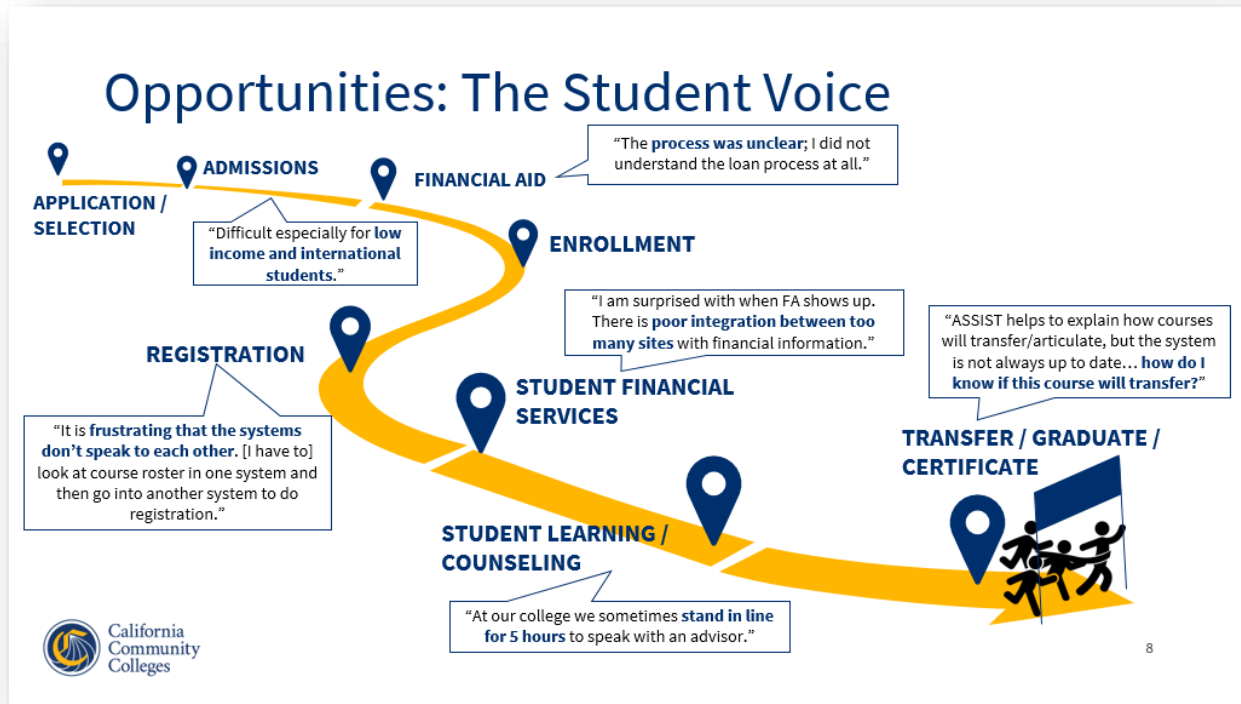


Key Opportunities

The results of the team’s findings portray an opportunity for change within the college community that is **compelling, urgent and, for the students, essential**. As will be indicated below, the represented college communities are willing to adopt change; they described an environment where the benefits of a shared system and processes far outweighed the risks. The primary caution expressed was one of resources to accomplish the change.

In this analysis, the student voice expressed the need for change in vivid terms. The students from the representative colleges underscored the need for equity and transparency in system support and processes across colleges. They offered up both a picture of why change is needed and a collective vision consistent with the CCC **Vision for Success** on how more consolidated systems would support their educational progress.

This illustration contains the themes of our student conversations and highlights:



The project findings from material reviewed, as well as staff, faculty, and students interviewed underscored the following goals as furthering those articulated in the **Vision for Success**:

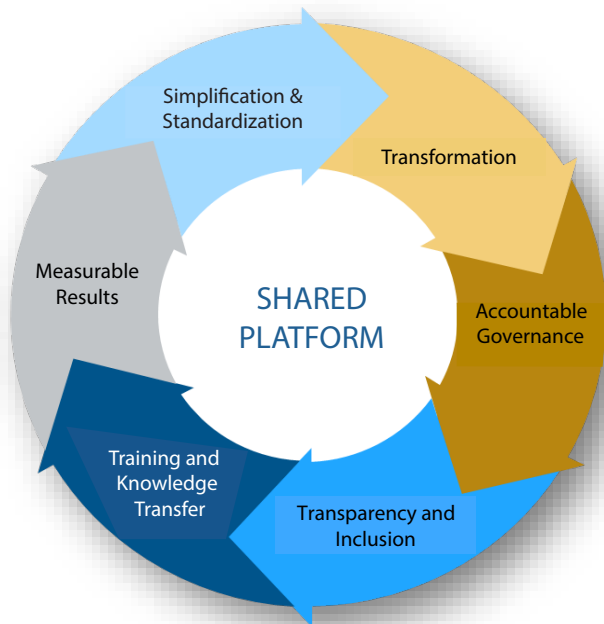
| Vision for Success | Project Findings |
|--|---|
| Focus relentlessly on students' end goals. | Need for ease of use and equity was articulated by the students from participating colleges as an urgently needed benefit of a shared platform. |
| Always design and decide with the student in mind. | The ERP platform touches every student at every critical juncture of their student experience, from applications through graduation. |
| Pair high expectations with high support. | Student support requires addressing technical equity and sustainability, as well as security and disaster recovery. |
| Foster the use of data, inquiry, and evidence. | Improved access to data and reports allows for more overall proactive management. |
| Take ownership of goals and performance. | Consistent processes and tools empower students to manage their academic journey. |
| Enable action and thoughtful innovation. | Utilizing the power of ERP for student self-service is preferred and elevates service roles. |

| Vision for Success | Project Findings |
|---|---|
| Lead the work of partnering across systems. | Cross-college partnering is welcome according to the Readiness Assessment performed and the workshop discussion feedback. |

Change Management and Transformation Roadmap

The Roadmap outlines the requisite business process alignment and change efforts to move to a shared technology platform.

The **scope** of this Roadmap includes the change management and transformation impacts of all primary ERP applications/pillars: Student Administration, Human Resources and Financials. It also assumes that the tasks identified in the *Next Steps* section below are complete, and that a vendor has been selected to implement the technical conversion, inclusive of Identity and Access Management and Enterprise data and reporting.



The Roadmap entails an 8-year overall implementation timeframe, with the districts and colleges grouped into staggered cohorts or waves. A critical first component of the Roadmap is the Program initiation phase. A similar initiation/readiness phase will be conducted prior to the start of each wave for colleges and districts, to establish a foundation locally before moving into the implementation cycle.

The selection of the first wave participants is particularly critical in establishing early success. A best practice established in the Assessment phase of this project is to have a representative group of districts to demonstrate wins for the wider community. This includes having a mix of small and medium sized districts, and varied ERP or student systems in use. It will also be useful to select districts with an immediate need, e.g., districts that

are currently considering a new Student, HR or Finance system because of compliance pressures, staffing shortages or constraints, or a desire to improve the student experience.

The effort for a program of this scale and complexity will be significant and includes investment from both the Chancellor's office as well as the districts and colleges. The efforts below are high-level estimates, and are divided across the central office resource efforts, and the district/college local efforts. They represent only those activities related to the change management and business process alignment activities, and do not include associated software implementation activities.

Estimated Central Efforts

| Staff Type | Hours | Cost |
|------------------|---------|--------------|
| CCCCO Staff | 125,436 | \$13,066,250 |
| Consulting Staff | 447,036 | \$89,407,200 |
| Travel | N/A | \$5,000,000 |

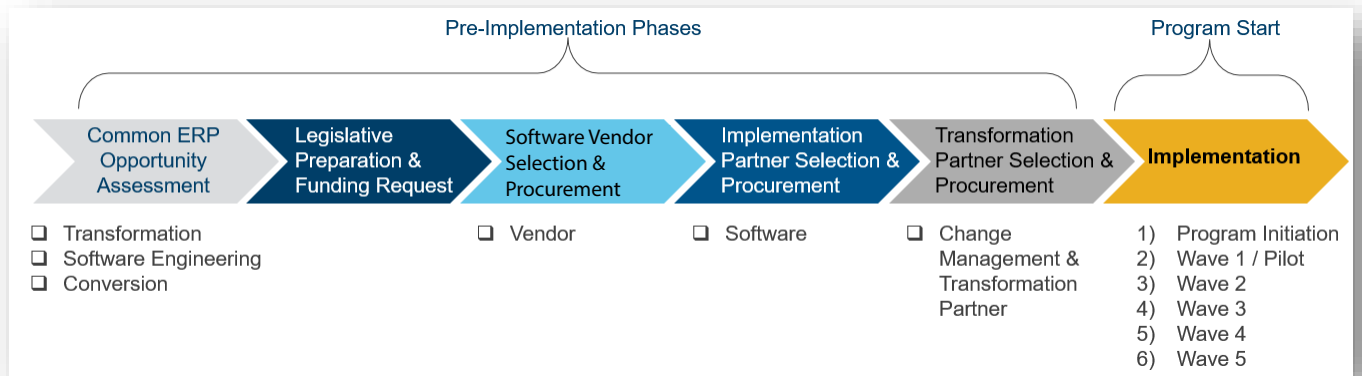
Estimated District/College Efforts

| College/District Type | Hours | Cost |
|---|--------|-------------|
| Small College/District Participating in Wave 1 | 7,680 | \$800,000 |
| Large College/District Participating in Wave 1 | 15,360 | \$1,150,000 |
| Small College/District Participating in Waves 2 – 5 | 5,760 | \$425,000 |
| Large College/District Participating in Waves 2 – 5 | 11,520 | \$850,000 |

