



ctcLink Project Quality Assurance

Final Monthly Report – April/May 2022

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 final 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 Project has now successfully deployed all 34 Colleges and the SBCTC Agency with the ctcLink solution! This is a monumental achievement based on the project status at the time of the replanning effort that began in 2017.

Each deployment group took advantage of lessons learned from previous deployment groups, building on the repeatable process foundation that began with DG2. The major focus was made to utilize common processes as much as possible. Colleges collaborated and shared information, with already deployed colleges extending a helping hand to colleges that were in the process of preparing for and/or going live.

The ultimate success story consisted of strong executive leadership, superior project/program management, hard-working project team, college staff and support organization resources, and outside vendors utilized where necessary to come together as one team to execute the detailed replanning effort.

ctcLink responsibility is transitioning to the SBCTC ERP Support organization. SBCTC is staffing the ERP Support organization with 92 budgeted positions. According to SBCTC IT leadership, future major projects will be additionally staffed based on specific governance approved project budgets. Proper staffing, funding and collaboration will be necessary for SBCTC to take advantage of the investment made in ctcLink.

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 Subgroups 6B and 6C.

ctcLink Project Assessment Scorecard

<u>Project Area</u>	<u>Prior Status March 2022</u>	<u>Current Status April/May 2022</u>	<u>Overall Comments</u>
Overall	YELLOW	GREEN	The Project has now successfully deployed all 34 Colleges and the SBCTC Agency with the ctcLink solution. Overall Project Status is GREEN. Given the many challenges, this completion of the ctcLink project should be recognized as a major program level accomplishment for the State of Washington Community and Technical Colleges and State Board.
SBCTC/ Governance	GREEN	GREEN	The governance structure utilized after replanning has functioned as intended. Meetings have been both in-person and remote. A new governance structure is currently being implemented for the ERP Support effort.
Project Management	GREEN	GREEN	In 2017, SBCTC replaced Ciber and brought program management in-house after serious problems with First Link College (FLC) implementations. SBCTC decided to internally staff the project with ctcLink PMO senior management (Christy Campbell hired in June 2017). Christy has provided effective leadership for the ctcLink Project and maintained key staff until the last colleges were deployed. SBCTC will be transitioning some of the PMO staff to the SBCTC Support Organization to focus on future ERP enhancements and projects.
Phase Scope	GREEN	GREEN	Replacement solutions are now implemented for deployed colleges and any on-going tasks have been transitioned to the ERP Support organization. The review and update to Requirements Traceability Matrix (RTM) for the ctcLink ERP was presented to ESC on May 17 th , with any outstanding items being transitioned to the ERP Support organization for further review and possible implementation
Schedule Status	GREEN	GREEN	Deployment Group 6 colleges (consisted of nine colleges) have now been implemented with the ctcLink solution. All 34 colleges and SBCTC agency are now working with a single ERP system. The use of the legacy system for main processing has been discontinued. The schedule now includes all steps involved with project shutdown work, expected to be completed by June 2022.

<p>Training</p>	<p>GREEN</p>	<p>GREEN</p>	<p>The Training staff, which was assigned from the Customer Support organization to work with the Project, is now working full-time for the ctcLink support organization. Additional training programs for ctcLink are being planned by the support team.</p>
<p>Testing</p>	<p>GREEN</p>	<p>GREEN</p>	<p>The future Testing aspect for ctcLink will now be performed by the ERP Support organization.</p>
<p>Technical Environment</p>	<p>GREEN</p>	<p>GREEN</p>	<p>QA was previously concerned with staff loss as this small team with their expertise was critical to completing DG6 implementations. The team was able to successfully complete installing/ maintaining project environments and supporting the final DG6 Data Conversions.</p>
<p>Organizational Change Management (OCM)</p>	<p>GREEN</p>	<p>GREEN</p>	<p>There will need to be on-going OCM work at the colleges to ensure that cross-pillar business processes and system-wide business process standardization continue.</p> <p>Staff turnover within the colleges will continue to require supplemental staff training and effective delivery of knowledge transfer. QA is concerned that leadership must encourage/ facilitate the 34 colleges to continue to evolve with ctcLink process improvements.</p>
<p>Project Staffing</p>	<p>GREEN</p>	<p>GREEN</p>	<p>Project team morale remains good. Majority of staff that will be staying with SBCTC as employees have transitioned to the ERP Support organization.</p>
<p>SBCTC Customer Support</p>	<p>YELLOW</p>	<p>YELLOW</p>	<p>QA considers the ctcLink Customer Support area as YELLOW trending GREEN. QA believes that the overall SBCTC support organization will continue to be viewed as YELLOW/GREEN now that all 34 colleges and SBCTC Agency are implemented.</p> <p>SBCTC is staffing the ERP Support organization with 92 budgeted positions. According to SBCTC IT leadership, future major projects will be additionally staffed based on specific governance approved project budgets.</p> <p>The support ticket work volume has held steady. As reported to QA, customer support is providing special support web sessions for the DG6-B/C colleges now that they are deployed.</p>
<p>SBCTC Application and Production Services</p>	<p>YELLOW</p>	<p>YELLOW</p>	<p>QA considers SBCTC Production/ Application Services area as YELLOW trending GREEN. QA also believes this area will viewed as remaining YELLOW/GREEN given size and expertise of the staff.</p> <p>This relatively small team will be instrumental in maintaining and enhancing the technical components of the PeopleSoft ERP and 3rd party</p>

