

## Common Process Outcomes & Recommendations Report

Common Process	VC01 Grants Management
Workshop Date	May 19 - 21, 2018
Submitted to Governance	June 1, 2018
<b>Working Group</b> Review & Acceptance	Reviewed June 13, 2018 - Approved to Send to Steering Committee
<b>Steering Committee</b> Review & Acceptance	

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### 1. Scope

The Grant Management value chain crosses multiple modules in the Finance Pillar of PeopleSoft including Grants, Contracts, Billing, and Project Costing. This value chain begins with grant proposal creation and ends with closing an award. A Grant for ctLink is defined as funding received from one source outside the college, that has a specific budget, has a prescribed start and end date, requires a way to collect the funds (Invoice) at a given time, and reports its expenses and cash received to the sponsoring agency. This workshop includes, for example, reimbursable grants from SBCTC, but would also include program grants such as Running Start. The value chain *excluded* capital projects.

### 2. Participants

Workshop in-person participants included 60 subject-matter experts from 25 institutions:

Bates	Edmonds	Peninsula	Spokane ( <i>online</i> )
Bellevue	Everett	Pierce College FS	Spokane Falls ( <i>online</i> )
Bellingham	Grays Harbor	Pierce College Puyallup	Tacoma
Big Bend	Green River	Renton	Walla Walla
Cascadia	Highline	Seattle Central	Wenatchee

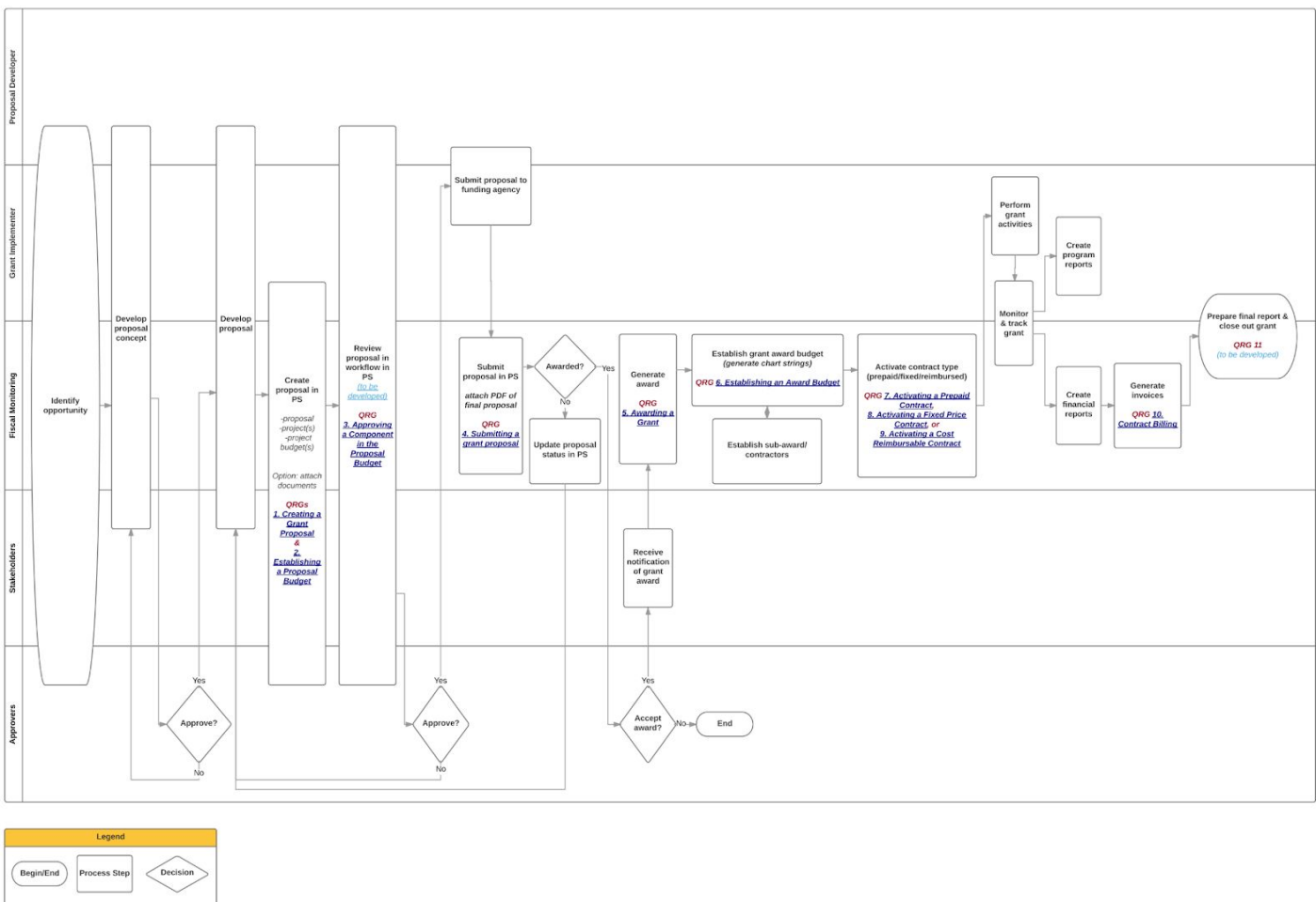
Centralia	Lake Washington	Shoreline	Whatcom
Clark	Lower Columbia	Skagit Valley	Yakima
Clover Park	North Seattle	South Puget Sound	SBCTC Agency
Columbia Basin	Olympic	South Seattle	

### 3. Common Process

Common Process map attached:

GRANT LIFECYCLE COMMON PROCESS [REVISED]

Workshop Consortium | April 21, 2017



### 4. Follow-up Items / Recommendations

Participants discussed a few items and agreement was reached on how to follow up:

**Chart of Accounts (COA)** - participants discussed options regarding each grant receiving a new department number or using program/project to identify the grants. After discussing with

Finance Lead, discussion and decision has been postponed until First Link Colleges close their year end financials. This decision is still pending.

**Update (Emmett):** Deviation from process can happen locally, based on decisions from colleges regarding using the program/project option.

**Running Start** - a proposal was made to add a separate value chain and workshop regarding Running Start. The new workshop has been added to the CPW list, titled VC31 Running Start Admissions & Billing, and will be scheduled at a future time.

## **5. Voting Records**

Voting to accept the developed Common Process was conducted by voice vote. The Grants Management Common Process was adopted unanimously without dissent. College-by-college votes were not taken during proof-of-concept workshops. The specific recommendations were projected on-screen and reviewed with the workshop participants for agreement.

Executive Sponsor Luke Robins was present during final process walkthrough and acceptance.

## **6. Testing Records**

Testing was completed in TR1 testing environment in the summer of 2017. The test instance available for Common Process testing is not a direct copy of the Production environment and does not have recurring requests or interfaces scheduled to run in the background which contributed to a delay in successfully executing a billing in TR1. The Test Lead worked with the SBCTC functional analyst to finish the testing in the PQA environment and was able to successfully complete an invoice/billing. This constraint should be considered when planning to test related value chains such as purchasing or charging payroll to a test grant.

Testing took place months beyond the initial estimate for a variety of factors, but followed a pattern of making progress until encountering an ambiguous item not addressed by the Quick Reference Guides (QRG). The issues listed are not directly relevant to the grants entry, but describe how the system operates and how decisions made in earlier steps can affect subsequent steps. Workarounds were recommended for Grant Accountants or those in a similar role who perform the data entry into ctcLink.

Four colleges participated in testing and submitted two non-Quick Reference Guide related observations and ten Quick Reference Guide revisions and all of them have been completed or a recommendation was made on how to address.