Next Steps

Moving to a shared ERP platform will allow CCCCCO to meet growing demands and prioritize the student experience. Upon adoption of a strategy to pursue a shared ERP platform, the CCCCCO must address the following to move forward towards a legislative budget to support this effort, including:

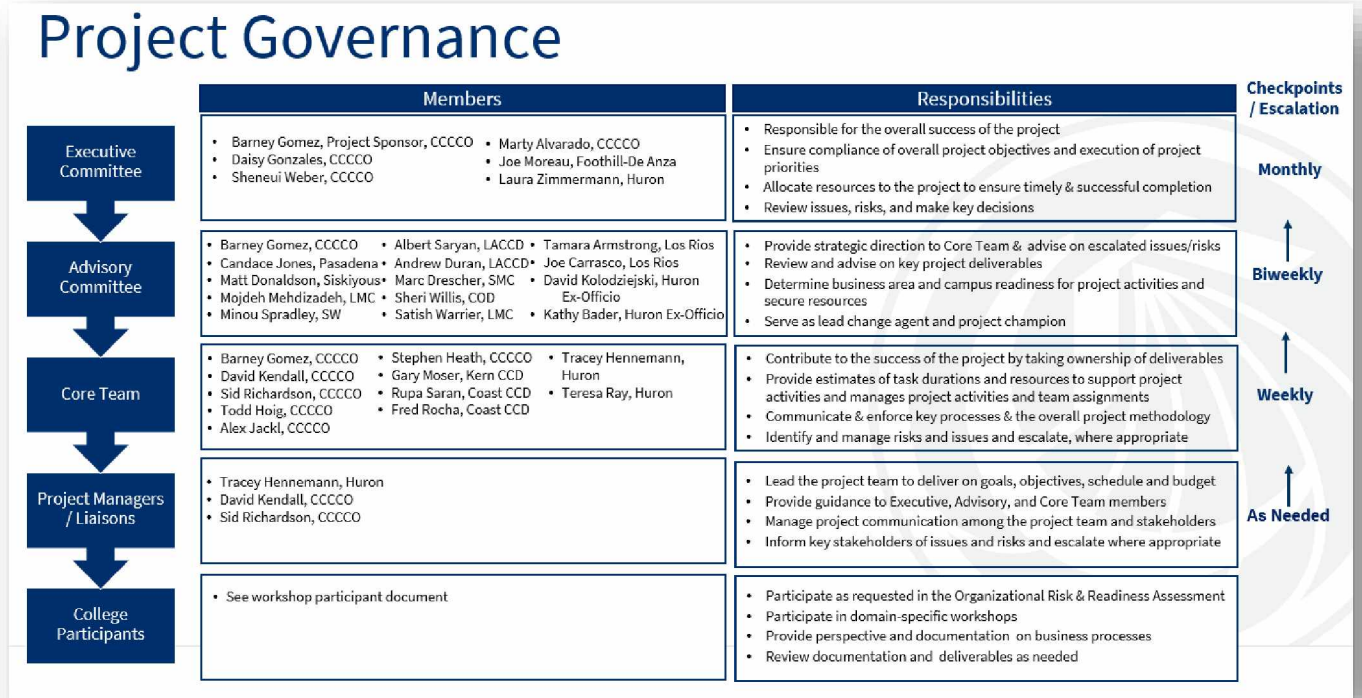
- Identify a CCCCCO Leader to champion this initiative through the legislative process
- Vet this Roadmap with appropriate CCC and CCCCCO groups
- Develop a consolidated strategy and budget for engineering, technical conversion, transition technical support and transformational management.
- Engage Governmental Relations and develop a comprehensive budget proposal for the legislature in the required format



Project Background and Governance

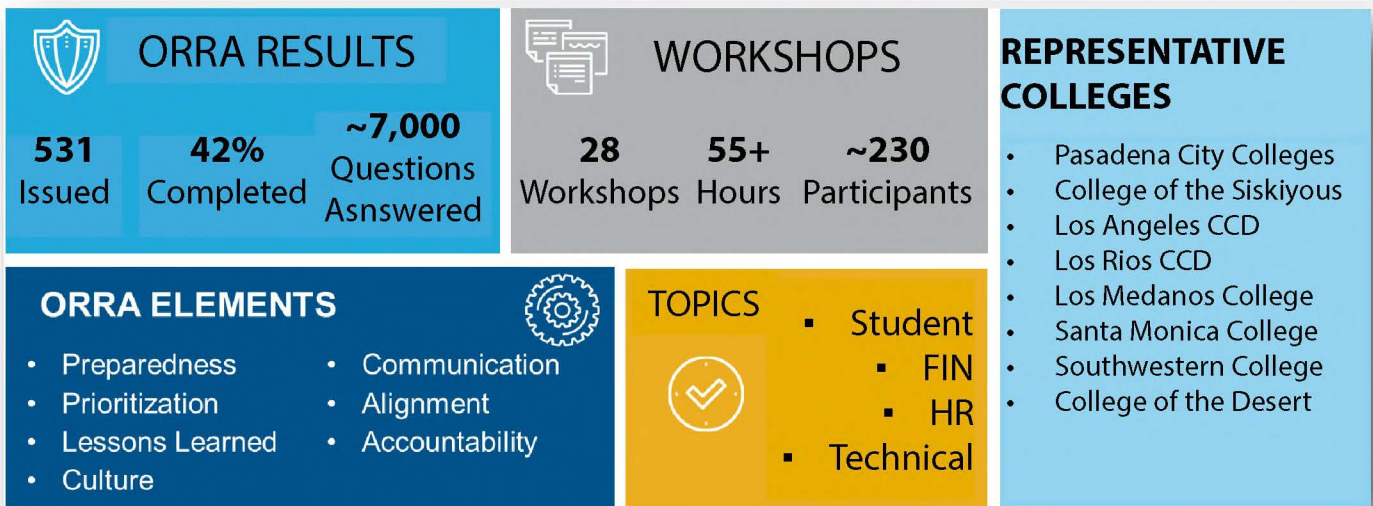
As described in the *Executive Summary*, Huron Consulting Group was asked to develop a report that outlines a Change Management and Transformation Roadmap for the California Community Colleges (CCC) to move to a shared platform with the highest possible degree of acceptance, understanding, and long-term success.

The project was organized in a manner that would streamline capture of data and provide a governance structure around how it would be interpreted and organized.



Current State Observations

Through workshops, focus groups and assessments, current state observations were identified, assessed, and documented to inform the change management and transformation approach and efforts required for CCCCCO to potentially move to a shared technology platform for enterprise applications. Eight (8) schools were brought together representing a broad topographical spectrum, including schools with varying geographic, resource, and student population profiles to engage in workshops, interviews, and organizational readiness surveys. We talked to administrators, staff, and students to assess the capacity of change, potential process differences, and the value and impact of moving forward to a shared platform.



Workshop: Summary of Results

Eight colleges with over 230 participants with subject matter expertise participated in workshops discussing business processes, current state challenges, personnel and talent development, and the current state technical landscape. Workshops were structured to cover the major areas of Student, Finance, Human Resources and Technical topics and designed to optimize the knowledge of functional users from each representative area. Workshops were led by highly specialized Huron professionals who facilitated discussion of specific topics, questions, and priorities based on the area. Huron professionals engaged as many as 35 participants in each workshop and achieved active participation and copious feedback.

