

EDUCATIONAL EXCELLENCE

Strengthening the Foundation and Future

of the

Chabot-Las Positas

Community College District

March 4, 2008

EDUCATIONAL EXCELLENCE

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The Vision for Excellence

Introduction

The Chabot-Las Positas Community College District (CLPCCD) serves the San Francisco East Bay area through its two colleges: Chabot in Hayward and Las Positas in Livermore. The District has nearly 22,000 students and employs more than 1,200 administrators, faculty, and classified staff. Combined, the Colleges serve 22 public, and parochial high schools.

The District is governed by a seven-member Board of Trustees that is responsible for all policy decisions. Board members are elected from trustee areas by the registered voters of nine communities: Castro Valley, Dublin, Hayward, Livermore, Pleasanton, San Leandro, San Lorenzo, Sunol, Union City, and parts of unincorporated Alameda County.

Although Chabot College and Las Positas College serve two very different populations, they are united in their fundamental purpose: education. The role of the District Office is to help the Colleges fulfill their purpose by assisting with human resources, institutional planning, reporting, business services, and general oversight.

On a day-to-day basis, each College essentially functions as an independent unit. The only direct reporting relationship between the Colleges and District Office lies between the Presidents and Chancellor.

Despite this seeming simplicity, the Colleges and District Office share many “dotted line” reporting relationships, particularly in the areas of business and technology. In addition, some critical aspects of the Colleges’ function (such as HR) are handled almost exclusively by the District Office. Still others – such as M&O – are District-based but housed at Chabot College.

The interweaving of roles and responsibilities between the three institutions is – in some respects – a result of the original operating format, which was for a single-college district (Chabot). Later, when Valley Campus (now Las Positas) was developed as an extension of Chabot, the District adapted to include this new, small site. In subsequent years, the District Office continued to grow in response to the tremendous expansion at Las Positas and continued success of Chabot.

In the 21 years since it officially became a multi-college district, the CLPCCD has made significant additions to its function, particularly in the area of technology. Despite this, many of the original reporting and operating methods have remained intact. A challenge common to the multi-college operating structure is the ability to function cohesively district-wide while maintaining the colleges as independent, locally-governed entities. It is the firm intent of the District Office to support the autonomy of the Colleges while facilitating their cooperative ventures and goals.

The Foundation for Excellence

The Mission of the Chabot-Las Positas Community College District

The mission of the Chabot-Las Positas Community College District is to provide quality educational opportunities to all residents of its service area. Fundamental to the success of this mission is the District's fervent commitment to proactive, effective student support services. All students should be encouraged to develop their minds, skills, character, and potential and will receive equal treatment and opportunity.

The District is committed to shared governance to ensure that processes and decision-making are inclusive and respectful of all participants. At all times, it welcomes and encourages freedom of thought and expression in its students, faculty, and staff.

The Chabot-Las Positas Community College District vigorously fosters and advances community partnerships that promote life-long learning, social responsibility, and fiscal stability. It recognizes the community - as a whole - as the lifeblood of the Colleges, and is a dynamic participant in the economic, cultural, and social development of its service area.

The Mission of the District Office

The mission of the Chabot-Las Positas Community College District Office is to provide leadership, assistance, and support to the Colleges so that they may further students' learning and good citizenship.

The Values of the District Office

The CLPCCD District Office is grounded in the beliefs that:

- ◆ All students are entitled to an education that fosters their intellect, character, and abilities.
- ◆ The District Office and Colleges must promote a learning environment that cultivates excellence, inclusiveness, integrity, accountability, and continuous improvement.
- ◆ The District Office and Colleges must proactively adapt and expand to meet changes in student expectations, technology, and employment.

The Commitment of the District Office

As part of its Mission, the District Office is fully committed to:

- ◆ Student Access and Success
- ◆ College Visibility and Access
- ◆ Economic and Workforce Development Partnerships
- ◆ Organizational Effectiveness
- ◆ Fiscal Development and Stability

Excellence in the Making

Purpose and Development of the Strategic Plan

This Plan – unlike many others that are mandated by federal and state regulations – has one primary audience: the employees of the Chabot-Las Positas Community College District. It is strictly an internal document—one that is to be used as a tool for developing plans, marking progress, and evaluating success. Because of this, this document is as succinct and direct as possible. Ultimately, it should operate as a desktop “checklist” which each department can review and update as it progresses towards its goals. The CLPCCD Strategic Plan carefully integrates the District’s external and internal demands with its purposes, intents, processes, and goals. It reflects and incorporates the combined efforts of Chabot College, Las Positas College, and the District Office. As such, it provides as a cohesive, formalized means to record the District’s progress toward its objectives while incorporating its changing needs and priorities.

The District Office began work on this plan in September 2006. The draft Strategic Plan was then distributed District-wide via the existing constituent groups. The Colleges provided excellent feedback; to a large degree, this final Plan incorporates all the suggested recommendations and changes. The Strategic Plan was then presented to the CLPCCD Board of Trustees on July 17, 2007. The Trustees provided additional feedback and this final Plan incorporates the suggested recommendations and changes. In addition, timelines and dates have been amended to account for the review period. The Plan also reflects an additional section denoted as Chancellor Office Services.

A primary outcome of this Strategic Plan was the identification of key areas in which the District Office and Colleges will need to work together to streamline, improve, and maximize their shared functions. This work – in some instances – may require the dissolution of decades-old practices and processes. However, the honesty, discipline, and collaborative spirit that contributed to the development of this Plan will shepherd the District through any transitions and changes that may be necessary.

This Strategic Plan serves both as a landmark and a roadmap. It decisively demonstrates the progress the District has made in the past 50 years, and provides critical guidance for its future. The continued success of the Chabot-Las Positas Community College District depends more than ever on its ability to remain inclusive, flexible, and proactive. This Strategic Plan is the first step in ensuring that success.

District Roles and Responsibilities

The District Office promotes and supports the work of Chabot and Las Positas Colleges by providing comprehensive and efficient services. The following are descriptors of the primary positions at the District Office and their responsibilities.

Chancellor

The Chancellor is responsible for the District’s total operation. The Chancellor facilitates effective relationships between the Colleges and the District Office and works closely with

the Presidents to provide academic leadership and careful evaluation of all programs and staff. The Chancellor assists the Colleges in identifying and developing opportunities to promote educational services and meet enrollment targets.

The Chancellor promotes a positive image of the District and works to strengthen working relationships with educational, business, and civic leaders in the area. A major aspect of the Chancellor's role is long-range planning to ensure the District's educational quality, fiscal stability, and community involvement.

The Chancellor serves as liaison to the Board of Trustees, administers Board-adopted policies, and represents the Board in its relationships with students, staff, and District residents. The Chancellor guides the Board in developing effective and appropriate long-range goals for the District Office and Colleges.

Vice Chancellor, Educational Services and Planning

The Vice Chancellor of Educational Services and Planning provides overall leadership in the development, implementation, and coordination of instructional and student support programs for the District. These programs include research, strategic planning, workforce/economic development, and educational technology.

The Vice Chancellor coordinates reports for federal, state, and local agencies, and reviews legislation which will affect programs and services District-wide. The Vice Chancellor also works closely with the Colleges to coordinate planning and implementation, to maintain instructional program inventory, and to monitor instructional and student support programs. He recommends changes in policies, organization, and procedures to optimize educational services and planning.

Vice Chancellor, Business Services

The Vice Chancellor of Business Services is responsible for the fiscal stability of the District and Colleges through the development, supervision, control, and evaluation of the District budget. The Vice Chancellor is administratively responsible for the Budget Office, Fiscal Services, Purchasing and Warehouse Services, and Maintenance and Operations. The Vice Chancellor supervises the District's communications systems, audits, tort claims, and money claims and is responsible for payment of all of the District's obligations, the receipt of all its income, and its adequate insurance coverage.

Vice Chancellor, Facilities Management

The Vice Chancellor of Facilities Management coordinates the planning, design, and construction of District facilities. A new critical component of this role is the administration of the \$498M Measure B Bond program (including new construction and modernization). Included in this is the responsibility for all fiscal and human resources involved in the design and construction process. The Vice Chancellor manages all aspects of facility projects, including oversight of plans and specifications, bid documents, contract awards, construction, change orders, and contract completion acceptances.

The Vice Chancellor represents the District with local, state, and federal agencies as well as with architects, engineers, technical consultants, legal advisors, inspectors, and contractor representatives. The Vice Chancellor prepares and coordinates the District Facilities Master Plan, organizes and coordinates all construction activities, manages the District's capital outlay program, and assumes responsibility for the mandatory Five-Year Construction Plans and Facilities Space Inventories.

Director, Human Resources

The Director of Human Resources provides leadership and direction for the Office of Human Resources. The Director is responsible for the development, organization, and implementation of effective and integrated human resource systems that work in concert with the District's mission, vision, and planning priorities. The Director ensures the effective administration of the District's HR services, including personnel operations, employee health and welfare programs, employee relations, payroll, policies and procedures, collective bargaining agreements, training, and staff diversity.

The Director advises College and District administration and the Board on human resource-related policies and procedures, and develops policies in response to legal requirements and District needs. The Director participates in negotiations with collective bargaining units and administers the District's labor contracts. In addition, the Director represents the District in grievances, arbitrations, and personnel-related legal actions and coordinates with legal counsel.

Chief Technology Officer

The Chief Technology Officer (CTO) is responsible for instructional technology, administrative computing, desktop support, user training, web support, and communications technology. The CTO provides leadership in the selection, design, implementation, and integration of information systems throughout the District.

The CTO keeps abreast of information technology developments and works collaboratively with the Colleges to plan and implement campus information technology expansion and upgrades. The CTO provides coordination and support of distance education initiatives District-wide.

Director, Public Information and Marketing

The District Director of Public Information and Marketing (PIO) implements and coordinates public information, community relations, marketing, legislative advocacy, and institutional advancement for the entire District. The PIO is the primary District spokesperson and alerts the media to stories of interest, prepares appropriate press releases, and hosts media representatives at meetings with the District and Colleges.

The PIO coordinates with the Colleges for the disbursement of all publicity and marketing efforts; and also maintains District-wide record of publicity. The PIO prepares copy for District press releases, newsletters, annual reports, and other publications.

Departmental Analysis and Plans

The following are synopses of the District Office functions by department, analyses of their strengths and weaknesses, and plans to remediate any problems that may exist.

Chancellor Services

The Office of the Chancellor is responsible for the District's total operation. The Office facilitates effective relationships between the Colleges and the District Office and works closely with the Presidents to provide academic leadership and careful evaluation of all programs and staff. The Chancellor assists the Colleges in identifying and developing opportunities to promote educational services and meet enrollment targets.

The Chancellor promotes a positive image of the District and works to strengthen working relationships with educational, business, and civic leaders in the area. A major aspect of the Chancellor's role is long-range planning to ensure the District's educational quality, fiscal stability, and community involvement.

The Chancellor serves as liaison to the Board of Trustees, administers Board-adopted policies, and represents the Board in its relationships with students, staff, and District residents. The Chancellor guides the Board in developing effective and appropriate long-range goals for the District Office and Colleges. The Office serves the Colleges and the District Office by:

- providing policy, advocacy, service, and resources for the operation of the colleges: Chabot College and Las Positas College;
- supporting the mission, goals, and priorities established by each college;
- directing public relations and development of a positive image in the communities it serves by working cooperatively with other educational segments, business, industry, and governmental agencies;
- influencing and supporting the local and state economic development plans, the internationalization of curriculum, the recognition of diverse cultures, and the artistic and scholarly achievement of the world's great artists and thinkers;
- providing general direction and coordination to the programs and operations of the college and providing centralized services and controls by maintaining over-all review of all college operations to avoid duplication and encourage coordination;
- providing district-wide coordination through the establishment of coordination devices that enhance communications;
- maintaining and enhancing a productive and open working relationship with the Board of Trustees to benefit the students served by both colleges;

Strengths of the Current System

The Chancellor's Office is committed to providing streamlined high-quality services to internal and external constituents. The staff is committed to the pursuit of the highest standards in collaboration with its users.

Weaknesses and Problem Areas of the Current System

The Chancellor's Office has been committed to transitioning the leadership of the organization in many key senior administrative positions. This transition coupled with significant advocacy and lobbying efforts have delayed the review and revision of many District processes.

Goals:

1. Review the structure, processes, and procedures as identified in this Strategic Plan and foster an action-oriented culture that leads to significant improvement in services.

Action Plans:

1.A Review Strategic Plan with new leadership and provide historical relevance.

1. Senior management workshop session: conduct a comprehensive session to foster greater understanding of relevant issues and plans for improvement.
2. Provide necessary resources: align required resources to identified priorities and recommend items to the Board of Trustees.

People Involved: Chancellor, Presidents, Vice Chancellors, managers in related functional areas.

Estimated Cost: Costs are estimated within this document under each functional area.

Timeline: Spring 2008 – and ongoing.

Person(s)

Responsible: Chancellor

1.B Evaluate each manager's progress in implementing their related piece of this plan on a monthly basis.

1. Evaluation: Each manager will provide a progress report on a monthly basis to their immediate supervisor and the Chancellor. This evaluation will also provide indicators for the annual performance evaluation.

People Involved: Area managers with their supervisors.

Estimated Cost: Staff time.

Timeline: Spring 2008 – ongoing.

Person(s)

Responsible: Area managers, their supervisors, and the Chancellor

2. Identify new funding sources that lead to additional resources and identify ways to meet the unique needs within the CLPCCD service area while maintaining fiscal stability.

Action Plan:

- 2A. *The Chancellor will increase local, State, Federal, and private sources to fund programs and priorities and communicate issues related to unfunded mandates and student access; success; and equity.*
1. Monthly contact: The Chancellor and/or the Public Information Officer will at minimum correspond with elected officials serving or capable of impacting the success of CLPCCD.
 2. Appropriations: The Chancellor will work with external professionals experienced in identifying, creating, and securing funding to support the Nursing program and other unique programs, creating green and clean programs that will provide high paying opportunities for students, and addressing the severe transportation challenges within our service area.
 - a. Introduce Appropriations Request for increasing health-related educational opportunities for students in the Bay Area to Congressman Pete Stark and Senator Dianne Feinstein (Health Resources and Services Administration).
 3. Contract Education and Economic Development: The Chancellor will expand the services and programs offered by the CLPCCD Contract Education and Economic Development program. This will include working with the Director to expand the Title IV.E program, apprenticeships, aggressively pursue opportunities as a certified OSHA Training Institute, and strengthen the District's role as the regional leader for training and workforce development. The District will explore opportunities to partner with the One-Stop to provide comprehensive business solutions: Staffing and Recruitment, Employee Training and Retention, Professional Development, Business Trends and Analysis, Pre-layoff Assistance, etc.

People Involved: Chancellor, Director of Contract Education and Economic Development, Public Information Officer, External Resource Development Team, Director of One-Stop, and College Presidents.

Estimated Cost: Positions identified in Economic Development and Contract Education section of this document. Self-funded by department with an estimated cost of \$460,000.

Timeline: January 2008 – June 2008.

Person(s) Responsible: Chancellor

2B. *The Chancellor will preserve and strengthen the District's human, fiscal, technological, and facility resources.*

1. Boards Fiscal Policies and resource priorities: The Chancellor will schedule a planning session with the Trustees to review the Board's Fiscal Policies and priorities for human, fiscal, technological, and facility resources.
2. Budgeting and Planning: The District will identify and strengthen the linkages between the Board's fiscal policies, planning, and budgeting processes. The planning time horizon will include the development of a five year fiscal plan.
3. GASB 45: The Chancellor will provide the Board of Trustees with alternative methods to consider for paying the unfunded retiree benefit liability.

People Involved: Chancellor, College Presidents, Vice Chancellors, Trustees (additional personnel – TBD).

Estimated Cost: Time

Timeline: January 2008 – August 2008.

Person(s)

Responsible: Chancellor and Vice Chancellors.

3. *Exert leadership in addressing climate change through stabilizing and reducing long-term energy costs, promoting sustainability, supporting the creation of energy and green tech programs, developing educational hubs near transit villages to serve commuter students, faculty, staff, and administrators.*

3A. *The Chancellor will increase local, State, Federal, and private sources to fund programs and foster an organizational culture that values sustainability.*

1. Policy and Commitment: The Chancellor will initiate the development of a comprehensive plan to achieve climate neutrality as soon as possible.
 - a. Create institutional structures to guide the development and implementation of the plan.
 - b. Complete a comprehensive inventory of all greenhouse gas emissions (including emissions from electricity, heating, commuting, and air travel) and update the inventory every other year thereafter.
 - c. Develop an institutional action plan for becoming climate neutral, which will include:
 - i. A target date for achieving climate neutrality as soon as possible.
 - ii. Interim targets for goals and actions that will lead to climate neutrality.

- iii. Actions to make climate neutrality and sustainability a part of the curriculum and other educational experience for all students.
- iv. Actions to expand research or other efforts necessary to achieve climate neutrality.
 - v. Develop mechanisms for tracking progress on goals and actions.
 - vi. Recommend the establishment of a policy that all new construction will be built to at least the U.S. Green Building Council's LEED Silver standard or equivalent.
- vii. Adopt an energy-efficient appliance purchasing policy requiring purchase of ENERGY STAR certified products in all areas for which such ratings exist.
- viii. Encourage the use and develop incentives for faculty, students, staff, and visitors to use public transportation.
- ix. Purchase or produce at least 15% of our institution's electricity consumption from renewable sources.
- x. Establish a policy and a District-wide committee that supports the climate and sustainability.

People Involved: Chancellor, Vice Chancellor for Educational Services and Planning, Vice Chancellor for Facilities, Vice Chancellor for Business Services, College Presidents, students, staff, representatives from the college sustainability committees, and the Board of Trustees.

Estimated Cost: TBD

Timeline: January 2008 – December 2008 (item 1c.ix. – TBD)

3B. *The Chancellor will explore the feasibility of developing community outreach centers serving as "Educational Hubs" within the transit villages in the Dublin and Union City transit centers.*

1. Appropriations: The Chancellor will work with external professionals experienced in identifying, creating, and securing Federal funding.
 - a. Introduce Appropriations Request for transit center educational hubs to Senator Barbara Boxer (Transportation, Education, Housing and Urban Development).
 - b. Introduce Appropriations Request for Dublin/Pleasanton transit educational center to Congressman Jerry McNerney (Transportation, Education).

People Involved: Chancellor, Vice-Chancellor for Educational Services and Planning, Vice-Chancellor for Facilities, Vice-Chancellor for Business Services, College Presidents, Director of Public Information, external Resource Development Team, College Personnel, students, community members, and the Board of Trustees.

Estimated Cost: TBD

Timeline: January 2008 – June 2008.

Person(s) Responsible: Chancellor

4. Provide leadership and a commitment to the following areas: diversity through recruitment, retention and promotion practices ;and initiatives to recruit, support, and retain a diverse student body.

4A. *The Chancellor will support and actively engage in promoting diversity within the District.*

1. Commitment: The Chancellor will support programs and initiatives that fosters a culture of inclusion. This commitment extends, but is not limited to the following:
 - a. Chabot College being recognized by the Hispanic Association of Colleges and Universities (HACU) as a Hispanic Serving Institution (HSI).
 - b. Statewide leadership in the consortium for the UMOJA community.
 - c. Support and encourage programs like PUENTE, Campus Change Network, DARAJA, International Student Program, and other programs that serve students and our college community.

People Involved: Chancellor, Vice Chancellor for Educational Services and Planning, College Presidents, and Director of Human Resources.

Estimated Cost: TBD

Timeline: January 2008 – June 2008.

Person(s) Responsible: Chancellor

5. Provide leadership and a commitment to providing a safe and healthy environment for teaching, learning, and working.

5A. *The Chancellor will support and actively engage in promoting a safe and healthy environment.*

1. Commitment: The Chancellor will monitor environmental and health issues that may impact the faculty, staff, students and community served by the District.
 - a. The Chancellor will apprise the Board of Trustees on any issues or concerns related to health and safety.
 - b. The Chancellor will attend training for crisis communication and NIMS Executive Training for Chief Executive Officers.
 - c. The District will work with the Colleges to develop emergency preparedness plans and train personnel.
 - d. Create a position to develop plans, provide training, and assess and manage risk – (Coordinator of Emergency Preparedness).

People Involved: Chancellor, College Presidents, Director of Human Resources, College security officers and other personnel to be identified.

Estimated Cost: Salary and benefits of coordinator (\$90,000 est.)

Timeline: January 2008 – June 2008.

Person(s) Responsible: Chancellor

6. *Provide leadership and to improve the performance and morale of District administrators, faculty, staff, and governance leaders.*

6A. *The Chancellor will lead and enhance the team of administrators through respect, and loyalty to one another, the Board of Trustees, the District, and in collaboration with the colleges (and laughter!).*

1. Delegation: The Chancellor will effectively delegate appropriate responsibilities to senior staff to increase efficiency, empower employees, and improve services.
2. College Presence: Increase services at the College and provide greater transparency and improved communication. This will include participation in town halls, recognizing employees, informational publications, visible attendance to campus events, and public forums to discuss issues.

People Involved: Chancellor, Senior Staff, District Employees.

Estimated Cost: TBD

Timeline: January 2008 – June 2008.

Person(s) Responsible: Chancellor

6B. *Participatory Governance through constituency-based committees will continue to serve as the methodology for successful collaboration and informed decision-making.*

1. Policy and Procedures: The Chancellor's Council will serve as the venue for discussing and communicating policy and procedures. The Council will also facilitate the discussion of many issues pertinent to achieving the mission of the District and provide an environment for open and honest communication.

People Involved: Chancellor, Chancellor's Council.

Estimated Cost: TBD

Timeline: January 2008 – June 2008.

Person(s) Responsible: Chancellor

Business Services

The following services are under the leadership of the Vice Chancellor of Business Services:

- Budget Office
- Fiscal Services
- Purchasing and Warehouse
- Maintenance and Operations.

Budget Office

The Budget Office works jointly with the Colleges' Business Services departments, their Financial Aid departments, and their state apportionment programs in the following ways:

Business Services – The Budget Office works closely with the College Business Services departments to develop the College budgets. The Budget Office provides the Colleges with state apportionment revenue projections, current year expense estimates, and District-directed allocation information. For year-end close, the Budget Office and Colleges jointly review items such as expense postings, grant/fund revenue accruals, and income deferral. During the year, the Budget Office and Colleges ensure that their budgets reflect projected revenue and expenditures accurately so that funds to support programs and students can be allocated efficiently.