			solutions. They are now managing the effort required to support 34 colleges and SBCTC agency in a production environment. This team has added technical staff/expertise and is still in process of hiring staff.
SBCTC Data Services	GREEN	GREEN	QA considers SBCTC Data Services as GREEN. Workload has substantially increased for this small team which is now supporting 34 colleges and SBCTC agency. This team, besides providing Centralized Data services to SBCTC, continues working with the deployed colleges, supporting Datalink, providing training for PS Queries and supporting additional custom solutions and standard ctcLink reports.
SBCTC Project Management Organization	NEW	GREEN	QA considers the new SBCTC Project Management Organization (PMO) as GREEN. ctcLink Project PMO has staff transitioning to the new SBCTC PMO at the end of June. Staff are working on future project management processes for small-to-larger projects as a foundational approach to the new PMO activity.

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

- The current 3 tier ctcLink Project Governance structure was implemented in April 2018. The Governance structure has worked for the ctcLink Project. Meetings are routinely scheduled and documented.
- The last Project Working Group meeting is scheduled for May 25th, Executive Leadership Committee meeting is June 2nd, and final Project Steering Committee meeting is scheduled for June 14th. A final presentation to the State Technology Services Board/OCIO is also scheduled for June 14th.
- The new ERP Governance Structure and Plan is expected to take effect starting July 2022. The Structure and Plan was finalized for presentation to the WACTC College Presidents with final approval expected in early June.
- SBCTC senior leadership has planned a post go-live stabilization period for all the 34 deployed colleges prior to starting another major project. There is recognition that current business processes as implemented in Peoplesoft ERP at the college level may need additional tuning for operational efficiency.

PMO and Staffing

- Based on feedback to the QA team, ctcLink Project morale remained good during the last two DG6 deployment sub-groups.
- The transitioning of state employees from the ctcLink Project to the ERP Customer Support organization will now be completed since DG6-C has been implemented.
- The Requirements Traceability Matrix (RTM) is based on the 2,488 separate items as listed in the original ctcLink Request for Proposal (RFP). It identifies what items have been implemented with the ctcLink deployments and what has been descoped. The final RTM update work was presented to the ESC. Any open items will be transitioned to the ERP Support organization for future implementation consideration.
- PMO is addressing the difference of State OCIO reported project budget vs. actuals between SBCTC Finance and State Office of Financial Management. Based on QA understandings, this has more to do with timing and characterization of data than any true difference.

Phase Scope

- The original ctcLink Scope included major application solutions acquired with the PeopleSoft ERP that later were considered inferior and colleges requested these be replaced. These replacement products have been implemented or available for use by all deployed colleges. The replacement solutions which have been managed by the project team, include:
 - **Continuing Education Solution/Software Product** - CampusCE is the 3rd party solution for Continuing Education. It has involved a multiple stage implementation. CampusCE Integration was split into three phases. Phase 3 to be available for all colleges now that DG6-C has gone-live with ctcLink. Remaining CampusCE tasks are being de-scoped from the Project and transitioned to ERP Support.
 - **Online Admissions Application Portal (OAAP)** - OAAP, which is a 3rd party custom solution replacing a Ciber provided component, is now implemented for all 34 ctcLink deployed colleges. The old OAA solution was retired. The 2nd phase of the custom OOAP is being planned with the vendor, including enhancements. Remaining OAAP tasks are being de-scoped from the Project and transitioned to ERP Support.

