



STEERING COMMITTEE MEETING MINUTES

January 28, 2020

SBCTC and WebEx

Meeting Participants

Voting Members

- Reagan Bellamy, Wenatchee
- Kurt Buttleman, Seattle
- Shanda Haluapo, Clark
- Choi Halladay, Pierce
- Lisa Hjaltalin, CCs of Spokane
- Tim Wrye, Highline
- Grant Rodeheaver, SBCTC
- John Boesenberg, SBCTC
- Carli Schiffner, SBCTC

Non-Voting Members

- Christy Campbell, SBCTC
- Bob Adams for Paul Giebel, Moran Technology Consulting
- Whitney Dickinson, OCIO Representative
- Clay Krauss, Tacoma PM
- PM Position Vacant

Guests & Staff

- Reuth Kim, ctcLink PM for Risks/Issues
- Janelle Runyon, ctcLink Project Communications Manager
- Dani Bundy, ctcLink Project Communications Manager

Welcome

Christy Campbell welcomed the committee and reviewed the agenda.

Approval of Minutes

Choi Halladay presented the Jan. 14, 2020 draft minutes, which were approved with two edits regarding Service Level Agreement and CampusCE RFP.

cELC Special Meeting with DG3 Presidents/Exec Sponsor

Choi reported out on the special ctcLink Executive Leadership Committee (cELC) meeting called by Chris Bailey, cELC co-chair, last week (Jan. 23) with the DG3 presidents due to conversations and concerns voiced about DG3 progress.

Choi said the presidents had concerns about Clark's day-to-day experience since go-live and the readiness of the SBCTC ctcLink Support Organization once six more colleges are added. He summarized the meeting that – although there have been problems with UAT and other issues – the presidents are generally in favor of staying on target for a March 9 go-live.

There was also a request to explore a couple of contingent go-live dates in late April and late May in case of readiness issues.

Christy said her preliminary conversations with presidents were focused on a few areas of college readiness:

- Is the ctcLink Project team on target and what are the largest risks to the implementation of DG3?
- Is the system ready for the DG3 colleges? (Local Configuration/Setup, Conversion/Data)
- Are the colleges ready to go live? (Security, UAT, Training, Learning, Understanding and Adoption)
- Is the SBCTC ctcLink Support Organization ready for six additional colleges?

Presidents said they wanted to go through the readiness process and discussions with colleges and governance toward the March 9 date, but wanted scenarios for a couple of alternative dates in late April and late May.

The presidents and executive sponsors were very clear they do not want a long delay and don't want to impact the overall implementation of ctcLink, but were willing to consider a four- to eight-week window.

Tim attended the cELC meeting as an invited guest and observed there was a surprising lack of understanding by more than one president of how colleges transition from an "implementation project" to "ctcLink post go-live support" really works. He suggested improved communication about how the "Project" versus "SBCTC Support" resources are aligned.

Christy said one of the presidents, who is also an executive sponsor, said communication going directly to presidents doesn't seem to be adequate, because there is general lack of understanding of what it takes to bring a college successfully through the implementation.

cELC members will take this advice to heart and communicate more with the larger body of WACTC presidents.

Choi said at the presidents' level he thinks they are highly dependent on their local ctcLink project management team to keep them informed – and are not necessarily connected to the day to day effort – and that is part of the disconnect.

Kurt asked if we are missing a mechanism to communicate with presidents.

Christy said she uses Edmonds Community College as a model example. Their PM was also an Organizational Change Manager, and has the president's and leadership's ear, is on the agenda for executive cabinet meetings and gives regular updates to the Board of Trustees. ctcLink's impact on resources significantly impacts campus operations, so it should be treated as a major campus initiative.

Tim said the ctcLink Project has been communicating this all along, but some of the sense of urgency needs to come from the colleges that have already gone live, because until they hear it from their peers, it doesn't strike home as hard. He cited the email Daniel Cordas shared with the PM/OCM list describing DG4 experiences, suggestions and their lessons-learned thus far as a good example of peer-to-peer sharing. Advice based on frontline experience gets people's attention.

