



ctcLink Project Quality Assurance

Monthly Report – June 2021

Presented to:



**Washington State Board for
Community and Technical Colleges**

By:



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Cover Letter

MTC is conducting regular quality assurance reviews of the Washington State Board for Community and Technical Colleges' ctcLink Initiative. The ctcLink project will provide the foundation for the next generation of services to students, faculty, and staff in an environment that enables them to self-manage their data and experiences. It will leverage and enhance the inherent efficiencies of the 34 college system through the implementation of a single, centrally provided system of online student and administrative functions. This report is intended to provide an independent, periodic assessment of the key components of the major project initiatives. This report is based on in-person and phone interviews with key project personnel and our review of documentation uploaded by the various teams to the SharePoint sites as well as any critical items that we may need to follow up on based on the previous assessments.

If you have any questions about the content of this report, please feel free to contact me at the email address or phone number provided below.

Sincerely,



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Executive Summary

There continue to be a couple of key risks as the project continues to move forward. One of the highest risks we see is the ability of the project to keep key personnel on the project through final deployment. The project has recently begun to see some key project personnel leaving the project for other opportunities. Unfortunately, with a project of this nature, this is not uncommon but needs to continue to merit attention from project and agency executives.

Project morale remains okay at this time; however, project staff is getting exhausted as the project tempo has accelerated in the final months of the project. Focus is on DG5 work; however, staff is concerned about workload for deploying the remaining 17 colleges and the overlapping schedules between DG5 and DG6.

Another aspect of the personnel issue is the transitioning from ctcLink Project staffing to ERP Customer Support organization, which is a major internal OCM challenge for SBCTC. This transition has already begun to impact morale and will have consequences that will need to be carefully managed.

Of a related nature, QA considers the Schedule as now YELLOW. Overall schedule is a derivative of the staffing and workloads. The potential loss of critical project personnel during the next 8-10 months raises a great risk. The ctcLink Project and SBCTC IT management are very aware of this risk. This risk also carries budget implications if the project is required to hire contractors to fill vacated positions in order to complete the project.

Another risk that has been well managed to date but should be monitored through the end of the project is the ctcLink Technical Environment. It is a project work stream that includes data conversions, project environments, and applications. QA considers this area GREEN; however, it is trending YELLOW. The small conversion team is a risk since the environments and data conversions workload has increased significantly with now having 17 colleges underway at the same time. Both DG5 and DG6 require three sub-groups during the go-live process. This is recognized by QA as a very challenging conversion effort for the project technical staff.

Project Status Scorecard

The following table summarizes the assessment of each of the critical areas included in the QA review with our focus now on completing implementation of Deployment Groups 5 and 6.

ctcLink Project Assessment Scorecard

<u>Project Area</u>	<u>Prior Status May 2021</u>	<u>Current Status June 2021</u>	<u>Overall Comments</u>
Overall	YELLOW	YELLOW	<p>The Overall Project Status remains YELLOW. The Project will most likely remain YELLOW until the remaining 17 colleges are implemented with PeopleSoft ERP.</p> <p>QA assessment is based on project risks due to the overlapping DG5 and DG6 deployment schedules and the number of colleges being deployed over a short timeframe.</p> <p>The other major project risk involves sustaining critical project staffing for completing the DG6 colleges. As of this report, the Project team has already started losing critical staff.</p> <p>QA continues to be concerned that SBCTC IT is properly staffed and prepared to handle ongoing ctcLink support.</p>
SBCTC/ Governance	GREEN	GREEN	<p>ctcLink Project Governance continues functioning as intended. Meetings are held remotely and documented.</p> <p>The ctcLink Project Steering Committee met in June to review progress on the DG5 and DG6 deployment activities. A major issue being addressed is the DG6 implementation schedule for 2022.</p>
Project Management	GREEN	GREEN	<p>PMO team is focused on the DG5/DG6 deployments. PMO priority is the DG5 deployment scheduled for 3 sub-group implementations starting in October 2021. DG6 implementation is scheduled to begin for the remaining colleges in February 2022. DG6 is also scheduled for 3 sub-group implementations, each with 3 colleges. Most likely the last deployment group will be in early May 2022. Specific dates to be determined by the DG6 colleges and approved by the Project Steering Committee.</p>
Phase Scope	GREEN	GREEN	<p>QA considers the Phase Scope as GREEN. The custom Online Admissions application (OAAP) is now in production for all 17 deployed colleges. CampusCE Phase 1 has been implemented at 6 colleges. Campus/CE Phase 2 design phase is continuing.</p> <p>The Planning and Budgeting Cloud Solution (PBCS) from Oracle is now in progress for DG4 colleges.</p> <p>A new updated version of the HighPoint Student Mobile Solution (HCX) went live in June.</p>

