



## ctcLink Project Quality Assurance

### Monthly Report - August 2021

*Presented to:*



**COMMUNITY AND  
TECHNICAL COLLEGES**

*Washington State Board*

**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

The overall assessment of YELLOW is primarily based on the risk around the ability of the project to keep key personnel on the project through final deployment. The Project team continues to lose critical personnel, and more are expected after the DG5 deployment. The Project has currently mitigated this with contractors and reassignment of staff.

The project has seen a new challenge impact the schedule as a new Washington state mandate to record Covid Vaccinations within the ctcLink software has required new software custom development. At this point in a project, new development is often frozen, meaning delayed until after go-live, but a mandate like this does not allow that option and must be implemented. This is another complexity that the project must include in the schedule as it implements the final deployment groups.

This mandate also has potential staffing impacts to the project should any state employees choose to not get vaccinated, which could possibly end their employment if an exemption is not accepted.

The ctcLink Project Steering Committee met in August to review progress on the DG5 and DG6 deployment activities. Grays Harbor College (GHC) requested and was granted approval from the Steering Committee to move their scheduled DG5 deployment date to allow an additional month for GHC to prepare for a successful ctcLink go-live. Grays Harbor has seen several key project resources leave recently, which led to the deployment group movement request. Even with the change in deployment groups, QA considers this an area of concern.

## 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 July 2021</u>	<u>Current Status August 2021</u>	<u>Overall Comments</u>
<b>Overall</b>	<b>YELLOW</b>	<b>YELLOW</b>	<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. The Project team continues to lose critical personnel, and more are expected after the DG5 deployment. The Project has currently mitigated this with contractors and reassignment of staff.</p> <p>QA continues to be concerned that SBCTC IT is properly staffed and prepared to handle ongoing expanded ctcLink support.</p>
<b>SBCTC/ Governance</b>	<b>GREEN</b>	<b>GREEN</b>	<p>ctcLink Project Governance continues functioning as intended. Meetings are held remotely and documented.</p> <p>The ctcLink Project Steering Committee met in August to review progress on the DG5 and DG6 deployment activities. Grays Harbor College requested approval from the Steering Committee for moving their scheduled DG5 deployment date to allow an additional month for GHC to prepare for a successful ctcLink go-live.</p> <p>Last DG6 implementations now scheduled for early May 2022.</p>
<b>Project Management</b>	<b>GREEN</b>	<b>GREEN</b>	<p>PMO team is focused on the DG5/DG6 deployments. PMO priority is the DG5 deployment (8 colleges) scheduled for 3 sub-group implementations starting mid October 2021 and ending in November.</p> <p>DG5 Colleges will be going into their scheduled September readiness assessments and signoff prior to implementation go live.</p> <p>DG6 implementation (nine colleges) is scheduled to begin in February 2022. DG6 is also scheduled for 3 sub-group implementations, each with 3 colleges.</p>
<b>Phase Scope</b>	<b>GREEN</b>	<b>GREEN</b>	<p>QA considers the Phase Scope as GREEN. The custom Online Admissions application (OAAP) is now in production for all 17 deployed colleges, and this application will be implemented with the</p>

			<p>DG5/DG6 colleges.</p> <p>CampusCE Phase 1 continued being implemented at deployed colleges. Campus/CE Phase 2 development and internal testing is continuing. Phase 2 includes college enrollments and payments interface with PeopleSoft. Currently, colleges that have implemented Phase 1 must manually update PeopleSoft with this information. The schedule for Phase 2 implementation has been adjusted due to project resource constraint.</p> <p>The Planning and Budgeting Cloud Solution (PBCS) from Oracle is implemented for deployed colleges with the exception of the DG4 colleges. Colleges are beginning to use the tool at their own pace. The remaining DGs will go live with PBCS after they go-live and have a substantial amount of finance data in ctcLink.</p>
Schedule Status	YELLOW	YELLOW	<p>QA considers the schedule status trending YELLOW. The schedule could be a future risk for DG6 given some project resources are leaving the project. There will be serious impact to the schedule if project leadership is unable to mitigate those critical project resources leaving the project.</p> <p>The DG5 go-live schedule for October and November weekends is considered tight; however, good progress is being made by the DG5 colleges in their User Acceptance Testing.</p> <p>QA is concerned that even with Grays Harbor College change in their go-live schedule to DG5C, the situation may still be problematic. This concern is due to loss of college skilled staff and the potential additional support required from the project and ctcLink customer support.</p> <p>The DG6 deployment group will be implemented over three weekends. DG6 Group A colleges will implement at the end of February 2022 and the DG6 Group C implementation is early May 2022.</p>
Training	GREEN	GREEN	<p>QA considers the Training area as GREEN.</p> <p>Additional training courses and materials are in use. Training staff are engaged with supporting DG5 User Acceptance Testing Sprints which started in late July and continuing in August. The DG5 colleges have been more successful with setting up their Role Security given the additional training and materials.</p> <p>The continuing challenge for the DG5/DG6 colleges will be to ensure their staffs receive the training in concert with the plans and schedules.</p>
Testing	GREEN	GREEN	<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</p>

