



**HOLYOKE COMMUNITY COLLEGE
SOFTWARE APPLICATIONS
PROJECT ROAD MAP
JUNE 27, 2016**



Executive Alliance

Experts in Process & Technology for Payroll and Human Capital Management

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EXECUTIVE SUMMARY

**HOLYOKE COMMUNITY COLLEGE
SOFTWARE APPLICATIONS
PROJECT ROAD MAP**






Project Objectives

Report on current status from previous Applications Roadmap

Gather and assess current departmental needs and application requirements. This will inform the software and resource investment decisions for Holyoke Community College (“HCC”) for the next 3 years.






STATUS UPDATE ON STRATEGIC PROJECTS

Proposed Strategic Projects as of October 2011

Project	Outcome	Status
Migrate Banner to new servers	<ul style="list-style-type: none"> ✓ Completed. Equipment for the new infrastructure was purchased and servers configured in late 2011-early 2012. Extensive testing was performed by end users in various departments throughout the spring, and the production Banner system was successfully migrated from its original end-of-life servers in June 2012. 	
Prospect/ Applicant Communications <ul style="list-style-type: none"> • Implement Banner Web for Prospect • Enhance prospect & applicant communication • Implement Prospect Portal 	<ul style="list-style-type: none"> ✓ Completed. ✓ Phase 1) Banner Web for Prospect was implemented in early 2012 with minor enhancements to reports used for creating letters and emails. ✓ Phase 2) Purchased the Recruiter CRM system Dec 2014, hired a dedicated staff resource Apr 2015, and after a 9-month implementation went live Oct 2015, replacing the Banner Web for Prospect and Web for Admissions modules. Features an improved user interface, online inquiry and application, communication plan tools, Banner integration, data tracking and reporting. 	
Degree Works – use technology for counseling	<ul style="list-style-type: none"> ✓ Completed. Degree Works was purchased Dec 2012 and after 1 year of configuration and training went live in Jan 2014. The result is a robust user-friendly advising resource that has been well-received by advisors and students. 	
Job Scheduler	Deferred. Chiefly due to ITD concerns about not having a dedicated Systems Administrator and the risks of continuing to rely solely on a remote contractor for such services.	
Human Resources Information Management <ul style="list-style-type: none"> • Managing employee information • HR hiring workflow • BCS Contract Management • Adjunct faculty contract management 	Deferred. HCC conducted an extensive feature review of the Banner HR module as well as price negotiations in 2011-12, but determined there was insufficient funding and staffing to acquire and implement the product at that time.	



STATUS UPDATE ON STRATEGIC PROJECTS

Proposed Strategic Projects as of October 2011

Project	Outcome	Status
Luminis portal upgrade	- Cancelled. Project kicked off in Sep 2012, but during implementation it was determined that features and security did not function as promised and thus failed to meet HCC's requirements. The project was suspended in Aug 2013.	
Single sign on deployment	✓ Completed*. The project expanded to include implementing a campus login requirement to improve network security. In Feb 2014 all constituent accounts were migrated to AD and in that year single sign-on was established with Gmail, Moodle, and Rave. The campus login requirement rolled out in phases between July 2014 and April 2016. (*Not yet included in single sign-on is HCC Online Services).	
Implement workflow	✓ Completed. After implementation and 1 year of training, the first Workflow process went live in Dec 2015. This will be an ongoing effort led by a team of technical and functional analysts collaborating with departments to determine how best to leverage WorkFlow to streamline steps and reduce manual work to improve process efficiency.	
Develop an enterprise wide reporting solution: DataMart and Dashboard	+ Dashboard in progress; - Datamart deferred; + HCC purchased and implemented the iDashboards system in 2015, and held staff training in Feb 2016. Conversion of older homegrown dashboards and creation of new ones is in progress.	
On-line Registration and Payment for non-credit	Deferred. Ellucian Elevate was selected as the preferred system in June 2015 but the purchase was postponed due to delays in development of critical product features, and a lack of existing Banner clients successfully live on Elevate.	

STATUS UPDATE ON STRATEGIC PROJECTS

Proposed Strategic Projects as of October 2011

Project	Outcome	Status
On-line Requisition (Finance Self-service)	+ Progress. The Business Office began rolling out Finance Self-Service in early 2015 to streamline requisition and purchase order processing yet does not feel the product adequately handles HCC's current approval process which is by expense type. Therefore no efficiencies have been realized. It remains to be determined how to resolve this incompatibility.	
User friendly budgeting	+ Progress. The Finance Self-Service rollout has enabled more user-friendly balance inquiries, but has not improved budget <i>management</i> to a significant degree. As for budget <i>development</i> , Banner Spreadsheet Budgeting has been implemented, and in conjunction with Finance Self-Service will be used beginning in 2016 for development of future budgets.	