<p>Schedule Status</p>	<p>GREEN</p>	<p>YELLOW</p>	<p>QA currently considers the schedule status as trending YELLOW. The schedule could be a future risk for DG6 given some project resources are leaving the project and SBCTC due to unknown future positions within SBCTC IT. There is a serious impact to the schedule if project leadership is unable to mitigate those project resources leaving the project. Based on the Overall Project Status Report (July 2, 2021), the DG5 colleges self- reported their status as GREEN, with the exception of Green River and Bellevue Colleges which reported their current status as YELLOW.</p> <p>Based on the Overall Project Status Report (July 2, 2021), the DG6 colleges all self- reported their status as GREEN with the exception of Columbia Basin River, Walla Walla, and Lake Washington which reported current status as YELLOW.</p> <p>One critical area being worked on for DG6 schedule is the Cycle #4 Data Conversion which overlaps with DG5 Go-live implementations.</p> <p>The need to divide implementation into multiple weekends is required for the DG6 deployment group given the number of colleges.</p>
<p>Training</p>	<p>GREEN</p>	<p>GREEN</p>	<p>QA recognizes that the colleges will continue to struggle with implementing and maintaining role security. SBCTC Customer Support are working with the deployed colleges to further assist them with role security issues.</p> <p>Additional training courses have been developed and are in use. Team is now prepping for the support of DG5 User Acceptance Testing Sprints which will be starting in late July/early August.</p> <p>The challenge will continue to be on the DG5/DG6 colleges to ensure their staffs receive the training in concert with the plans and schedules. The next major training task for DG5 colleges will be participating in the UAT Sprints and using their data and local configurations.</p>
<p>Testing</p>	<p>GREEN</p>	<p>GREEN</p>	<p>The Project testing team is focused on DG5. The leadership for this area has improved processes to meet the schedule. There is still a major dependency on the 8 colleges included in scope for DG5 Parallel and UAT testing to validate their configurations, processes and data. DG5 SIT testing and parallel testing workstreams continued in July per schedule and is mostly completed.</p>
<p>Technical Environment</p>	<p>GREEN</p>	<p>GREEN</p>	<p>The ctcLink Technical Environment is a project work stream that includes data conversions, project environments, and applications. QA considers this area GREEN; however, it is trending YELLOW. The small conversion team is a risk since the</p>

			<p>environments and data conversions workload has increased significantly with now having 17 colleges underway at the same time. This is recognized by QA as a very challenging conversion effort for the project technical staff.</p> <p>The project technical team is currently working with the Project functional teams to complete the DG5 Data Cycle #4 conversions and DG6 Data Cycle#2 conversions.</p> <p>Certain DG5 components are now installed in production environment, including College Course Catalogs and current Employee/IDs.</p>
<p>Organizational Change Management (OCM)</p>	<p>GREEN</p>	<p>GREEN</p>	<p>The OCM work and Communications associated with coordinating the remaining 17 colleges is particularly challenging for Project staff.</p> <p>Effective leadership at the colleges is considered key to successful implementations. The PMO has indicated that DG5/DG6 Presidents and senior staff are very engaged with their colleges ctcLink activity.</p> <p>The Project Communications team continues to work closely with the College PMs, PIOs, and OCMs.</p> <p>Weekly meetings are being held between the Project and DG5/DG6 PMs.</p> <p>DG5/DG6 colleges are now engaged in OCM related activities that are preparatory to their college implementations. Local configurations and data conversions are underway for both DG5 and DG6 colleges.</p> <p>QA remains concerned that the DG5/DG6 colleges will have turnover of key staff that may impact their implementations.</p>
<p>Project Staffing</p>	<p>GREEN</p>	<p>GREEN</p>	<p>QA considers Project Staffing as GREEN; however, this is expected to trend YELLOW as the ctcLink approaches completion. Critical project staffing losses started in June and this trend could accelerate after DG5 implementations and possibly jeopardize the DG6 scheduled deployments.</p> <p>Staffing additional positions for the SBCTC IT ctcLink Support organization once ctcLink project is fully deployed is now in process. Based on the planned upscaling of the SBCTC support organization, there are more combined Project and Legacy staff than available positions, and current staff have been applying for these positions.</p> <p>Interviewing staff for these positions is to begin in late July.</p> <p>With no guarantee of selection for future additional SBCTC support positions, as external career and job opportunities present themselves to Project staff, QA expects these individuals will be lost to the project in the final months.</p>