			<p>and UAT testing to validate their configurations, processes and data. DG5 SIT testing and parallel testing workstreams are completed. UAT Sprint #1 workstream was underway and college SMEs are now actively testing. Project functional teams are providing support to the colleges.</p> <p>Preparations underway for the dry run planned for September.</p>
<p><b>Technical Environment</b></p>	<p><b>GREEN</b></p>	<p><b>GREEN</b></p>	<p>The ctcLink Technical Environment is a project work stream that includes data conversions, project environments, and applications. QA considers this area GREEN. The small conversion team workload has increased significantly with 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 conversions and DG6 Data Cycle#3 conversions.</p> <p>A new State Mandate to record Covid Vaccinations within the ctcLink software has required new software custom development.</p> <p>Certain DG5 components are now installed in production environment, including College Course Catalogs and current Employee/IDs. This college data is being used for the UAT Sprints.</p> <p>DG6 Course Catalog is now in production.</p>
<p><b>Organizational Change Management (OCM)</b></p>	<p><b>GREEN</b></p>	<p><b>GREEN</b></p>	<p>The volume of project OCM/Communications work increases with the number of colleges. Coordinating the remaining 17 colleges is particularly challenging for Project staff.</p> <p>DG5/DG6 colleges are now fully engaged in OCM related activities that are preparatory to their college implementations.</p> <p>QA remains concerned that the DG5/DG6 colleges will have key staff losses that may impact their implementations.</p>
<p><b>Project Staffing</b></p>	<p><b>GREEN</b></p>	<p><b>GREEN</b></p>	<p>QA considers Project Staffing as GREEN; however, this is expected to trend YELLOW as the ctcLink approaches completion. Project team morale is good with DG5 colleges being within weeks of going live.</p> <p>Critical project staffing losses have started and continues. The trend could accelerate after DG5 implementations and possibly jeopardize the DG6 scheduled deployments.</p> <p>As a mitigation, the PMO has replaced critical positions with contractors and reassigned staff.</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</p>

			<p>expects these individuals will be lost to the project in the final months.</p>
<p><b>SBCTC Customer Support</b></p>	<p><b>YELLOW</b></p>	<p><b>YELLOW</b></p>	<p>QA considers the ctcLink Customer Support area as YELLOW. The upstaffing of the CS support organization started in July with job postings and interviewing started in August.</p> <p>SBCTC ITD has hired a Director, Project Management Office who will transition from the ctcLink Project upon completion of DG6 deployments.</p> <p>SBCTC ITD has hired 2 Associate Directors for Customer Support and will be interviewing for Senior Functional Analysts beginning in September. The current Support Ticket work volume remains steady at 500 open tickets.</p> <p>The ctcLink Service Level Agreement (SLA) revision has been reviewed/completed and SBCTC Customer Support management has now finalized service level processes for use with the SLA.</p>
<p><b>SBCTC Application and Production Services</b></p>	<p><b>YELLOW</b></p>	<p><b>YELLOW</b></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 is adding technical staff/expertise to meet DG5 and DG6 projected workloads.</p> <p>A status report for the Production/ Application Services clearly shows the substantial workload for which this team is responsible. Currently the technical team is unable to multi-task resolving priority tickets. This is a QA concern that should be addressed by the SBCTC IT management.</p> <p>The new Okta identity management program was the responsibility of SBCTC ITD but has required ctcLink project resources. ctcLink deployed colleges have until the end of September to implement.</p> <p>The Online Admissions (OOAP) vendor is working on some accessibility improvement updates. The 2<sup>nd</sup> Phase of the custom OOAP is being planned with the vendor and includes enhancements. Will be going to governance for approval.</p> <p>This team is also responsible for Accessibility Issues and SBCTC leadership continues engaged with Oracle on moving forward with SBCTC prioritized PS accessibility improvements.</p>
<p><b>SBCTC Data Services</b></p>	<p><b>YELLOW</b></p>	<p><b>GREEN</b></p>	<p>QA team consider SBCTC Data Services as GREEN. Workload is substantially increasing for this small team with another 17 colleges. The team will be adding staff. This team, besides providing Centralized Data services to SBCTC, has been working with the deployed colleges, supporting Datalink, providing training for PS Queries and</p>