At the end of each workshop, current state summaries were created by each Huron specialist and presented to the CCCCCO advisory committee. This group, composed of senior leadership from each college, was able to verify the results of the workshops. Current state observations covered with the Advisory Committee for Student, HR, Finance, and Technical functions included:

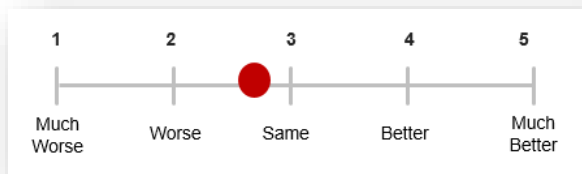
| Organization & Culture | Business Process | Technology | Data & Reporting | Policies & Procedures | Talent Development |
|---|---|--|---|---|---|
| <ul style="list-style-type: none"> Colleges feel unable to leverage the systems they already have Some colleges are in need of change and currently looking for solutions Colleges that recently went through a student implementation are less eager for change Mixed willingness to change depending on business function | <ul style="list-style-type: none"> Student service a high priority but hampered by outdated processes Students in multiple colleges struggle with curriculum and course numbering differences Manual, redundant, and inconsistent processes for many business functions Reliance on county HR/FIN systems further fractures processes Paper forms and lack of workflow | <ul style="list-style-type: none"> Lack of technical equity causes different user experiences Lack of standard identity management solution Systemwide enterprise disaster recovery plan needed Multiple third-party and ancillary systems in use with limited or no integration Outdated tools result in failure to meet student, faculty, and staff needs | <ul style="list-style-type: none"> Lack of end-user tools for reporting and tracking of data Multiple reporting and analytics tools used Data reporting is often manual, impacting accuracy Challenges with MIS reporting including changes, data quality, and support Cumbersome reconciliation processes needed to address data quality issues | <ul style="list-style-type: none"> Continued struggle across colleges to reduce barriers to education while complying with federal and state requirements. Ex. CCCApply Varying policies and procedures by college can create confusion and difficulty for students to navigate Difficult to track and enforce policies with existing technology | <ul style="list-style-type: none"> Currently, institutions do not feel they have sufficient resources/skills to maintain current systems Staffing and skillset offer possible single points of failure Greatly varying skillsets, especially among end users Lack of formal training programs |

A detailed list of current state observations by workshop and topic can be found in the “Final Report Addendum: Workshop Themes, Takeaways and Details” submitted with this report.

Organizational Risk and Readiness Assessment (ORRA): Summary of Results

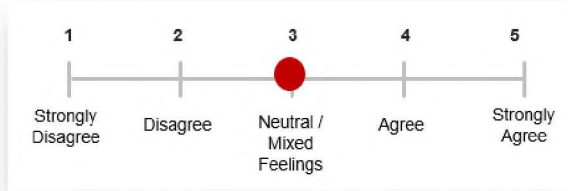
The Organizational Risk and Readiness Assessment (ORRA) identified opportunities to leverage organizational strengths and specific barriers to be addressed. ORRA assesses crucial factors that impact implementation success, such as the culture of the organization, past experience with change, alignment across the organization, communication barriers, organizational priorities, accountability, and the preparedness of the organization to manage change. Each were evaluated and analyzed through this assessment yielding actionable recommendations to inform the implementation. The full report of findings was presented to the Core Team, the Advisory Committee, and the Executive Committee. The following question reveals how respondents feel about remaining on the same path.

Q: “If our college continues to operate the same way as it is today (with same processes, cost structure, efficiencies, volume, productivity, and techniques), the results over the next 5 years will be:”

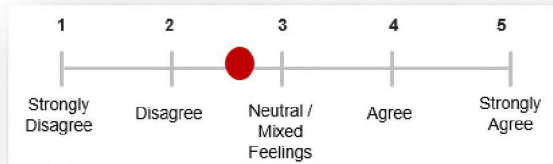


The next responses describe current state perspectives of respondents.

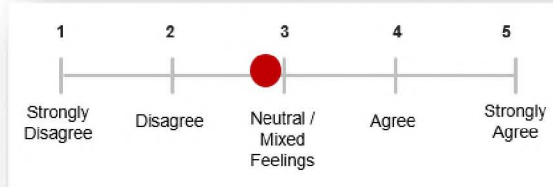
Q: "In our college, people feel involved in how we will implement major change."



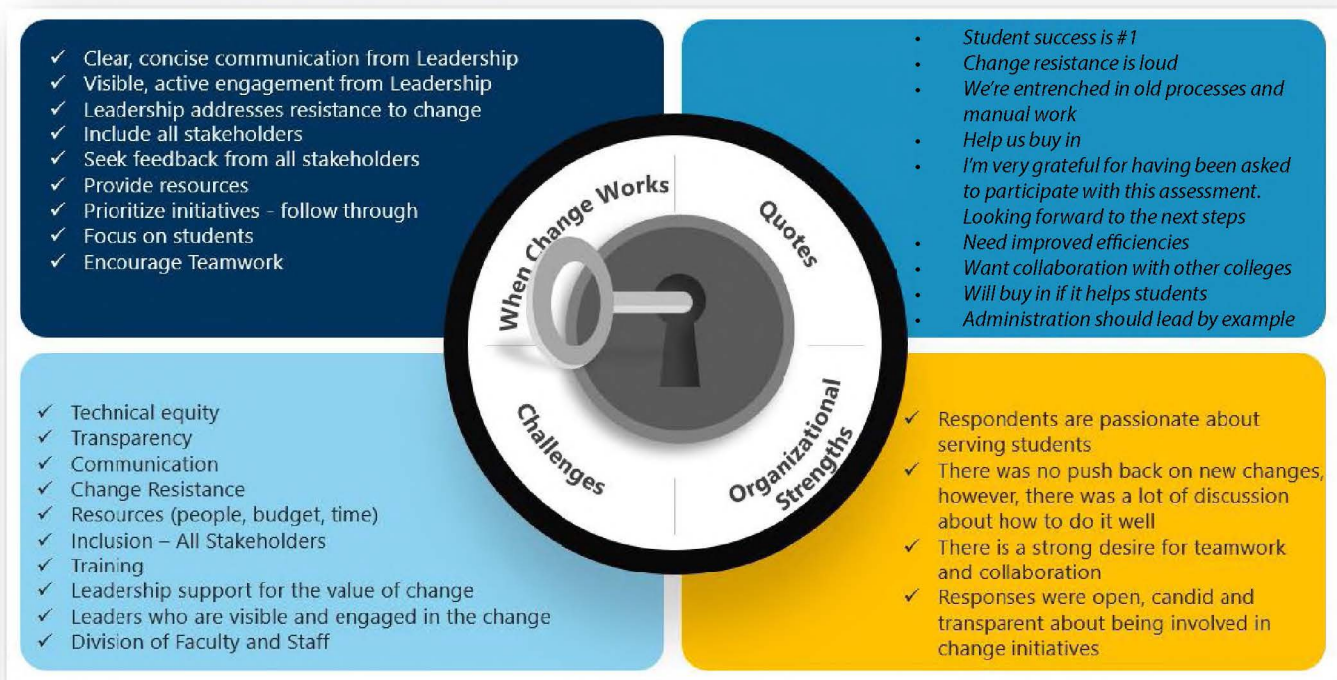
Q: "Our awards and incentives are aligned with our priorities."



Q: "We communicate in a way that changes are clear and defined at each level across the college."



The following image identifies key areas of focus. Specific notice is given to the area of 'when change works.' The responses were extremely similar to the areas identified when the question was asked 'when change doesn't



work'. The findings point to the specific factors that, when executed well, increase the possibility of success significantly.

Administrative Organization Assessment

Through workshops, focus groups and the ORRA assessment, several key observations and overarching themes were identified in the areas of Student, Finance, HR, and Technical. The administrative organization assessment identified several common patterns among most colleges in the study, including resources, system functionality, skills, and barriers.



These themes represent areas for growth, remediation, and optimization that better serve individual colleges and the entire CCCCO community utilizing effective leadership and a holistic change management and transformation approach.

Benefits & Opportunities




Moving to a shared ERP platform will yield significant advantages to the Colleges and Districts as well as to the Chancellor's Office, including:

- **Enhanced Student Service:** Enable and equitably empower students to understand and manage their educational progress by providing a transparent user interface and more agile administrative support.
- **Nimble Software Support:** Replacing outdated and custom systems will allow focus to be placed on forward looking software that supports the continuous growth and changes to the student curriculum and demographic.
- **Strategic Business Model:** A shared platform system helps support a more efficient and effective business model by allowing strategic workforce planning, a shift from transaction processing to strategic value-add work and collaborative student service functions.
- **Increased Business Returns:** A shared ERP platform increases business returns with the ability to monitor and improve agility of academic portfolios, improved budget management, fully utilize funding sources and contracts supported by user-friendly and up-to-date financial reports, increase negotiation, and spend power, and ensure regulatory compliance with the State.
- **Reporting Capabilities & Analysis:** Disparate data manually maintained in external spreadsheets limits reporting capabilities and affects real-time decision-making ability. A shared platform offers improved,

faster decision-making with real-time, system-wide data, resulting in overall higher quality outcomes for state and federal reporting, as well as targeted analytics to support student retention.