<p>SBCTC Customer Support</p>	<p>YELLOW</p>	<p>YELLOW</p>	<p>QA considers the ctcLink Customer Support area as YELLOW. The upstaffing of the CS support organization will start in July. It must be ready to handle the future anticipated support work for the additional 8 DG5 colleges beginning in October.</p> <p>The major challenges of supporting a total of 34 colleges with a single instance, fully integrated PeopleSoft ERP and with interfaced 3rd party software solutions needs to be organizationally recognized. Doubling the number of colleges after DG5 and DG6 implementations will increase the number of work tickets and require substantially more staff and further improvements in support processes.</p> <p>A WACTC executive taskforce worked with SBCTC leadership approaches for funding the increase in required support staffing. The funding alternatives were presented to the WACTC Presidents in June and then to the SBCTC Board for final approval.</p> <p>The State Budgeting Process for FY21/22 established the basis for SBCTC offering future employment opportunities for support staff. SBCTC expects to use a standard recruitment process that has project and legacy staff submit employment applications for posted positions. Staff not hired to these positions will most likely begin looking for outside SBCTC opportunities.</p>
<p>SBCTC Application and Production Services</p>	<p>YELLOW</p>	<p>YELLOW</p>	<p>QA team considers SBCTC Production/ Application Services as YELLOW at this time, as they are still managing the effort required to support 17 colleges in a production environment. This team also requires additional technical staff/expertise to meet DG5 and DG6 projected workloads.</p> <p>The complexity of supporting colleges with PeopleSoft Role Security has been difficult in April due to staff loss. A serious backlog of college role security changes has become problematic since priority is on meeting technical security requirements.</p> <p>A status report for the Production/ Application Services clearly shows the substantial workload for which this team is responsible.</p> <p>Team worked with the Project staff to deploy the new version of the HighPoint Mobile solution (HCX) in June.</p> <p>The Online Admissions Application (OOAP) was installed for the DG4 colleges in June.</p> <p>Team is also responsible for Accessibility Issues and SBCTC leadership has been engaged with Oracle on moving forward with SBCTC prioritized PS accessibility improvements.</p>

SBCTC Data Services	GREEN	GREEN	QA team continues to consider SBCTC Data Services as GREEN. This is an important and an under-reported area. Besides providing Centralized Data services to SBCTC, it has been at the forefront of working with the deployed colleges, supporting Datalink, providing training for PS Queries and supporting additional custom solutions and standard ctcLink reports.
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LEGEND	GREEN	YELLOW	RED
Risk Description	1) Low risks may be encountered NO immediate action needed	2) Moderate risks may be encountered Serious deficiency and action item recommended	3) High risks may be encountered Needs to be escalated and can impact project effort or cost

Additional Quality Assurance Findings

Governance

- ctcLink Governance is working as planned. Meetings are routinely scheduled, documented.
- The Washington State Board for Community and Technical Colleges approved funding for 36 new positions to staff the ctcLink Project and Customer Support and Service Plan. Organization staffing and structure will be re-evaluated after one year post-DG6 deployments.
- The potential scope for a future ctcLink “Optimization Project” is in an early requirements stage and not included in current ctcLink Project.
- Gate Funding preparatory work has been impacted by changes in reporting process being made at State OFM and OCIO.

PMO and Staffing

- Project morale remains okay at this time; however, project staff is getting exhausted as the project tempo has accelerated in the final months of the project. Focus is on DG5 work; however, staff is concerned about workload for deploying the remaining 17 colleges and the overlapping schedules between DG5 and DG6.
- The transitioning from ctcLink Project staffing to ERP Customer Support organization is an internal major OCM challenge for SBCTC. This transition has already begun to impact morale and will have consequences that will need to be carefully managed.
- As approved, the ctcLink Support Organization is adding 36 positions.
 - Current Project is currently staffed with 50(+/-) SBCTC employees and 12 Contractors. SBCTC employees are especially concerned about their future employment opportunities in the Customer Support organizations once DG6 implementation is completed in Spring 2022.
 - New positions for the Customer Support organizations have been posted, applications from internal staff received, and some interviews will be starting in late July.
 - The current Legacy support employees are also at risk and will be needed until all remaining colleges are deployed. Once DG6 Subgroup C goes live, their current job positions will be eliminated. This team is also concerned about their future career opportunities within the SBCTC IT Division since they do not have the PeopleSoft expertise.
 - NOTE: The loss of project personnel has started and PMO expects additional critical staff loss until the project is complete which will elevate the risk to both DG5 and DG6 implementations. PMO does not have any current plan on adding/augmenting new Project staff to replace these positions at this time.
- The SBCTC IT Division will be staffing a new Project Management Office to support the ctcLink ERP after the completed deployment of DG6 colleges. Initial focus for the PMO is enhancements to the PeopleSoft product as well as additional related solutions. The recruitment for a Director of the PMO will be occurring over the next 4-6 weeks.
- The PMO continues mentoring the DG5 and DG6 College PMs. This is a very important aspect since the College PMs vary both in skill and Higher Education environment backgrounds.
- The Requirements Traceability Matrix (RTM) update work is continuing. The RTM is a status analysis of the original ctcLink scope requirements measured against what has actually been implemented or scoped/descoped by governance. The ctcLink Project Director has implemented a process of RTM review which started in June. The QA team views the completed RTM should be included within scope of the ctcLink Project Closeout by the PMO.

- The PMO and Project staff continue to work remotely. The SBCTC offices will remain closed at this time. Tentative date set for re-opening the Olympia office is now the fall 2021.
 - Project staffing will remain remote, with the option to come into the office when it is opened.