			supporting additional custom solutions and standard ctcLink reports.
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LEGEND	GREEN	YELLOW	RED
<b>Risk Description</b>	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 and documented.
- Post go-live systemwide governance planning is underway, led by the WACTC Strategic Advisory Committee (STAC). They are gathering input from commissions and councils about how systemwide ctcLink priorities will be set in the future.
- State OCIO must be notified of use of ctcLink Project contingency funds by SBCTC.
- SBCTC presented the ctcLink overall program status to the State Technology Services Board (TSB) in August. The Technology Services Board focuses primarily on information technology (IT) strategic vision and planning; enterprise architecture; policy and standard; and major project oversight. The TSB was significantly impressed with the current state of the project and the progress that has been made to date.
- The DG5 Colleges will be performing a Readiness Assessment and Go-live Signoff by Executive Sponsors starting in September. The go-live implementation decision will be reviewed by the Project Steering Committee for approval.

### 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 DG6 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 is impacting project morale and will have consequences that will need to be carefully managed.
- The loss of project personnel is now occurring and PMO expects additional critical staff loss until the project is complete which will elevate the risk to DG6 implementations. PMO does not have any current plan of adding/augmenting new Project State employees to replace these positions. PMO has contracted for consultants for critical replacements at this time.
- PMO is evaluating employees/contractors at risk and will work to mitigate the critical risks.
- 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 PMO focus involves enhancements to the PeopleSoft product as well as additional related solutions. A PMO Director level position for this organization has been filled with the hiring of the current Deputy ctcLink Project Director. Additional positions will be hired to report to this individual.
- 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 process of RTM review started in June. The Steering Committee will be reviewing descoped items for documented approval as part of the RTM process. 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. Project staffing will remain remote, with the option to come into the office when it is opened.

- The State of Washington Governor has mandated that all employees and contractors working onsite are vaccinated for the Covid Virus. This is a new mandate that has the potential of some SBCTC ctcLink Project and College employees opting to not comply and losing their employment with the state.

### Phase Scope

- There are several replacement solutions being managed by the project team, including:
  - **Continuing Education Solution/Software Product** – CampusCE is the 3<sup>rd</sup> party solution for Continuing Education. It is being deployed in two steps. Phase 1 has been implemented for all deployed colleges. The Phase 2 integration of student enrollments and payments is underway. Team is working to get the Phase 2 software available for DG5 UAT. Phase 2 scope to go into production with DG5 implementations. Phase 2 includes all current deployed colleges.
  - **Online Admissions (OAAP)** – OAAP, which is a 3<sup>rd</sup> party custom solution replacing a Ciber provided component, and now implemented for all ctcLink deployed colleges. OAAP functionality is included for deployment with DG5/DG6 colleges. SBCTC IT Application Support now has responsibility for supporting OAAP. The Ciber solution has been decommissioned.
  - **Planning and Budgeting Cloud Solution (PBCS)** – The solution is now live with DG2 and DG3 colleges. Colleges are using this solution at their own pace. DG4/5 colleges are targeting January 2022 for implementation. Implementation dates are based on college use in their budgeting schedule. Recognizing that this 3<sup>rd</sup> 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 is reporting status.
  - **Dashboards and Analytics/OBIA** - 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 trending YELLOW. QA concern centers potential project loss of critical personnel during the next 7-9 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.