Financial Aid – The Budget Office works throughout the year with Financial Aid to draw down funds and resolve any discrepancies between the federal site and the Financial Aid Office’s fund availability and disbursement. The two departments work together on issues related to administrative allowance transfers, postings in Banner, and year-end reconciliation. The accurate and timely drawdown of funds is crucial to ensuring a seamless financial aid process for students.

Program Directors – During the audit process, the Budget Office works with program directors (Calworks, EOPS, DSPS, VTEA, etc.) to provide information requested by auditors.

Strengths of the Current System

The District and Colleges both benefit greatly from the collaborative system used in the budgeting process. This process ensures all parties have complete information at all times; it also provides a way for each site to check the accuracy and validity of the other’s input. Throughout the year, the Office communicates regularly with the Colleges to facilitate problem resolution and process improvement. The separation of revenue receipt and disbursement functions for Financial Aid is another key strength of current operations.

Weaknesses/Problem Areas of the Current System

The inclusion of the Budget Office in all purchasing requisition approvals creates an extra layer in the requisition process and increases the potential for mistakes. The Financial Aid process is likewise not as efficient as it could be due to multiple personnel involved. In the revenue and invoicing system, checks from grantors and state agencies are received without backup, occasionally causing errors in check posting.

Program code reconciliation is another area of concern. State Report 311 specifies what account/object codes can be used with which program codes; however, some of the District’s codes do not match state codes, which creates occasional confusion.

Budget transfers still require a good deal of manual input and verification of entries. This process is time-consuming and subject to inaccuracy.

Goals

- 1. Reduce processing time for purchase requisitions.*

Action Plan: The Budget Office will program Banner to accept purchase requisitions for processing only if the referenced account has sufficient funding. In the event of non-sufficient funds (NSF) the requisition would be routed back to originator’s queue. The originator would re-evaluate the purchase and source of funding, and would submit a budget transfer request as needed. Change-order processing (increase/decrease in purchase orders) also need a NSF flag or a change in process whereby the budget review step is shifted to the initiator and/or final processor (Purchasing staff).

The institution of the purchasing credit card (P-Card) program will further reduce requisition processing time by transitioning some of the high-volume, low-dollar purchases directly to the P-Card.

People Involved: Purchasing, Fiscal Services, ITS.

Estimated Cost: Internal resources.

Timeline: January 2008 – June 2008.

Person(s) Responsible: Purchasing Staff, Budget Officer

2. Improve efficiency of Financial Aid processing.

Action Plan: The Budget Office will reduce the number of personnel involved in Financial Aid transactions (drawdown of funds, account journals, check disbursement, and bank reconciliation, etc.). The Budget Office will also work with the Accounting department to reassign duties so that the overall system is significantly more efficient and that fiduciary firewalls effectively are maintained. These two changes will create a more clear and direct communication channel for the Colleges' Financial Aid Offices.

People Involved: Fiscal Services, ITS, College Staff.

Estimated Cost: Internal resources.

Timeline: July 2008

Person(s) Responsible: Budget Officer, Fiscal Services Staff.

3. Improve efficiency of the revenue reconciliation/invoicing process.

Action Plan: Create a centralized system/position for revenue reconciliation and invoice processing related to incoming checks for grants, etc.

People Involved: Fiscal Services, ITS, College Business Services.

Estimated Cost: Internal resources.

Timeline: July 2008

Person(s) Responsible: Budget Officer.

4. Improve efficiency and reduce processing errors in the budget transfer process. (This area has been identified by the District Business Process Workgroup as one with opportunities for improvement.)

Action Plan: Automate the budget transfer process or program Banner with defaults which prohibit entries when codes are incongruent and when budget transfers do not net to zero. Set up Banner to reject input from funding sources with non-sufficient funds.

People Involved: Fiscal Services, ITS, College Business Services.

Estimated Cost: Internal resources.

Timeline: December 2007 – June 2008

Person(s) Responsible: Budget Officer.

Fiscal Services

Fiscal Services works closely with many departments at each College; virtually all business transactions requiring either disbursement or collection of funds terminate in Fiscal Services. This includes monthly payroll for all regular and part-time employees, weekly payments to vendors and students, and recording and collection of revenue. For some transactions, Fiscal Services interacts with external “customers” such as students, vendors, contractors, funding agencies, and regulatory entities.

Critical to the overall effectiveness and stability of Fiscal Services is the ability of the department to process its work in a way that ensures timeliness, proper classification, and fiscal compliance while facilitating the identification, tracking, monitoring, and reporting of activities.

Strengths of the Current System

The Banner administrative software system (which integrates finance, student, human resources, financial aid, accounts receivable, and fixed assets) is an important basic strength of Fiscal Services. Banner is well-tailored to the operations of the District as a fund-accounting-based component of the California Community College system, subject to Generally Accepted Accounting Principles and the Government Accounting Standards Board (GASB).

Fiscal Services is well regarded for its routine-transaction processing methods (e.g., processing invoices against annual open purchase orders) which are accomplished with a consistent degree of accuracy within a reasonable timeframe.

Weaknesses/Problem Areas of the Current System

Despite the smoothness with which it operates, the transaction-processing function is the most concerning and problematic. Although the step-by-step process is well understood, it is also fragmented, duplicative, redundant, and non-integrated. Furthermore, this process – such as it is – is not documented; this is particularly true for “exception” transactions.

In addition, the lack of initial training and on-going staff development hinders optimum employee performance. Similarly, the lack of adequate reporting and analysis tools often results in low customer satisfaction with the department.

The lack of integration and coordination between payroll functions and human resources has been a major source of concern. There is no clear delineation of roles and responsibilities which often leads to problems and/or mistakes in the payroll process.

Goals

1. Improve the responsiveness of Fiscal Services staff and delivery of Fiscal Services.

Action Plan: The department has instituted regularly-scheduled meetings with supervisors and staff to discuss general operational issues and service delivery methods. Meeting topics include: reasonable timeframes for responding to phone calls, emails, and other inquiries; processes that provide backup customer-service support to cover occasions when regular staff are not available; and extensive customer-service training.

People Involved: Fiscal Services staff; customer input.

Estimated Cost: Internal Resources.

Timeline: January 2007; continuous.

Person(s) Responsible: Director of Business Services.

2. Update Banner Software and other available tools to provide accurate cost accounting and reporting by program/area. (This task was the number one action item recommended in the KH study.)

Action Plan: Fiscal Services will modify the Banner chart of accounts to simplify reporting. The Crystal Reports Ad-Hoc reporting tool was released by IT in April 2007, and the Banner self-service web-based interface is due to be released in spring of this same year. Web-based interface will provide inquiry, approval, requisition, purchase order, and budget transfer functions to remote users at both Colleges.

People Involved: Fiscal Services, IT staff, and IT consulting.

Estimated Cost: \$36,000

Timeline: Chart of Accounts modifications - April 2007 through June 2008; Web for Finance - October 2007 through May 2008 (Finance query, budget, on-line requisitions); Crystal Reports - May 2007 through April 2008.

Person(s) Responsible: Director of Business Services and Chief IT Officer.

3. Better integrate and coordinate operations between payroll and Human Resource Services.

Action Plan: Facilitate the transition of Payroll processing from Business Services to Human Resources. Identify the tasks and functions to be centralized and transferred from Business Services, Budget and Fiscal Services, to the Payroll Manager.

People Involved: Business Services, Human Resource Services, IT staff and IT consulting, College staff as needed.

Estimated Cost: Internal resources for Business Services.

Timeline: Completed in Fall 2007.

Person(s) Responsible: The Chancellor and Vice Chancellor of Business Services.

4. Develop written procedures for all processes in Fiscal Services and provide training to District and College staff.

Action Plan: Fiscal Services staff will be participating in three hours of procedure development every other Friday until this goal is completed. Fiscal Services staff and other Banner users will be attending Banner training sessions for three hours on alternate Fridays until all users are adequately trained. Following this, Fiscal Services and IT staff will provide Banner training at each College for three to four hours every other month during the year.

Tasks will include:

1. Establishing written guidelines for routine transaction processing (e.g., memberships, conference/travel, revolving cash disbursements, employee reimbursement, and direct payments to vendors).
2. Developing standards for exception transaction processing.
3. Defining Banner data-entry standards which clearly identify transactions and render them easily-understood by all users and customers.
4. Reviewing the operational workflow to eliminate duplicative processing.
5. Expanding Banner access to enable employees to both perform and record tasks, thereby eliminating preparation of paper documents for data-entry purposes.
6. Dedicating resources to implement Banner features that yield the greatest operational benefit.
7. Documenting all process improvements as they occur. (This will yield draft training manuals and procedural guidelines.)
8. Instituting comprehensive Banner training and functional cross-training within all areas of Business Services so that employees can provide full-service customer support and remote troubleshooting.

People Involved: Business Services, ITS, college staff and consulting services.

Estimated Cost: \$64,000

Timeline: January – December 2008

Person(s) Responsible: Director of Business Services.

5. *Examine the current relationship and account structure with existing banks and financial institutions to improve the District's ability to manage cash, integrate cash operations with Fiscal Services and Banner, and maximize financial strength.*

Action Plan: Inventory all accounts, identify their purpose and desired function, consolidate banks, and modify the Banner system.

People Involved: Fiscal Services, Budget Office, ITS, College Business Office staff; banking representatives.

Estimated Cost: Internal Resources.

Timeline: July 2008

Person(s) Responsible: Director of Business Services, Vice Presidents of Business Services and Chief Information Technology Officer.

Purchasing and Warehouse Services

Purchasing and Warehouse Services handles many important processes for the District including:

- Requisition processing
- Purchase order issuance
- Formal and informal bidding for equipment, supplies, services and construction
- Reception and distribution of equipment and supplies
- Fixed-assets system processing
- Surplus equipment processing
- Contract administration.

Purchasing and Warehouse Services conducts the majority of its transactions with the Business Offices at both Colleges, M&O, the Measure B staff/consultants/contractors, and the other Business Office departments at the District. In addition, the department has regular interactions with the Information Technology Services department (ITS), College and District administrators, and any departments or individuals involved in specific purchasing processes.

Strengths of the Current System

The main assets of the Purchasing and Warehouse Services department are its top-tier software and hardware, its experienced staff, and its new manager. These elements combine to position the department for improvement. Already a turnaround has begun and the Purchasing staff has received positive customer-service feedback. The manager opened the lines of communication, conducted District-wide purchasing initiatives (such as the copier contract), and initiated a new

collaborative spirit with the Colleges. Anticipated improvements to the department will stem from a renewed staff focus on improved processes and customer service results.

Additionally, Measure B facilities improvements will strengthen the Warehouse services offered.

Weaknesses/Problem Areas of the Current System

Available technology is not being fully leveraged and is a shortcoming in Purchasing and Warehouse Services operations. Banner's on-line requisition feature, group printing to multifunction devices (MFD), electronic records management, intra/internet, third-party services, and regular operational status reports should be maximized to improve customer satisfaction, problem-solving ability, efficiency, and effectiveness.

Insufficient communication, particularly in the form of formalized, written procedures, constitutes another significant obstacle for the department. Unclear processes, coupled with uninformed preparation (in the case of some College/District personnel) can lead to unnecessary "last minute" work. In addition, the lack of training and cross-training leads to an environment in which staff is hesitant to abandon old methods and patterns.

Goals

1. *Implement business process improvements for low-dollar purchase transactions.*

Action Plan: Revise current procedures. Plan for the purchasing card (P-Card) program.

Implement, monitor, and revise the program to target a high user adoption rate and gain the greatest efficiency.

People Involved: Business Services, ITS, College Staff.

Estimated Cost: Internal Resources.

Timeline: April 2007 – June 2008

Person(s) Responsible: Manager, Purchasing and Warehouse Services.

2. *Establish new customer outreach and communication initiatives.*

Action Plan: Create a procedure manual for customer use in both paper and electronic format.

Establish an intranet web site and publish the manual. Increase awareness and knowledge of purchasing procedures followed by the district.

People Involved: Purchasing, ITS, College Staff.

Estimated Cost: Internal Resources

Timeline: June 2007- June 2008

Person(s) Responsible: Manager, Purchasing and Warehouse Services.

Maintenance and Operations (M&O)

The Department of Maintenance and Operations (M&O) is divided into three sections: Maintenance, Grounds, and Custodial Services. Incorporated into these sections are the functions of waste removal, recycling, composting, and vehicle maintenance.

The department is responsible for the maintenance and upkeep of the Colleges and the District Office. Its mission is to provide well-maintained, clean, comfortable, and safe facilities that are conducive to a positive learning environment.

The breadth of the work covered by M&O results in their staff interacting regularly with many faculty and staff District-wide. At the Colleges, the M&O staff works most closely with the Presidents, Vice Presidents, Deans, Security Officers, the IT department, and the Theater managers. M&O also coordinates with P.E./Athletics and the College Business Offices to schedule outside user groups, games, classes, irrigation times, field preparation, and student bus trip schedules. At the District Office, M&O most often is involved with the Purchasing/Warehouse department and Accounting.

College departments and staff request M&O services through e-mail, telephone calls, and – in some cases – directly through the electronic work order system. M&O office staff work closely with the switchboard/mailroom, Accounting, and Purchasing departments to expedite requisitions, Banner MOs, vendor invoices, contracts, budgets, and construction bidding processes.

Strengths of the current system

The M&O Department's most notable strength is its outstanding customer service. All department members – from the office staff to the custodial, grounds, and maintenance staff – work diligently to ensure that most requests and problems are resolved in an efficient and timely manner. Partnered closely with this ethic is the commitment of the M&O department to providing clean, pleasant, and well-maintained facilities.

Weaknesses/problem areas of the current system

Internal and external communications within the District are not always efficient and can result in unnecessary complications and delays. Lack of communication with the College switchboards/ security departments – and very slow mail service – make it difficult for M&O to respond to service calls in a timely manner.

Lack of staffing is the primary weakness of the department – both within the department itself and at the Colleges. With the passage of Measure B, both Colleges are adding much needed additional square footage; however there has been little discussion of the additional staff that will be needed to maintain the Colleges new buildings.

Goals

1. Upgrade the electronic work order system to improve communication and customer service.

Action Plan: Purchase new software to increase user access through the district intranet. The new work order system will provide intranet access for the submission of work order requests as well as the ability to research status reports. Training will be conducted for designated users and the end result will be direct access for users, and improved efficiency/communication.

People Involved: ITS, M&O, Designated college staff

Estimated Cost: \$5,000

Timeline: 2007-2008

Person(s) Responsible: Director of M&O

2. Develop and implement a 5-year staffing plan.

Action Plan: Develop a realistic staffing plan that projects a clear picture of current staffing. As the facilities expand in square footage, determine the staffing increases required to maintain the facilities at a minimum of the current level of service.

People Involved: M&O Managers, Human Resources, Business Services.

Estimated Cost: Full Implementation - \$2,000,000.

Timeline: 2007-2011.

Person(s) Responsible: Director of M&O.

The following table indicates staffing needs for future growth but doesn't include increased staffing for current vacancies. This is a flexible document that can be adjusted as funds become available.

Educational Services and Planning

The department of Educational Services and Planning coordinates District-wide initiatives related to institutional effectiveness and educational programs. It provides support, advocacy, and resources so that the Colleges and District can offer strong academic and student services. In addition, the Vice Chancellor is responsible for Economic Development and Contract Education at the District.

Educational Services and Planning works closely with both Chabot and Las Positas to develop, coordinate, and communicate policies and procedures with various task forces and constituent groups. The Vice Chancellor is in regular contact with the Colleges and works collaboratively with them to determine the most effective use of funds and efforts.

Strengths of the Current System

One of the great strengths of Educational Services and Planning is the willingness of its staff to evaluate and change current practices to maximize local strengths, gain public trust, and – ultimately – achieve excellence. Similarly, the department benefits from the District’s long-standing culture which values innovation, flexibility, and risk-taking.

More concretely, there are two committees that have significant impact on planning, coordination, and decision making District-wide. The District Curriculum Council serves to coordinate relevant academic and curricular issues between the two Colleges. This Council provides a framework for the District Office and the Colleges to collaborate on interests and better serve students. The District Enrollment Management Committee (DEMC) is vital in establishing District and College student growth targets, allocation of resources, and review of program productivity. Both committees develop strategies to resolve issues within the District and provide further direction.

Weaknesses/Problem Areas of the Current System

A developing area of weakness is the decline in enrollment numbers, both overall and for specific populations (i.e., international, concurrent, evening, and weekend students). The Colleges and District need to actively enhance their presence – within the community, with other schools, and with local institutions – to strengthen collective outreach opportunities.

In addition, the District would benefit from strengthening its role in the areas of research and grants.

Goals

- 1. Strengthen recruitment and retention strategies.*

Action Plan: The District Enrollment Management Committee (DEMC) will ask the College Enrollment Management Committees (CEMCs) to identify successful recruitment and retention strategies. The Counseling division at each College, including the Dean and faculty members, shall create the Counseling division’s annual discipline plan. The document will include qualitative and quantitative measurements of activities, timelines,

accountability strategies, and student contact hours. The plan will be submitted concurrently with the instructional discipline plans in accordance with CEMC guidelines.

People Involved: Vice Presidents of Student Services and Academic Services, Deans of Counseling, faculty, Dean of Educational Services and Planning, Director of Public Information and Marketing, CEMC, and DEMC.

Estimated Costs: There may be costs associated with the identified strategies in addition to the expense of personnel time. Each CEMC will be funded up to \$10,000; funding for expenses beyond this dollar amount will be considered based on the merits of the identified strategy and the recommendation by the DEMC to the Chancellor.

Timeline: 2007-2008

Person(s) Responsible: Vice Chancellor of Educational Services and Planning.

- 2. Educational Services and Planning will strengthen its role in providing quality assistance in the enrollment management process. The department will place emphasis on providing timely and accurate FTEF allocations, enrollment targets, and enrollment monitoring reports.*

Action Plan: The District Enrollment Management Committee (DEMC) will prepare a draft document explaining the process for making decisions regarding FTEF allocations and targets. The document will provide the timeline and methods for communication with the College Enrollment Management Committees (CEMCs). The Dean will attend CEMC meetings and serve as liaison for the Vice Chancellor.

People Involved: DEMC Committee Chair, CEMC Committee Chairs, DEMC Members, Dean and Vice Chancellor of Educational Services and Planning.

Estimated Cost: Other than personnel, to be determined.

Timeline: The draft document explaining all aspects of DEMC (i.e. timelines, allocation process, establishment of targets, etc.) will be completed by July 2008.

Person(s) Responsible: Vice Chancellor of Educational Services and Planning.

- 3. Educational Services and Planning – in collaboration with the Colleges and Human Resource Services – will develop a process for tracking, monitoring, and reporting the Full-time Faculty Obligation. All state reporting coordinated by the District Office will be identified to include relevant student data and characteristics.*

Action Plan: The department will initially map out the processes currently in place. The Director of Human Resources will submit full-time faculty obligation reporting, and the IPEDS reporting data will be reconciled in collaboration with the Director, Vice Chancellor, Dean, and the Academic Service Vice Presidents. In addition, the

department will conduct an audit of all reporting (VTEA, Basic Skills, FTES {P-1 – P-4}, Flexible Calendar, reconciling curriculum, instructional programs inventory, etc.) and will develop a process for administering them.

People Involved: Director of Human Resources, Vice Chancellor and Dean of Educational Services and Planning, Chief Technology Officer, Vice Presidents of Academic Services.

Estimated Cost: Programming time. May require the addition of a District-wide researcher.

Timeline: March - December 2008

Person(s) Responsible: Director of Human Resources (to be transitioned from Vice Chancellor of Educational Services and Planning).

4. *Work with the Colleges' Admissions and Records departments to develop policies and procedures for apprenticeship programs' initial establishment, as well as student/apprentice registration, rosters and grade report generation.*

Action Plan: Create a Standard Operations Procedures manual for processing a new apprenticeship program, as well as on-going maintenance. To include State Chancellor's office interface requirements, quarterly reporting requirements, etc.

People Involved: Director of Economic Development and Contract Education, Director of Admissions and Records at Colleges, State Chancellor's Apprenticeship Liaison.

Estimated Cost: Not applicable.

Timeline: By September 2008.

Person(s) Responsible: Director of Economic Development and Contract Education.

5. *Review FTES generation derived from Work Experience and develop a plan to assist and encourage expansion of Work Experience credit.*

Action Plan: Create a template for generating FTES from work experience. The template will be modeled on apprenticeship work experience programs and provided to the DEMC as a guide.

People Involved: Director of Economic Development and Contract Education, Vice Chancellor and Dean of Educational Services and Planning, State Chancellor's Office Personnel.

Estimated Cost: Not applicable.

Timeline: By June 2007.

Person(s) Responsible: Director of Economic Development and Contract Education.

6. Work with stakeholders to explore the feasibility of educational centers in the cities Dublin and Union City.

Action Plan: In collaboration with the College Presidents and city representatives, the Vice Chancellor will study the creation of educational centers in Dublin and Union City. Discussion would include a review of California Postsecondary Education Commission (CPEC) guidelines for establishing centers eligible for funding under SB 361.

People Involved: Vice Chancellor of Educational Services and Planning, Vice Chancellor of Business Services, College Presidents, School Superintendents, and the Mayors of Dublin and Union City.

Estimated Cost: Staff time.

Timeline: The review will be concluded by January 2008 and a recommendation made by March 2008.

Person(s) Responsible: Vice Chancellor of Educational Services and Planning.

7. Work with the Colleges to develop policies and procedures for identifying, soliciting, receiving, and managing grants. (KH Consulting – Strategic Cost Management).

Action Plan: Vice Chancellor of Educational Services and Planning and the Vice Chancellor of Business Services will schedule meetings with both Vice Presidents of Business Services to map processes and procedures for receiving grants. The group will review existing grants and will study multi-College districts with successful grant departments. It will then outline a process which delineates roles, responsibilities, and relevant factors.

People Involved: Vice Chancellor of Educational Services and Planning, Vice Chancellor of Business Services, Vice Presidents of Business Services.

Estimated Cost: Staff time. Possibly District-wide grant writer.

Timeline: Fall 2008.

Person(s) Responsible: Vice Chancellor of Educational Services and Planning.