Phase Scope

- There are several replacement solutions being managed by the project team, including:
 - **Continuing Education Solution/Software Product** – CampusCE is the solution selected for use with Continuing Education. CampusCE is optional for a college. A couple of the deployed colleges have not decided to use this product. It is being deployed in two steps. Phase 1 was implemented in April for 6 deployed colleges, another 2 in June and 4 more by mid-summer. The Phase 2 development work was underway after design work was completed in June. Working to get the Phase 2 software available for DG5 UAT. Phase 2 scope to go into production with DG5 implementations. Includes all current deployed colleges.
 - **Online Admissions (OAAP)** – OAAP, which is a custom application solution replacing a Ciber provided component, is now implemented for all ctcLink deployed colleges. OAAP for DG4 colleges was implemented in June. OAAP functionality included for future deployment with DG5/DG6 colleges. SBCTC IT Application Support now has responsibility for supporting OAAP.
 - **Planning and Budgeting Cloud Solution (PBCS)** – The solution is now live with DG2 and DG3 colleges. DG4/5 colleges are targeting January 2022 for implementation. Dates are based on college use in their budgeting schedule. Recognizing that this 3rd party software tool from Oracle requires a high level of expertise to utilize, QA has recommended that the SBCTC Data Services team develop some budgeting reports to further assist college departments in managing their budgets.
- Additionally, there is other scope which is being planned for inclusion in future ctcLink projects. This functionality includes:
 - **Accessibility** – SBCTC IT has responsibility for this area and will be reporting status. SBCTC Executives have now directly escalated Accessibility concerns to Oracle/PeopleSoft.
 - **Dashboards and Analytics/OBIA** - The new hires for SBCTC-IT and the ctcLink project staff have expertise to implement this solution for dashboards and analytics. This work is currently funded in the ctcLink budget. Timing for inclusion in a specific DG implementation is not available at this time. Most likely this will be worked on post DG6.
 - **Physical Inventory Software Product** - This product scope is now post- ctcLink go-live. Vendor solutions status was delayed in order to evaluate integration with asset tracking scanners directly with ctcLink PeopleSoft.
 - **Guided Pathways** – The ctcLink Steering Committee has defined Guided Pathways work as “out of scope.” This has been communicated to all colleges by SBCTC executive management and will be addressed in future projects post-DG6.
 - **Integration Broker (IB)** – Integration Broker is a foundation component of the PeopleSoft architecture. A pilot approach for using Integration Broker (IB) involves extracting data directly from PeopleSoft databases using the IB tool. No Deployment Group or date for this has been established.

Schedule

- QA considers the Schedule as now YELLOW. QA concern centers potential loss of critical Project personnel during the next 8-10 months. The ctcLink Project and SBCTC IT management are very aware of this risk. Overall schedule is a derivative of the staffing and workloads. The current evaluated highest area of risk involves the Technical Project staffing area, which requires expertise with data conversions, environments, and complex PeopleSoft software.
- The schedule overlap in DG5 go-live with the DG6 Data Cycle #4 conversion schedule is a known risk that the PMO is currently addressing.
- Another risk to the Schedule is the continuing ability of the colleges to implement ctcLink with possible staff turnover of their key personnel. This has been a risk since the beginning of ctcLink but becomes more pronounced with the number of colleges.
- DG5/DG6 Deployment Groups Status
 - All colleges are now routinely reporting status.
 - There are now 17 college PMs being actively involved with their implementations. This number of PMs is a challenge.
 - The DG5 plan/schedule is being finalized as much as possible. Changes are made to the schedule, some based on lessons learned with DG4. Schedule changes continue to be made in close collaboration with DG5 PMs, utilizing effective communications and a degree of flexibility.
 - PMO is using a 90-day, firm schedule for DG6 at this time. Coordinating DG6 colleges are using a 30-day window since this is the best estimate until DG6 Conversion Cycle 2 activities complete in mid- June. An updated schedule will be provided that includes estimated go-live date ranges (subject to future Project Steering Committee approval/decisions). This is the same scheduling timeline in scheduling methodology for prior DGs as it is dependent on Cycle 2 data conversion times.
 - DG5 overall targeted implementation date begins in October 2021. It has been scheduled over multiple weekends, due to data volumes and conversion processing time constraints. Implementation dates for each sub-group (DG5A, DG5B, and DG5C) have now been and approved by the ctcLink Project Steering Committee.
 - DG5A consists of the following colleges: Grays Harbor, Green River, Skagit Valley.
 - DG5B consists of the following colleges: Bellingham, Big Bend, and Whatcom.
 - DG5C consists of the following colleges: Bellevue and Everett.
 - DG5 work schedule is now very active.
 - Data Cycle #4 conversion data was being worked on in June and will be provided to the DG5 colleges in July for data validation. According to Project staff, the converted data is at a very high quality.
 - Local configuration work continues with DG5 colleges.
 - Parallel Testing and Systems Integration (SIT) testing was underway and mostly completed.
 - UAT Sprint #1 Tests were being worked on by Project staff.
 - DG5 User Acceptance Testing (UAT) scheduled for starting end of July.