- **Planning and Budgeting Cloud Solution (PBCS)** – PBCS was first launched for DG2/3 colleges in February 2021. DG4-A went live January 2022. PBCS implementation for remaining colleges brought to Steering Committee for Project de-scoping and transferred to ERP Support because colleges will go-live with PBCS after they have a substantial amount of finance data in ctcLink. Colleges are using this solution at their own pace.
- Additionally, there is other scope which is being planned for inclusion in future ctcLink projects. This is a future work effort to be managed by the SBCTC PMO. This functionality includes:
 - **Accessibility** – SBCTC IT has responsibility for this area and is reporting status.
 - **Dashboards and Analytics /OBIA** - 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.

Schedule

- DG6 project schedule was a derivative of the staffing and workloads. The highest risk to this schedule involved the Technical Project staffing area, which required expertise with data conversions, environments, and complex PeopleSoft software. ctcLink PMO was able to mitigate this risk with staff reassignment and short-term contractors.
- The ctcLink Project Shutdown schedule has been developed and identified tasks assigned and underway. Schedule is to be completed by end of June.

Training

- Training team, which is part of the SBCTC IT ERP Customer Support organization, has maintained/updated the Training and Reference materials and this activity will be continuing.
- DG6 colleges received additional end-user training support through the ctcLink Customer Support organization.
- Training team continues to update and improve the Organization Business Process Guide documentation for First Week/First Month cross-pillar operations.
- Training team is supporting Local Security Administrator training.

Testing

- The testing workstream for ctcLink is now completed. Staff assigned as Testing Coordinators are being re-assigned.

Configurations/Data Conversions/Environments/Development

- Technical team has completed the Data Conversions for DG6 colleges. Special recognition for this small team in staying focused and committed to completing this workstream on schedule, despite the loss of key resources.

Organizational Change Management/Communications

- PMO working on the Lessons Learned document resulting from the DG6 deployments. This work is scheduled to be completed by May 31st.

- For the colleges to implement the ctcLink solution, the OCM activities began at the highest levels. College Executive Leadership has been a key critical success factor for the deployed colleges. ctcLink PMO and SBCTC executives continued maintaining increased level of communications to the College Presidents and Executive Sponsors to keep them informed, knowledgeable, and fully supportive of their college project related activities.
- The Colleges Project Managers/OCM Leads were instrumental in keeping their colleges engaged and on schedule with their pre-deployment tasks. Many of the PMs will continue to support their colleges with future ctcLink enhancement and related projects.
- Role Security activity was a critical component for ctcLink. Early on in the ctcLink Project, the understanding of what is the importance of role security within the ERP was not duly acknowledged and tasks planned. It has required significant development and support by the ctcLink Project. Ensuring that business processes have correct supervisory control over access and authorized changes to transactions has been a major challenge for the colleges as they prepared to implement PeopleSoft. The legacy system did not have this level of transactional role security, requiring enhanced OCM efforts to implement this part of the solution.
- QA also wants to recognize the assignment of a Senior Project Manager from the ctcLink PMO that provided mentoring and guidance to the college PMs as deployment groups moved through their schedules. This was another important OCM area since the majority of College PMs were without prior project management experience and needed this help.

SBCTC ctcLink Customer Support (CS)

- SBCTC IT Division Management continued addressing overall support staffing needs for post-DG6 expected workloads.
 - Project personnel are now transitioned or being transitioned to ERP Customer Support.
- ERP Customer Support and ITD participated in preparing their readiness assessment for the DG6 decision package used with Special ctcLink Steering Committee meetings.
- ERP Customer Support is continuing to hold Weekly “Open Sessions” per Pillar area for deployed colleges. Given on-line attendance levels, ERP Customer Support has requested each college PM submit a list of questions prior to these session in order for answers to be prepared in advance for each question. This is based on real-life lessons learned by the ERP Customer Support team.
- 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 has been shared with the colleges. The SOPs are starting to be implemented by the ctcLink Support organization.
- Projected level of support tickets is based on history with deployed colleges. Ticket support work remains high. According to the Director, current ticket count is holding steady at (+/-) 650 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.
- ERP Customer Support Director has regularly meetings with the college PMs and now with the WACTC- Commissions and Councils. These meetings will gain importance and will be continuing as the Support organization is now responsible for ctcLink. Colleges and Commissions/Councils expect to participate in future ctcLink related decisions.
- With completion of the DG6 deployments, the ctcLink Working Group responsibility now shifts from the Project to Customer Support/ITD Project Management.