Economic Development/Contract Education

District Economic Development and Contract Education works with companies to strengthen their organizational effectiveness, competitiveness, and profitability through education, training, and services.

Contract Education's work with the Colleges is limited almost exclusively to its apprenticeship setup and processing. The vast majority of the department's interactions are with other District Office departments (e.g., HR, Payroll, Purchasing, ITS, Public Information) and are all directly related to the actual "nuts and bolts" of the Contract Education classes, including the hiring and payment of teaching staff.

Strengths of the Current Operating System

Economic Development/Contract Education has been growing steadily since 2002; this growth can be expected to double or triple over the next several years. The department is expanding its apprenticeship offerings and adding new programs on a regular basis.

In addition to partnering with the Colleges on apprenticeship programs, Contract Education has begun working with the colleges to address training needs that arise from local community partners. Contract Education provides timely assessment and training for those organizations, and the resulting profit strengthens the Colleges financially. Furthermore, these initial contacts broaden the Colleges' impact in the community and can ultimately benefit related organizations such as the College foundations.

Economic Development/Contract Education is in a strong position to expand its services to the community and positively impact the District's financial revenues. Careful planning will allow the department to continue as one of the California Community Colleges' top five economic development organizations, and will provide financial resources for the District for years to come.

Weaknesses/Problem Areas of the Current Operating System

Currently, apprenticeship programs throughout the District are distributed across all three sites (Chabot College, Las Positas College, and the District Office), resulting in duplication in student registration and apprenticeship tracking. Providing one point of contact would allow the Colleges to focus on their areas of strength while the organizational portion of the apprenticeship programs would be coordinated by the District Office. In addition, this arrangement would build upon the already strong relationships that the District Office has in this area with the state Chancellor's Office and U.S. Department of Labor.

The District Economic Development Task Force should be revived and should meet quarterly to re-enforce the current relationship between the District Office's Contract Education department and the two Workforce Development Deans at the Colleges.

Economic Development/Contract Education's ability to expand its services is hampered by its limited staff. In order to serve the community fully, expand the number of apprenticeship programs, and better coordinate economic development with the Colleges, the department needs the following additional staffing positions:

- Assistant Program Coordinator – scheduling, invoicing, instructor coordination.
- Apprenticeship Coordinator – coordinating programs, acting as liaison with program sponsors, recruiting new programs to the District.

- Marketing & Sales Associate – working with Marketing & Sales Manager to develop new community contacts, deepen relationships with current clients, and expand the service area.
- Program Coordinator – working with Senior Program Coordinator on major contracts (Title IVE) and continued program delivery as these contracts grow.
- Course Registrar – resource for new training programs that require registration assistance be made available to attendees.
- Program Coordinator – OSHA Training Institute

All of these positions will be supported by the revenue generated by the department.

Goals

1. Revitalize the District Economic Development Task Force.

Action Plan: The Chancellor will convene the Task Force to coordinate work between the Colleges and the District.

People Involved: Chancellor, Economic Development Task Force, Director of Economic Development, and College Presidents.

Estimated Cost: Not applicable.

Timeline: To be completed by June 2008.

Person(s) Responsible: Chancellor

2. Oversee administration of all District apprenticeship programs.

Action Plan: Work with revived Economic Development Task Force to establish a strategy for partnering with the Colleges. Establish clear roles and create a profit-sharing plan to equitably distribute expenses and revenue. Review each apprenticeship program to establish that all available resources are being collected (RSI, FTES). Hire an Apprenticeship Coordinator to administer program and to work with campus Admissions and Records and Business Services.

People Involved: Director of Economic Development, Vice Chancellor of Educational Services and Planning, Chancellor, Presidents, Board of Trustees, Vice Presidents, Workforce Development Deans, Human Resource Services (for hiring process).

Estimated Cost: \$85,000 for Apprenticeship Coordinator salary, plus benefits.

Timeline: 2007-2008.

Person(s) Responsible: Director, Economic Development/Contract Education.

3. Coordinate a district-wide community outreach and referral system for Contract Education.

Action Plan: Make regular presentations to the Board of Trustees and the campus leadership to make them aware of the continued fiscal and educational contributions of the Contract Education Program. Reestablish District Economic Development Task Force. Create and maintain a database of contacts, and share referrals with foundation staff. Create new informational pieces for distribution by the foundations and by PR staff at community events.

People Involved: Director of Economic Development/Contract Education, Vice Chancellor of Educational Services and Planning, Chancellor, Board Members, College leadership, Workforce Development Deans, Foundation Directors, and ITS.

Estimated Cost: \$1,500 for informational materials.

Timeline: 2007-2008

Person(s) Responsible: Director of Economic Development/Contract Education.

4. *Expand Contract Education revenue generation.*

Action Plan: Update the market analysis report and determine anticipated growth opportunities in service area. Partner with local and statewide organizations to establish new training opportunities. Hire a new Sales Associate and additional support staff (Program Coordinator, Course Registrar). Obtain office space for additional staff.

People Involved: Director of Economic Development and Contract Education, Marketing & Sales Manager (Contract Education), Vice Chancellor of Educational Services and Planning, Chancellor, Board Members, Human Resource Services (for hiring process), Director of Facilities (for space issues).

Estimated Cost: Market analysis consultant (\$3,000) Marketing and Sales Associate (\$90,000 + benefits) Program Coordinator (\$70,000 + benefits), Course Registrar (\$50,000 + benefits), office space for new positions.

Timeline: 2007-2008

Person(s) Responsible: Director of Economic Development/Contract Education.

5. *Research the feasibility of establishing Economic Development and Contract Education as a non-profit (501c3). Develop a business plan depicting how the non-profit would be structured and how it would interface with the District.*

Action Plan: Review literature related to non-profit (501c3) community college programs. Upon completion of review, determine whether to recommend that Economic Development/ Contract Education should be changed to a 501c3. The recommendation will include all elements of transition, timeline, costs, etc.

People Involved: Director of Economic Development and Contract Education, Vice Chancellor of Educational Services and Planning, Vice Chancellor of Business Services, and legal counsel.

Estimated Cost: May require minimal travel resources and legal counsel.

Timeline: Research completed by May 2008.

Person(s) Responsible: Vice Chancellor of Educational Services and Planning.

6. *Research structures of Contract Education and Economic Development in consultation with the Economic Development Task Force will identify key elements to be provided – apprenticeships, work experience, contract education, grants, community education, etc.*

Action Plan: The Director of Economic Development/Contract Education will review successful organizational structures for community college Contract Education/Economic Development programs. This review will also incorporate findings of the KH study and Board policy. Upon completion of the review, the Director will make a recommendation to the Chancellor regarding organizational and program structure.

People Involved: Director of Economic Development/Contract Education, Chancellor, Vice Chancellor of Educational Services and Planning, College Presidents, Workforce Development Deans, and the Economic Development Task Force.

Estimated Cost: May require minimal travel resources and staff time.

Timeline: Review will be conducted by February 2008.

Person(s) Responsible: Director of Economic Development/Contract Education.

Facilities Planning and Management

The District Office has historically coordinated the planning, development, and maintenance of all facilities District-wide. This includes development of the Colleges' Facilities Master Plans, the state Five-Year Capital Construction Plans, and facilities space inventories for the Colleges. Prior to December 2006, this responsibility was handled by the Vice Chancellor of Business Services. It is currently handled by the Vice Chancellor of Facilities Planning and Management.

Because of the newness of this arrangement, the breakdown into "strengths" and "weaknesses" is not applicable. Instead, the following is a summary of the transition in this area and its current status.

Prior to December 2006

The initial planning and needs assessment for the \$498 M facilities bond measure was conducted in the spring, summer, and fall of 2003. Measure B (Proposition 39) was successfully passed by the voters of the District on March 2, 2004.

The Bond is providing the District with funds to strengthen and modernize its facilities so that students will have access to updated and safe equipment, technology, and buildings.

Chabot College currently serves over 13,000 students at a campus that is more than 40 years old. Most of its buildings are in desperate need of repair and modernization. Measure B will update and expand job training classrooms, modernize labs used for training nurses, remove unsafe asbestos, and repair leaky roofs and decaying walls.

Las Positas College serves more than 8,500 students on a campus originally built as a College extension. With enrollment projected to top 15,000 students in just a few years, the College needs to “build out” its campus to accommodate student demand. Through Measure B, Las Positas College will be able to construct a new science and technology building, a child development center, athletic fields, and new classroom buildings.

District-wide, the Bond will allow for technology improvements in computer equipment and infrastructure. These improvements include networking elements such as fiber-optic wiring and conduit as well as classroom equipment, library materials, network devices, communication equipment, and technology advancements that support instruction.

Passage of the facilities bond made it necessary for the District to seek assistance from an experienced program management firm to execute the bond projects; the District did not have sufficient in-house staff to coordinate broad-based and intensive work. The District undertook an open, competitive process to select a program management firm and ultimately contracted with DMJM, a large professional program management company.

The contract ran for 24 months, with a scheduled end-date of June 22, 2006. DMJM provided bond program support, contract development and administration, document control, and program control. It also managed projects at each College, financial management (including interface with the District SCT/Banner software system), and oversight of master planning.

Post December 2006

As the bond program evolved over the first 20 months, construction costs began to skyrocket due to the rapid rise of construction materials. As a result, the District decided to accelerate the building program timeline to complete all construction within five years in lieu of the original ten-year plan. In addition, the District decided it needed to assume greater responsibility for the project’s technical aspects in order to maintain quality while remaining accountable, economical, and consistent. Furthermore, the District believed that the construction process would be more responsive and less cumbersome if it had internal (rather than external) control of the program.

In April 2006, the Chancellor recommended to the Board that the District phase out the use of consultants by January 2007 and that it hire internal staff to handle the responsibilities of the

project. The District hired a Vice Chancellor of Facilities Planning and Management in December 2006, and has continued to hire additional project staff as needed. This transition has resulted in less cost to the District and more efficient communications and operations.

The Vice Chancellor of Facilities Planning and Management represents the District with local, state and federal agencies as well as with architects, engineers, technical consultants, legal advisors, inspectors and contractor representatives. In addition to working on Measure B projects, the Vice Chancellor prepares and coordinates the District's Facilities Master Plan, manages the District's Capital Outlay Program, and is responsible for the Five-Year Construction Plan and Facilities Space Inventories.

Goals

1. Hire Program Controls Manager

Action Plan: Establish the position and Job description and recruit qualified individuals for capital projects (including Measure B). This person will ensure that the project's scope, schedule and cost are appropriately defined and that reporting systems are in place to maintain financial accountability using Prolog project management and Banner accounting systems.

People Involved: Human Resources, Hiring committee.

Timeline: Pending budget review and office space available. Projected October 2007.

Estimated Cost: \$102,000

Person(s) Responsible: Vice Chancellor of Facilities Planning and Management.

2. Enhance IT support through use of District ITS staff for the facilities modernization program.

Action Plan: Define resources and system requirements to communicate to IT.

People Involved: Vice Chancellor of Facilities Planning and Management, Chief Technology Officer.

Estimated Cost: \$100,000.

Timeline: October 2007 – May 2008.

Person(s) Responsible: Vice Chancellor of Facilities Planning and Management.

3. Issue a RFQ for on-call architectural and engineering services (multi-year, task-based) to make progress on the facilities modernization program.

Action Plan: Define resource requirements and communicate them to Purchasing.

People Involved: Contract Manager, Director of Purchasing, Buyer, Board of Trustees.

Estimated Cost: Utilize in-house staff to procure.

Timeline: Completed.

Person(s) Responsible: Vice Chancellor of Facilities Planning and Management.

4. *Change the current construction management contracts to ensure a more efficient approach for the facilities modernization program.*

Action Plan: Re-issue contracts that are multiplier-based and employ a staff augmentation approach.

People Involved: Contract Manager, Director of Purchasing, Buyer, Board of Trustees.

Estimated Cost: Reduce the cost-per-hour of services.

Timeline: Completed.

Person(s) Responsible: Vice Chancellor of Facilities Planning and Management.

5. *Discontinue operations with the current program management firm and restructure the District Facilities department to perform these critical functions itself at a reduced overall cost.*

Action Plan: Reduce expenses and transition the functions to District staff.

People Involved: Vice Chancellor of Facilities Planning and Management.

Estimated Cost: Reduce the cost for services.

Timeline: Completed June 2007

Person(s) Responsible: Vice Chancellor of Facilities Planning and Management.

6. *Streamline the Accounts Payable and Accounting processes and practices for the facilities modernization program.*

Action Plan: Reduce the number of steps, reviews, and signatures currently being used in these processes.

People Involved: Vice Chancellor of Facilities Planning and Management, Accounting Assistant, Director of Business Services.

Estimated Cost: Reduced time for staff, and more timely and accurate information available to the Project Managers.

Timeline: Completed April 2007.

Person(s) Responsible: Vice Chancellor of Facilities Planning and Management.

7. *Streamline the Procurement processes and practices for the facilities modernization program.*

Action Plan: Reduce the number of steps, reviews, and signatures currently being used for the contracting process.

People Involved: Vice Chancellor of Facilities Planning and Management, Buyer, Purchasing Manager, Contracts Manager.

Estimated Cost: Reduced time for staff, and more timely and accurate contracts available to the Project Managers.

Timeline: Completed.

Person(s) Responsible: Vice Chancellor of Facilities Planning and Management.

Human Resource Services

The Office of Human Resources is responsible for the development and implementation of an effective and efficient HR program that is responsive to District and employee needs. The Office serves the Colleges and the District Office by:

- facilitating the recruitment and selection of employees;
- developing and administering the classification and compensation system;
- administering health benefit plans;
- developing, interpreting, and applying HR-related Board policies and procedures;
- negotiating and administering labor contracts;
- administering payroll,
- maintaining official personnel files; and
- overseeing and facilitating the application of Human Resources and HR-related policies and procedures at the Colleges and the District Office.

The Office of Human Resources collaborates closely with all areas throughout the District and is committed to strong customer service and ongoing and effective communication. To be successful, the Human Resources staff must be knowledgeable, accessible, and understand the needs, goals, and timelines of the Colleges and the District Office. Similarly, the faculty, staff, and administrators at the Colleges and District Office must be able to access the HR staff easily and must receive from them consistent and reliable information.

Strengths of the Current System

Human Resources is committed to providing high-quality professional service to the District. The staff takes pride in its work and has a solid understanding of how its contributions fit into the overall mission and goals of the Chabot-Las Positas Community College District. The department has a strong sense of teamwork and flexibility and is receptive to service-oriented improvements and change.

Weaknesses and Problem Areas of the Current System

Currently, HR is establishing priorities and realigning responsibilities throughout the office. Key processes are being reviewed and revised and a staffing plan has been outlined. Budget constraints may delay the implementation of the staffing plan; however, critical responsibilities must be covered and overtime has been budgeted.

Banner, some Human Resources processes/policies, and portions of the collective bargaining agreements are not in alignment, resulting in confusion and frustration for staff. The department will further discuss, clarify, and refine the system to address this problem. Numerous Human Resource procedures either are outdated or do not exist; this problem is critical and needs to be addressed immediately. Many forms are confusing, outdated, and/or not in compliance, and instructions on how to complete and process the forms are minimal. In addition, the HR website provides limited information for employees and must be improved significantly.

The Human Resource function needs a strong presence at both Colleges to allow local support for employees and to facilitate operations District-wide. Finally, Human Resource functions and the Payroll functions need much stronger coordination and synchronization. The District needs to clarify processes and initiate group discussions to address these areas of concern.

Goals:

1. *Restructure and staff the Office of Human Resource Services to provide the professional expertise required to assure integrated and proactive human resource services and support for the District and its external customers.*

Action Plans:

- 1.A *Clearly identify the functional areas of HR and delineate areas of responsibility to include:*
 - i. Employment and Employee Relations: recruitment, staffing, classification, compensation, step placement, step adjustments, records, employment verification, performance management, reorganization, layoff, disciplinary processes, immigration/Visas, background checks, TB screening, harassment, discrimination.
 - ii. Benefits: insurance (health, dental, vision, life, long-term disability), retirement programs, tax-deferred annuities, flexible spending accounts, Family Medical Leave Act, Workers' Compensation, Americans with Disabilities Act, leave issues (vacation, sick, extended sick, holidays, bereavement), employee drug testing, unemployment insurance.

- iii. Payroll Services: payroll processes, payment of District-paid employee fringe benefits, federal and state payroll tax returns, payroll reports, withholding of employees' contributions (e.g., retirement programs, FICA, etc.), timesheets and service reports, data entry, pay warrant preparation and distribution, wage garnishments, payroll record management.
- iv. Administration: contract negotiation, labor relations, policy development, legal issues, budget, communications.
- v. Employee Development: orientation programs, supervisory and leadership development, human resource subject-matter training.
- vi. Technology and Information Systems: Banner, reporting processes, report development, web page development and maintenance, web-based form development, data integrity, data analysis, Listserv.

People Involved: HR Staff.

Estimated Cost: Staff time.

Timeline: Phase 1: Summer 2007; Phase 2: September - Spring 2008

Person(s) Responsible: HR Director

1.B Provide staffing to address District needs and to deliver effective services.

1. Employment and Employee Relations:
 - a. Manager: Create a manager position that is parallel to other key functional areas (i.e., Benefits and Payroll).
 - b. Human Resources Supervisor (filled)
 - c. Analyst: Create an human resources analyst position
 - d. Human Resources Technician II (filled)
 - e. Human Resources Technician I (filled)
 - f. Temporary College Clerk (student) (vacant)
2. Benefits
 - a. Manager (filled)
 - b. Human Resource Technician II-Benefits and Workers' Compensation (filled)
 - c. Human Resource Technician II-Benefits and Workers' Compensation (filled)
3. Payroll
 - a. Manager: Established manager position in Fall 2007 to assume leadership role in development, direction, and implementation of payroll function that provides well-integrated services and support to District (recruiting).
 - b. Payroll Supervisor (filled)
 - c. Payroll Technician (filled)
 - d. Payroll Technician (filled)
4. Administration
 - a. Assistant Director (vacant)
 - b. Director (filled)

- c. Executive Assistant (filled) – review and revise job description.
- 5. Employee Development
 - a. No positions currently assigned to unit. Director works with Director, Contract Education, and human resources staff to cover highest-priority needs.
- 6. Technology and Information Systems
 - a. No positions currently assigned to unit. Staff in Information Technology (Senior Programmer Analyst I and II) provide support for Banner functions, and human resource technicians provide support for webpage development and electronic form development. Technology needs of unit can support 2 FTE staff.

People Involved: HR Staff, Recruitment Committees.

Estimated Cost: Compensation for added and reclassified positions.

Timeline: Implement as positions and funding are approved.

Person(s) Responsible: HR Director.

1.C Utilize short-term consultants.

- 1. Identify critical needs and hire short-term, high-caliber consultants or employees, as appropriate.

People Involved: HR Staff.

Estimated Cost: To be determined depending on expertise of consultant and identified need (estimated \$20,000)

Timeline: As needed.

Person(s) Responsible: HR Director

2. Improve processes and procedures with the goal of making human resource operations transparent, user-friendly, and efficient.

Action Plans:

- 2.A Assess current Human Resources policies and procedures to eliminate redundant and unnecessary processes. Seek input from users.*

People Involved: HR staff, College liaisons

Estimated Cost: Staff time.

Timeline: On-going

Person(s) Responsible: HR Director, HR Supervisor, Benefits Manager, Payroll Manager.

2.B Evaluate all Human Resources forms; update and improve to simplify and facilitate processing. Eliminate unnecessary and complicated forms.

People Involved: HR staff, College liaisons

Estimated Cost: Staff time, printing costs (estimated \$500).

Timeline: Phase 1: August 2007; Phase 2: September 2007 – December 2008.

Person(s) Responsible: HR Director, HR Supervisor, Benefits Manager, Payroll Manager.

2.C Eliminate all triplicate human resources forms developed by the District.

People Involved: HR staff

Estimated Cost: Staff time.

Timeline: September 2007- June 2008

Person(s) Responsible: HR Supervisor.

2.D Develop and implement a personnel action form for processing routine and Board personnel action requests. Seek input from Payroll and Finance staff, College liaisons, management, and other users.

People Involved: Staffing: HR staff, various user groups

Estimated Cost: Staff time.

Timeline: Phase 1: September 2007; Phase 2: Fall 2007 – June 2008

Person(s) Responsible: HR Supervisor.

2.E Convert all Human Resources forms to electronic format (pdf) so a user can complete them electronically and return them either via mail or as an attachment to an email message. Post forms on human resources website; communicate availability to District.

People Involved: HR staff

Estimated Cost: Staff time.

Timeline: October 2007 – June 2008

Person(s) Responsible: HR Supervisor

2.F *Implement plans to convert the majority of Human Resource forms to a web-based format.*

People Involved: HR staff; IT or outside technical support.

Estimated Cost: Staff time.

Timeline: July 2008.

Person(s) Responsible: HR Supervisor.

2.G *Create a matrix of types of leave (e.g., sick, extended sick, FMLA, ADA, Workers' Compensation) to ensure the appropriate and required application of state and federal laws, California Education Code, Board policies, and collective bargaining agreements. The matrix should include how and when they are enacted, and the required paperwork, practices, notifications, and follow-up*

People Involved: HR staff; Legal Counsel

Estimated Cost: Legal fees (estimated \$10,000).

Timeline: Phase 1: July 2007 (completed); Phase 2: Fall 2007 – June 2008.

Person(s) Responsible: HR Director, Benefits Manager, HR Supervisor, Payroll Manager.

2.H *Identify the signature authority for various HR actions with the goal of minimizing the number of signatures, eliminating unnecessary signatures, and reducing the amount of routing.*

People Involved: HR staff; College liaisons

Estimated Cost: Staff time.

Timeline: Phase 1: November 2007; Spring 2008

Person(s) Responsible: HR Staff

2.I *Clarify and codify the differentiation between employee classifications, including independent contractor and professional expert assignments.*

People Involved: HR staff; Legal Counsel

Estimated Cost: Staff time, legal fees.

Timeline: November 2007

Person(s) Responsible: HR Director, HR Supervisor.

2.J *Develop and distribute clear and concise information about benefit options to new employees to aid in the decision-making and benefit sign up process.*

People Involved: HR staff

Estimated Cost: Staff time.

Timeline: September 2007 – June 2008

Person(s) Responsible: Benefits Manager.