- DG5 Courses/Classes were implemented in Production environments. Related production workshops and training for DG5 college users has been provided.
- Security activities are continuing. Project has added a resource to work with the colleges. Additional workshops have been held with College security administrators participating. DG5 College PMs are also engaged in this process.
- To reduce schedule overlap for UAT and Data Validation tasks, PMO has now re-structured data validation tasks during UAT Sprint #1.
- PMO reviewed lessons learned and has made changes to help explain critical nature of proper sequencing of UAT tests, related data conditions and validation for use with UAT as it involves cross-departmental transactions.
- Bellevue College does payroll processing for 3 other colleges. This represents additional work for the Project team to ensure the ctcLink payroll processes work with this configuration. This issue also impacts HCM role security shared between colleges.
- As reported in the latest ctcLink Project Status report (July 2nd), five of 6 DG5 College PMs were self-reporting their status as GREEN. Exceptions are Green River and Bellevue Colleges both reporting their status as YELLOW. Green River anticipated returning to GREEN status by mid-July now that they have a Project Manager.
- DG6 will be scheduled over multiple weekends, due to the number of colleges, data volumes and conversion processing time constraints. Implementation dates for each sub-group (DG6A, DG6B, and DG6C) is being evaluated prior to review and approval by the ctcLink Project Steering Committee. DG6 Implementation window is currently scheduled to begin in February 2022.
 - DG6 consists of the following 9 colleges: Bates, Clover Park, Columbia Basin, Lake Washington, Renton, Shoreline, South Puget Sound, Walla Walla, Yakima Valley.
 - As reported in the latest ctcLink Project Status report (July 2), six of the 9 DG6 College PMs are self-reporting their status as GREEN. The exception colleges which reported their status as YELLOW are. Columbia Basin, Walla Walla, and Lake Washington.
 - DG6 local configurations are being worked on in June. DG6 Data Cycle #2 data validation workshops with DG6 colleges were held in June.
 - Planning and preparations underway for DG6 Data Cycle #3 data conversions.
 - DG6 PM meetings are now being held bi-weekly.
- The PMO has a website dashboard which now shows the scheduled (3 weeks) forecast of required meetings for the DG5 colleges. This new dashboard addressed Project Issues #125 and #126 that were concerning to the DG5 College PMs. It was scheduled to be provided to DG6 PMs in June. This is another project improvement resulting from lessons learned. Involves implementing tool to for transparency and keeping 17 colleges updated with latest meeting schedules for their PMs and SMEs.

Training

- Training staff are now engaged in both DG5 training and continuing to provide CS support.
- Additional training content developed for security. Security training is now a Canvas Course with exercises. Additional improvements made in the training. Quick Reference Guides are being updated with role security.

- Training team is continuing to update and improve the Organization Business Process Guide documentation for First Week/First Month cross-pillar operations.
- Documentation for the new HighPoint mobile solution HCX is being developed.
- Other activities include development work for DG5 Key Concepts/ILT trainings and working with Testing team to begin to prep for DG5 UAT.

Testing

- Testing management has transitioned from the Functional Project Leads to the PMO Testing Coordinators for the remaining Deployment Groups.
- Payroll parallel processing using Data Cycle #3 data completed.
- System Integration Testing (SIT) now basically completed. Testing team supported pillar functional analysts with testing.
- DG5 Student Financials parallel testing of tuition calculations held additional workshop in June and was well attended. Testing involved comparing Spring 2021 Enrollments vs. Legacy. Good results from the parallel were reported to the QA team.
- Internal testing was underway for DG5 UAT and Role Security Sprints.
- Testing underway on DG6 Data Conversions.

Configurations/Data Conversions/Environments/Development

- Oracle PUMs were installed in all Project environments.
- Planning now underway for future PS and 3rd party product updates. This is a concern that some updates will need to be scheduled within preparations timeframe for DG6 deployments.
- DG5 Data Cycle #4 planning work underway. Team will be supported colleges with their Cycle #4 data validations in mid-July.
- Technical team supported the DG6 Cycle#2 conversions in June. Currently planning and prepping for DG6 Cycle#3 conversions.
- The DG6 Cycle #4 workload for conversions overlap with the DG5 Go-live implementations. This requires schedule mitigation to reduce conversion team stress.

Organizational Change Management

- Communications work continues to expand to meet the challenges of all deployment groups, deployed colleges, and councils/commissions.
- PMO/Communications team is now actively providing support for DG5 and DG6 college deployments. Holding bi-weekly meeting with DG6 PMs/Communications staff.
- PMO has increased the level of communications to the Executive Sponsors to keep them informed, knowledgeable, and full supportive of their college project related activities. An Executive Sponsors Guide now available is being updated.
- PMO continues to make adjustments that are OCM related based on the DG4 Lessons Learned. This includes more Workshops, Guides, and noted areas of improvement.
- PMO, Customer Support, and Communication team finalizing development of the 90-day post-live guide for use with DG5/DG6 colleges.
- PMO continues to support bi-weekly sessions with DG5 PMs and now with DG6 PMs.
- Role Security activity support for DG5 underway and critical for use with DG5 UAT Sprints.
- A new series of monthly workshops for “Hot Topics” was started by the Project working with Support staff. Includes quest speakers from the deployed colleges.