Project Objective

During April and May of 2016 Executive Alliance, Kathy Keene, Director of Applications, Linda Szalankiewicz, CIO met with representatives from all divisions.

- Academic Affairs
- Administration & Finance
- Business & Community Services
- Information Technology
- Institutional Development
- President's Office
- Student Affairs

The goal of these conversations was to identify applications currently in use by the end user community, evaluate the capabilities and utilization of the Banner solution, identify future software investments that would be needed in the next three years.

MEETING PARTICIPANTS

ACADEMIC AFFAIRS

Monica Perez - Interim VP of Academic Affairs

Idelia Smith – Asst. VP of Academic Affairs

Jennifer Adams - Coordinator of Library Services

Mary Dixey - Dean of Library Services

Carl Todd - Coordinator of Library Services

ADMINISTRATION & FINANCE

Bill Fogarty - VP of Administration and Finance

Karen Desjeans - Admin & Finance Staff Assistant

Clara Elliott - Dean of Human Resources

Curt Foster - Interim Assistant Comptroller

Olivia Kynard - Bursar

Johanna Lebron - Assistant Bursar

Marcia Mitchell - Interim Comptroller

Joe Rivera - Director of Public Safety

Terry Turban - Banner Finance & AR Product Manager

BUSINESS AND COMMUNITY SERVICES

Jeff Hayden - VP of Business and Community Services

Kermit Dunkelberg – Asst. VP for ABE & Workforce Development

Arvard Lingham – Asst. to VP & Coordinator of Kittredge Center Operations

Sara Schmidt - Coordinator of Picknelly Adult Family Education Center

Ken White - Dean of Community Services

INSTITUTIONAL DEVELOPMENT

Erica Broman - VP of Institutional Development

Amy Dopp - Dean of Resource Development

Kim Gifford - Staff Assistant

Michelle Riberdy - Research Associate

PRESIDENTS OFFICE

Bill Fogarty - Interim President

Nelson Lopez - Staff Assistant



INFORMATION TECHNOLOGY

Linda Szalankiewicz - Chief Information Officer
Kathy Keene - Director of Enterprise Applications
Hugh Bailey - Help Desk Coordinator
Kelly Champagne - Senior Applications Specialist
Zak Demka - Systems Analyst
Carlos Garcia - AV Equipment Technician
John Hardy - Director of IT Services
Reid Hunter - Computer Technician
Bruce Kellogg - Systems Analyst
Mike Magiera - Computer Analyst
Sal Mateo - Technical Operations Manager
Brian Redfern - Computer Analyst
Tristan Simonds - Interim Director of Infrastructure

STUDENT AFFAIRS

Yanina Vargas - VP of Student Affairs
Maureen Conroy - Director of Disability & Deaf Services
Karen Derouin - Director of Financial Aid
Juan Dixon - Disability & Deaf Services Admin Assistant
Eileen Hocking - Asst Dean of Enrollment Management
Chris Holbrook - Interim Registrar
Katie Lynch - Assoc Dir of Financial Aid Technology Operations
Sarah Mcinnis - Enrollment Operations Manager
Elsie Rodriguez-Garcia - Director of STRIVE Program
Tony Sbalbi - Dean of Student Services
Renee Tastad - Dean of Enrollment Management

During this review we were able to speak with more people getting greater campus input into our strategic application road map.

Software

We have identified more than 72 potential software projects based on our meetings with the divisions. This count excludes infrastructure and academic computing solutions.

- The projects identified fall into three main categories
 - Research and discovery is needed to assess the business need
 - Large scale application investment needed to expand functionality or meet additional user needs
 - Improvement projects that largely revolve around automation of batch jobs, workflow, and reporting.

- The organizational themes that emerged during our discussions are:
 - The need for document management
 - Automation of workflow and expansion of online transactions
 - Communication delivery systems for credit/non-credit students, prospects, applicants, aid applicants, employees, and trustees
 - Human Resources system and data management
 - The need for improved purchasing and budget management technology solutions

PROJECT MATRIX

Project Summary

- We have further categorized the 72 application projects into the following ratings
- Projects were evaluated along the dimensions of Impact and Level of effort. Projects with high impact and low to medium level of effort, shown below in green should be started first.
- Projects shown in yellow should be evaluated further to assess the true costs and value to Holyoke Community College
- Projects shown in red should not be pursued.