2.K *Develop and post on Human Resources website a clear summary of benefit options for District employees as well as information addressing “frequently asked questions.”*

People Involved: HR staff

Estimated Cost: Staff time

Timeline: Phase 1: September 2007; Phase 2: ongoing.

Person(s) Responsible: Benefits Manager.

2.L *Revive administrator evaluation process. Review forms and processes and modify, if necessary, to fit the online environment. Improve notification and follow-up processes. Work with KH Consulting, as appropriate.*

People Involved: HR staff

Estimated Cost: Staff time.

Timeline: Fall 2007; ongoing

Person(s) Responsible: HR Director

2.M *Implement process improvements to payroll function. Streamline procedures and clarify processes for employees. Assure compliance with staff and faculty collective bargaining agreement and Board of Trustees policies. Ensure accuracy and timeliness of payroll processes and utilize technology fully.*

People Involved: HR staff, IT staff

Estimated Cost: Staff time; may involve consultant (see 1.C.)

Timeline: Phase I: Fall 2007; Phase 2: ongoing.

Person(s) Responsible: Payroll Manager

2.N *Implement electronic, web time entry system that allows employees to enter time sheet information directly into a secure web-based system. The web-based system will improve time sheet processing and accuracy and will allow managers to provide better oversight to the process.*

People Involved: HR staff, IT staff

Estimated Cost: Staff time

Timeline: Phase 1: November 2007 – March 2008; Phase 2: April – December 2008

Person(s) Responsible: Payroll Manager

2.O *Implement PeopleAdmin, an integrated web-based applicant system, to provide an integrated approach to application processing, screening, and selection. System includes a position description module that allows full integration of position management, review, and requisition processing. PeopleAdmin system meshes with the Banner system, thus providing a coordinated and unified approach to these functions.*

People Involved: HR staff, IT staff

Estimated Cost: \$25,000 - \$30,000 per year.

Timeline: Phase 1: July 2007 (completed); Phase 2: August – November 2007; Phase 3: December 2007 - ongoing

Person(s) Responsible: HR Director, HR Supervisor

3. *Provide timely, relevant, and reliable human resource information; ensure that this information is easily and widely accessible.*

Action Plans:

3.A *Develop a Human Resources webpage that is accurate, attractive, easy-to-use, and updated regularly.*

People Involved: HR staff; IT staff or consultant

Estimated Cost: Staff time; may need short-term assistance.

Timeline: September 2007; on-going

Person(s) Responsible: HR Director, HR Supervisor, Benefits Manager, Payroll Manager.

3.B Develop and improve data and reports for effective decision-making within Human Resources and District-wide.

People Involved: HR staff; IT staff

Estimated Cost: Staff time.

Timeline: November 2007; ongoing

Person(s) Responsible: HR Director, HR Supervisor, Benefits Manager, Payroll Manager.

3.C Make greater use of technology and current business practices to provide information and services to current and potential employees and the general public.

People Involved: HR staff, IT staff or outside consultants

Estimated Cost: Staff time, short-term consultant (estimated \$12,000).

Timeline: Ongoing

Person(s) Responsible: HR Director, HR Supervisor, Benefits Manager, Payroll Manager.

3.D Implement Benefit Bridge software program to provide employees access to their benefit information and to enable them to make changes in a manner that is both easy and confidential.

People Involved: HR staff, Keenan and Associates

Estimated Cost: Staff time.

Timeline: Phase 1: Summer 2007; Phase 2: Fall 2007 – Spring 2008

Person(s) Responsible: Benefits Manager

3.E Develop on-line tools for supervisors and employees that provide them with direct and immediate access to a wide-range of Human Resource information.

People Involved: HR staff; College liaisons, ITS

Estimated Cost: Staff time.

Timeline: November 2007; ongoing

Person(s) Responsible: HR Director, HR Supervisor, Benefits Manager, Payroll Manager.

4. *Ensure that the District is operating in full compliance with all applicable laws, regulations, and statutes.*

Action Plans:

4.A *Review CLPCCD HR related Board policies and procedures and revise (as necessary) to bring in alignment with California regulations and procedures and Federal law.*

People Involved: HR staff; Legal Counsel

Estimated Cost: Staff time, legal fees (estimated \$2,500).

Timeline: Phase I: December 2007; ongoing

Person(s) Responsible: HR Director, HR Supervisor, Benefits Manager, Payroll Manager

4.B *Develop new HR related Board policies and procedures to support administrative decisions and revised internal protocols.*

People Involved: HR staff; Legal Counsel

Estimated Cost: Staff time, legal fees (estimated \$2,500).

Timeline: On-going

Person(s) Responsible: HR Director

4.C *Clarify and enforce security/background check requirements and TB testing requirements.*

People Involved: HR staff

Estimated Cost: Staff time.

Timeline: Phase 1: July 2007 (completed); Phase 2: October 2007.

Person(s) Responsible: HR Director, HR Supervisor.

4.D *Assure appropriate processes are implemented for the development and maintenance of official personnel files. Conduct in-house training and information session for Human Resources staff.*

People Involved: HR staff, College liaisons

Estimated Cost: Staff time.

Timeline: September 2007.

Person(s) Responsible: HR Supervisor

4.E Conduct a comprehensive classification and compensation study for classified staff and supervisory/confidential staff.

People Involved: HR staff, classified Union representatives, outside consulting firm

Estimated Cost: \$120,000

Timeline: Phase I: Summer 2007 (completed); Phase 2, Spring 2008; Phase 3, Fall 2008.

Person(s) Responsible: HR Director, HR Supervisor.

5. Employ various modes of positive communication to foster a sense of partnership and cohesion District-wide.

Action Plans:

5.A Create a monthly newsletter that provides HR-related information. Have it distributed to all employees electronically and posted on the human resources website.

People Involved: HR staff; College liaisons

Estimated Cost: Staff time.

Timeline: September 2007 – May 2008; ongoing

Person(s) Responsible: HR Director

5.B Provide a regularly-scheduled “HR Day” every month at each campus where employees can have employment and benefit questions answered or issues addressed face-to-face by members of the HR staff.

People Involved: HR staff; College liaisons

Estimated Cost: Staff time; travel (estimated \$600).

Timeline: Phase 1: July 2007 (completed); Phase 2: August 2007; ongoing.

Person(s) Responsible: HR Supervisor; Benefits Manager

5.C *Formally identify a College Liaison/HR Specialist on each College campus. Individuals will provide services to College employees (e.g., review HR forms prior to submission for processing, assist with implementation of HR policies and procedures). Include these individuals in human resource planning and implementation activities.*

People Involved: HR staff

Estimated Cost: Staff time

Timeline: Phase 1: Summer 2007 (completed); Phase 2: Fall 2007; ongoing

Person(s) Responsible: HR Director, HR Supervisor

5.D *Modify the department name to “Office of Human Resource Services” to reflect service orientation and new focus of the office.*

People Involved: HR staff

Estimated Cost: None (documents and forms will be updated as supplies are exhausted).

Timeline: June 2007 (completed).

Person(s) Responsible: HR Director

5.E *Meet regularly with leadership of the SEIU 1021 and the Faculty Association to foster open communication and collegiality.*

People Involved: HR staff

Estimated Cost: Staff time

Timeline: Ongoing

Person(s) Responsible: HR Director

6. *Strengthen the District’s ability to attract and retain quality employees.*

Action Plans:

6.A *Develop branding strategy/theme for HR marketing materials, job fairs, the Internet, newsletter, flyers, etc.*

People Involved: HR staff, Marketing staff, outside consultant

Estimated Cost: Staff time; materials (estimated \$2,500).

Timeline: Fall 2007; on-going

Person(s) Responsible: HR Director; HR Supervisor; Director, PIO and Marketing.

6.B *Review hiring policies and procedures, clarify language, and align documents, procedures, and communications with sound human resource practices. Revise the document as needed, post on human resources website, and inform managers of its availability. Develop appropriate training and implement.*

People Involved: HR staff, College liaisons

Estimated Cost: Staff time; legal fees (estimated \$700).

Timeline: Phase 1: Spring 2007 (completed); Phase 2: July-October 2007; ongoing.

Person(s) Responsible: HR Supervisor

6.C *Implement human resources Listserv to inform potential applicants of employment opportunities.*

People Involved: HR staff, IT staff

Estimated Cost: Staff time; web host service (estimated \$200).

Timeline: Phase 1: Spring 2007 (completed); Phase 2: Fall 2007

Person(s) Responsible: HR Supervisor

6.D *Shorten the turn-around time for application processing and screening.*

People Involved: HR staff

Estimated Cost: Staff time

Timeline: May 2007 (completed); ongoing

Person(s) Responsible: HR Supervisor

6.E *Improve the applicant screening process. Develop tools and training materials to help with the review and screening of applications. Conduct training sessions, as appropriate, and provide information on human resources website*

People Involved: HR staff

Estimated Cost: Staff time; materials (estimated \$500).

Timeline: Phase 1: July 2007 (completed); Phase 2: December 2007; ongoing.

Person(s) Responsible: HR Director, HR Supervisor

6.F Facilitate the recruitment, retention, and advancement of a diverse workforce. Provide information and training to hiring managers, search and screening committees, and administrators.

People Involved: HR staff

Estimated Cost: Staff time

Timeline: November 2007; ongoing

Person(s) Responsible: HR Director, HR Supervisor

6.G Develop new employee orientation for all faculty and staff, including administrators. Conduct monthly orientation sessions for new employees.

People Involved: HR staff, College liaisons

Estimated Cost: Staff time

Timeline: Fall 2007; ongoing

Person(s) Responsible: HR Director, HR Supervisor

6.H Improve/strengthen employee rewards and recognition programs.

People Involved: HR staff, College liaisons

Estimated Cost: Staff time

Timeline: January 2008; ongoing

Person(s) Responsible: HR Director, HR Supervisor, Benefits Manager

6.I Institute and maintain a climate of internal consistency and fairness.

People Involved: HR staff

Estimated Cost: Staff time

Timeline: Ongoing

Person(s) Responsible: HR staff

6.J *Develop a structure for leadership training and succession planning.*

People Involved: HR staff, Contract Education staff

Estimated Cost: Staff time

Timeline: winter 2008

Person(s) Responsible: HR Director; Director, Contract Education

7. *Foster the development of trained and competent human resources staff which is committed to high-quality and effective customer service.*

Action Plans:

7.A *Implement professional development plan to enhance the knowledge and skill set of each human resource staff member. The development plan will be focused on departmental and District needs and will consider each staff member's interests.*

People Involved: HR staff

Estimated Cost: Staff time, professional development (estimated \$500).

Timeline: Phase 1: Fall 2007

Person(s) Responsible: HR Director, HR Supervisor, Benefits Manager, Payroll Manager

7.B *Provide resources and training to create a core group of certified professionals within the human resources office at the Professional in Human Resources (PHR®) and/or Senior Professional in Human Resources (SPHR®) level.*

People Involved: HR staff

Estimated Cost: Staff time; training costs (est. \$1,000)

Timeline: Ongoing

Person(s) Responsible: HR Director

7.C *Implement an in-house training program in current technology and software products to enhance productivity, efficiency, and service to customers (e.g., Microsoft® products, Adobe Creative Suite, Dreamweaver, data management, communication tools, PeopleAdmin, JobElephant, Banner, etc.).*

People Involved: HR staff, Contract Education staff, IT staff or outside consultant

Estimated Cost: Staff time

Timeline: Phase 1: July 2007 (completed); ongoing

Person(s) Responsible: HR Director, HR Supervisor, Benefits Manager, Payroll Manager

7.D Assess office staffing in consideration of current and future needs and recommend appropriate changes to Chancellor.

People Involved: HR staff

Estimated Cost: Staff time

Timeline: Ongoing

Person(s) Responsible: HR Director

Information Technology Services (ITS)

District ITS staff is responsible for centralized information systems and services that provide technology solutions for the College and District operations. The services provided by the District ITS department complement those provided by the College computer support staff. The primary services provided by District ITS include:

- Administrative computing
- Network infrastructure for the Wide Area Network and Local Area Network
- Servers for District-wide applications
- Desktop support
- Web development and support
- Centralized Help Desk services
- User training
- Technology initiatives supporting Measure B Facilities projects.

District ITS works with the Colleges to evaluate, select, and implement new hardware and software solutions. Through Measure B, this collaboration has been expanded to instructional and administrative computing resources, resulting in new District-wide standards for computer equipment. District ITS meets formally with the College computer support staff through participation on the District Technology Committee and the College Technology Committees. Initiatives for networking, desktop and server standards, common software applications, and Web sites are discussed and scheduled based on the Colleges' needs. The Chancellor's Cabinet assumes responsibility for setting priorities on the major development projects for Banner to ensure the critical automation needs are met District-wide.

District ITS works with all primary College and District personnel – from the Presidents to the hourly employees – through Banner support and through the use of centralized services such as email and the Web. District ITS has the responsibility to evaluate and design automated solutions to solve problems or enhance functionality for the District. ITS and the user groups constantly interface for system analysis and testing of new features or system modifications. Committees such as the Banner Chairs Committee and the Banner User Groups provide forums for all interested parties to discuss relevant issues and opportunities.

Strengths of the Current System

Over the past five years, the District CTO has worked to integrate ITS services across all three sites and find appropriate technology solutions to satisfy needs District-wide. In addition, the CTO has collaborated closely with the Colleges to effectively coordinate operations and services. Through this cooperative effort, the technology committees have been able to significantly improve the District's networking, enterprise servers, Web sites, desktop equipment, and software options.

The District has established a similar committee structure to evaluate and recommend new technology advancements for the Banner Enterprise System. These Banner User Group recommendations are then brought to the Chancellor's Cabinet for review, approval, and integration into the multi-year plan for Banner project priorities. This ensures that all locations have the same focus and that the limited resources available for change are effectively utilized. Banner projects are evaluated for priorities based on impact to students, improved productivity, and reduction of costs. The current emphasis for Banner is to automate manual procedures at the District and Colleges, to make data accessible to a larger user population, and to migrate more functions to the Web platform for ease-of-use as well as remote access.

District ITS analysts possess significant knowledge of the Banner Enterprise System and they are highly-regarded by the Sungard vendor since the District has used the system since the early 1990's. In addition, the staff's extensive years of service to the District has resulted in a thorough understanding of operations and procedures District-wide. The staff's knowledge and stability provide valuable insight when evaluating new systems and performing major upgrades. The District ITS staff is very team-oriented and flexible in adapting to changing priorities as needed. The staff focuses on high-quality customer service and operates as a partner with the user community in accomplishing the District's goals.

Weaknesses/Problem Areas of the Operating System

The District ITS resources are shared between operational support for current systems and development projects for new implementations. The limited staff size in all areas restricts how many new projects can be completed within any given year. In addition, budget constraints severely limit the use of consultants to supplement staffing.

Training in Banner has been a challenge for some years, due to the frequent turnover in the user areas. District ITS staff assists in the technical training, but the functional training remains the responsibility of the user groups and is largely inadequate due to time constraints. Furthermore, all user areas suffer from a lack of written departmental Banner procedures.

Although the Banner System's comprehensive features for students, finance, financial aid, human resources, and payroll have been a strong asset to the District, the departments are not utilizing all the system's automation capabilities to the fullest extent. The District needs to review the latest Banner System features and their current business processes to evaluate where changes can be introduced that will streamline processes and improve efficiency.

Under Measure B, funding is available for supplemental resources, but finding full-time analysts with sufficient skill and knowledge in both IT network and construction has been challenging. Although the District and Colleges have made significant strides over the past couple of years with instituting new technology standards District-wide, there are still additional areas to address such as Wireless and Smart Classrooms. This is an area that will continue to expand as the Bond facilities construction accelerates.

Goals – Specific Projects

The multi-year project objectives for the District ITS have been defined through a combination of the Banner Project Priority List and the District Strategic Plan Requests included in Appendix A. For each project listed in the Appendix A charts, project goals are provided with the corresponding Action Plan, People Involved, Estimated Cost, and Timeline. For the District Strategic Plan chart, only the tasks requiring some ITS action for technology updates were extracted from the goals identified within this document for the other District Departments. It should be noted that the Strategic Cost Review conducted by KH Consulting in 2005 provided recommendations for ITS projects and many of these suggestions are reflected in these two lists in Appendix A.

The Banner Project Priority List was established in 2005 by the Chancellor's Cabinet; this list is updated as new requirements are identified. Some key activities that are currently in progress include:

- Room Scheduling Software
- Crystal Ad-hoc Reporting
- Automated Timesheets
- Web for Faculty with online grades
- Luminus Portal with Student E-mail
- Elumens Student Learning Outcomes
- Web for Finance for expenses, budgets, and purchase requisitions.

The draft of this Strategic Plan was used to develop a list of ITS tasks that need to be achieved to support the primary goals of other District departments. Some of these goals are already a part of the planned Banner Project Priority List. Other areas of emphasis for the department include:

- Taking advantage of more Banner features
- Improving training for Banner
- Documenting procedures and processes
- Streamlining processes and improving efficiencies
- Improving reporting tools
- Increasing Web-based Banner functions for remote access
- Implementing Business Process Improvements

- Implementing new customer outreach and communication initiatives
- Creating electronic forms.

The Measure B project list for the next five years was established in 2003 by the Technology groups (with updates provided as needed), but it is too extensive to be included in this document. The Information Technology Master Plan for the District and the Facility Master Plans for the Colleges contain Action Plans, Estimated Cost, and Timelines for all the ITS technology initiatives being completed under Measure B.

Goals – General

1. *The District should reassess the importance of many of the routine but time-consuming operational tasks that Banner users request on a daily/weekly basis. These routine tasks need to be either minimized or handled by temporary technical staff if the Banner developmental projects are to assume a more accelerated timeline.*

Action Plan: District ITS will begin to utilize the automated Banner Operational Task List for each user group to track ALL requests received by ITS for action. Currently, many requests are received via phone or email and are completed without being documented on the automated Banner Task List. This procedure will allow the Banner Chair representatives for each of the user areas to more effectively evaluate what types of activities are consuming the ITS analysts' time, which takes away from the more complicated development projects. In addition, District ITS will reassess the usage of the Help Desk to track calls for Banner requests and utilize this automated tracking system for routine operational tasks instead of having phone calls go directly to the ITS analysts. As District ITS increases ITS programmer analysts, the new hires will be utilized on the routine operational tasks which will allow the Senior Programmer Analysts to concentrate on the more complex Banner Priority Projects directed by the Chancellor's Cabinet.

People Involved: Chief Technology Officer, VPs and Directors at Colleges and District, Banner User Chairs, ITS Analysts

Estimated Cost: Internal Resources.

Timeline: On-going

Person(s) Responsible: Chief Technology Officer, Banner User Chairs

2. *Full-time staff increases should be made where appropriate in order to adequately accommodate the Banner priorities and the District Strategic Plan.*

Action Plan: Currently, there is one ITS analyst assigned to each main Banner user area who services the daily operation needs, development projects, production problem resolution, and training for that Banner user area. Based on the volume of manual tasks that each Banner user group is attempting to automate fully as we get closer to a paperless

environment to achieve efficiencies and improve productivity, the ratio for each Banner user area should be at least 2 FTE programmer/analysts. The Chief Technology Officer will evaluate the ITS manpower resources needed to meet the critical deadlines identified for the Banner Project Priorities and the District Strategic Plan. New hires will be utilized to service the routine Banner operational tasks to backfill for the Senior Programmer Analysts so they have time to work on the high level Priority tasks. Recommendations for new hires will be made to the Chancellor. Contingent on budget availability, positions will be approved by the Chancellor's Cabinet for new programmer analysts to service the College and District needs for automation. During summer 2007, three positions were identified (2 Programmer Analyst II and 1 Administrative Analyst II) as immediate increases required and these were approved by the Board. Offers have been extended for all three positions and staff will be in place for the start of the fall term. In order to achieve the 2:1 ratio for ITS analysts to Banner user areas, District ITS would require two additional programmer analysts over the next fiscal year.

People Involved: Chief Technology Officer, Chancellor, Chancellor's Cabinet

Estimated Cost: \$220,000/year for 3 positions. Additional \$146,000 for 2 more positions.

Timeline: September 2007 for 3 positions. April 2008 for 2 more positions.

Person(s) Responsible: Chief Technology Officer

- 3. The District should devise methods to ensure department-specific Banner training and documentation. If internal resources are not adequate for this task, outside assistance may be warranted.*

Action Plan: The District ITS has recommended in the past to establish ITS staff positions that can be dedicated to the training needs for the Banner users and assist with procedural documentation on how to use the Banner System. Currently, ITS assists the Banner groups in training new hires on the technical aspects of the Banner System. Following the ITS training, the user groups are then responsible for training new hires on the procedural aspects for their specific department. The same ITS analysts who do the Banner operational tasks and Banner development projects are the same staff that perform the user technical training on Banner, so this does not allow enough time to do ample training on a recurring basis as needed. To date, District ITS has contracted with temporary consultants to assist with the training and documentation tasks and will continue to use this contract help as needed. For a long term solution, the District ITS should pursue hiring 1-2 Administrative Systems Analyst who could be solely responsible for these training and documentation tasks for all Banner user groups. The full-time solution maintains the knowledge base within the District and remains consistent from year to year.

People Involved: Chief Technology Officer, Chancellor, Chancellor's Cabinet, Directors and Managers at Colleges and District, ITS Analysts

Estimated Cost: \$120,000 yearly for 2 full-time positions or minimum \$64,000-\$96,000 yearly for consultants

Timeline: On-going as needed

Person(s) Responsible: Chief Technology Officer

4. *In addition to the current Banner User Groups, the District should develop a separate Executive Steering Committee -- with representatives from the Chancellor's Cabinet -- to discuss topics, review progress, and make additions as needed for major District-wide projects.*

Action Plan: Banner Project Priorities are initially discussed at the individual Banner User group meetings and then recommendations are forwarded to the Chancellor's Cabinet for review and final approval. Periodic progress on the Banner Project Priorities is provided in both the Banner User group meetings and in the Chancellor's Cabinet. The Chief Technology Officer and Chancellor discussed the option of establishing a new Executive Steering Committee for review, status, and approval of the Banner Priority Projects. It was determined that the same participants that would participate in this new Executive Steering Committee are the same members as the Chancellor's Cabinet. Therefore, it was determined that each quarter one of the Cabinet meetings will be reserved for the Banner Project Priorities to review progress and introduce new projects to be prioritized. In addition, Banner User groups have been reconfigured to include cross-functional areas rather than a single Banner user area to ensure effective communication across the Colleges and District about the Banner requirements and activities. Effective fall 2007, the new Banner groups include: (1) Finance & Human Resources (2) Student & Financial Aid (3) Finance and Financial Aid (4) Academic Services, Human Resources, and Student.