Choi suggested it is time to schedule a ctcLink academy during upcoming WACTC meeting. This will require coordination with Jan Yoshiwara. Perhaps Grant, Choi and Chris Bailey could discuss how best to bring this forward.

Grant said the key is college organizational readiness and change management. It's not just about software and conversion being ready; it's all the people who need to change business processes and job roles. Leadership needs to be supporting and understand that change frustration is natural.

Tim pointed out that even under the best circumstances – when leadership is supportive and employees prepared – it's a struggle. For example, even those on Highline's change management team (who have been thoroughly steeped in what's ahead) have wondered how they are going to do their day jobs while doing ctcLink prep. It's just a lot of work.

DG3 risks were reviewed with cELC

College Security Assignments

Risk: Colleges have been unable to complete security mapping and validate user roles in the system.

Mitigation: The Project is delivering final workbooks for colleges to assign users roles and permission lists. Environment provided to complete validation. An additional week of UAT allocated for regression and security testing and validation

- Christy reported Security roles have been figured out and mapped and will evolve over time, of course. For now, the issue is documentation – how to help Legacy security and IT staff, as well as business staff – understand the roles and assign the correct permissions. The level of detail needed in that documentation has been the project team’s most significant issue.
- The Project recently let go of a new contract resource who was not performing to expectations. SBCTC needs a post-go-live Security support resource with a level of commitment, ownership and robust leadership similar, by way of example, to how Carmen McKenzie manages Data Services and partners with the ctcLink Project team.

UAT/Parallel Completion

Risk: UAT test completion has run behind schedule due to environment issues, as well an understanding of the system.

Mitigation: An additional week of UAT allocated for regression for the colleges either to complete those remaining sprints or re-test as needed

- DG3’s schedule has been compressed due to issues and early miscommunications. Pierce’s configuration was not correct in the system; which was a Project issue.

Training timeline

Risk: Colleges concerned based upon conflicting activities that training timeline is not sufficient.

Mitigation: The training timeline has not been changed.

- Christy said DG3 is expressing new concerns that remote training will not be sufficient. Colleges have requested on-campus training, but the project is not staffed for that. One college’s finance department reached out for in-person finance training in Olympia. They said they learned more in a one-day session on-site than they would have in two or three weeks.
- The new Storyline training components will provide more updated and user-friendly simulations. These are in process.

Schedule Compression

Risk: The movement of parallel testing and additional requests to colleges have made the work focus and completion of activities a challenge for the college staff.

Mitigation: The project added an additional week of UAT to help with some of the compression. For some colleges the resources are different that need to participate in the activities and for others it is the same resources.

- Christy said we are asking colleges to adjust on the fly.

Conversion Execution Approach

Risk: This is the first time the project team is executing the repeatable multi-college conversion approach.

Mitigation: The project team has developed an approach that can be used for DG3, DG4, DG5, and DG6. The plan is currently in progress to load historical separately that current term data. This approach will minimize ctcLink downtime and allow for all DG Colleges to go live as one group

- There are too many colleges in DG3 to run all conversions in one weekend, so it’s divided up over two weekends.

Support Readiness

Risk: The plan to onboard staff to ERP support the deployment groups and number of colleges.

Mitigation: SBCTC has on boarded additional staff for functional and technical support. Training resources that can be utilized to add additional staff to support the current and new colleges. A select group of vendors is being evaluated to help with the additional staffing demand to support the colleges on ctcLink

- Choi asked about how post-go live support will look, because their college is hearing about how things are going with Clark College.

Christy said we need an updated Clark College conditions and concerns summary.

Choi said lightbulbs are starting to turn on about the level of change required to business workflows and the locus of effort. He said people have been trying to map analogies to the Legacy world, but we are just starting to get our heads around “this is what they meant when they said “change.” It’s radically different with a completely different workflow, some of which is better; some is not.