		Impact		
		Low	Med	High
Level of Effort	Low	16	10	1
	Med	2	22	6
	Med/high	0	1	0
	High	0	2	12



Proposed Strategic Projects

- Job Scheduler
- Catalog and curriculum management solution
- Purchase and Implementation of the non-credit on-line registration system
- Human Resources Management (Employee Data, Hiring workflow, BCS Contracts, Adjunct Faculty Contracts)
- Revise Record retention requirements
- Evaluate Document management systems
- Investigate communication delivery systems
- Research portal solutions to centralize access to applications and information
- Investigate Banner budget management tools
- Investigate Banner Online Requisitioning – document gaps, identify solutions that may include configuration, process change, training, and workflow.
- Expand the use of Banner workflow.
- Expand the use of existing Banner functionality and of self-service in particular.

PROJECT ROAD MAP (MED-HIGH IMPACT)

HCC Strategic Project Road Map														* Denotes dependency on
Calendar Year	2016	2017				2018				2019				
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
Accutrack Upgrade														
Employee Data														
Create a new records retention policy														
Self-Service Purchasing assessment														
Reimburse Travel via payroll														
Improve the refund business process														
Upgrade Cash Registers														
Third Party Contracts file upload														
Campus Police Training on Rave & IMC reporting														
Improve Police Reporting														
Campus Police Technology Review														
Parking Permit & Ticketing system upgrade and review														
Support PAFEC's desired intake/referral strategy														



PROJECT ROAD MAP

HCC Strategic Project Road Map													
Calendar Year	2016	2017				2018				2019			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Reporting for Disability & Deaf Services													
Student and campus communications													
Maintain Academic Maps in DegreeWorks													
Advisor assignment automation													
ID system													
Virtualization of Banner database													
Oracle database upgrade													
Streamline Faculty Library registration process													
Trustee Information access													
Complete DegreeWorks upgrade													
Upgrade Ellucian Mobile													
Support Recruiter Upgrade													
Upgrade BRIM/BEP													
Upgrade Evisions FormFusion													



PROJECT ROAD MAP

HCC Strategic Project Road Map													
Calendar Year	2016	2017				2018				2019			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Accutrack evaluate ID capabilities													
Explore portal or mobile app strategy													
IT Applications Intake process improvement													
Dashboards													
Catalog and Curriculum Management													
Accutrack expand utilization													
Academic Forms review and migrate online													
Job/process scheduler													
Human Resources system													
On-line Document Storage													
Electronic Payments to Vendors													
Grants Administration													
Travel & Expense processing													



PROJECT ROAD MAP

HCC Strategic Project Road Map													
Calendar Year	2016	2017				2018				2019			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Non-Credit shopping cart system													
Analyze BCS data needs and create solutions													
Use Recruiter CRM for non-credit outreach													
Create student email account earlier in process													
Blackbaud products review													
Workflow for Academic Affairs													
Board Packet Software													
Cost Center Budget Management													
Touch Net - explore additional functions													
Document limitations of using Google/Gmail													
Banner XE upgrade													



PROJECT ROAD MAP

HCC Strategic Project Road Map													
Calendar Year	2016	2017				2018				2019			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Grants Management pre-award & post-award													
Archived student data													
Update Server Architecture													
Early Alert													



Risk Factors that impact the Road map

- Resources are limited (financial and human resources)
 - Priorities will need to be clearly established
 - Loss of focus due to the number of projects
 - Emerging issues involving high priority operational needs will consume existing resources.
 - IT reliance on outside contractors for infrastructure, database management, and systems administration
- Clearly defining the roles and responsibilities of the IT team and the roles and responsibility of in department functional Subject Matter Experts who will work together as this effort evolves will continue to be of importance
- All projects require functional representation and leadership

The primary goal for the application road map is to align the organizational investment from IT and the functional areas to address the most critical needs of the institution

Operational Activities

- Acknowledge the good work that has been completed to date
- Separate projects that can be managed as part of day to day work (Low effort, med to high impact). Order these projects by priority and start to work them into daily operations
- Evaluate the utilization of contractors to determine if bringing these services in-house improves efficiency, service levels, and reduces risks of loss of organizational intelligence
- Evaluate filling the current open Systems Analyst position.

Program Management Activities

- Identify a functional lead and executive sponsor for all projects
- Complete requirements gathering to inform priorities
 - HR systems and Employee Data
 - Document Management
 - Creation of automated workflow and the elimination of forms
 - Grants management Pre and Post award
 - Communications methods with Students, employees, and board members
- Assess Medium Impact and High level of effort projects to determine which have functional leads, budget, and executive sponsors and incorporate into the future plan
- Identify people and financial requirements (budget) for high priority projects