People Involved: Chief Technology Officer, Chancellor, Chancellor's Cabinet

Estimated Cost: Internal Resources

Timeline: On-going

Person(s) Responsible: Chief Technology Officer, Banner User Chairs, Banner User Groups

5. *The District should standardize the following Measure B initiatives District-wide over the next couple of years:*
 - *Implementation of Wireless for the classrooms and general student/administrator use.*
 - *Establishment of a template for different types of Smart Classroom configurations based on disciplines and course needs.*
 - *Migration towards consolidated storage solutions such as SANs or NAS.*
 - *Upgrading of the tape backup system across all locations in conjunction with the new storage solutions.*

- *Establishment of more central PO agreements such as the Gateway PC agreement as well as the Cisco switches and Printers.*
- *Expansion of Video Conferencing and Streaming Media Capabilities*

Action Plan: District ITS and the College Computer Support staffs have worked collaboratively since 2005 to establish District-wide standards for computer equipment, network infrastructure devices, and cabling to support Measure B improvements. The existing standards are reviewed on a regular basis and modified appropriately when needed to ensure the District takes advantage of any new technology innovations or price leverages. The District Technology Committee, which consists of technical representatives from the Colleges and District, will continue to be the forum where these standards are discussed, defined, and documented to be utilized for new equipment RFP's and construction contracts.

People Involved: Chief Technology Officer, College VPs Business Services, District ITS Network Staff, College Computer Support Staff, Purchasing, Facilities

Estimated Cost: Internal Resources

Timeline: On-going for Measure B and beyond

Person(s) Responsible: Chief Technology Officer

6. *The District should continue to require the District CTO to approve all computer hardware and software purchases to ensure standards are maintained and new equipment is compatible with the existing environment.*

Action Plan: District ITS and District Purchasing instituted in 2006 an effective “check and balance” procedure for the purchase of all computer hardware and software District-wide. This procedure ensures that computer purchases adhere to the current District-wide equipment standard and that new hardware or software are compatible with the District and College environments for fault-free operation. In addition, the District evaluates whether the purchase is duplicated in other areas of the District where sharing can be achieved among the Colleges for cost savings and operational efficiencies. Also, the District communicates to each College any innovations that are being achieved at the other locations for their consideration for future innovations. Since the implementation of this procedure, past problems have been eliminated and monitoring continues to ensure compliance to the ITS equipment guidelines. Finally, the District CTO works on behalf of the colleges with the vendors and Purchasing to acquire the maximum discounts and the best contract terms and conditions based on the District's vast experience with the computer products and vendor alliances. As the new Purchase Card is implemented over the next year to utilize credit cards for low dollar purchases, District ITS will work with the Purchasing Manager to develop new procedures to provide the desired flexibility and responsiveness while still maintaining the necessary controls for hardware and software purchases.

People Involved: Chief Technology Officer, District Purchasing Manager, Purchasing staff, District ITS staff, College Computer Support staff

Estimated Cost: Internal Resources

Timeline: On-going

Person(s) Responsible: Chief Technology Officer

Public Information and Marketing

The Public Information and Marketing Office handles public and media relations, marketing, governmental affairs, and publication. The Office works with every department and service area at each College and covers many activities, including foundation support, program marketing, and special events.

When helping to promote a class, event, or award, the Public Information Office relies upon the Colleges for key information; the Office then writes and distributes press releases, and follows up with the press to promote coverage/attendance. The process is time-intensive, so communication throughout must be clear and concise.

The Office also provides guidance (and funding in some cases) for various College publications. It assists with the research and writing of publications, and serves as a liaison to graphic designers and printers. This relationship is successful when all involved are committed to the same concept and required outcomes of the piece. Again, communication is critical to save both time and money.

Strengths of the Current Operating System

The primary strength of the current operating system is in the concept of “the bulk discount.” Oftentimes, the Public Information/Marketing department is working with both Colleges on similar projects and is able to have items (such as brochures) printed at the same time and lower the per-item cost through volume-pricing.

Similarly, the Public Information Office serves as a key information liaison between the two Colleges so that each is able to save time and money by sharing experiences and not “re-inventing the wheel.” This approach has been particularly successful in the areas of marketing and outreach. The Public Information Director serves on each College’s Outreach and Marketing Committee; thereby able to relay experiences and recommendations between the two in order to help efficiently expand and improve outreach services.

Weaknesses/Problem Areas of the Current Operating System

Lack of staffing is the primary weakness of the current operating system – both within the department itself and at the Colleges. Currently, the Director is the primary source for publicity for the entire District. The lack of public information or marketing staff on each campus impacts the amount of publicity and work that can be generated. Lack of staff at the Colleges has also

led to communication breakdowns on some occasions. Instead of working with a designated campus staff member, the Director must often communicate with several different people at the Colleges for a single event; because of this, important messages are sometimes not received or are misunderstood.

Funding is another weakness. The Colleges have many projects that are worthy of attention and effort; however, the District budget is not sufficient to support these projects in addition to the annual recruitment advertising campaigns.

Goals

1. *Increase the budget at District level to fully fund advertising campaigns for fall, spring, and summer.*

Action Plan: The current budget allows for money for one advertising campaign on a small scale: newsprint and a small radio buy on KKIQ. In order to have the Colleges' message reach a maximum number of people, the budget must support an advertising campaign that includes buses, billboards, print, and radio. This type of extensive campaign was implemented based on one-time funds for spring 2007. The results have been extremely positive with a community "buzz" created and dramatically increased enrollment numbers at each College.

People Involved: Director of Public Information and Marketing, Vice Chancellor of Business Services, Chancellor, and College Presidents.

Estimated Cost: \$250,000 annually for summer/fall and spring campaigns.

Timeline: July 2007 – June 2008.

Person(s) Responsible: Director of Public Information and Marketing.

2. *Create a publications budget to enhance and support outreach, advertising, and marketing efforts District-wide.*

Action Plan: The lack of a publications budget has hindered the effectiveness of the Colleges' and the District's outreach and public relations efforts. For example, the Colleges' public images are currently defined by a series of photocopied flyers designed by staff; these are distributed to prospective students, parents, and at community and high school visits.

An increased budget will allow the department to enhance its outreach and marketing efforts through a series of publications, CDs, DVDs and web-based communications.

People Involved: Director of Public Information and Marketing, identified "marketing" staff at the Colleges, College Marketing & Outreach Committees.

Timeline: July 2007.

Estimated Cost: \$50,000.

Person(s) Responsible: Director of Public Information and Marketing.

3. *Hire a District-level marketing specialist to support overall and specific marketing efforts at both Colleges.*

Action Plan: Currently, marketing and public information efforts are centralized at the District Office. With only one Director and a full-time Assistant, projects that are College-specific are satisfactorily accomplished. However, issues emerge when projects at the division and department level are attempted. Lack of staffing and resources prohibit the department from successfully producing projects at this level. In addition, they prevent the department from moving beyond “satisfactory” at the College and District level.

Hiring a full-time Marketing Specialist at the District Office will fit the existing organizational model while allowing for greater productivity overall. A small amount of one-time money was recently used to hire a contract employee to work on several initiatives, including marketing. The department was able to combine efforts and implement a project for the Las Positas College business department, as well as two brochures for Chabot College. This idea was embraced by both Colleges and has been successful.

Transitioning this position from a small, contract position to a full-time, permanent position will greatly enhance the marketing and public information efforts of the District and Colleges, especially in the outreach and foundation areas.

People Involved: Director of Public Information and Marketing, College Presidents, Foundation Directors.

Estimated Cost: Salary of approximately \$75,000 – including benefits.

Timeline: As ranked with other District staffing priorities.

Person(s) Responsible: Director of Public Information and Marketing.

4. *Establish process to review, prioritize and implement recommendations from CLARUS District-wide market research survey and Interact college website navigation redesign.*

Action Plan: Work with the District and Colleges to establish working groups to focus on areas identified in the CLARUS District-wide market research survey. These groups will review and recommend solutions to the identified “Issues to be Addressed” in the survey document. For the Interact website navigation redesign, closer working relationships between the Public Information Office and the College webmaster will need to be developed. The redesign recommendations have been reviewed but a process and a timeline need to be established for implementation.

People Involved: Director of Public Information and Marketing, College and District faculty and staff, College Webmasters

Estimated Cost: \$50,000

Person(s) Responsible: Director of Public Information and Marketing

Ensuring Excellence: Future Action and Evaluation

Implementation Process

The Chancellor's Cabinet will oversee the implementation of this Strategic Plan. Each Vice Chancellor (and/or appropriate District administrator) will be responsible for the successful completion of his or her area goals. In instances where both a District and College administrator are responsible for cooperatively resolving a particular issue, both will be held accountable. The Chancellor, Vice Chancellors and College Presidents will coordinate the development of detailed implementation plans with measurable outcomes and timelines.

Budget Alignment

The implementation of the Strategic Plan will rely heavily on strong intra-District communication to ensure that both District and College goals are met. The Chancellor's Cabinet and Council – comprised of classified, faculty, and administrative representatives from all three sites – will review the Plan's financial implications and make appropriate recommendations to the Chancellor. At all times, the District will work to assume the potential costs of the Plan's implementation into the regular operating roles and expenses of the District and Colleges.

Review and Improvement

Each year, the Chancellor will lead the Cabinet and Council in a process to assess and update the Strategic Plan. The Chancellor will be responsible for reviewing progress on the old Plan, ensuring thorough incorporation of new elements, and completion of the revised Plan in a timely manner.