- **Policy and Process Standardization:** A unified, concerted shift away from exception-based culture will reduce burden on central offices, reduce overall processing time and enhance student service by aligning policies and procedures.
- **Community Environment:** A shared platform provides the ability to communicate, network, and collaborate with similar positions among all the colleges both operationally and technically and establish support systems. This creates an environment for continuous learning and sharing knowledge. A community environment establishes a unified team with a shared vision for student success.

Valuable opportunities in each area shown below demonstrate real-world benefits of a shared model platform supported by workshop findings.

|  HR |  FINANCE |  TECHNICAL |
|---|---|---|
| <ul style="list-style-type: none"> • Consistent and automated method to manage onboarding and personnel changes • Ability to manage mid-academic year changes • Integrated Core HR and Benefits solution • Common and automated method for collecting time, resulting in more accurate payroll • Improved ability to manage labor budgeting, reporting and reconciliation • Integrated recruiting solution with core HR system | <ul style="list-style-type: none"> • Improved / Automated budgeting processes • Consistent method for processing journals • Improved tracking and management of assets and inventory • Automated tracking and management of project grants (resulting in improved compliance) • Automation of invoicing and receivables tracking • Automation of banking integrations and cash forecasts • Common system-based travel and expense tool • Ability to control and enforce spending policies | <ul style="list-style-type: none"> • Provide technical equity across all districts/colleges • Common identify management solution • Cohesive data governance policy and process • Access to data warehouse and reporting platform • Enterprise disaster recovery plan |

Risk Mitigation

In the above section on Key Opportunities, it was suggested that, overall, the staff interviewed expressed that the risks associated with moving to a shared transactional platform were outweighed by the benefits. This section will outline what those risks may be and how they could be mitigated. In many cases the mitigation strategy was offered up by the representatives from the participating colleges and through the comments provided in the Organizational Risk and Readiness Assessment (ORRA).

| What are the risks or liabilities of a CCC move to a shared platform? | Mitigation Strategy |
|--|--|
| Increased leadership and responsibility of Chancellor's Office | The creation of a CO-level Office of Transformation will support the program and develop a service delivery model. Active and visible project leadership and a defined decision-making process can be established to clearly outline responsibilities. |

| What are the risks or liabilities of a CCC move to a shared platform? | Mitigation Strategy |
|--|---|
| Loss of individual college autonomy, customizations and competing priorities | To assist in these decisions, the CCC/CCCCO should develop a strong governance structure and on-going change management and transformation program. This should include a committee established with representatives from the colleges to ensure priority development between individual colleges and the Chancellor's Office. Collaboration between colleges will leverage vendor relationships, ensuring better alignment to the CCC needs. |
| Strain on current resources and staffing | The project resource plan will be built in coordination with the college/district with sufficient consulting and backfill effort to ensure proper balance of project and operations work, as well as knowledge transfer and change management. For on-going support, a shared platform will maximize the use of staff across the board. |
| Data security and access concerns; risk of technical failure | Modern ERP platforms have advanced security to address access to sensitive information. Security and integrity of data will be improved through an integrated, best practice platform. Vendor service level agreement (SLA) will be documented, and adherence monitored to ensure software performance, reliability, and support. |

Change Management and Transformation Approach

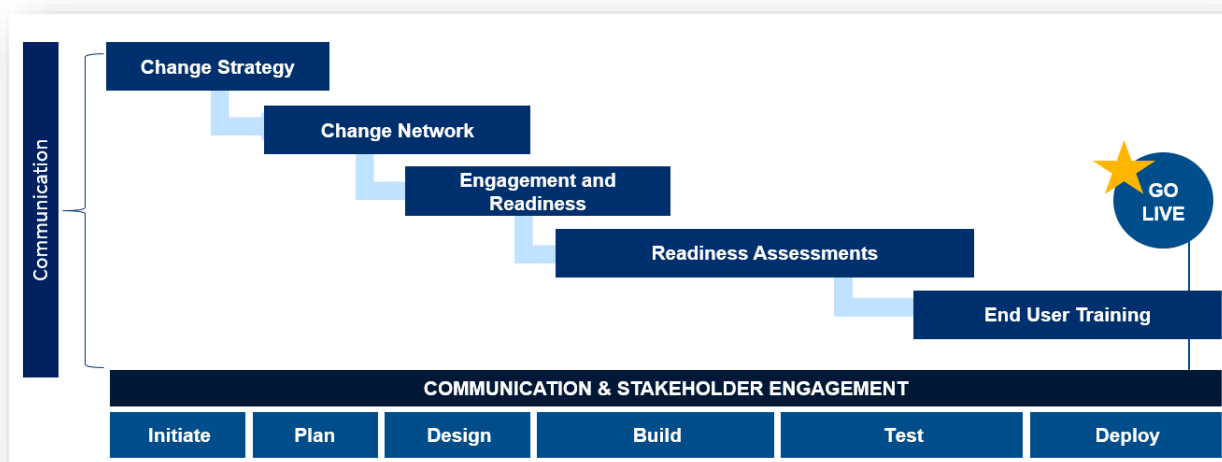
Change Management and Transformation Overview

The California Community Colleges (CCC) have a vital role in serving a diverse population of students. Through workshops, focus groups and the Organizational Risk and Readiness Assessment (ORRA), an evidence-based understanding of the change impacts and efforts required are outlined for CCC to move to a shared technology platform for enterprise applications for Student HR, Payroll, and Finance.

Understanding that there is a difference between the transition paths for various colleges as well as a large population of students, faculty and staff, the Change Management and Transformation Approach outlined here takes the complexity into consideration and describes best practice activities to support this initiative.

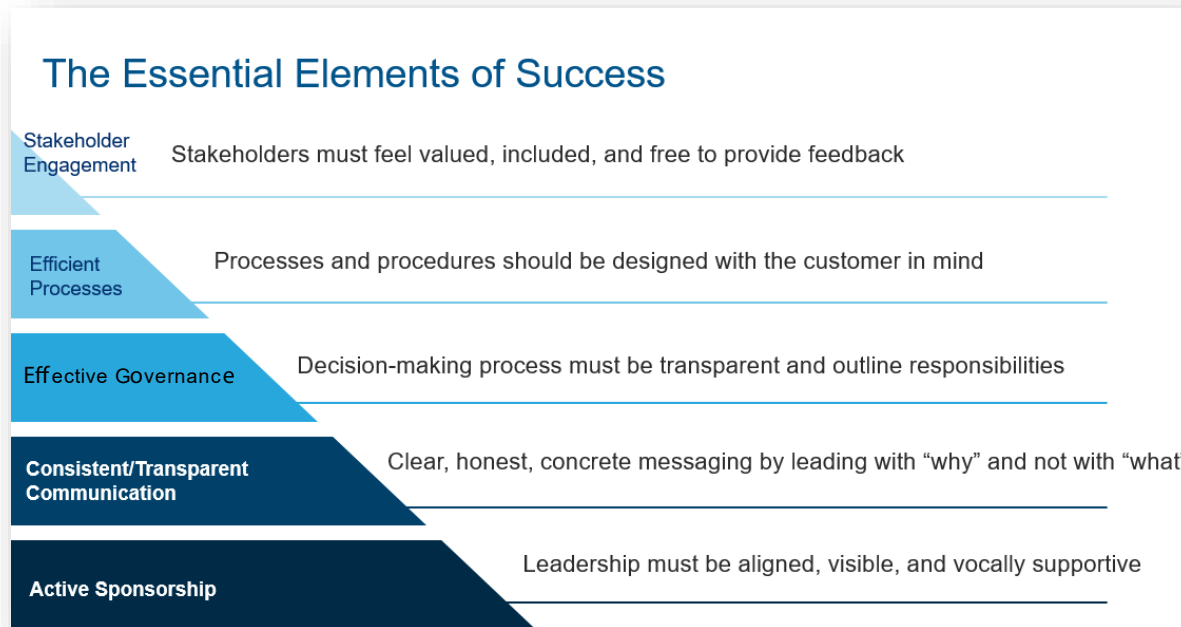
Change Management and Transition activities are embedded throughout the project lifecycle to increase engagement and create continuous learning opportunities and ensure project adoption and success. Communication is foundational to user buy-in and adoption and is continuous throughout the implementation and beyond go-live.

A website will be created and managed at the Chancellor's office level for all colleges to have one place to get the most helpful and relevant information. The website will also provide transparency and clarity as each college moves through system adoption. A change network at each college is designed to increase awareness and allow for engagement and readiness of administration, faculty, staff, and students. Training will be provided to prepare everyone for a successful start as the project goes live.