- DG5/DG6 Deployment Groups Status
  - DG5 consists of 8 colleges.
    1. Based on the Overall Project Status Report (August 27, 2021), the DG5 colleges self-reported their status as GREEN. Exceptions include: Bellevue, Bellingham, Skagit Valley and Grays Harbor which reported current status as YELLOW. Grays Harbor College is having severe staffing problems and has been moved from Deployment Group 5A to 5C to give more time for their personnel to get ready for implementation.
    2. Data Cycle #4 conversion data was provided to the DG5 colleges in July for data validation. According to Project staff, the converted data is at a very high quality. Data Cycle #4 data is being used with the UAT Sprints.
    3. UAT Sprint #1 with the DG5 colleges was underway in August. It seems to be going good at this time. Sprint #2 will be underway in September.
    4. Implementation of College Role security is also reported to be improved.
    5. The first DG5 Deployment Group A is scheduled to go live with ctcLink in 6 weeks (October 11<sup>th</sup>). A dry-run test for this go live was being planned. The last DG5 Deployment Group C goes live on November 8<sup>th</sup>. At this time, 75% of the colleges will have been transitioned from the legacy system to PeopleSoft ERP.
  - DG6 consist of 9 colleges.
    1. Based on the Overall Project Status Report (August 27, 2021), the DG6 colleges all self-reported their status as GREEN with the exception of Walla Walla which reported current status as YELLOW. Walla Walla reports that it is having critical staffing issues.
    2. The PMO has now baselined and published the DG6 Master Schedule once DG6 dates were approved.
    3. One critical area for DG6 schedule is the Cycle #4 Data Conversion which overlaps with DG5 Go-live implementations. This is a known risk that the PMO continues addressing and mitigating.
    4. PMO has developed an updated schedule based on the approved DG6 go-live dates. This is the same scheduling methodology used for prior DG modified with Deployment Group implementations.
    5. DG6 Data Cycle #3 data conversions was underway in August and planning/preparations being made for Data Cycle #4 Conversions.
    6. DG6 PM meetings continue to be held bi-weekly.
  - The PMO is using a website dashboard which shows the scheduled (3 weeks) forecast of required meetings for the DG5 colleges. 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 UAT training and continuing to provide CS support. Team is working with Testing/Functional analysts to provide Instructor Lead Training (ILT) for DG5 UAT Sprints.
- Additional training content was 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 continues 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 has been developed.
- Other activities include development work for DG5 Key Concepts/End User Training which is now being used for DG5 for the first time.
- End user training for DG5 colleges has been underway now since May 2021 and will continue to be supported through completion of DG5C deployments. After this time, DG5 colleges will get additional end-user training support through the ctcLink Customer Support organization.

### **Testing**

- Testing management transitioned from the Functional Project Leads to the PMO Testing Coordinators for the remaining Deployment Groups.
- DG5 payroll parallel processing completed.
- Testing team was involved with CampusCE and OOAP testing.
- Testing team completed support for DG5 Data Validation Cycle #4.
- System Integration Testing (SIT) is now completed. Testing team supported pillar functional analysts with testing.
- Testing team assisted DG5 Users log into new Okta software during the start of the UAT Sprint #1.
- UAT Sprint #1 latest status indicates that 6 of the 8 DG5 Colleges are at least 80% complete in their work prior to starting Sprint #2.
- Testing is underway on DG6 Data Conversions.

### **Configurations/Data Conversions/Environments/Development**

- Oracle PUM #22 (Financial Aid and 1098t) was installed in all Project environments. Oracle CS PUM (Selective Adoption) is being worked on.
- Certain DG5 data components are now installed in ctcLink production environment, including College Course Catalogs and current Employee/IDs. This college data is being used for the UAT Sprints.
- DG6 Course Catalog is now in production and data is available for the DG6 colleges to verify.
- Planning is now underway for future PS and 3<sup>rd</sup> party product updates. This is a concern that some updates will need to be scheduled within preparations timeframe for DG6 deployments.
- DG5 Dry Run for environments and conversions is being planned prior to DG5A.
- Technical team supported the DG6 Cycle#3 conversions in August.
- 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 continues providing support for DG5 and DG6 college deployments and is now holding bi-weekly meetings with DG6 PMs/Communications staff.
- PMO has increased the level of communications to the Executive Sponsors to keep them informed, knowledgeable, and fully 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 finalized development of the 90-day post-live guide for use with DG5/DG6 colleges and will help these colleges with the transition to ctcLink.
- 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 and includes guest speakers from the deployed colleges.