APPENDIX A



Chabot - Las Positas Community College District

Organizational Chart

2007-2008

Figure 1

March 2008

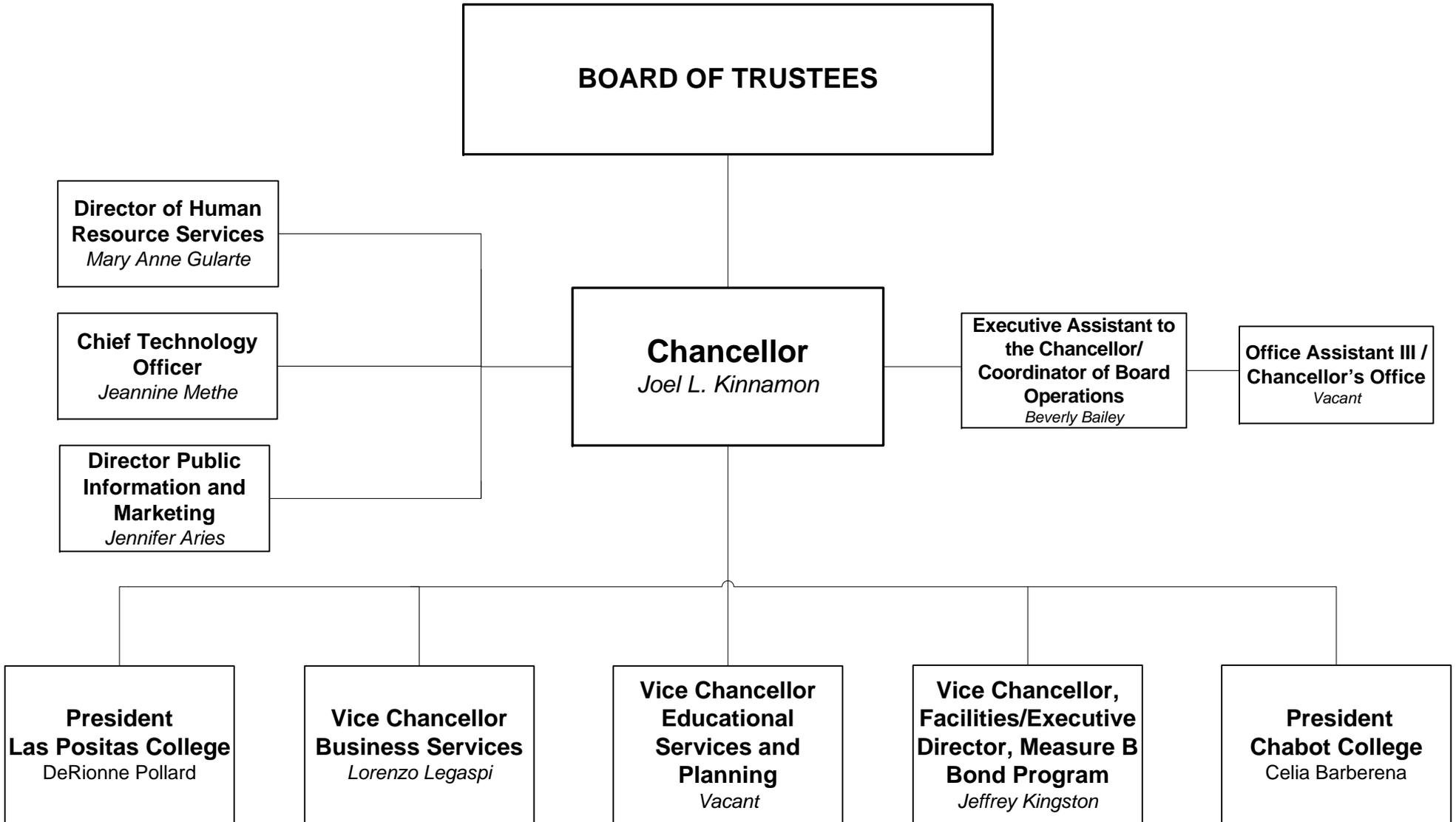


Figure 2

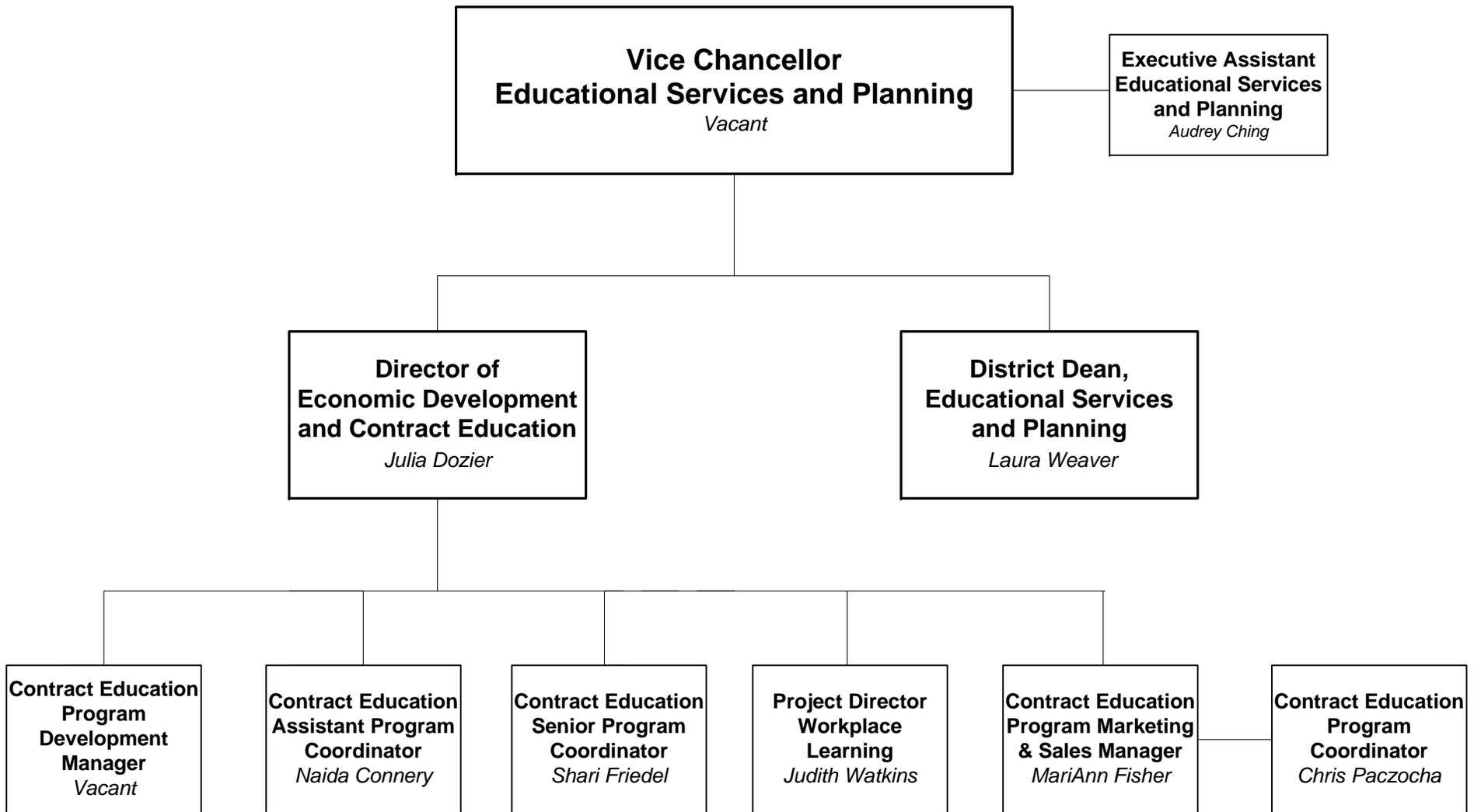


Figure 3

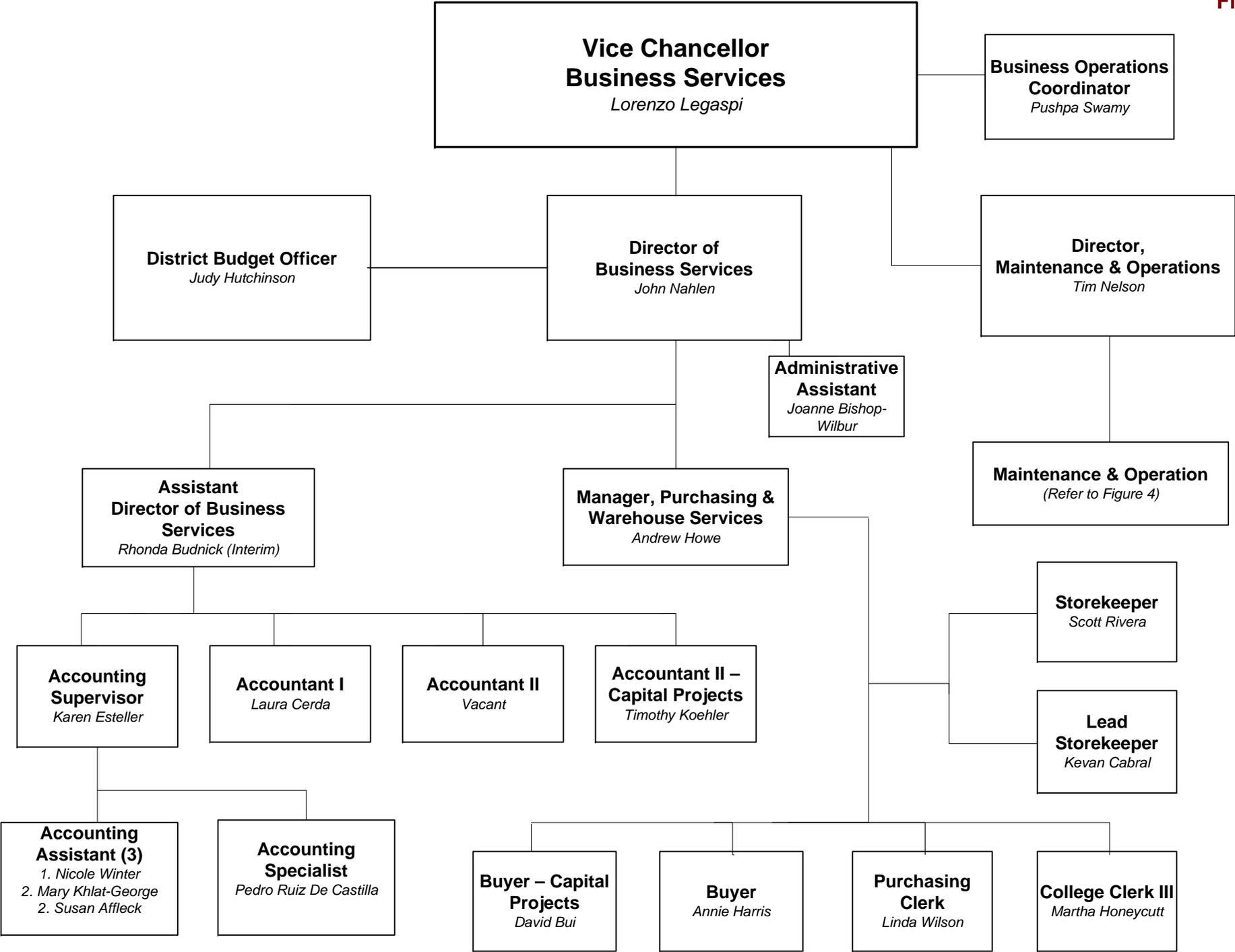


Figure 4

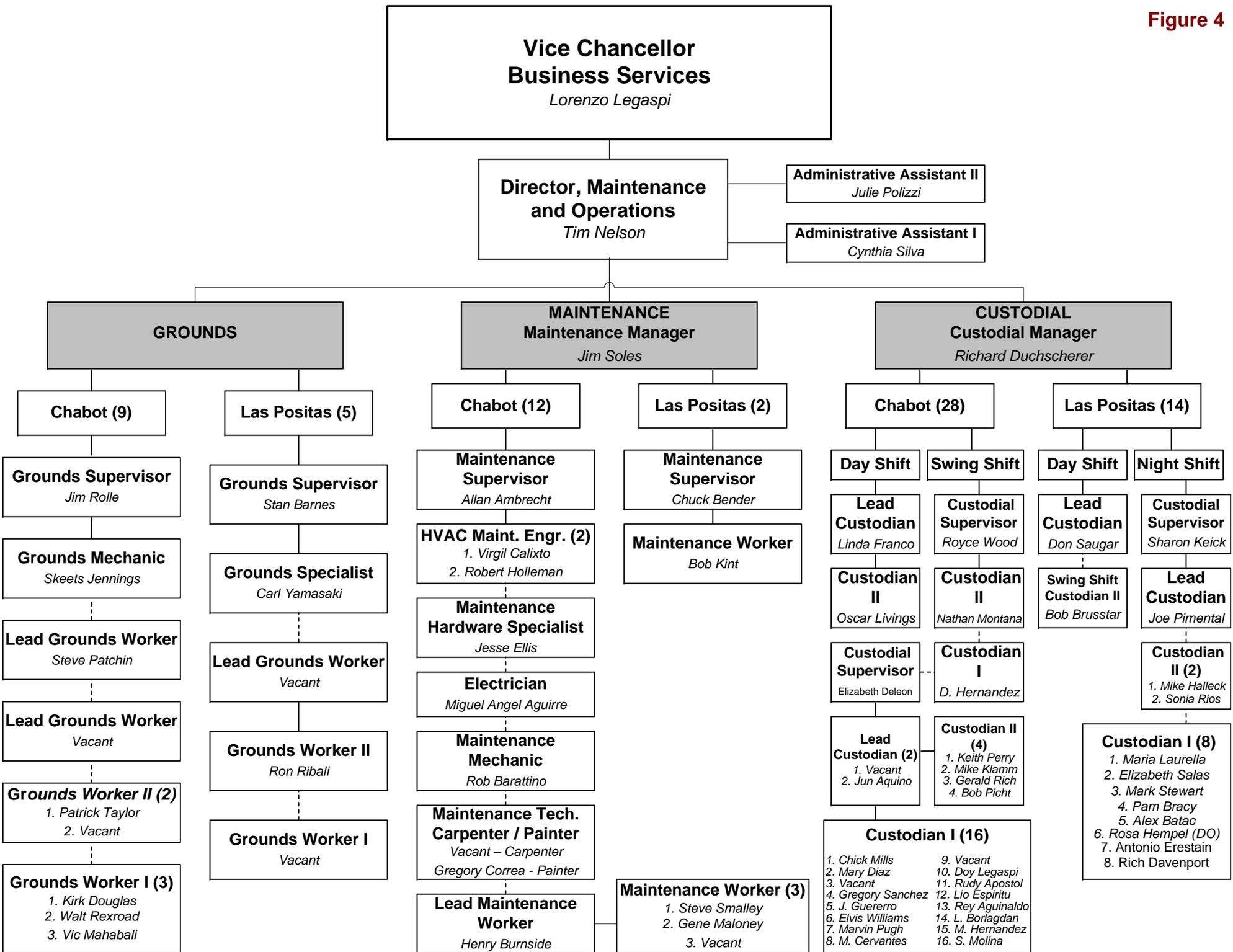


Figure 5

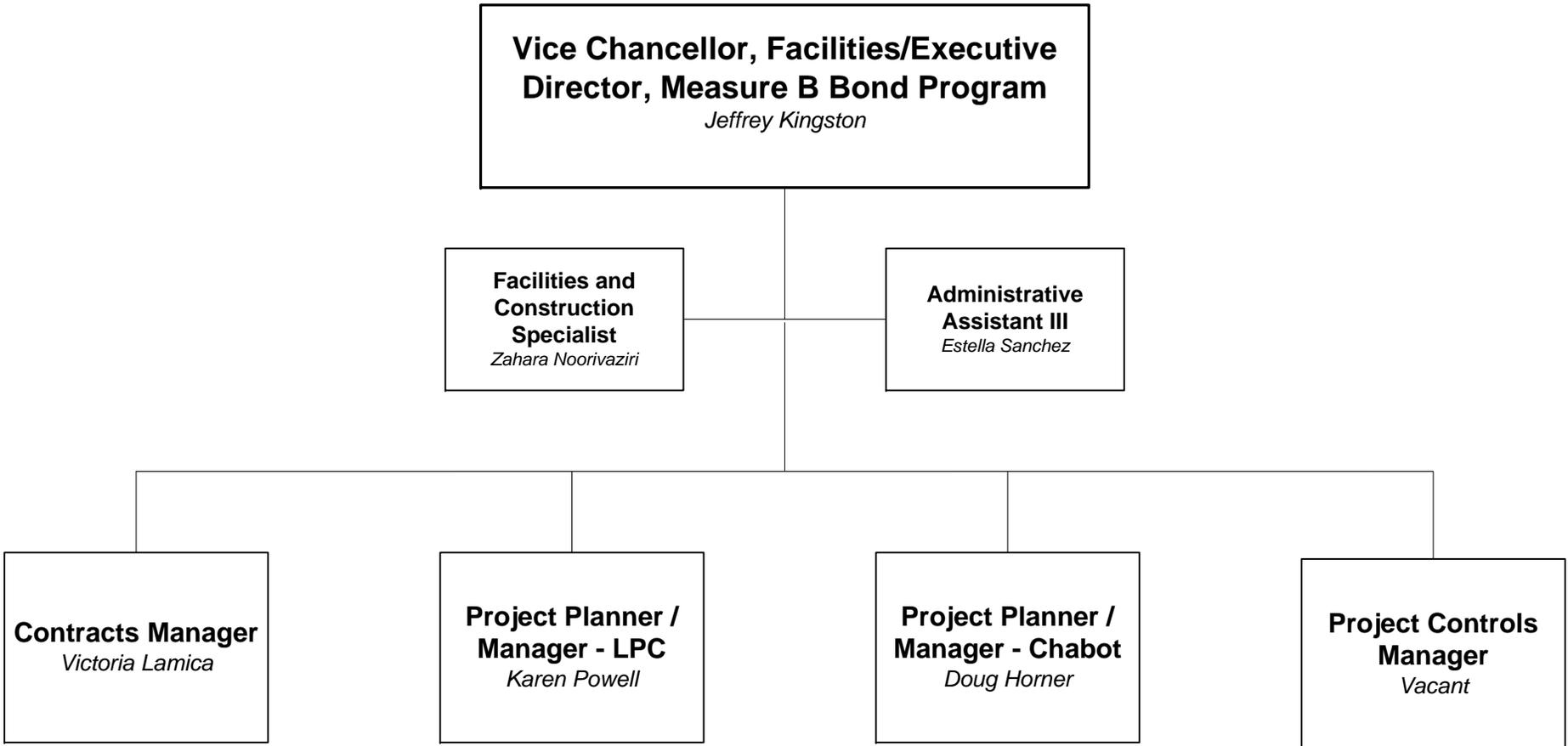


Figure 6



Figure 7

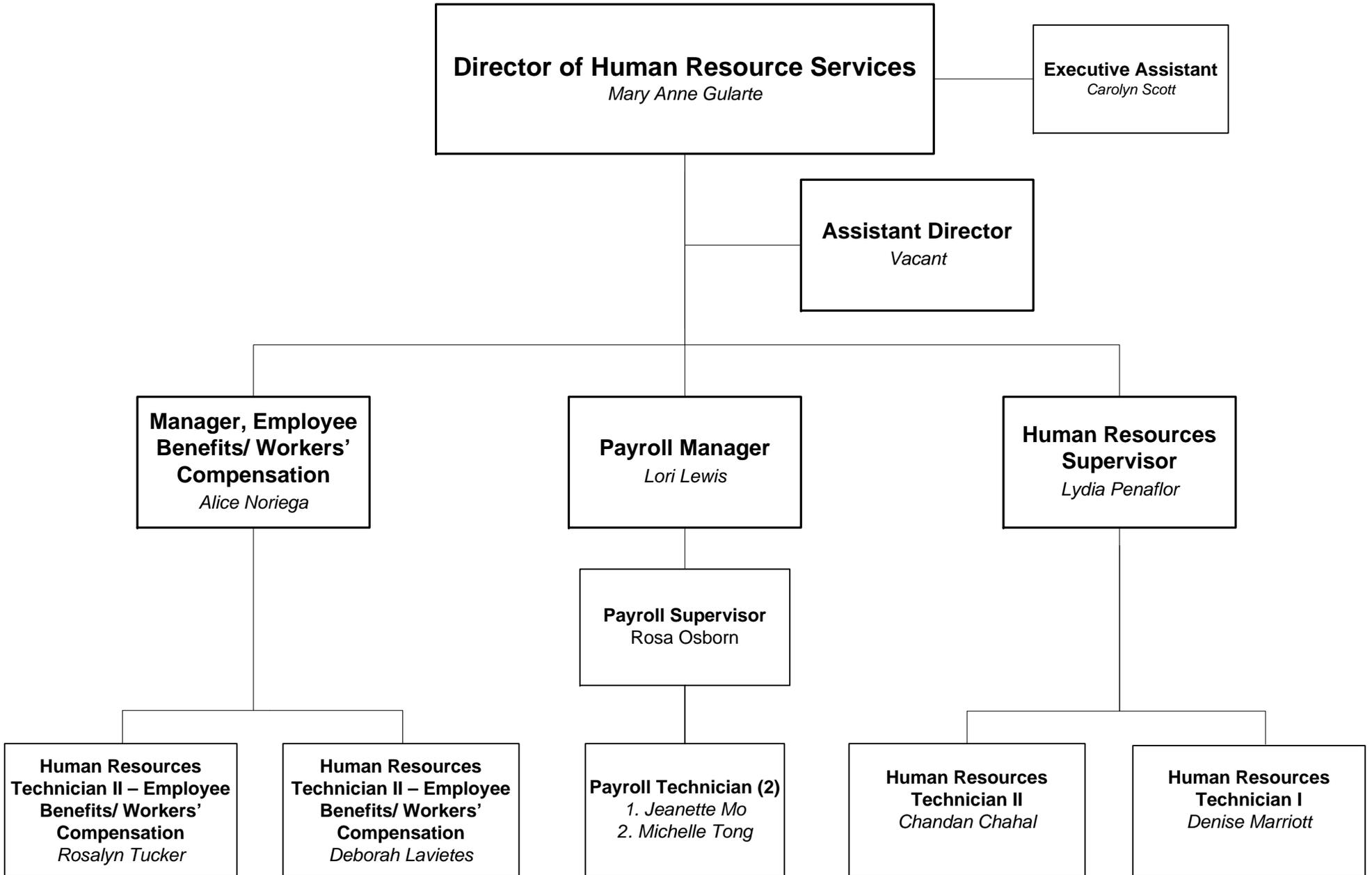
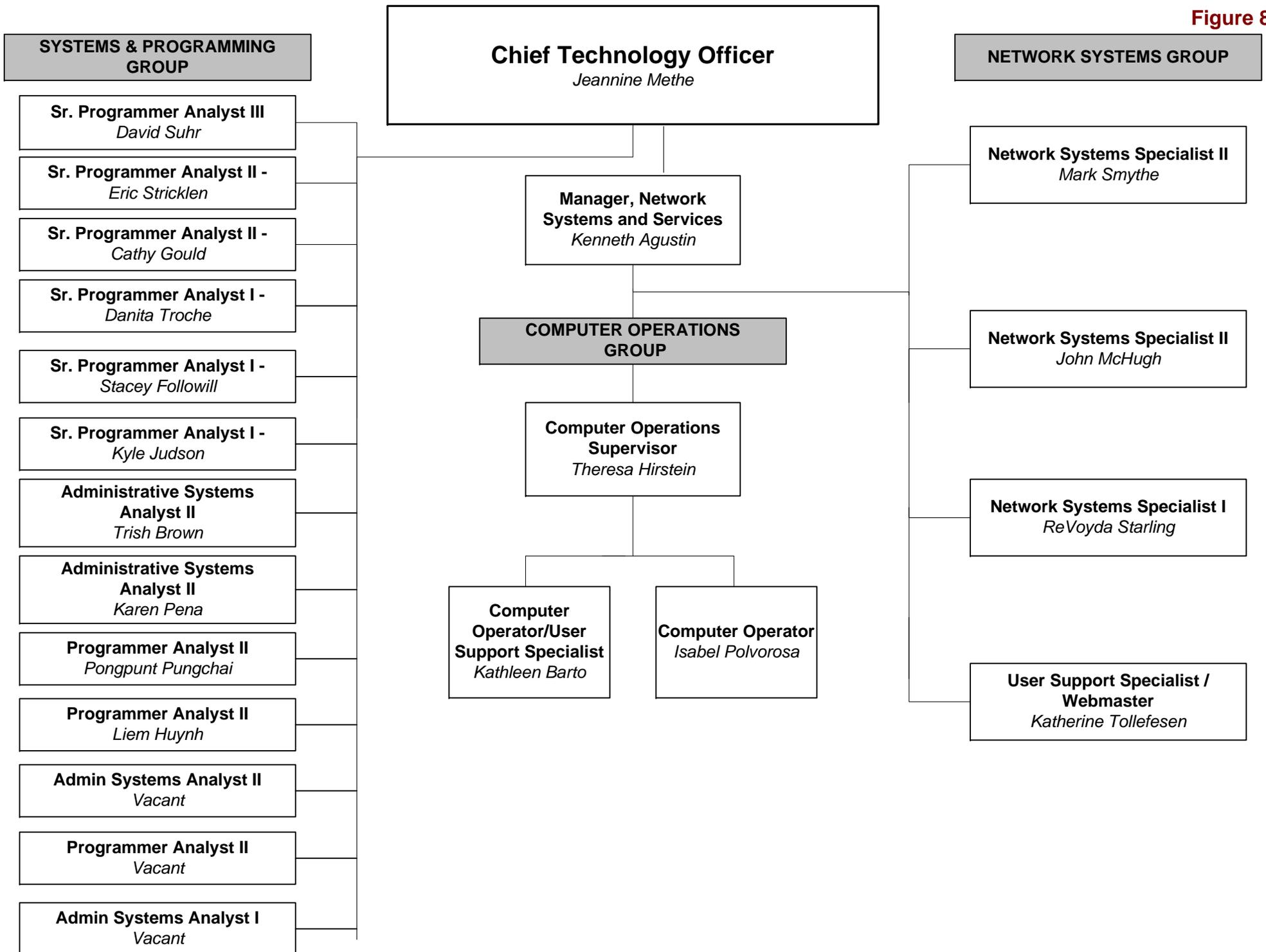


Figure 8



**District Strategic Plan - ITS Requests Only
August 2007**

ITS Proj	Person(s)		SPECIFIC GOALS - SUBSET FOR ITS ACTION	ITS ACTION PLAN	ITS STATUS	Timeline/
Priority, New, Mod	Responsible					Estimated Cost (External)
	(ITS for all)		GOALS PROPOSED BY COLLEGES & DISTRICT FOR STRATEGIC PLAN			
Priority, New,Mod	Budget Office	1	Reduce processing time for purchase requisitions: Program Banner to accept requisitions for processing only if the referenced account has sufficient funding. If NSF, then req will be routed back to originator to submit a budget transfer. Change order also needs NSF flag so budget review step is shifted from Budget Manager to initiator.	Change is best addressed by implementing the online budget transfer and online requisition process in Web for Finance so initiator sees edits real-time.	ITS released the Web for Finance to Business Services in Dec 2006 and held demos for staff. Web Finance won't let users input unless funds are available. Bus Svcs staff reviewing features to test and evaluate what written procedures are required and when can release to users outside Business Svcs.	Feb 08-Apr 08
Priority, New	Budget Office	2	Reduce processing time for purchase requisitions: Institute the Purchase credit card (P-card) program to transition some of high volume, low dollar purchases to P-Card.	Requires procedural setup by Business Services, but also requires ITS action to create a custom Banner interface from the credit card company so Business Svcs does not need to manual input the billing data.	ITS did analysis for what is required to interface Banner with outside credit card companies - is a custom mod that ITS will need to write.	Pilot: Apr 07- May 08, All Depts: June 08
Mod	Budget Office	3	Improve efficiency of Financial Aid processing. Reduce number of personnel involved in drawdown funds, account journals, check disbursement, bank reconciliation. Reassign duties so system is more efficient.	Could be just a user procedure change. However, assume some of the changes require ITS action to automate some manual processes or provide additional tracking/reconciliation reporting.	Some Fin Aid checks are local printed at District - those remaining at Chabot for print due to bank restrictions. Finance in process contacting banks for possible conversion for Checks & Positive Pay. Some ITS support for report enhancements for disbursements.	By July 08
Mod	Budget Office	4	Improve efficiency of revenue reconciliation/invoicing process for incoming checks for grants, etc.	Could be just a user procedure change. However, assume some of the changes require ITS action to automate some manual processes or provide additional tracking/reconciliation reporting.	No ITS actions identified yet.	By July 08
Priority, New,Mod	Budget Office	5	Improve efficiency & reduce processing errors in the budget transfer process. Automate budget transfer process in Banner with defaults to prevent entries when codes are incongruent and when budget transfers do not net to zero. Setup Banner to reject inputs from funding sources with NSF.	Implement new online Budget Transfer feature within the Web for Finance.	ITS released the Web for Finance to Business Services in Dec 2006 and held demos for staff. Bus Svcs staff reviewing features to test and evaluate what written procedures are required and when can release to users outside Business Svcs.	Fin Oct 07, Budget Dec 07- Feb 08, Online Reqs Oct 07 - May 08

NOTE: Grey Shaded Items are on Banner Project Priority List from Cabinet

**District Strategic Plan - ITS Requests Only
August 2007**

ITS Proj	Person(s)		SPECIFIC GOALS - SUBSET FOR ITS ACTION	ITS ACTION PLAN	ITS STATUS	Timeline/ Estimated Cost (External)
Priority, New, Mod	Responsible					
Mod	Fiscal Services	6	Update Banner software and other available tools to provide accurate cost accounting and reporting by program/area: Modify Banner chart of accounts to simplify reporting.	Major effort. User action for analysis and review of past history to decide new chart of accounts. ITS action will be required to assist in conversion of accounts and/or reporting changes if needed.	ITS changed TOP program codes back in 2006 and different usages of program codes by colleges which also affects accounts prohibited us from converting all codes that still needs to be reconciled by the colleges with District Business Svcs. Also, need to review impact on Accounts Receivables.	Apr 07 - June 08, Cost: \$36K Consulting
Priority, New	Fiscal Services	7	Crystal Reports Ad-hoc reporting tool will be used for supplemental Fiscal Reporting.	Implement the Crystal Reporting tool for selected users in Finance. Users to determine data views needed from Banner before ITS can do the setup.	ITS installed Crystal Tool in November 2006 and is in the process of working with Financial Aid on their data views. Business Services will be the next group, estimated in April/May 2007. Users assigned to be able to give inputs for data views needed.	May 07 - Feb 08
Priority, New	Fiscal Services	8	The Banner self-service web based interface will provide inquiry, approval, requisition, purchase order, and budget transfer functions to remote users at both colleges.	Implement Web for Finance in phases - release query functions first, then updates for Approvals, Budget transfers, Budget worksheets, and finally requisitions (latter requires extensive procedures before it can be released).	ITS released the Web for Finance to Business Services in Dec 2006 and held demos for staff. Bus Svcs staff reviewing features to test and evaluate what written procedures are required and when can release to users outside Business Svcs.	Fin Oct 07, Budget Dec 07-Feb 08, Online Reqs Oct 07 - May 08
New	**Fiscal Services - Moved to Human Resources Due to Org Change	9	Better integrate and coordinate operations between Fiscal Services & Human Resources Services which will take full advantage of the functions provided by Banner and will better assist employees. It will also provide automatic integration and coordination of the HR and Payroll departments.	User action for procedure improvements, but may impact ITS if need to automate some manual processes or provide additional reporting.	No action until specific needs for automation are identified.	Moved to HR due to Org Change, July 07 - Nov 07, Cost: \$30K Consulting
Priority, New	**Fiscal Services - Moved to Human Resources Due to Org Change	10	Implement electronic Web Time Entry to improve timesheet processing and accuracy.	Implement Web for Time Entry in phases based on employee groups.	ITS installed Timesheet module last year. Reviewed with HR, Payroll, College, and ITS team all the functionality and how CLPCCD would implement. Project put on hold due to Payroll & HR staffing. Now pending only Payroll staff to be available to continue process.	Moved to HR due to Org Change, 1st Phase Nov 07 - Mar 08, 2nd Phase Apr 08 - Dec 08

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**District Strategic Plan - ITS Requests Only
August 2007**

ITS Proj	Person(s)		SPECIFIC GOALS - SUBSET FOR ITS ACTION	ITS ACTION PLAN	ITS STATUS	Timeline/
Priority, New, Mod	Responsible					Estimated Cost (External)
New	Fiscal Services	11	Develop written procedures for all processes in Fiscal Services and provide training to District and College staff. Includes routine transaction processing, exceptions, Banner data entry standards, operational workflow using Banner, expanding usage of Banner features, document process improvements, implement comprehensive Banner training and functional cross-training.	User action for written procedures, but ITS will provide consultants or ITS District staff as needed to answer questions about the Banner system and its functions or to assist in training.	ITS has lined up a Finance consultant through Sungard, Mickey Hughes, to assist the users on training and Banner system understanding. Deferred due to recent Audit. Awaiting Finance availability to use consultant.	Jan 08 - Dec 08, Cost: \$64K Consulting
New	Fiscal Services	12	Examine current relationship and account structure with existing banks and financial institutions to improve District's ability to manage cash, integrate cash operations with Fiscal Services and Banner, and maximize financial strength.	User action but may require ITS action for automation with banks, additional reporting, or change in check processing.	No action until specific needs for automation are identified. Change in check processing has been reviewed in the past and restrictions from the County or banks have prohibited changes. If outside orgs approve, then ITS can use Evisions to produce checks.	By July 08
Priority, New	Purchasing	13	Implement business process improvements for low-dollar purchase transactions. Plan for purchasing card (P-Card) program, revise current procedures, and target a high user adoption rate.	SAME AS #2 ABOVE	SAME AS #2 ABOVE	Pilot: Apr 07- May 08, All Depts: June 08
New, Mod	Purchasing	14	Establish new customer outreach and communication initiatives: Create procedure manual for customer use, Establish Intranet Web site, Publish manual.	Recommend completing manual in conjunction with future online requisition module in Banner. (Refer to #1 above)	ITS is in the process of working with Purchasing on their future documentation for the online requisition module in Banner. ITS is setting up an internal Web site with Purchasing for them to store pertinent content such as procedures and documentation.	June 07 - June 08
New	Economic Dev/Contract Ed	15	Coordinate a district-wide community outreach and referral system for Contract Education.	May be related to Marketing Outreach requirements from Public Information Officer, so the same automated solution could perhaps satisfy both departments.	ITS will work with Marketing and Contract Ed to determine what if any additional modules are available in Banner that can be purchased and satisfy this Outreach requirements. Based on a preliminary research by ITS, Banner does have other modules that CLPCCD does not have that appear to be in line with the Outreach needs.	On-going - Same as Contact Mgt System