Change Strategy, Roles, and Responsibilities

The image below describes the leading factors for project success. Visible and active sponsorship is the foundation to achieving success. Sponsors will need to provide consistent support, communication, effective governance, efficient processes, and stakeholder engagement which are critical for change optimization.



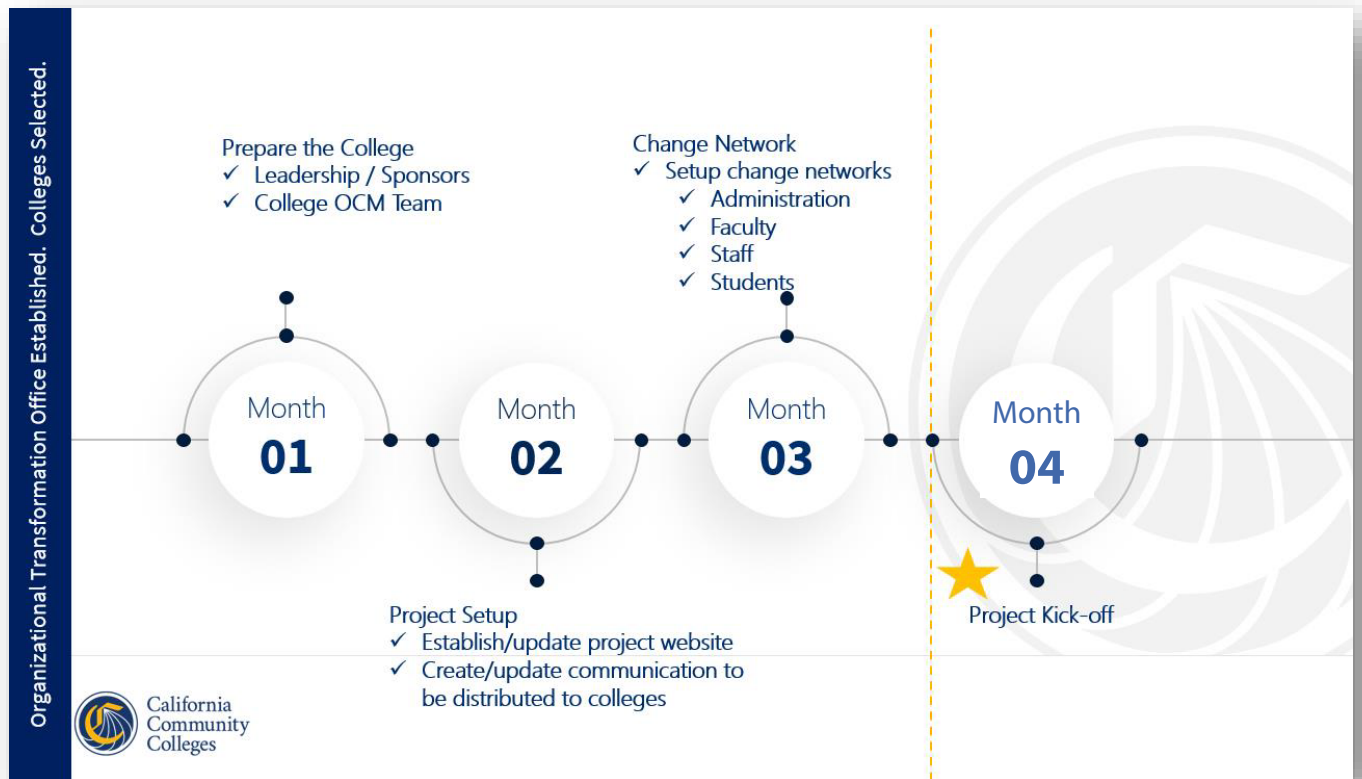
To position each college for success, leaders must consider these interconnected components of change including active executive sponsorship, a shared vision, honest and timely communication, a culture that promotes change, manages resistance, and ensures that all stakeholders are informed and included.

Active sponsorship is the foundation. Active Sponsorship is achieved through consistent communication, effective governance, efficient processes, and stakeholder engagement which are critical to achieving change optimization. To position an institution for success, the leadership team must consider these interconnected components of change, as depicted in the graphic below. Effective sponsorship reaches each level of the college, generating buy-in among stakeholders, and fostering an atmosphere of transparency, inclusion, and trust. To ensure effective sponsorship, executive leaders must first understand their role in visibly supporting and building a coalition of sponsorship with stakeholders.

Stakeholder engagement helps to ensure that the colleges’ needs are integrated into the change strategy. Appointing a Change Lead and team of champions from within the institution to develop feedback mechanisms and monitor stakeholder acceptance can help to mitigate opposition, which is a common result of any change initiative. Stakeholder engagement is achieved through effective communication, transparency, and collaboration.

The image below outlines the approach for each wave of college implementations. Three months prior to project kickoff, the change management and transformation team, in collaboration with the transformation office will begin working with the selected colleges to prepare leadership, sponsors and the local Organizational Change

Management (OCM) resource(s). These local OCM resource(s) will be the primary contact for their college change network and will coordinate efforts with the CCCC OCM team and serve as the liaison to college leadership.



To successfully launch the Change Network, each identified stakeholder must have incentive to participate and understand their role before they can effectively lead change.

A phased Change Network Launch utilizes cascading communications to uniquely engage each Change Network group in preparation for the first campus information session. The image below describes the roles and activities of the full change network from the college to the transformation office and the CCCC OCM Team.

Change Network Launch



Project Governance, Decisions, and Issue Resolution

Project Governance is critical for overall success. The image below outlines the roles and responsibilities of each member of the governance structure as well as the escalation path.



As issues arise the proposed organizational transformation office will be foundational in escalating them up through the governance structure to the executive committee if needed. When decisions are needed for project execution, the executive committee will cascade the decisions through the governance structure to be executed and communicated by the organizational transformation office to the project team and colleges.

In the Approach section below, the implementation is divided into “waves” with a subset of colleges going first in Wave 1. To ensure continuity, it will be important that there is representation from the Colleges in subsequent waves as business reengineering and other decisions are made. The Governance structure should have this expanded representation at the various levels indicated above and below.



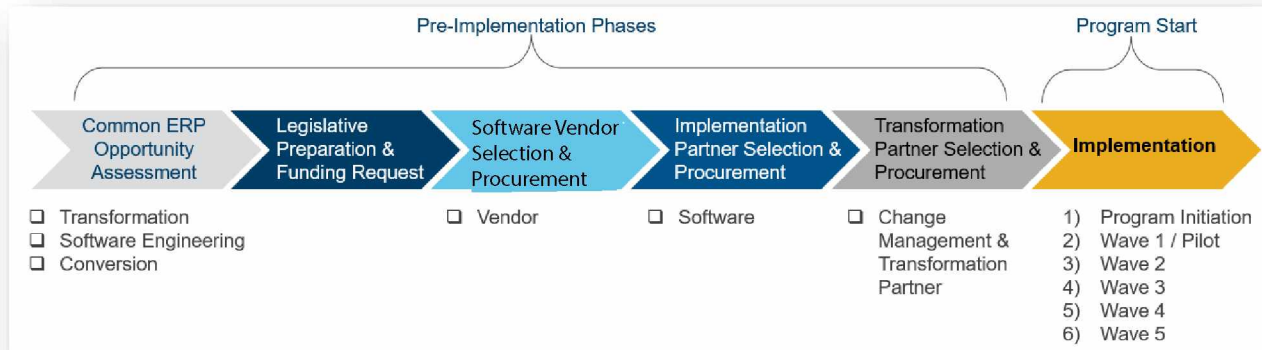
Conclusion

Complex projects, such as the one California Community College Chancellor's Office is considering, are a journey. The goal is to implement systems that provide increased efficiency, improved reporting, accurate data analytics, technical equity, simplified processes for faculty, staff and students and excellent services and support. A successful journey requires a flow of communication, alignment, and prioritization from the full spectrum of project leadership.