Tim said that as folks get into user acceptance testing (UAT) and running processes end-to-end, people find that the business process maps are a start, but they don’t paint a complete picture.

Choi said there’s a fundamental misunderstanding that PeopleSoft business processes will work like Legacy. It does not fit their mental model. There’s also a misperception that if it doesn’t work 99% like Legacy, we need to remediate something. They don’t understand it is not a configuration problem; this is how ctcLink PeopleSoft was designed and why colleges are asked to rethink their business processes.

Choi said most colleges are probably not organized correctly to run PeopleSoft; they are overstaffed in some areas, understaffed in others. In the new ctcLink world, the colleges’ staffing models will be completely different. This is part of the angst systemwide and why organizational change management is so critical. Christy said there is a natural panic that sets in when an organization gets six to eight weeks out from deployment.

She said even though the colleges have been handed off for post-go-live SBCTC ctcLink Support, the Project (implementation) team still owns the items that went wrong in the implementation, which was not clearly communicated during DG2

DG3 Go/No-Go Decision approval date and process

- Feb. 11 – Steering Committee Meeting: Preliminary DG3 Go/No-Go Discussion
 - Feb. 14 – DG3 PMs submit final college readiness and signed go-live recommendation forms
 - Feb. 18 - Steering Committee Special Meeting: DG3 Go/No-Go Decision (special date, if needed)
- Alternative dates and impacts will be considered as needed.

ctcLink Support Organization – Update

DG2 (Clark) Post-Go-Live Update – Stabilization, Support

Susan Maxwell, Clark College project manager, gave an overview of some of the issues they are currently working on.

Support

- She is pulling data out of PeopleSoft to mail-merge letters, because they can’t get someone to update their 3Cs template. It might not seem like a big deal, but it’s very time-consuming. Dani said the templates can be created and edited by the colleges depending on their level

of access, but SBCTC support has to create an initial letter code. Dani will contact Susan after the meeting.

- Struggling from a service ticket perspective, because Clark College is not getting the timely support it needs.
- Their finance issues are conversion or set-up related. They have random issues with continuing education. Cashiers check daily to see what didn't post correctly.
- Sabra, Clark College business office, is concerned about Chart of Accounts item type setup. She is getting calls from the DG3 colleges.
- In terms of ctcLink ERP Support, HCM is now conducting a weekly WebEx. Campus Solutions was already holding a weekly WebEx.
- We have meetings to prioritize service tickets, but this is not sustainable — nor is it scalable — once you add six more colleges.
- Courses, classes, registering students is doing pretty well.
- In terms of organizational change management, you will need a lot of tissues. It is difficult. Every time we run payroll, we run into new issues, because we are doing new things depending on the month.
- Roles and access are still a struggle.

Organizational Change Management

- The main frustration is about the business processes, but if people don't understand how to do their new jobs — and it involves their computer — they just blame ctcLink. The long-time experts in Legacy are no longer the experts in the new ctcLink business processes.
- There's a lot of work you need to do with individuals to help them through. Some staff are embracing ctcLink and rising to the top.
- Susan's advice for college PMs and campus ctcLink teams is to work with their presidents and executive groups. If you don't have their support and they don't continue to support you after go-live, that's when you will run into problems.
- Staff will complain to leaders when the system isn't working and one of two things can occur:
 - If your executives listen, calmly look into the issues and work with pillar leads, that is a good process.
 - If your leaders who hear a complaint immediately escalate and say the "sky is falling," that will poison everything and undo efforts.
- Susan warned the committee that if project governance (cELC, Steering Committee, Working Group) decides to listen only to executives and leadership — and not to the campus ctcLink teams on the ground — it will seriously impact morale, impact the project and people's willingness to work on the project.

Staffing Issues

- Clark uses a lot of student employees and work-study students. There are questions about levels of roles/access, because student workers have always been able to log in to certain parts of Legacy to work. If the student workers can't get access, departments will feel ctcLink is limiting its ability to get the work done.