NOTE: Grey Shaded Items are on Banner Project Priority List from Cabinet

**District Strategic Plan - ITS Requests Only
August 2007**

ITS Proj Priority, New, Mod	Person(s) Responsible		SPECIFIC GOALS - SUBSET FOR ITS ACTION	ITS ACTION PLAN	ITS STATUS	Timeline/ Estimated Cost (External)
New, Mod	Educational Services & Planning	16	Strengthen recruitment and retention strategies.	User action for improvements, but may impact ITS if need to automate some manual processes or provide additional reporting.	ITS may also need to look at improved solutions for the current Enrollment Management System developed in-house. Banner may have future modules that we could purchase that would address the tracking and monitoring for recruitment and retention.	Short term: Nov 07 - Online registration for Contract Ed; Long term: On-going Same as Contact Mgt System
New, Mod	Educational Services & Planning	17	Strengthen its role in providing quality assistance in the enrollment management process. The department will place emphasis on providing timely and accurate FTEF allocations, enrollment targets, and enrollment monitoring reports.	User action for improvements, but may impact ITS if need to automate some manual processes or provide additional reporting.	No action until specific needs for automation are identified. No ITS actions identified to date.	
New, Mod	Educational Services & Planning	18	In collaboration with the Colleges and Human Resource Services, develop a process for tracking, monitoring, and reporting the Full-time Faculty Obligation. All state reporting will be identified to include relevant student data and characteristics. Improvements include mapping current process, reconciling Full Time Obligation reporting and IPEDS reporting, conduct audit of all reporting (VTEA, Basic Skills, FTES (P-1, P-4), Flexible calendar, reconciling curriculum, and instructional programs inventory.	User action for improvements, but may impact ITS if need to automate some manual processes or provide additional reporting.	No action until specific needs for automation are identified.	Analysis Sep 07 - Dec 07, Implement Jan 08 - Mar 08
New	Facilities Planning & Management	19	Enhance IT support through use of District ITS staff for the facilities modernization program. Define resources and system requirements for communication to IT.	Provide local District resources to replace the DMJM staff at Owens office for technical support (some support received from DMJM Los Angeles office)	District ITS has begun providing support for the previous DMJM services for PCs, servers, printers, FTP sites, backups, and support for office relocations as needed.	Mar 07 - Dec 07
Priority, New	Facilities Planning & Management	20	Streamline the Accounts Payable and Accounting processes and practices for the facilities modernization program.	Review current processes both procedural and through Banner to determine pertinent improvements.	District ITS is working with Vice Chancellor and Project Managers to evaluate potential Prolog interface with Banner and to provide additional Banner reports as needed for Bond Measure B.	Mar 07 - Dec 07

NOTE: Grey Shaded Items are on Banner Project Priority List from Cabinet

**District Strategic Plan - ITS Requests Only
August 2007**

ITS Proj	Person(s)		SPECIFIC GOALS - SUBSET FOR ITS ACTION	ITS ACTION PLAN	ITS STATUS	Timeline/ Estimated Cost (External)
Priority, New, Mod	Responsible					
Priority, New	Facilities Planning & Management	21	Streamline the Procurement processes and practices for the facilities modernization program.	Review current processes both procedural and through Banner to determine pertinent improvements.	District ITS is working with Purchasing on improvements for P-card and online requisitions which can be extended to Bond Measure B. New system features will be installed first for operational expenses and then once proven it will be extended to the more complex Bond Measure B process (also more comprehensive procedures will be required). Refer to #2, #13, #14 above.	Purchase Card June 08, Online Reqs May 08
Priority, New, Mod	Maintenance & Operations	22	Improve the electronic work order system to help internal and external communications.	User action to coordinate with vendor on upgrade.	NEW action for District ITS - new system upgrade requires hardware for Web services and technical support for the software upgrade and maintenance. Request for purchase of upgrade by M&O processed.	Completed July 07
Priority, New	Public Information & Marketing	23	Create a publications budget to enhance and support outreach, advertising, and marketing efforts district-wide.	Requires new System to satisfy Marketing Outreach requirements for both colleges. The same automated solution could perhaps satisfy the PIO needs as well as the other departments with "outreach" goals such as Economic Dev/Contract Ed and Educational Services/Planning.	ITS will work with Marketing and Contract Ed to determine what if any additional modules are available in Banner that can be purchased and satisfy this Outreach requirements. Based on a preliminary research by ITS, Banner does have other modules that CLPCCD does not have that appear to be in line with the Outreach needs.	Interim Retention System Sep 07, New Contact System Oct 07 - Oct 08

NOTE: Grey Shaded Items are on Banner Project Priority List from Cabinet

**District Strategic Plan - ITS Requests Only
August 2007**

ITS Proj	Person(s)		SPECIFIC GOALS - SUBSET FOR ITS ACTION	ITS ACTION PLAN	ITS STATUS	Timeline/
Priority, New, Mod	Responsible					Estimated Cost (External)
New, Mod	Human Resources	24	Convert all human resources forms to electronic format (PDF) so a user can complete them electronically and return either via email or as an attachment to an email message. Post forms on human resources website and communicate availability to District.	Evaluate Human Resource forms and identify if the Banner system provides the online form or if the form is external to any Banner functions. Select forms for the appropriate automation method and coordinate with District ITS as needed.	District ITS purchased Omniforms and installed. Human Resources needs to identify forms that are not contained in the Banner system that can be setup with Omniforms and these forms will be added to the pilot list. Human Resources is in the process of reviewing their forms for possible modifications, and this step should be completed prior to implementing on Omniforms. Any Banner online forms such as Timesheet will be implemented as part of the Banner projects and not using Omniforms.	Provide HR forms support as needed 1st Phase Omniforms Oct 07, PDF's Sep 07, Web based forms July 08
New	**Fiscal Services - Moved to Human Resources Due to Org Change	25	Implement process improvements to payroll function. Streamline procedures and clarify processes for employees. Assure compliance with staff and faculty collective bargaining agreement and Board of Trustees policies. Ensure accuracy and timeliness of payroll processes and utilize technology fully.	User action for procedure improvements, but may impact ITS if need to automate some manual processes or provide additional reporting.	No action until specific needs for automation are identified.	Moved to HR due to Org Change, July 07 - Nov 07, Cost: \$30K Consulting
Priority, New	**Fiscal Services - Moved to Human Resources Due to Org Change	26	Implement electronic Web Time Entry system that allows employees to enter time sheet information directly into a secure web-based system. The web-based system will improve time sheet processing and accuracy and will allow managers to provide better oversight to the process.	Implement Web for Time Entry in phases based on employee groups.	ITS installed Timesheet module last year. Reviewed with HR, Payroll, College, and ITS team all the functionality and how CLPCCD would implement. Project put on hold due to Payroll & HR staffing. Now pending only Payroll staff to be available to continue process.	Moved to HR due to Org Change, 1st Phase Nov 07 - Mar 08, 2nd Phase Apr 08 - Dec 08
Priority, New	Human Resources	27	Install PeopleAdmin, an integrated web-based applicant system, to provide an integrated approach to application processing, screening, and selection. System includes position description module that allows full integration of position management, review, and requisition processing. PeopleAdmin system integrates with our Banner system, thus providing a coordinated and unified approach to these functions.	Implement ASP Model for PeopleAdmin screens first and then interface with Banner HR module.	Vendor contract for HR for Application Service Provider model has been completed. Vendor provides remote services for hardware and software. CLPCCD personalizes the system to suit their environment.	Initial Nov/Dec 07, On-going

NOTE: Grey Shaded Items are on Banner Project Priority List from Cabinet

**District Strategic Plan - ITS Requests Only
August 2007**

ITS Proj Priority, New, Mod	Person(s) Responsible		SPECIFIC GOALS - SUBSET FOR ITS ACTION	ITS ACTION PLAN	ITS STATUS	Timeline/ Estimated Cost (External)
New, Mod	Human Resources	28	Develop a human resource webpage that is accurate, attractive, easy-to-use, and updated regularly.	HR Review of Web pages should be coordinated with District PIO for Internet and District ITS for Intranet.	District ITS can assist in the Web page additions or modifications once the enhancements are identified by Human Resources.	Sep 07, Support as needed
New, Mod	Human Resources	29	Develop and improve data and reports for effective decision-making within human resources and District-wide.	For ITS portion only to provide electronic tools, implement the Crystal Reporting tool for selected users in Human Resources. Users to determine data views needed from Banner before ITS can do the setup.	ITS installed Crystal Tool in November 2006 and is in the process of working with Financial Aid on their data views. Business Services will be the next group, estimated in April/May 2007, then followed by Human Resources group. Users need to be assigned to be able to give inputs for data views needed. It should be noted that Human Resources already has ad-hoc reporting capability that was developed by ITS years ago using a different tool, so the user groups without any ad-hoc reporting capabilities were selected first for Crystal implementation.	HR June 07 - Feb 08, Add Depts Aug 08
New, Mod	Human Resources	30	Make greater use of technology and current business practices to provide information and services to current and potential employees and general public.	Review current processes both procedural and through Banner to determine pertinent improvements.	District ITS will work with Director of Human Resources to identify the department future needs and research potential technology solutions to satisfy HR requirements.	On-going
New, Mod	Human Resources	31	Implement Benefit Bridge software program to provide employees access to their benefit information to make changes in a manner that is both easy and confidential.	Develop a custom Banner interface to send data to the vendor system, Benefit Bridge, for full time employees and retirees to create a supplemental system to track benefit changes. Banner will still be used by HR to store benefit data for usage in Payroll processing.	District ITS completed the programming and testing to provide a Banner extract to automatically load data into the Benefit Bridge System.	1st Phase Banner Interface Completed Summer 07, 2nd Phase Training Fall 07

NOTE: Grey Shaded Items are on Banner Project Priority List from Cabinet

**District Strategic Plan - ITS Requests Only
August 2007**

ITS Proj	Person(s)		SPECIFIC GOALS - SUBSET FOR ITS ACTION	ITS ACTION PLAN	ITS STATUS	Timeline/ Estimated Cost (External)
Priority, New, Mod	Responsible					
New, Mod	Human Resources	32	Develop online tools for supervisors and employees that provide them with direct and immediate access to a wide-range of human resource information.	Review current processes both procedural and through Banner to determine pertinent improvements.	District ITS will work with Director of Human Resources to identify the department future needs and research potential technology solutions to satisfy HR requirements.	Initial Nov 07, On-going
New, Mod	Human Resources	33	Implement human resources Listserv to inform potential applicants of employment opportunities.	Evaluate various Listserv options that are available for features and costs. Assess both the subscription service models and the local server models based on the CLPCCD load requirements. Select a solution that can be applied District-wide as new Listserv requirements arise.	District ITS setup Listserv subscription services for human resources as well as other college functions such as Chabot Performing Arts. Released to Human Resources staff for production usage in February 2007.	1st Phase - Setup Listserv Spring 07, 2nd phase Fall 07, Cost: \$500
New, Mod	Human Resources	34	Implement in-house training program in current technology and software products to enhance productivity, efficiency, and service to customers (e.g., Microsoft products, Adobe Creative suite, Dreamweaver, data management, communication tools, PeopleAdmin, JobElephant, Banner, etc.).	ITS can coordinate Banner training and onsite assistance from Banner consultants for system usage and system documentation. Users must address written policies & procedures for their department.	ITS has provided consultant services for HR and Payroll in 2006-2007 with Melinda Wibby-Bryant to assist with problems, document current processes and procedures for the Banner functions for HR and Payroll, and make recommendations for potential changes for improvement. ITS has purchased CBT's (Computer Based Training) for each of the Banner modules "vanilla" system. ITS provides Banner training classes internally as needed for new hires and can coordinate with the Banner vendor for more formal classes if desired.	Consultant services Nov 06 Nov 07 for HR and Payroll, On-going, Cost: \$36K Consulting

NOTE: Grey Shaded Items are on Banner Project Priority List from Cabinet

**District Strategic Plan - ITS Requests Only
August 2007**

ITS Proj Priority, New, Mod	Person(s) Responsible		SPECIFIC GOALS - SUBSET FOR ITS ACTION	ITS ACTION PLAN	ITS STATUS	Timeline/ Estimated Cost (External)
	ITS, Budget Office, Fiscal Services, Purchasing, Human Resources, Economic Dev/Contract Ed, Educational Services & Planning, Facilities Planning & Management, Maintenance & Operations, Public Information & Marketing	35	ADDITIONAL GENERAL RECOMMENDATIONS FROM SCHOOL SERVICES OF CA FOR FINANCE: (1) USERS DO NOT FULLY UTILIZE ALL OF THE EXISTING FEATURES OF BANNER SO PROVIDE TRAINING AND EVALUATION OF PROCEDURES TO TAKE ADVANTAGE OF THE SYSTEM CAPABILITIES AND IMPROVE PRODUCTIVITY. (2) CREATE WRITTEN PROCEDURES AND DEPARTMENTAL MANUALS. (3) ESTABLISH STAFF DEVELOPMENT PLAN TO PROVIDE TRAINING AND CROSS-TRAINING ON BANNER SYSTEM AND WRITTEN PROCEDURES.	User action to develop written procedures. Training content and schedule to be coordinated by users with ITS and Banner vendor.	For training, ITS has purchased CBT's (Computer Based Training) for each of the Banner modules "vanilla" system and ITS has posted these on the Web for Banner users. For full utilization of Banner, ITS is working with the Banner vendor to provide consultant services as user schedules permit to review the Banner System and make recommendations on potential changes for CLPCCD. New offering was announced at Summit starting in March 2007 by Sungard called "Step 2" Services designed for older customers of Banner to identify gaps in system usage, which would be beneficial to CLPCCD.	On-going, Cost: \$64K Consulting and/or Training Offsite

NOTE: Grey Shaded Items are on Banner Project Priority List from Cabinet

Banner Project Priorities from Cabinet as of August 2007

CABINET FINAL PROJECT PRIORITIES PROJECT DESCRIPTIONS PERSON(S) RESPONSIBLE	ITS ACTION PLAN ITS STATUS AS OF 7/31/07	PROJECT STATUS TIMELINE ESTIMATED COST (EXTERNAL)
GROUP 1 - Primary Projects	GROUP 1 - Primary Projects	
<p>1. <u>State MIS Data, HR Staff & IPEDS Reporting</u>: Extensive reporting is required for the State Chancellor's Office and other agencies throughout the year so Banner extracts from all the modules (Student, Financial Aid, Finance, and Human Resources) with corresponding reporting are submitted electronically. As the Banner System changes, these Banner extracts need to be modified accordingly. ITS is reviewing with users all the Banner data elements required and reprogramming the processes for improved efficiencies and to include new audit reporting features on a monthly basis for better monitoring. <u>PERSON(S) RESPONSIBLE</u>: ITS, HR, Student Services, Academic Services, Business Services, Financial Aid</p>	<p>Design completed for Student, Fin Aid, and HR specifications. Programming completed for Fin Aid and Student. Pending HR portion. Project on hold since Sungard is redoing all MIS Reporting as part of CA Solution Center. ITS is reviewing in-house modifications instead of waiting for the CA Solution Center.</p>	<p>In Process- Hold for Sungard CALB In-House Mods June 08</p>
<p>2. <u>Convert TOP Codes from Edition 5 to 6</u>: The State Chancellor's Office periodically provides updates to the TOP codes utilized for course instruction categories. Some updates are more major than others as in the case of the conversion to edition 6. <u>PERSON(S) RESPONSIBLE</u>: ITS, Student Services, Academic Services, Business Services</p>	<p>Conversion Completed for all Academic Top Codes in 2005/06. Colleges do have some codes incorrectly used that could not be converted. Did not convert 6xxxx accounts.</p>	<p>Complete</p>
<p>3. <u>Room Scheduling Software - Scheduler 25 or Astra (BOND)</u>: Academic and events scheduling software integrates with Banner and provides online real-time management of the facility utilization throughout the campuses. In addition to the construction benefits, the Room Scheduling will enable the colleges to increase enrollments by maximizing the space on campus. The inventory capabilities for the rooms will also ensure that the right equipment is available for all the disciplines. The automated systems optimize campus facility use by comparing section/classroom scenarios, assigning classes to rooms, producing detail reports of the results, and providing "what if" simulations for planning purposes. <u>PERSON(S) RESPONSIBLE</u>: ITS, Academic Services, Student Services, Business Services</p>	<p>Evaluated CollegeNet & Astra products through demos and team unanimously selected CollegeNet. Installed CollegeNet "Room Scheduling" package - Schedule 25, Resource 25 in Jan 2007. Complex install since involves 5 discrete servers. Implementation teams for Academic Scheduling done in Feb- LPC and Chabot complete. Preliminary Events Scheduling Overview done on April 10-11. Schedulers for events will resume work in Summer to input data to system with remote vendor assistance as needed. Once all college data is loaded for both Academics & Events, then training will follow. Formal training by vendor for Academics Schedulers completed the week of July 25. Additional onsite training planned for week of September 14 for both Academics and Events Schedulers. Plan to use Academics portion in parallel for Spring 2008 Schedule. In Nov 07, Schedulers will use system live to generate Summer and Fall 2008 schedules. Training for General Use Query for all users will be scheduled after Academics and Events core groups are live. Subscription to ASP service for X25 for analysis and comparative studies to be turned on once all live data loaded and approved</p>	<p>In Process Academics Oct-Dec 07 Events Oct-Dec 07 \$162,383 SW, Consult, Train</p>

Banner Project Priorities from Cabinet as of August 2007

CABINET FINAL PROJECT PRIORITIES PROJECT DESCRIPTIONS PERSON(S) RESPONSIBLE	ITS ACTION PLAN ITS STATUS AS OF 7/31/07	PROJECT STATUS TIMELINE ESTIMATED COST (EXTERNAL)
<p>4. <u>Crystal Reports Adhoc Reporting</u>: Banner provides standard reports for all modules within the baseline product, including the ability to download to Excel if desired. ITS has created many custom reports for users to control, but the parameters for these custom reports are fixed. Users have a requirement for an ad-hoc reporting tool to supplement the Banner System that allows them to define the variables for data extractions and to create their own formats for the output reports. <u>PERSON(S) RESPONSIBLE</u>: ITS, HR, Student Services, Academic Services, Business Services, Financial Aid</p>	<p>Installed Business Objects Web product for ad-hoc reporting in November 2006. Complexity is the installation and the setup of Banner views for users. Major effort is to setup views with user groups before can use the product. First group to define and setup Banner views and pilot product is FIN Aid which ITS began working with in January 2007. Using Fin Aid as the pilot group, training materials for the Web Intelligence Product were developed and posted on the Banner Web page. Concurrently in May, ITS began working with the next user groups - Finance, followed by HR. The current activity with both Finance and HR is definition and design of the views needed and initial training on the product. ITS will continue working with the 3 groups - Fin Aid, Fin, and HR - in parallel to get core users operational on the adhoc report tool. Once these groups are operational, ITS will then address the Student area.</p>	<p>In Process Finance & HR May 07-Feb 08 All User Depts by Aug 08 \$39,600 Software, Other Internal</p>
<p>5. <u>Automate Timesheets</u>: The Banner System contains a Web for Time Entry module that automates the manual timesheet to place all the functions related to the submission of timesheets online. Timesheet hours are submitted by exception only for vacation, sick leave, etc. The module also tracks online Leave requests for employees approved in advance. Employee and management approval for all activity is tracked online with online queries and reporting available. Migration to the online timesheets will be done by job category and each step will shorten the timeframe for Payroll processing. <u>PERSON(S) RESPONSIBLE</u>: ITS, HR, Payroll Business Services, College Management and Deans, District Management</p>	<p>Installed Timesheet module. Reviewed with HR, Payroll, College, and ITS team all the functionality and how CLPCCD would implement in Summer 2006. Project placed on hold due to Payroll and HR staffing. As of April 2007, just waiting for available Payroll staff to continue process. ITS has completed the technical tasks to create new calendar for Web entry and continues testing of the Payroll interface. After Banner 7.3 upgrade in July 2007, reconvene user committee with reps from HR, Payroll, and ITS to come up with a implementation plan and schedule for the first phase (excludes faculty & hourly).</p>	<p>Hold 1st Phase Nov 07-Mar 08 2nd Phase Apr 08-Dec 08</p>
<p>6. <u>Web for Faculty - Needed for Waitlist</u>: In order to provide online Web services for the Faculty, CLPCCD had to purchase an additional Banner module, Web for Faculty, which is part of the Banner suite for Self-Service features through the Web. Web for Faculty provides online services to faculty and advisors for updating personal information, entering grades, viewing courses rosters, managing course enrollment, and viewing course load and schedule. This module now gives the Faculty comparable online capabilities as the students have with CLASS WEB; however, the faculty module provides a more comprehensive view by course. <u>PERSON(S) RESPONSIBLE</u>: ITS, Faculty, Student Services, Academic Services</p>	<p>Installed Web for Faculty. Committee meetings held Nov & Dec 2006. Release of Query functions for faculty March 2007, also includes Web for Employee. Updates for grades have Pilot planned for May 2007 & Summer 2007 with full operation in Fall 2007 where grades are done in Nov/Dec. ITS mod for "drop" sheets was included in the Pilot. Spring 2007 Pilot completed and post-implementation review was done in June with good feedback from participants. Faculty volunteers for Summer Pilot were selected and in process. ITS added a custom "Mid Term Progress Report" to the system and a section for Retention comments from faculty and follow-up actions. Pending item to be addressed with user committee is the update of "office hours" where both procedures and screens need to be finalized. Review of potential to transition to Waitlist requested by faculty in DEMC. Waitlist review vs. Add Authorizations to follow Web for Faculty due to dependencies. Will evaluate benefits for both methods to decide which is best for CLPCCD with either the Kern CCD Waitlist customization or the new Sungard CA Solution Center version.</p>	<p>In Process Pilot Mar 07-Aug 07 Live Fall 07 (Nov 07) \$76,700 Software</p>