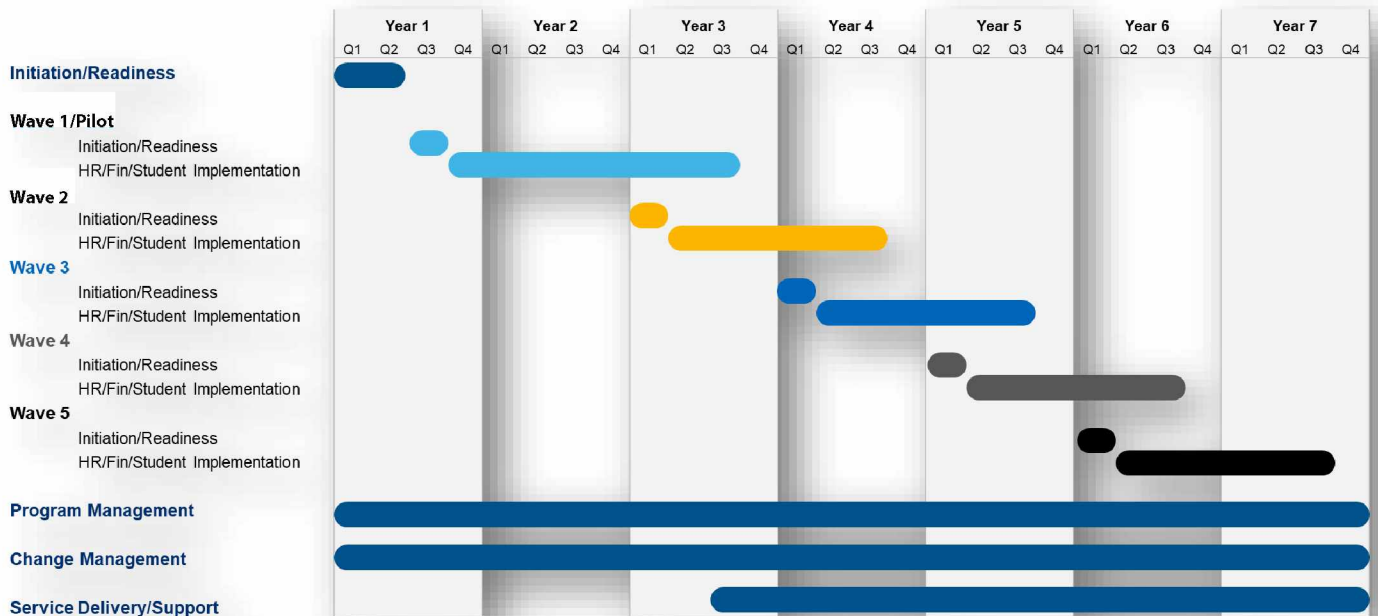
Roadmap

The purpose of the Roadmap is to provide CCC with a potential schedule and timeline for moving to a shared platform. The Roadmap is developed based upon assumptions gathered throughout the work conducted in addition to overall shared platform implementation best practices at other institutions. As issues arise the proposed organizational transformation office will be foundational in escalating them up through the governance structure to the executive committee if needed. When decisions are needed for project execution, the executive committee will cascade the decisions through the governance structure to be executed.



High Level Program Timeline

The timeline above represents a potential implementation schedule to move all CCC districts and colleges to a shared platform. The foundation of this timeline is based upon an assumption that CCC would migrate districts and colleges in a staggered format (i.e., waves). This is a recommended best practice, and given the size and scale of the CCC, the only feasible method for such an initiative.



Program Initiation Readiness Phase

A key component of this timeline will be the initial phase of work – the Initiation Phase. During the Initiation phase, CCCC's leadership team will determine which resources should be brought into the program, and how to communicate roles and responsibilities throughout the organization to prepare and mobilize resources early in the program. The graphic below represents the progression of this deployment so that CCCC resources are fully mobilized by the start of the implementation.

Key Components of the Project Initiation Phase



It will be imperative for CCC to invest the appropriate time and resources up front to ensure a program of this scale is appropriately planned and scoped. Much of the preparation for building out the change approach discussed in the earlier section would be conducted during this phase, setting the overall foundation and structure for the program.

Additionally, building a steady project foundation helps ensure that this large strategic initiative receives wide adoption now and, in the future, as you transition to new operations on the shared platform. Throughout this phase, CCC will work to address the following questions:

- Does CCC have the right people staffed for the transformation?
- Does everyone understand their role in the project?
- Are CCC comfortable with how their current technical landscape (e.g., integrations, shadow-systems) will fit into the future deployment?
- Do you have the right guardrails in place to define your future state business processes?
- How will end users be included and informed throughout the project?
- How will you support end users and maintain the shared platform beyond go-live?

Asking the right questions early in the journey to a shared platform forges a clear path forward—one that leads to modernizing the experiences of your students, faculty, and staff, integrating platforms, and securing a foundation for sustainable growth in an era of unprecedented change.

A primary outcome of this phase of work is to establish a deployment framework that can be utilized for staging the districts and colleges into a repeatable implementation process.

Repeatable Implementation Process



Timeline Assumptions

As stated previously, a foundational assumption of this timeline is that CCCC would migrate districts and colleges to the shared platform in a staggered, or waved approach. While this approach likely increases the overall timeframe for full deployment, it segments the effort and scale into more manageable components. Additionally, staggering the deployment will allow for CCC to improve upon their implementation as they progress through the waves, applying lessons learned to subsequent waves, and improving the overall process.

The Roadmap assumes the initial Deployment Wave would take two years to complete, while subsequent waves could be done within 18 months. Additionally, each wave would include a 3-month readiness phase, allocating time for the respective districts and colleges to ramp-up and adequately prepare to participate in the implementation for their locations. Similar to the necessity of establishing a foundation at the start of this program, it will be equally important that a similar foundation is created at each district/college before they move into the implementation cycle.

While the timeline reflects a sequenced or waved approach, there is also an assumption that certain activities, primarily focused within the Chancellor's Office, would remain consistent throughout. This includes the overall Program Management effort as well as the central Change Management and Transformation efforts. Maintaining a centralized focus and commitment from Chancellor's Office in these areas will be critical in establishing a consistent program and associated management and change processes throughout the life of the program.

Scope Assumptions

The timeline reflected above is based upon a set of scope assumptions that would need to be validated as part of the initial readiness phase of work. The timeline assumes the following:

- A shared platform software vendor has already been selected.
- The primary scope areas for movement to a shared platform include the primary ERP applications/pillars: Student Administration, Human Resources and Finance.
- Additional scope would include an Identity and Access Management solution and Enterprise data and reporting capabilities.

- All ERP pillars will be implemented for a given wave together. This can be revisited as part of the Initiation/Readiness phase, particularly once a software platform has been selected. Should CCCC elect to stagger the application scope, it is highly recommended that HR/Finance be implemented together based upon best practices and methods of existing software vendors.

Selection Criteria for Waves / Deployments

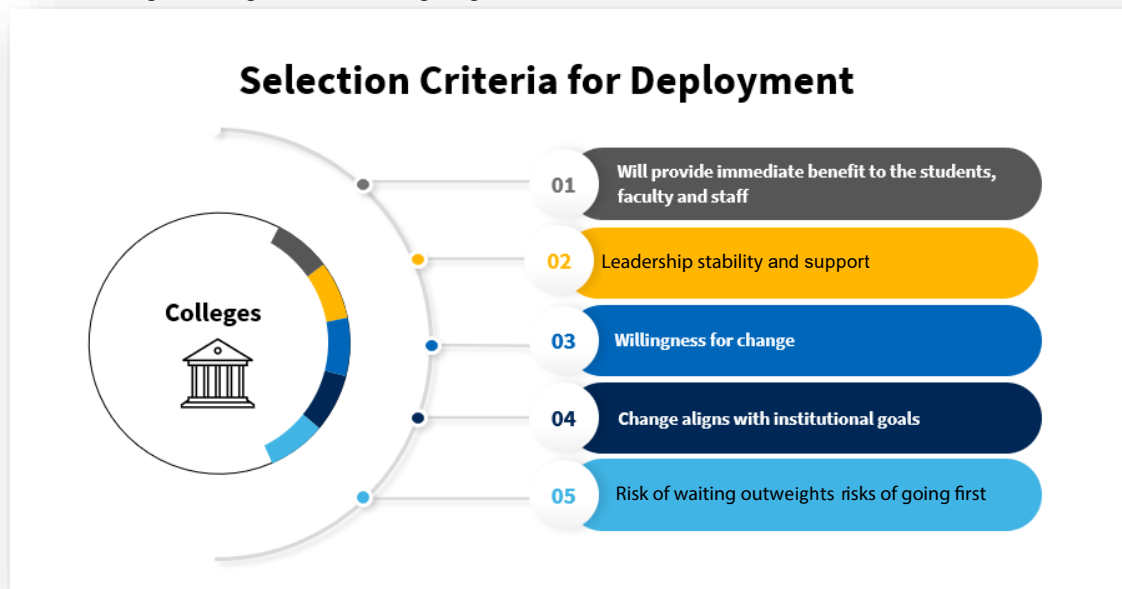
While the Roadmap proposes implementation waves throughout, the selection of the first wave participants is particularly critical in establishing early success. A best practice established in the Assessment phase of this project is to have had a representative group of districts to demonstrate wins for the wider community. This includes having a mix of small and medium sized districts, and varied ERP or student systems in use. It will also be useful to select districts with an immediate need, e.g., districts that are currently considering a new Student, HR or Finance system because of compliance pressures or a desire to improve the student experience. As the Assessment has demonstrated, there are areas, for instance, where the student experience could be radically improved with a new system. In determining the schools to be selected, the Chancellor's Office has the option of surveying the current districts for willingness and specific criteria for determining the appropriate topographic balance for success.