SBCTC Customer Support

- SBCTC IT Division Management continues addressing overall support staffing needs for post-DG6 expected workloads.
- CS will be staffing the new approved positions starting in July. CS job descriptions have been developed and the majority were being posted internally in early July. Will be closing internal applicants in mid-July and interviewing started.
- QA believes there is now probably a 6- to 10-month window for SBCTC IT to recruit and fill approved positions and transition staff from the project. Certain critical staff must stay on the project until all DG6 colleges are implemented.
- The ctcLink Service Level Agreement (SLA) and related Standard Operating Procedures are being reworked to reflect the future centralized ctcLink Support organization model/structure.
- CS is holding workshops for all pillars and WebEX sessions occurring everyday with deployed colleges.
- Oracle updates continue breaking already working PeopleSoft functionality requiring additional support work from CS and Production/Applications Support. QA recommends delaying future Oracle updates until after DG6 and based on needs assessment.
- Projected level of support tickets is based on history with the current deployed colleges. Ticket support work remains high. The number of tickets is an indicator of support workload; however, tickets vary in priority, level of complexity, resource requirements, and degree of difficulty to resolve.
- Many of the more complex open support tickets require both functional consultants and staff from the technical support group, possibly use of project personnel.

SBCTC Production/Application Support

- This technical support group will be adding addition staff. QA remains concerned that the Applications Support team is currently understaffed and will be challenged with the production implementation of DG5/DG6 colleges in addition to those colleges already deployed.
- Okta Identity Management Software was being implemented by SBCTC IT in June. The Okta identity management program implementation is planned for July 31, 2021. Once implemented, the current password recovery process will be replaced with functionality from within Okta. The ctcLink Okta portal is used primarily to change passwords or add recovery options. This product should have minimal impact on ctcLink PS functional applications.
- A Web Ex session is now held monthly to address issues with ctcLink Accessibility.

SBCTC Data Services

- Oracle DataLink connects the PeopleSoft production database to each college district's Pluggable Databases (PDBs), replicating data stored in PeopleSoft in near real-time.
- DataLink Databases are now fully implemented for all colleges.
- Data Services team is working with Burgundy (Managed Services Contractor) to implement a virtual Database solution vs. the 31 separate databases. This approach could have major benefits in reducing ongoing maintenance.
- A Reporting Catalog has been created within the ctcLink Reference Center. Reporting solutions are being added to the Catalog for the more complex reporting processes.
- Data Services is also working on specific ctcLink support tickets.

Direct Project Recommendations

The following shows the open and recently closed recommendations with current updates from the QA and Project Teams.

- **QA 0180 Finding:** The Instructor Lead Training and the UAT Sprint schedules were not aligned effectively for DG4.

Recommendation: QA recommends that the Instructor Lead Training and the UAT Sprint schedules be better incorporated into future deployment detail schedules. **Latest Update:** QA considers this closed.
- **QA 0181 Finding:** A number of potential future projects/enhancements/3rd party products have been viewed as elements of a “ctcLink Optimization” project.

Recommendation: This potential scope needs to gain traction/support within the WACTC Presidents and ctcLink Governance structure for the ctcLink PS system. It impacts future staffing, organization, and funding post DG6 deployments. **Latest Update:** ctcLink Project will need to review this recommendation.
- **QA 0182 Finding:** It is QA experience that the last months for a multi-year ERP project has serious challenges keeping critical project staff employed/contracted as they pursue other immediate career opportunities.

Recommendation: QA recommends that the ctcLink Program Director develop, working closely with SBCTC Executives and implement necessary mitigation activities to keep critical staff on the project until DG6 is fully implemented in 2022. **Latest Update:** WACTC Approval - June 4th, State Board Approval- June 24, 2021. Internal recruitments began on June 7, 2021. QA considers this closed.
- **NEW QA 0187 Finding:** There is increased potential for loss of key personnel during the final month of the project. This could have a serious consequence on the DG5 and DG6 deployments.

Recommendation: SBCTC and the ctcLink PMO will need to identify and backfill most critical positions with part-time consultants since hiring new employees for the project is not practical now.

Other SBCTC Agency/Non-Project Recommendations

The following shows the open and recently closed recommendations with current updates from the SBCTC IT Agency Support Teams.

- **QA 0163 Finding:** The area encompassing Internal Quality Control Processes becomes more important as more colleges are implemented with PeopleSoft ERP.