- Plan ahead and prioritize. For example, Clark had two people who process requisitions and one went out on medical leave a month before go-live. Even if they had been present, it would've been difficult, because it's a new process and because they weren't allowing people to submit requisitions in October. They asked everyone to do them ahead of time in September. When they opened up PeopleSoft in November, a flood of requisitions. They've been processing them in order received, but they now have a backlog which is causing a financial issue. For example, In IT and facilities, quotes for products and Repair and Minor Improvement (RMI) expire in 30 days. If we haven't processed in 30 days, the department needs to go back to get a new quote and the price may have increased.

Preparations for DG3

Grant reported they will be onboarding a ctcLink Customer Support Director. The ctcLink Training team was scheduled to move over to ctcLink Support from Project in July, but will reorganize to move over in mid-February.

Five of the nine additional support positions created have been filled and he is working with contractors and vendors to augment staff capacity. Choi said the integration of the support team is critical, given how ctcLink is integrated.

Upcoming Action Items Discussion

DG5 Go-Live Date

Expect to start March 30, 2020 on the Global Design Adoption program. Not approved or planned, but it's looking like a late October 2021 go-live date.

DG6 Go-Live Date

Not approved or planned, but it's looking like a late February / early March 2022 go-live.

ctcLink Program Status

Christy reviewed highlights. Refer to the presentation deck for additional updates on the status and QA reports. We have asked for training for the new OCIO funding gates.

Remediation and Replacement Solutions

Christy has not been able to set up a meeting with Spokane to circle back with remediation items they do not think should be closed yet.

Budget planning tool

Vendor wants us to start working Feb. 1. It would require about 25% of the colleges' budget office resources' time for three to four months, so it would be a heavy lift.

CampusCE update

Next activity is Feb. 20 BAC meeting and referral to WACTC operating budget committee meetings.

OAA

Next activity is Feb. 20 BAC meeting and referral to WACTC operating budget committee meetings.

Accessibility Update/Next Steps

Grant reported that IT team has installed the PeopleTools 8.57 environment and is going through testing. The updated PeopleTools will address many of the accessibility findings.

Implementation Colleges

- DG3: Struggling with being able to complete DG3 UAT for many reasons and compression of activities.
- DG4: Yellow for Seattle and Highline, which is likely related to BPGF homework. The weather has been an impact, too. Tim said Highline would like to get started on Security mapping sooner rather than later, because they keep hearing how much work it is.

Pre-implementation Colleges

- DG5: Making good progress and are close to where we expect them to be.
- DG6: Have seen a lot of good work going on. There are two that are lower in their progress, but nothing alarming yet.

Program Risks & Issues

Risks are UAT, Compression, and Repeatable conversion approach. Issues are Security activities and accessibility. See report for details.

Moran Quality Assurance & OCIO

Bob Adams, Moran Consultants, said the major issue they are seeing is that the scope of this project is beyond anything that anyone in the world has ever done before. With 500+ new business processes the day colleges go live, the bottom line is that this is a major shock to any colleges that go through it even if everything goes perfectly. Colleges cannot delay their business process mapping and planning activities.

Christy said they communicated with the OCIO's office that it is unreasonable to expect lessons learned in 30 days and they agree to revise it to 60 days. Our project is different than others, because we are not done and closing down shop; our team is rolling on to the next Deployment Group.

Steering Committee Nomination Subcommittee Update

Choi said there were three possible dates for Choi, Kurt and Tim to get together and just need to figure out when to meet.

Christy asked for permission to reach out to a DG3 PM as an interim/guest member until the vacant non-voting PM position is filled. The committee agreed.

Agenda Items for Future Meetings & Closure

- Feb. 11, 2020 – Preliminary Go/No-Go; Nomination committee
- Feb. 18, 2020 – Special meeting for DG3 Go/No-Go, if needed
- Feb. 25, 2020 – Report from the Feb. 20 BAC meeting)