### **SBCTC ctcLink Customer Support (CS)**

- SBCTC IT Division Management continues addressing overall support staffing needs for post-DG6 expected workloads.
- QA believes there is now probably a 5- to 9-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 (SOPs) have been reworked to reflect the future centralized ctcLink Support organization model/structure. The SOPs include procedures for processing and prioritizing support tickets. This information to be shared with the colleges.
- Oracle updates continue to break previously 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. Current holding steady at (+/-) 500 tickets. 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.
- 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.
- 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.
- QA has recommended that additional Reports are developed to assist college departments with implementation of the Oracle Planning and Budgeting solution.

## Direct Project Recommendations

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

- **QA 0181 Finding:** A number of potential future projects/enhancements/3<sup>rd</sup> 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 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. **Latest Update:** A risk mitigation plan is being developed for each role on the project team. It includes identifying critical resources and the probability of that resource leaving the project as well as how critical that resource is to the remaining activities and timeline. At this time, we have been successfully procuring contractors for the 2 out of 5 roles that have already submitted their resignations and/or left the project. These 2 roles were critical to the project success, the other 3 roles the project PMO has been able to mitigate that workload. We have vendors that we are sharing the high-risk roles to prepare if candidates need to be considered and contract staff.

## 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, 3<sup>rd</sup> 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:** SLAs are complete and SOPs are scheduled to complete soon.
- **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 3<sup>rd</sup> 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:** SLAs are complete and SOPs are scheduled to



complete soon.

- **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:** With the new SOPs we will have a better way to indicate metrics.

- **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 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.

<b>Gate 6 Deliverables / Description</b>	<b>Artifacts (Documents)/Links</b>	<b>Quality Assurance Moran Technology Consulting Review/Feedback</b>	<b>Date Completed</b>
DG6 - Master Project Plan (Baseline #1)	<p>Restricted access ~</p> <p>PWA: <a href="https://ctclink.sharepoint.com/sites/pwa/Projects.aspx">https://ctclink.sharepoint.com/sites/pwa/Projects.aspx</a></p> <p>cDR: <a href="https://sbctc.app.box.com/folder/87524875299">https://sbctc.app.box.com/folder/87524875299</a></p>	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	<p>DG5 Milestones Tracking &amp; Readiness google sheet: <a href="https://docs.google.com/spreadsheets/d/14l_5c-TkECgkTMP2h2pYGRWnETTsOcXLWC1PhrsRcJM/edit#gid=419379519">https://docs.google.com/spreadsheets/d/14l_5c-TkECgkTMP2h2pYGRWnETTsOcXLWC1PhrsRcJM/edit#gid=419379519</a></p>	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	<p>SBCTC Site: <a href="https://www.sbctc.edu/colleges-staff/it-support/ctclink/project-steering-meeting-minutes.aspx">https://www.sbctc.edu/colleges-staff/it-support/ctclink/project-steering-meeting-minutes.aspx</a></p> <p>Refer to: January 12, 2021 meeting: ctclink DG4-A Go Live Readiness Presentation &amp; January 26, 2021 meeting: ctclink DG4-B Go Live Readiness Presentation</p> <p>DG4 Milestones Tracking &amp; Readiness google sheet: <a href="https://docs.google.com/spreadsheets/d/1NwvkrYv5H-ZI7-xIPino2Lm8wyOk0H-PJ51Cj4mRYL0/edit#gid=1981670060">https://docs.google.com/spreadsheets/d/1NwvkrYv5H-ZI7-xIPino2Lm8wyOk0H-PJ51Cj4mRYL0/edit#gid=1981670060</a></p>	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: <a href="https://docs.google.com/spreadsheets/d/1NwvkrYv5H-ZI7-xIPino2Lm8wyOk0H-PJ51Cj4mRYL0/edit#gid=1981670060">https://docs.google.com/spreadsheets/d/1NwvkrYv5H-ZI7-xIPino2Lm8wyOk0H-PJ51Cj4mRYL0/edit#gid=1981670060</a>	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: <a href="https://waocio.secure.force.com/ProjectDetail?id=a06U000000G3n6VIAR">https://waocio.secure.force.com/ProjectDetail?id=a06U000000G3n6VIAR</a>	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 and colleges to maintain current resources through the end of the project as staff start to consider future employment opportunities. If project 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.