Recommendation: QA recommends that the ERP Support Organization builds/incorporates QC processes into most critical areas such as: environment changes, product updates, 3rd party interface changes, new functionality, testing, and delivered training. There are standard QC processes in use by large ERP support organizations that SBCTC should become familiar with and consider for use. This would move the SBCTC Support organization closer to meeting the SLAs objectives. **Latest Update:** Revision of SLAs are completed. SOPs are pending.
- **QA 0174 Finding:** SBCTC has been supporting the legacy system for over 12 years. SBCTC will continue to support the legacy system for colleges that have not been deployed with ctcLink. It needs to be recognized that the ERP PeopleSoft system acquired for the ctcLink project has substantially more functionality and is technically more complex and, as such, requires sufficient staffing and expertise to meet the service requirements of system of 34 colleges. SBCTC needs to be positioned to be successful with organization, processes, funding, and staff.

Recommendation: QA recommends that consideration be given to contracting the consulting services of a recognized 3rd party expert firm in evaluating future organization, processes, and staffing requirements. The byproduct of this should be recommendations and a blueprint for SBCTC and WACTC to implement over the next year while the remaining colleges are deployed. **Latest Update:** Deputy Director continues to work on this.
- **QA 0175 Finding:** The Washington Association of Community and Technical Colleges Presidents (WACTC), with its multiple Commissions and Councils, provide policy, leadership, and ownership of the business processes used by the colleges. While the ctcLink Steering Committee has added non-voting members from Commissions and Councils to its meetings, the current Governance structure utilized for the ctcLink Project does not address post-live production and future projects and expanded needs of the colleges, including involvement of Commissions and Councils.

Recommendation: QA recommends that consideration be given to addressing post-deployment Governance, including roles of Commissions and Councils, before all colleges are fully deployed. **Latest Update:** ctcLink governance is being reviewed for ongoing operational planning. SBCTC -IT will be meeting with Commissions and Councils to review existing project governance (Exec. Leadership Committee, Steering Committee, Working Group, Change Mgmt. Board). The Strategic Technology Advisory Committee will also review and provide input to an ongoing governance model. Feedback and Draft model to be reviewed with Commissions, Councils, WACTC during the summer 2021 meetings.
- **QA 0176 Finding:** The processes of managing the prioritization of routing/monitoring incoming support tickets is a QA concern that it was developed in time for the DG4 implementation. Given all her responsibilities, CS Director has not been able to develop these processes.

Recommendation: QA believes the Customer Service Director requires additional expertise and support to address this key aspect of an effective support organization. This needs to be addressed immediately. **Latest Update:** Revision of SLAs are completed. SOPs are pending.

- **QA 0178 Finding:** The current Support Ticketing system used for ctcLink ERP does not produce the metrics required to effectively manage Customer Support operations. This makes it extremely challenging for the Customer Support Director to evaluate and trend the performance of the Customer Support organization.

Recommendation: QA recommends that this Support Ticketing system either be replaced or changed to better produce meaningful metrics. **Latest Update:** Working with the ticketing system admin team to determine additional features of the current ticketing system to better produce metrics.
- **QA 0179 Finding:** A Triage Manager position in ctcLink Customer Support is a part-time share with the Project PMO. Once the DG4 colleges are implemented, over 17 colleges will be dependent on the SBCTC IT ctcLink Customer Support organization.

Recommendation: QA recommends that the Triage position become full-time staffed with ctcLink Customer Support and the Triage processes be integrated with support ticket prioritization. **Latest Update:** An organizational chart was shared that includes a position for a triage manager in the long term plans as it is a critical role.
- **QA 0183 Finding:** The Legacy system (data, software, and hardware) will be no longer operationally required once ctcLink is deployed for all 34 colleges and SBCTC. There are substantial cost savings related to software licenses to be achieved. Planning needs to begin to determine how best to sunset the Legacy system.

Recommendation: QA recommends that the SBCTC IT team work with the Information Technology Commission (ITC) and Data Governance group to plan the steps for sunsetting the current Legacy hardware, software and data once all 34 colleges are using ctcLink. **Latest Update:** Initial planning has begun. Legacy Transcript project implementation is in process. Final data migration platform and access being architected.
- **QA 0184 Finding:** The current ctcLink Project staff is concerned regarding future job opportunities within SBCTC IT ERP Support, whether in Customer Support, Applications Services, or Data Services. Some of the Project staff has indicated an interest in continued employment post-ctcLink project. Without opportunity, the staffing for DG6 will be at risk since the project staff will be looking for their next employment opportunities and will leave prior to DG6 completion.

Recommendation: QA recommends that SBCTC leadership prepare transition strategy and steps to ensure continuity of critical staff within the next 12 months. **Latest Update:** WACTC Approval - June 4th, State Board Approval- June 24, 2021. Internal recruitments began on June 7, 2021. SBCTC Agency recommends to QA that this can be closed out because jobs are posted. QA considers this closed.
- **QA 0185 Finding:** The new Budgeting tool that has been included in scope for ctcLink requires a high level of expertise to use and support. A consultant is being contracted for by the Project to assist colleges with the software product.