The selection of first wave participating schools is important because it will:

- Demonstrate early success and build confidence for future phases
- Validate expectations and assumptions around success factors
- Establish best practices for subsequent waves

Huron recommends that the first wave is composed of no more than five districts ranging for small to medium size. We recommend that the schools represent a diverse group with one or more of the following criteria:

- Established need to adopt a new system
- Eagerness to participate
- Leadership stability to provide direction
- Move to shared system supports institutional goals
- Desire to help prove and improve the implementation approach
- Risk of waiting outweighs the risk of going first



Budget

The effort for a program of this scale and complexity will be significant and includes investment from both the Chancellor's Office as well as the districts and colleges. We have developed an overall cost model for central and district/college activities, based upon the draft Roadmap and Timeline outlined above.

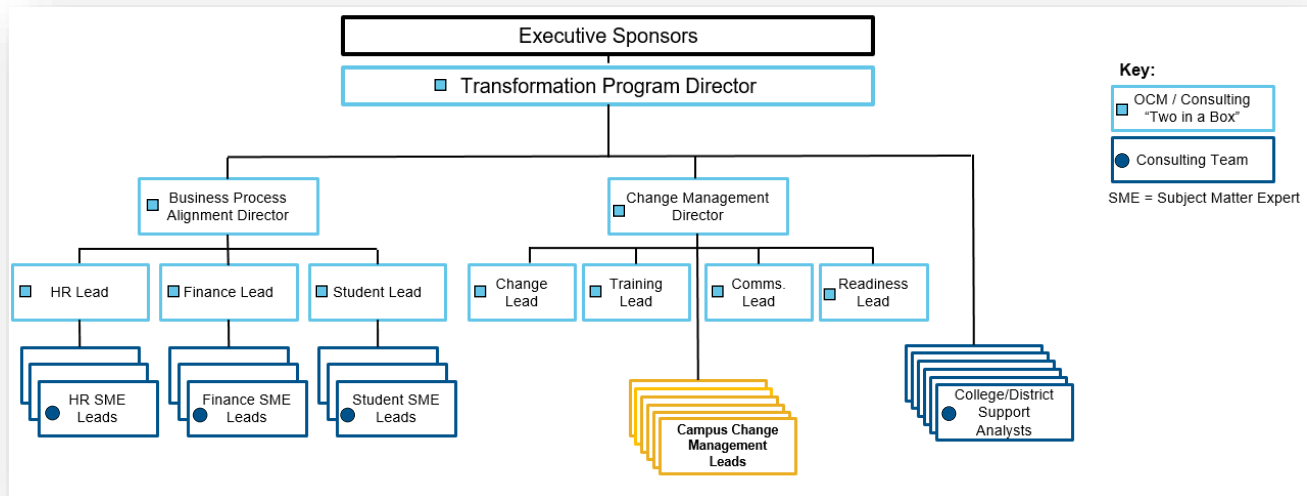
It should be noted the efforts estimated in this report reflect the Change Management and Transformation related activities only, and do not include the additional efforts such as Vendor Software engineering and conversion, as well as associated implementation partner efforts. While there is likely some level of overlap, particularly at the leadership resourcing level, this model would need to be integrated with these additional cost estimates to obtain a full cost perspective for this program.

Our model depicts efforts for both consulting resources as well as internal CCCCCO resources to participate in the initiative. Our cost model assumes the majority of work will be performed by consultant resources, given the relatively minimal number of available resources to staff from the CCCCCO. At a minimum, our recommendation is to partner CCCCCO resources with a consulting resource at the key leadership levels.

Finally, our internal resource recommendations do not reflect what may be needed by CCCCCO to support a shared platform after deployment and may need to be revised based upon the support model that is ultimately designed for this initiative.

Chancellor's Office / Central Program Team Costs

The diagram below outlines a high-level overview of the recommended organizational structure to support the change management and transformation as well as business process alignment activities to move to a shared platform. The resources in this organizational structure are correlated to an overall effort that would be needed and includes both central staff as well as consulting resources. Our recommendation, based upon best practices, is that the Chancellor's Office partner with consulting resources for at least the key lead positions. This is represented in the structure below. Depending on how CCCCCO plans to provide support beyond the deployment, they may elect to partner at lower levels within the team structure to effectively prepare staff for supporting campuses after deployment.



Additionally, this organizational structure reflects a recommended implementation support model for the colleges and districts, by providing a team of location support analysts, who would work with a given Wave cohort during their implementation cycle to ensure they are getting appropriate support from the central team. The alignment of the consultants depicted in this organizational chart frames up foundational support throughout the project lifecycle and acknowledges the Campus Organizational Change Management resources needed for a successful implementation. The yellow boxes represent each college appointing some resources to support organizational change management and transformation. A full description of each position can be found in [Appendix A1 – Roles and Responsibilities](#). Based upon the organizational structure outlined above, we estimate the overall resource hours across the full implementation as follows:

| Consulting Resources | | | | | | |
|--|---------------|----------------|----------------|----------------|-----------|-------------------|
| | Readiness | Wave 1 | Waves 2 - 5 | Total Hours | FTE | Costs |
| Program Management | | | | | | |
| Transformation Program Director | 960 | 4,320 | 7,680 | 12,960 | 1 | \$ 2,592,000 |
| Business Process Alignment | | | | | | |
| Business Process Alignment Project Manager | 960 | 4,320 | 7,680 | 12,960 | 1 | \$ 2,592,000 |
| HR Subject Matter Expert Lead | 960 | 4,320 | 7,680 | 12,960 | 1 | \$ 2,592,000 |
| Fin Subject Matter Expert Lead | 960 | 4,320 | 7,680 | 12,960 | 1 | \$ 2,592,000 |
| Student Subject Matter Expert Lead | 960 | 4,320 | 7,680 | 12,960 | 1 | \$ 2,592,000 |
| 3 HR SME Leads | 2880 | 12,960 | 23,040 | 38,880 | 3 | \$ 7,776,000 |
| 3 HR Business Analysts | | 12,960 | 23,040 | 36,000 | 3 | \$ 7,200,000 |
| 3 Fin SME Leads | 2880 | 12,960 | 23,040 | 38,880 | 3 | \$ 7,776,000 |
| 3 Fin Business Analysts | | 12,960 | 23,040 | 36,000 | 3 | \$ 7,200,000 |
| 4 Student SME Leads | 3840 | 17,280 | 30,720 | 51,840 | 4 | \$ 10,368,000 |
| 4 Student Business Analysts | | 17,280 | 30,720 | 48,000 | 4 | \$ 9,600,000 |
| Change Management | | | | | | |
| Change Management Director | 960 | 4,320 | 7,680 | 12,960 | 1 | \$ 2,592,000 |
| Change Lead | | 4,320 | 7,680 | 12,000 | 1 | \$ 2,400,000 |
| Training Lead | | 4,320 | 7,680 | 12,000 | 1 | \$ 2,400,000 |
| Communications Lead | | 4,320 | 7,680 | 12,000 | 1 | \$ 2,400,000 |
| End User Readiness Lead | | 3,996 | 7,680 | 11,676 | 1 | \$ 2,335,200 |
| District/College Support | | | | | | |
| 6 Campus Support (HR/Fin/Student) | | 25,920 | 46,080 | 72,000 | 6 | \$ 14,400,000 |
| Total Hours | 15,360 | 155,196 | 278,480 | 447,036 | 36 | 89,407,200 |
| Chancellor's Office Resources | | | | | | |
| | Readiness | Wave 1 | Waves 2 - 5 | Total Hours | FTE | Costs |
| Program Management | | | | | | |
| Overall Change Management Program Director | 960 | 4,320 | 7,680 | 12,960 | 1 | \$ 1,350,000 |
| Business Process Alignment | | | | | | |
| Overall Business Process Director | 960 | 4,320 | 7,680 | 12,960 | 1 | \$ 1,350,000 |
| HR Subject Matter Expert Lead | 960 | 4,320 | 7,680 | 12,960 | 1 | \$ 1,350,000 |
| Fin Subject Matter Expert Lead | 960 | 4,320 | 7,680 | 12,960 | 1 | \$ 1,350,000 |
| Student Subject Matter Expert Lead | 960 | 4,320 | 7,680 | 12,960 | 1 | \$ 1,350,000 |
| Change Management | | | | | | |
| Transformation Office Director | 960 | 4,320 | 7,680 | 12,960 | 1 | \$ 1,350,000 |
| Change Lead | | 4,320 | 7,680 | 12,000 | 1 | \$ 1,250,000 |
| Training Lead | | 4,320 | 7,680 | 12,000 | 1 | \$ 1,250,000 |
| Communications Lead | | 4,320 | 7,680 | 12,000 | 1 | \$ 1,250,000 |
| End User Readiness Lead | | 3,996 | 7,680 | 11,676 | 1 | \$ 1,216,250 |
| Total Hours | 5,760 | 42,876 | 76,800 | 125,436 | 10 | 13,066,250 |

These efforts include a component to provide dedicated support to the respective locations participating in a given Wave's deployment as well (i.e., District/College Support). In addition to personnel costs, travel expenditures are estimated at \$5 million.

