Action Plan Executive Briefing

November 3, 2016
Ellucian Action Plan Debrief

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Purpose: To debrief the leadership team of Ohlone Community College District on the Action Plan Findings, Proposed Timeline and Investment Summary.

Key Findings:

- Most staff interviewed were unaware of some key functionality that existed.
- Many users were unaware of the Ellucian online resources available at no additional cost (e.g. documentation, webinars, eCommunities).
- Majority of processes are paper-based with minimal use of rules and communications management within Colleague to automate.
- Staff has strong reliance on IT for report creation and query support. The current reporting production requires extensive manual manipulation and IT intervention.
- Faculty and office staff expressed a desire to extract data and run their own reports.
- The Ellucian delivered reports were not well known to most staff.
- Decentralizing knowledge to each department & assigning super-users is essential (depending on the module).
- Increasing self-services for students, faculty, and staff is essential.

Recommendations for Phase 1:

- Increase Efficiencies and Improve Automation
  - Consulting to combine multiple student accounts.
  - Implement FA Self Service and Student Financial Views for accurate views of student debt as well as options to pay charges.
  - Post transfer credits when student transcripts are received to allow for a more accurate student education plan and roadmap for program completion.
  - Roll out Projects Accounting module to better track and manage grants.
  - Complete migration for Windows SQL.
- Expand Self-Service
  - Professional Services consulting to work with Financial Aid, Student Billing, Human Resources, and Finance offices to configure and launch Self-Service modules such as Financial Aid, Student Financial Views, Parent Proxy, Graduation Application, Emergency Contact, User Profile updating, Projects Accounting and Budget Administration.
- Roll out a Portal Implementation Strategy
  - Enable needed functionality such as document storage, targeted communications, centralized sites for campus organizations, alerts and notifications, and a reporting center for ad-hoc, analytical, and dashboard reporting.
  - Enable Single-Sign On to various Colleague and 3rd party links.
- Establish a Governance Structure to Sustain Success
  - Formation of a CORE team. Team leader role should be a 6-month rotational non-IT director level, but with AVP of IT Services sponsorship.
  - Host Data Governance seminar offered by Ellucian Professional Services.
  - Determine basic training minimums for new hires and current staff using the Ellucian On-Demand Subscription Library and schedule departmental “lunch & learns”.
- Implement Identity Solution and Review Security
Implement the Ellucian Ethos Identity solution to integrate identity management and leverage the technology to synchronize, update and manage the identity of users across the infrastructure.

- Create a Culture Shift
  - Implement a power-user model.
  - Annually budget for training and Ellucian regional and national attendance.
  - Streamline "exception" practices and find ways to reduce/eliminate exceptions.

- Increase Service – Effectively Distribute Information & Enable Constituent Transactions
  - Provide Informer training to end users so they can pull ad-hoc reports.
  - Provide access to Ellucian HUB and eCommunities for documentation and updates.
  - Provide Colleague Research Fundamentals training to end users who request reports.

- Optimize Use of Existing Functionality
  - Follow up with consulting for the resulting findings/recommendations of the Usage Audits.
  - Communications Management Fundamentals training for end users across the campus with follow up consulting for specific offices such as Admissions, FA, Billing, and Alumni/Foundation.
  - Make use of delivered ASUM and SHAP screens within Colleague to process additional information from non-standard applications.
  - Process Reviews of current processes and future needs to DSPS, EOPS and Veterans Affairs offices, followed by consulting to implement the recommendations. Immediately begin using CASM and CON screens to capture meeting notes with students instead of current spreadsheets.
  - RPCA form for HR/Payroll team to calculate retroactive pay after Board approves pay increases after fiscal year has begun.

- Evaluate New Ellucian Software to help support strategic goals:
  - Evaluate Ellucian Elevate solution for Continuing Education and Workforce Development.
  - Evaluate Ellucian Talent Management Suite.
  - Evaluate and implement an Operational Data Store (ODS) for enhanced reporting abilities that tie Colleague data to that from other databases.
Proposed Timeline

Based on the Ellucian findings of the engagements for Ohlone, Ellucian recommends the following optimization timeline to support these projects. This timeline is a living, breathing document, and the project manager will work closely with all key stakeholders and leadership to adjust as necessary to ensure institutional success.
### Investment Summary

**Phase 1 - 11/3/2016**

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Benefitting Office/Module</th>
<th>Software/Subscription Pricing</th>
<th>Maintenance Pricing</th>
<th>Estimated OCCD Services ($225/hr)</th>
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**Indicates Services Needing Scoping**

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Prices are valid for 30 days