Recommendation: QA recommends that the SBCTC Data Services team develop some budgeting reports to further assist college departments in managing their budgets at the Departmental levels. **Latest Update:** Under review - Data director was on medical leave needs more time to review. Will be updated in next response.
- **QA 0186 Finding:** The ctcLink Data Services Support organization is expanding and taking on additional PS critical responsibilities. There is no routinely reported status of the current workload, schedules, and progress.

Recommendation: QA recommends that a monthly status report is prepared for ctcLink Data Services and distributed to the deployed colleges and to the Steering Committee that shows

workload status, schedule, priorities, staffing concerns, and completed activities. **Latest**

Update: Under review - Data director was on medical leave needs more time to review. Will be updated in next response.

Gate 6 Deliverable Review

QA has reviewed Gate 6 Deliverables.

Gate 6 Deliverables / Description	Artifacts (Documents)/Links	Quality Assurance Moran Technology Consulting Review/Feedback	Date Completed
DG6 - Master Project Plan (Baseline #1)	Restricted access ~ PWA: https://ctclink.sharepoint.com/sites/pwa/Projects.aspx cDR: https://sbctc.app.box.com/folder/87524875299	Updated regularly and provided to college PMs. Look aheads are also pulled and provided regularly.	12/1/2020
DG5 - Business Process Fit/Gap Homework Complete	DG5 Milestones Tracking & Readiness google sheet: https://docs.google.com/spreadsheets/d/14l_5c-TkECgkTMP2h2pYGRWnETT5OcXLWC1PhrsRcJM/edit#gid=419379519	Made some updates to the process based on DG4 lessons learned feedback - better able to track progress by college.	1/29/2021
DG4 - Data Validation Sign-off	SBCTC Site: https://www.sbctc.edu/colleges-staff/it-support/ctclink/project-steering-meeting-minutes.aspx Refer to: January 12, 2021 meeting: ctcLink DG4-A Go Live Readiness Presentation & January 26, 2021 meeting: ctcLink DG4-B Go Live Readiness Presentation DG4 Milestones Tracking & Readiness google sheet: https://docs.google.com/spreadsheets/d/1NwvkrYv5H-ZI7-xIPino2Lm8wyOk0H-PJ51Cj4mRYL0/edit#gid=1981670060	Shown at the appropriate executive steering committee as part of go-live decision making process.	1/21/2021
DG4 - Security Mapping Sign-off	Same as DG4 Data Validation Sign-off	Significant tracking shown and most work completed before go-live decision; colleges were accepting of	1/21/2021

		risks associated with those tasks not completed before go-live.	
DG4 - Updated User Acceptance Test Results	Internal stats of completion email referenced.	Data was emailed regularly and colleges had completed most testing before go-live decision.	1/8/2021
DG4 - Go/No Go Readiness Assessment	DG4 Milestones Tracking & Readiness google sheet: https://docs.google.com/spreadsheets/d/1NwvkrYv5H-ZI7-xIPino2Lm8wyOk0H-PJ51Cj4mRYL0/edit#gid=1981670060	Data was shown (~50 criteria) that was used to determine go-live readiness.	1/26/2021
DG6 - Global Design Review Participation and Adoption Sign-off	Internal stats of completion email referenced.	Data tracked and reported on regularly throughout the design process.	5/31/2021
DG4 - Go-Live Milestone Sign-off Acceptance	Same as DG4 Data Validation Sign-off	Milestones tracked and signed-off throughout the go-live activities.	1/21/2021
DG4 - Lessons Learned Activity	Posted to OCIO Site: https://waocio.secure.force.com/ProjectDetail?id=a06U000000G3n6VIAR	Lessons learned information was exhaustive from a collection method and actual data collected. It was whittled down to a manageable level of key lessons learned for presentation.	4/15/2021
All - Requirements Traceability Matrix (RTM)	Moved to Gate #7.	QA has been informed that this has been moved to Gate 7 as a deliverable in alignment with project closeout and final deployment group.	

Risk Assessment

Identify potential barriers to meeting project objectives and milestones, their probability of occurring and impact if they occur, and recommended and observed mitigations.

The Top Risks are:

- The ability of the project to maintain current resources through the end of the project as staff start to consider future employment opportunities as the project nears completion. If staff do leave early and need to be replaced with contractors, there is a direct impact on the project's ability to continue to deliver within budget.
- Ability of ctcLink PeopleSoft Customer Support to be properly staffed and knowledgeable for the future, multi-college deployment groups.
- Continued active engagement of colleges as they begin and continue preparations for future deployment go-lives. Strained budgets and remote work environments have increased this risk.
- Covid-19 and its continuing impact on finances and remote working environments.

The PMO and the SBCTC IT organization is taking mitigation actions for each of these risks within its control.

The QA team has reviewed and agrees with the risks as identified by the Chief Technology Officer - ctcLink Program and included in the Project Status Report.