Budgeting Assumptions (applies to the above and subsequent budgets)

- Average Consulting Rate – \$200/Hour
- Average Fully Loaded CCCC Cost – \$200,000/Year
- Work Hours/Month – 160
- Travel expenditures estimated at one \$1500 trip per month for each consultant

District / College Cost Model

In addition to the overall central team effort, each college/district will have their own local costs that would be incurred as they participate in their given Wave deployment. The organizational structure below represents a recommended model and is consistent with the discussion earlier in the Change Management and Transformation Approach section.



The estimated hours for a given college/district are highly dependent upon their size and complexity, as well as whether they are participating in the initial Wave or a subsequent Wave, given the initial Wave is assumed to cover a longer duration. This is based primarily on assumptions that a smaller/less complex district or college will not need a full-time resource for each of the roles outlined above. We have provided a range of estimated hours here. These costs represent a per college/district cost and should be calculated for each distinct college participating in each wave. For example, if a district contains multiple colleges who all operate their own systems, these estimates will apply to each college within the district.

These costs assume contracted employees are being leveraged for this work, and/or existing employees are being utilized while their current roles are being backfilled.

Finally, these costs represent only the work efforts associated with the transformation effort, and are not inclusive of additional software implementation costs that a given college/district will need to provide (e.g., local integrations, local data conversion, etc.)

| College/District Effort - Small Wave 1 | | | |
|---|------------|--------------|----------------|
| | FTE | Hours | Cost |
| Change Lead | 0.5 | 2,160 | \$ 225,000 |
| Training Lead | 0.5 | 2,160 | \$ 225,000 |
| Communications Lead | 0.5 | 2,160 | \$ 225,000 |
| End User Readiness Lead | 0.5 | 1,200 | \$ 125,000 |
| Total | 2 | 7,680 | 800,000 |

| College/District Effort - Large Wave 1 | | | |
|---|------------|---------------|------------------|
| | FTE | Hours | Cost |
| Change Lead | 1 | 4,320 | \$ 450,000 |
| Training Lead | 1 | 4,320 | \$ 450,000 |
| Communications Lead | 1 | 4,320 | \$ 450,000 |
| End User Readiness Lead | 1 | 2,400 | \$ 250,000 |
| Total | | 15,360 | 1,150,000 |

| College/District Effort - Small Waves 2-5 | | | |
|--|------------|--------------|----------------|
| | FTE | Hours | Cost |
| Change Lead | 0.5 | 1,680 | \$ 175,000 |
| Training Lead | 0.5 | 1,680 | \$ 175,000 |
| Communications Lead | 0.5 | 1,680 | \$ 175,000 |
| End User Readiness Lead | 0.5 | 720 | \$ 75,000 |
| Total | | 5,760 | 425,000 |

| College/District Effort - Large Wave 2-5 | | | |
|---|------------|---------------|----------------|
| | FTE | Hours | Cost |
| Change Lead | 1 | 3,360 | \$ 350,000 |
| Training Lead | 1 | 3,360 | \$ 350,000 |
| Communications Lead | 1 | 3,360 | \$ 350,000 |
| End User Readiness Lead | 1 | 1,440 | \$ 150,000 |
| Total | | 11,520 | 850,000 |

Appendix

The appendix includes additional details referenced in the report sections above. The appendix includes:

- A1 – Roles and Responsibilities
- A2 – Additional Documentation

A1 - Roles and Responsibilities

| Role | Responsibilities |
|--|---|
| Executive Sponsors | <ul style="list-style-type: none"> • Provides input, review, and approve the overall project and change management / transformation strategy and plan • Identifies key organizational partners for communication, readiness, and training efforts • Identifies key contacts for each college • Provides oversight and overall direction throughout the project • Provides active and visible sponsorship for colleges and project teams |
| Transformation Program Director | <ul style="list-style-type: none"> • Manages the critical intersection of people, processes, and technological (i.e., engineering and conversion) change to further advance CCC's vision for success. • Partners with executive leadership, project, and program leaders throughout implementation • Drives full implementation strategy, activities, and resources • Oversees full change management and transformation team throughout implementation • Reports to Executive Sponsors • Manages budget and staffing resources for the change effort |
| Change Management Director | <ul style="list-style-type: none"> • Manages the effort of the change management and transformation team leads and subject matter experts (SMEs) • Ensures that the functional team's effort aligns with the overall implementation objectives • Reports to the Transformation Program Director |
| Business Process Alignment Director | <ul style="list-style-type: none"> • Manages the effort of the subject matter expert (SME) leads • Ensures that the functional team's effort aligns with the overall implementation objectives • Reports to the Transformation Program Director |
| Change Management Leads (CCCCO and Consultant SME's) | <ul style="list-style-type: none"> • Responsible for day-to-day operations and decisions of the change management and transformation activities |

| Role | Responsibilities |
|--|---|
| | <ul style="list-style-type: none"> • Works with project team leads to align activities and identify dependencies • Responsible for creation and maintenance of OCM strategy work plan • Responsible for overall change management, communication, readiness, knowledge transfer, and training strategies • Promotes use of change management and change leadership methodology in the delivery of change management and transformation tasks • Schedules and meet with stakeholders • Schedules and meet with college sponsors |
| <p>Training Leads (CCCCO and Consultant SME's)</p> | <ul style="list-style-type: none"> • Responsible for overall training and knowledge transfer • Creates and Executes training strategy and training needs analysis to identify needs by college and determine activities and/or resources needed to support performance • Collaborates with functional SMEs and conduct functional team reviews • Develops functional area training plan for each assigned application • Designs and develops course materials: presentations, toolkits, job aids, worksheets, online classes, etc. • Plans and executes logistics of training events • Maintains FAQ's for go-live • Coordinates with college resources and functional leads to deliver training • Evaluates training program effectiveness and provide periodic reports to project leadership • Prepares and/or review training-related communications |
| <p>Engagement and Readiness Leads (CCCCO and Consultant SME's)</p> | <ul style="list-style-type: none"> • Documents organizational change impacts • Coordinates readiness workshops and webinars • Supports meetings of the change network • Develops, administers, and analyzes implementation readiness evaluation methods, schedules, and milestones • Measures and tracks college implementation readiness and escalate risk areas to project leadership • Provides actionable steps to improve readiness • Coordinates with Communications team to provide ongoing, timely, and relevant communication to change network addressing any concerns or resistance • Collects feedback from change network on the most significant risks |

| Role | Responsibilities |
|---|--|
| Communications Team (CCCCO and Consultant SME's) | <ul style="list-style-type: none"> • Drafts communication and works with executive sponsors, transformation office, and project team members for input and review as needed. • Manages the communication matrix to ensure efficient and effective development, approval, and delivery. • Creates/assists in communication development and delivery • Monitors/evaluates effectiveness of the communications effort • Designs, creates, and manages project Intranet / Website • Updates project Intranet/Website with communications, training, and workshop materials • In conjunction with the other change leads, identifies and assesses communication needs for the project • Oversees approval processes that includes review of communications by appropriate parties • Monitors and evaluates communication effectiveness and periodically and report to project leadership • Maintains a keen understanding of communication trends, developments, and best practices |
| Subject Matter Expert (SME) Leads | <ul style="list-style-type: none"> • Partners with colleges and vendor to align business processes to achieve efficiencies and fully leverage the software solution • Guides discussion of business processes. • Encourages consideration of industry best practices. • Documents decisions. |
| Business Analysts | <ul style="list-style-type: none"> • Supports the SME Leads to facilitate business process alignment. |
| College/District Support Analysts | <ul style="list-style-type: none"> • Partners with the college leads to ensure successful implementation. These consultant leads specialize in each area affected and will support business process transformation. |

***Note:** The College Organizational Change Management and Transformation Lead is vital to the success of each college. The College Lead partners with the OCM Team in the Chancellor's office. Based on the size and complexity of each college or district, it is advised to also add support with communications, readiness, engagement, and training.

A2 – Additional Documentation

Additional documents submitted with this report include:

- *Final Report Addendum: Workshop Themes, Takeaways and Details* - A detailed list of current state observations by workshop and topic.
- *Current State Report* - Presented to Advisory Committee, April 2021



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