SBCTC Production/Application Support

- Current focus is on open priority ctcLink support tickets.
- The ERP Technical Support group has added staff, including a security specialist, but has recently lost their “test automation” person and will be recruiting a replacement.
- ERP Application Support Has hired a position of Integration Engineer. This individual will focus on 3rd party software integrations.
- Any post ctcLink work (future projects) requires additional technical staffing. QA remains concerned that the ERP Applications Support team will be understaffed and will be challenged with the supporting ctcLink deployed colleges and addressing additional scope requirements.

SBCTC Data Services

- This technical support group has been adding staff to support ctcLink.
- Oracle DataLink connects the PeopleSoft production database to each college district’s Pluggable Databases (PDBs), replicating data stored in ctcLink in near real-time.
- A Reporting Catalog was 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.

SBCTC Project Management Office

- The staffing for the SBCTC Project Management team will come from the Project. This team is now transitioning from the ctcLink Project upon completion of the DG6 deployments. PMO leadership is now developing their processes to be used to categorize, communicate, prioritize and manage future enhancements and projects.

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/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. Once Key roles are filled on the IT Support organization as well as the PMO. Projects such as Guided Pathways, Optimizations, Enhancements, etc. will be discussed, evaluated, and prioritized. **QA Update:** This work will be transitioned to the ERP Support organization and QA considers this closed.
- **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:** As the project is winding down this risk has been realized several times and mitigated by bringing on additional consultants which was part of the original strategy. The project feels this risk can now be closed. **QA Update:** QA considers this closed.

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:** The team is continuing to monitor the data and identify key areas where QA processes need to be established.
- **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:** The new Governance plan has been shared with the ctcLink Working Group, Steering Committee and ctcLink Executive Leadership Committee. Good progress is being made to establish all processes, charters and membership. **QA Update:** With approval by WACTC expected, QA considers this closed.
- **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:** Once all colleges are live and the new governance in place, the review of all requests and prioritization of new enhancements will be evaluated.
- **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:** The current system is being continually updated for usability and determining ways to extract meaningful data. A new ticketing system is not in the current budget.
- **QA 0188 Finding:** The PMO has a senior Project Manager that has been going to specific colleges that are having major staffing challenges with their ability to effectively understand and utilize PeopleSoft software even after participating in the training and remote online knowledge support programs. This Project Manager has really good 1-on-1/small group facilitation skills and extensive HE business process knowledge. This Project Manager comes

from a DG2 college and played a key role in that implementation and subsequent deployments.

Recommendation: QA recommends that SBCTC-IT consider keeping this individual on staff in the role of Sr. Management Consultant that can fill the gap of remote Customer Support and make a difference for the success of the colleges during the post-live stabilization period. QA understands this will be a budget issue; however, the role this individual would fill is an important consideration. **Latest Update:** This request is being evaluated based upon all new staffing and budget constraints.

- **QA 0189 Finding:** The Planning and Budgeting Cloud Solution (PBCS) from Oracle that has been acquired in ctcLink current scope and is being implemented by the colleges requires significant and specialized expertise to enable and fully support the product. The ability for SBCTC to recruit and retain staff with this required specialized expertise will be difficult. QA is concerned that SBCTC Customer Support will not have the consulting expertise to support colleges with use of the PBCS software.

Recommendation: QA recommends that SBCTC-IT consider a range of alternatives for providing post-live PBCS product support for the colleges to meet the staffing challenge.

Latest Update: The resources currently responsible for the Project Management and Technical and Functional support have accepted new roles with SBCTC IT to be able to continue this de-scoped work effort to implement the remaining colleges as well as support those colleges live on PBCS. **QA Update:** Based on the transitioning of resources to ERP Support, QA considers this closed.

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 end of the implementation project does not correlate with the end of risk. The ctcLink solution will need continued support and enhancement to further the investment made to date.

The top risks going forward are:

- Ability of the ERP Support organization to be properly staffed and knowledgeable to handle the workload of 34 colleges and the SBCTC agency.
- Ability of the ERP Support PMO to implement the agreed upon governance structure and implement future projects/enhancements to the ctcLink solution that provide value to the colleges and agency.
- Covid-19 and its continuing impact on finances and remote working environments.