Banner Project Priorities from Cabinet as of August 2007

CABINET FINAL PROJECT PRIORITIES PROJECT DESCRIPTIONS PERSON(S) RESPONSIBLE	ITS ACTION PLAN ITS STATUS AS OF 7/31/07	PROJECT STATUS TIMELINE ESTIMATED COST (EXTERNAL)
<p>7. Administrative Justice Instructor Tracking: Specific programs at the colleges such as the Administrative Justice program utilize several unique features which are different than the standard Banner setup for course tracking and assignments. CLPCCD will review all Banner features to determine what can be used within the Banner System so that current manual activity that the Deans perform outside of Banner can be eliminated. PERSON(S) RESPONSIBLE: ITS, HR, Academic Services</p>	<p>Review and analysis of Banner options available to use for Administrative Justice done with T. Miller & S. Davidson and ITS. Deferred due to HR and Payroll staffing changes. Plan is to enter AJ as LPC assignments in Banner and then use existing tools to report as do the rest in Banner for step increases, MIS data, and labels. Need an org or acct code to differentiate from other assignments.</p>	<p>Hold</p>
<p>8. Student Degree Audit (Degree Works instead of CAPP): The colleges need a web-based tool that provides an academic advising and degree audit solution that helps students with their curriculum requirements. The students need a better automated method to guide them through the college degree requirements and help them work with counseling on their path to graduation. The colleges can define and track general education, core, major, minor, and concentration requirements as well as mandated competencies, remedial courses, and test scores. Once the program requirements are defined, students with their advisors can generate detailed student education plans. Additional capabilities for "what if" and "look ahead" features show students the impact of every academic option. PERSON(S) RESPONSIBLE: ITS, Student Services, Counseling, Academic Services</p>	<p>Sungard vendor is currently reviewing CAPP and looking at Degree Works alternative as possible improved solution. ITS and Banner users got more information on this topic from SCT Summit. Good reviews from CLPCCD Summit attendees. Demo done for CLPCCD Counseling on April 5 to evaluate product features. Consistent good reviews on the product in comparison to the previous CAPP which other colleges have had difficulty implementing. Banner colleges now selecting Degree Works in lieu of CAPP due to features and implementation. ITS got vendor pricing for product to reserve future funding if proceed with this alternative. After evaluating Degree Works and collaborating with other California Community Colleges going in that direction, the final decision was to proceed with this solution for CLPCCD. The purchase of hardware and software is in process to first complete the technical setup and installation. Degree Works project is on a fast track for implementation within a 6-9 months timeframe.</p>	<p>In Process Install/Setup Oct 07-Mar 08 Student Process Jan-May 08 Admin Process June-July 08 Live Summer 08 (Aug 08) \$140,340 SW, Consult, Train</p>
<p>9. Third Party Products - SARS, STARS, PE: The colleges use third party products to track positive attendance (SARS-TRAK and STARS) and counseling appointments (SARS-GRID). ITS works with each of the colleges to ensure the same releases of the software are maintained at both campuses. ITS reviews new software products within the SARS suite as new products are introduced. Two such modules are the web-based e-SARS that allows remote access to the SARS systems on campus and SARS-CALL that provides an automatic call capability to students for Counseling and A&R. PERSON(S) RESPONSIBLE: ITS, Student Services, Counseling, Academic Services</p>	<p>No consolidation of servers required as of yet. Both colleges use SARS for Counseling and are at the same release and have purchased the new WEB e-SARS to provide online appointments. New module SARS-CALL for interface with SARS-GRID for Counseling was recently purchased. Both e-SARS and SARS-CALL are in the process of installation.</p>	<p>In Process June 07-Nov 07 Colleges Purchased SARS</p>

Banner Project Priorities from Cabinet as of August 2007

CABINET FINAL PROJECT PRIORITIES PROJECT DESCRIPTIONS PERSON(S) RESPONSIBLE	ITS ACTION PLAN ITS STATUS AS OF 7/31/07	PROJECT STATUS TIMELINE ESTIMATED COST (EXTERNAL)
<u>GROUP 2 - Secondary Projects</u>	<u>GROUP 2 - Secondary Projects</u>	
<p>10. <u>Web for Finance (Includes Budget)</u>: The Banner System contains the Web for Finance module that provides web-based services for Finance information such as budgets, expenses, requisitions, and approvals. This module now provides remote access to the Finance Banner data which was restricted previously to campus access. Capabilities include online queries and reporting for budgets vs. expenses, budget transfers, budget worksheets, purchase orders, and requisitions. The module also contains custom query features that give the users control over the data fields extracted and calculations desired. <u>PERSON(S) RESPONSIBLE</u>: ITS, Business Services, College Management and Deans, District Management</p>	<p>Installed Web for Finance and released to Business Services staff at District and Colleges in Nov/Dec 2006 who will review and determine timeline to release to other groups. Includes all queries for Budgets and Expenses. Web for Finance Queries were released to other users besides Finance starting in April 2007 and training at Chabot was completed in April/May. Training for District personnel is scheduled for July/August. Still pending training for LPC personnel. Module also includes update functions for Budget Transfers, Budget Worksheets, and Requisitions/PO's. Budget Manager currently using Budget features. Users to determine Timeline to release to users outside Business Services at Colleges and District. The requisitions functions need new policies/procedures from Purchasing before it can be released to other groups. No Purchasing activity will be done on these procedures until after the year end close due to limited staff resources. Chabot has requested to extend the Banner requisition input (not Web version) to other personnel so this training was done in June. In Fall, ITS will implement monitoring tools to track user usage on this module.</p>	<p>In Process Finance Oct 07 Budgets Dec 07-Feb 08 Online Reqs Oct 07-May 08</p>
<p>11. <u>Enrollment Management Custom Web Tool</u>: ITS developed an in-house Enrollment Management System which has been used for several years with very effective results. Users want to have web-based services for this in-house system which would require a total rewrite of the system to be compatible with the Web HTML format. <u>PERSON(S) RESPONSIBLE</u>: ITS, College Management and Deans, District Management</p>	<p>No action to-date except revisions as requested to the current Enrollment Management tool using Access. Related to new project for "Contact" System for Marketing Efforts below. New SCT Sungard Enrollment Management Suite may be a good solution to replace this Enrollment tool plus address the Recruiting and Retention objective.</p>	<p>Defer</p>
<p>12. <u>Accounts Receivables Reconciliation</u>: The Banner Accounts Receivable module is impacted by activity within other Banner modules so Business Services monitors the Receivables and takes action where appropriate. ITS provides needed reporting and data extracts as required. <u>PERSON(S) RESPONSIBLE</u>: ITS, Business Services</p>	<p>ITS continues to work with Business Services on Accounts Receivables and balances for past years, reviewing and reconciling as needed.</p>	<p>In Process On-going as needed</p>
<p>13. <u>Applicant Tracking</u>: HR has a requirement to automate many of the manual tasks performed either through better use of Banner or through other third party products if appropriate. HR needs an automated web-based system for accepting and processing employment applications. In addition, HR needs an automated system to perform administrative tasks related to the management processes involved with employee re-classifications and position descriptions. <u>PERSON(S) RESPONSIBLE</u>: ITS, HR, College Management, District Management</p>	<p>Other third party products besides Banner were reviewed to provide online services through the Web. Human Resources selected PeopleAdmin which is a partner with our Banner vendor, Sungard. An ASP model was selected where hardware and software is provided at the vendor site. Personalization of the system is done by CLPCCD with the vendor's assistance. Banner interfaces will be developed by the ITS staff.</p>	<p>In Process Nov/Dec 07 HR Purchased - \$38,500</p>

Banner Project Priorities from Cabinet as of August 2007

CABINET FINAL PROJECT PRIORITIES PROJECT DESCRIPTIONS PERSON(S) RESPONSIBLE	ITS ACTION PLAN ITS STATUS AS OF 7/31/07	PROJECT STATUS TIMELINE ESTIMATED COST (EXTERNAL)
<p>14. <u>Strategic Cost Management System - KH Consulting</u>: ITS completed new data extracts and reporting to support the KH Strategic Cost Management initiatives. Recommendations were made to possibly automate these new processes further. CLPCCD management determined that would not be necessary in light of some of the other new Banner Projects planned. PERSON(S) RESPONSIBLE: ITS, College Management, District Management <u>Not ranked - Schedule as Needed:</u></p>	<p>No action to-date. Current reports used before are still available and the new Crystal Ad-hoc reporting could be used to allow users to develop their own custom reports. Consensus was no need for new system as originally defined.</p> <p><u>Not ranked - Schedule as Needed:</u></p>	<p>Defer</p>
<p>15. <u>Review of Document Imaging Systems (BOND)</u> CLPCCD requires a district-wide Document Management System that has the capability to scan documents such as student transcripts, employee applications, vendor invoices, and other Finance or Financial Aid documents, and to store these documents through an indexing mechanism for retrieval. Due to the large volume of paper that is stored at the colleges and district, this would not only archive documents for easy access or update, but would eliminate wasted building space used for document storage. PERSON(S) RESPONSIBLE: ITS, HR, Student Services, Academic Services, Business Services, Financial Aid</p>	<p>No action to-date. Initial step is to do vendor demos and select a product solution. Implementation is anticipated to be a major effort due to the complexity of these types of systems and the extensive user involvement required since this system impacts all departments. Major task for college representatives and ITS who are already fully occupied on the other Priority Projects above. SCT Sungard Web Xtender to be reviewed as well as other vendor products such as Hershey.</p>	<p>No Action June 08-Feb 09 \$275,000 SW, Consult, Train</p>
<p>16. Upgrade from Banner 6 to 7 (first window Dec 2005 - defer to April 2006)</p>	<p>Completed April 2006 as planned. Patches have been applied as needed. Deferred any significant upgrade to 7.3 until forced to by Financial Aid (See #21 below)</p>	<p>Complete</p>
<p>NOTE: ITS PRIORITIZED WITHIN GROUP 1 BASED ON RESOURCES AND LEVEL OF EFFORT, THEN SAME WITHIN GROUP 2.</p>	<p>NOTE: ITS PRIORITIZED WITHIN GROUP 1 BASED ON RESOURCES AND LEVEL OF EFFORT, THEN SAME WITHIN GROUP 2.</p>	

Banner Project Priorities from Cabinet as of August 2007

CABINET FINAL PROJECT PRIORITIES PROJECT DESCRIPTIONS PERSON(S) RESPONSIBLE	ITS ACTION PLAN ITS STATUS AS OF 7/31/07	PROJECT STATUS TIMELINE ESTIMATED COST (EXTERNAL)
Priority Projects Added by Cabinet in 2006 (After June 2005 Initial List):	Priority Projects Added by Cabinet in 2006 (After June 2005 Initial List):	
<p>17. <u>EPOS Credit Card Payment</u>: CLPCCD needs a new vendor to provide a full payment option for student registration and fees paid through credit cards. The vendor must have processes already in place that also complies with the new federal regulations for credit card processing which the prior vendor Touchnet did not provide. <u>PERSON(S) RESPONSIBLE</u>: ITS, Student Services, Business Services</p>	<p>Completed - full credit card payment uses EPOS.</p>	<p>Complete</p>
<p>18. <u>FACTS Deferred Payment Plan</u>: There is an additional need to provide some "Partial Pay Installments" plan for students where the "Full Pay" option is a financial burden. The combination of the full pay and partial pay installment plans gives maximum flexibility to the students resulting in increased enrollments and retention. <u>PERSON(S) RESPONSIBLE</u>: ITS, Student Services, Business Services</p>	<p>Completed - installment payment plan uses FACTS</p>	<p>Complete</p>
<p>19. <u>Luminus by Sungard (Portal, Single Sign-on, Student Email)</u>: As more web-based applications are introduced into the District environment and supplemental interfaces to the Banner System increase, the need for a more centralized portal solution is necessary. Sungard's product "Luminus" provides the automatic links from Banner to other applications through the portal with the appropriate security. Luminus also allows for a single sign on solution no matter what supplemental system is being accessed. In addition, Luminus provides the software to make student email available for all registered students so that email can become a substitute for mailers, thus improving the timeliness of communications. <u>PERSON(S) RESPONSIBLE</u>: ITS, HR, Student Services, Academic Services, Business Services, Financial Aid</p>	<p>Purchased Luminus. Very complex install due to multiple components requiring 5-6 servers. Working with SCT vendor on the consultant resources to install Student Email first, which is not the standard install. SCT resources were tied up through April due to a March upgrade to Luminus that existing customers are implementing. Current schedule for initial install was May 2007. Sungard vendor is still working on the final installation with the ITS staff which has turned out to be more complicated than expected. Estimated completion is August. A user committee will be formed to develop an implementation plan for student email after the Banner 7.3 upgrade in July. Anticipated date for availability of Student email is Fall 2007 to do a pilot group at both colleges, followed by full operation in Spring 2008. Student email initially plan to be used by A&R, Fin Aid, and faculty for correspondence. After email, ITS will work with Sungard on the other major features for portals and single sign-on features which will require heavy user involvement, so a separate user committee will be formed.</p>	<p>In Process Email Pilot Sep - Dec 07 Student Email Live Jan 08 Portal Oct 07-Aug 08 \$253,560 SW, Consult, Train</p>
<p>20. <u>E-LUMENS Student Learning Outcomes</u>: Colleges needed an automated tool to track and evaluate student learning outcomes. The system needs to interface with Banner for courses offered in order to collect statistical measurements of student assessments for those courses. The system should be accessible on campus and remote access through the Internet is highly desirable for faculty. <u>PERSON(S) RESPONSIBLE</u>: ITS, Student Services, Counseling, Academic Services</p>	<p>Software purchased by LPC for Student Learning Outcomes in 2006. Server installation is complete at LPC. Chabot reviewed software with the vendor for their usage and possible license terms. District received OK to purchase for Chabot and then will require centralized server to service both colleges. Chabot notified vendor week 3/12 to do local demo and provide pricing for Chabot. Vendor pricing received in May and new software agreements were processed to accommodate both colleges. District funded Elumens for both colleges. District negotiated with vendor to receive discount on Chabot's software fee and to defer annual maintenance until June 2008 for both colleges, giving LPC a year extension on their services at no costs.</p>	<p>In Process LPC June 06 Chabot Aug 07 \$26,000 SW, Train</p>

Banner Project Priorities from Cabinet as of August 2007

CABINET FINAL PROJECT PRIORITIES PROJECT DESCRIPTIONS PERSON(S) RESPONSIBLE	ITS ACTION PLAN ITS STATUS AS OF 7/31/07	PROJECT STATUS TIMELINE ESTIMATED COST (EXTERNAL)
<p>21. Banner 7.3 Upgrade</p>	<p>Required to adhere to the Financial Aid regulatory requirements including the new CalWorks. MUST complete by July 2007 to meet the August deadlines for Fin Aid. CalWorks has new state MIS data reporting requirements due in August 2007 which affect funding. CalWorks has been tested and will be put into production earlier in mid-June to allow for user training to meet state deadlines. ITS staff has reviewed release updates for the remaining Banner modules and is applying local mods. User testing of new release has already started in Financial Aid and will be extended to other user groups by mid-June. Cutover completed July 7-8.</p>	<p>Completed July 07</p>
<p>22. <u>Online forms</u>: CLPCCD needs a short term solution to automate some common forms utilized by the colleges and district for centralized storage to facilitate access. Initial requirements are to provide PDFs on the Web where data can be entered and routed. This interim solution is very basic and does not provide the advanced indexing with update and retrieval capabilities that a comprehensive Document Imaging System includes. <u>PERSON(S) RESPONSIBLE</u>: ITS, HR, Student Services, Academic Services, Business Services, Financial Aid</p>	<p>Purchased Omniforms and installed. Low cost solution to start putting forms online. College reps identified first set of forms to automate. Excluded forms that will be addressed in Banner Projects such as Timesheet where Banner will have full automation and integration. Cabinet reviewed list and provided additions/changes. First phase creates PDF files for query, fill in form online, and email capabilities. Not a replacement for a Document Imaging System, since does not include electronic signature or mass storage of documents.</p>	<p>In Process Phase 1 Web Access - Sep 07 Phase 2 On-going Add forms</p>

Banner Project Priorities from Cabinet as of August 2007

CABINET FINAL PROJECT PRIORITIES PROJECT DESCRIPTIONS PERSON(S) RESPONSIBLE	ITS ACTION PLAN ITS STATUS AS OF 7/31/07	PROJECT STATUS TIMELINE ESTIMATED COST (EXTERNAL)
Priority Projects Requested by VPs/Vice Chancellors after Sept 2006:	Priority Projects Requested by VPs/Vice Chancellors after Sept 2006:	
<p>23. <u>Purchase Card</u>: Procurement has identified substantial benefits for migrating to credit card purchases for low dollar requisitions. Credit card limits will be enforced for a maximum which will be below the capital asset guidelines. Banner interfaces will be customized to electronically generate vendor payments when credit card statements are received. <u>PERSON(S) RESPONSIBLE</u>: ITS, Business Services, Procurement, College Management, District Management</p>	<p>Initially, this was not an ITS action. Business Services has determined that they cannot implement this credit card feature without having a custom interface to Banner from the outside credit card vendor so that there is no manual input required. ITS will have to write their own interface in conjunction with the credit card company. Will use P-card portion from Banner + custom code. Statistics were compiled that showed 70% of the requisitions were below \$1,000 which proves that the Purchase Card has a greater benefit than the online requisition.</p>	<p>In Process Pilot Apr 07-May 08 Implement June 08</p>
<p>24. <u>Parking Permits</u>: Colleges needed an automated Parking Permit system that would facilitate the payment of student fees and include a provision for financial aid students. Banner interfaces will be customized to download student data to the Parking Permit system. Provisions for the creation of parking permits and the tracking of the issuance of these permits needs to be available. <u>PERSON(S) RESPONSIBLE</u>: ITS, Student Services, Business Services</p>	<p>ITS completed some custom Banner screens to allow students to request Parking Permits online. Reviewed by colleges who are now looking at vendors to provide the actual parking permits. Users reviewed BossCars vendor software package with other vendor to provide permits. Users also evaluated other competitive vendors - T2 and Credentials, comparing functionality, Banner interface, and pricing. Colleges decided to proceed with a vendor package based on cost benefits and functionality. If proceed with package, it will still require support from ITS for hardware server, software install, upgrades, and custom Banner interfaces. Expect new system implementation in Spring 2008. Formal RFP was issued in May 2007 to competitive bid and responses were received back. Responses were received from BossCars, T2, and Credentials, the 3 vendors that had presented demos to CLPCCD in the past. These responses were reviewed by a team with representatives from Security and ITS and BossCars was the vendor selected.</p>	<p>In Process Cutover Register Nov 07 Colleges Purchased</p>
<p>25. <u>Prolog - Bond Project Management System</u>: Prolog software is used by Bond Facilities to track the new construction and renovations for all Bond projects. The current Prolog setup was a separate system with no automatic Banner interface. A custom Banner interface will be programmed to electronically send purchase order and payment data to the Prolog system so manual input is eliminated. This capability reduces the need for data reconciliation between the two systems. <u>PERSON(S) RESPONSIBLE</u>: ITS, Facilities, Business Services.</p>	<p>All work supported by DMJM staff for Bond in the past needs to now be supported by ITS as requested by Vice Chancellor of Facilities. Includes Prolog with custom interface to Banner System for data to/from the Bond System. Also includes creation and support for FTP server and server for DMJM files with appropriate backups. ITS has completed the FTP server installation and backups. ITS completed the installation of the Prolog server. Banner extracts for Finance data to support the Prolog System are in process by the ITS analyst in conjunction with the Rotech consultant who provides Prolog support.</p>	<p>In Process June 07-Oct 07 BOND - Facilities Purchased</p>
<p>26. <u>Upgrade to M&O Work Order System</u>: Facility requests performed by Maintenance & Operations are tracked via an automated system. Upgrades to the system are required to make it web-based that allows remote access for college and district staff. <u>PERSON(S) RESPONSIBLE</u>: ITS, Facilities</p>	<p>M&O requested upgrade to vendor software Goglobal that provides the Work Order System. This project requires local support for install and upgrades from ITS. Enhances SPMMS (School Preventive Maintenance Management System) to provide online Web access for users</p>	<p>In Process Live Aug 07 Facilities Purchased</p>

Banner Project Priorities from Cabinet as of August 2007

CABINET FINAL PROJECT PRIORITIES PROJECT DESCRIPTIONS PERSON(S) RESPONSIBLE	ITS ACTION PLAN ITS STATUS AS OF 7/31/07	PROJECT STATUS TIMELINE ESTIMATED COST (EXTERNAL)
<p>27. <u>"CONTACT" System for Marketing Efforts at Colleges</u>: CLPCCD needs an automated tracking system that would be a comprehensive and integrated solution to address marketing contacts, recruitment efforts, enrollment projections, and retention. The system should provide a full cycle to measure performance and identify areas needing improvements. <u>PERSON(S) RESPONSIBLE</u>: ITS, Marketing, Student Services, Academic Services, College Management, District Management</p>	<p>PIO and Colleges requested that ITS review what Banner can offer for tracking Contacts for Marketing and Recruitment efforts - look at what we have today and/or what new modules Banner may have that we could purchase. ITS saw briefing at SCT Summit on the NEW Enrollment Management Suite which addresses recruiting, enrollment, and retention. Does include Contact management, campaigns, and performance measurement. Technical features include workflow, email capability, and students can create own Portal webspace. Requires purchase of new modules - recommend to Sungard that they do demo for Cabinet to evaluate if this solution satisfies CLPCCD requirements. Also requires that Luminus is already installed for the portal and email support for the EM suite. In July 2007, District ITS developed a basic Retention Comments feature within the Web for Faculty module in Banner so faculty can refer students and the Retention staff at the colleges can document the results of their follow-up with the students.</p>	<p>No action Retention Comments - Sept 07 Oct 07-Oct 08 Cost TBD - Estimate \$350K-\$450K</p>
<p>28. <u>Benefit Bridge for Human Resources</u>: District wants to provide online capabilities for full benefit coverage. Banner interfaces are required to establish the initial baseline for the Benefits Bridge system. <u>PERSON(S) RESPONSIBLE</u>: ITS, HR</p>	<p>Develop a custom Banner interface to send data to the vendor system, Benefit Bridge, for full time employees and retirees to create a supplemental system to track benefit changes. Banner will still be used by HR to store benefits data for usage in Payroll processing and deductions.</p>	<p>Complete</p>
<p>29. <u>Need for new Sub-system to support the TRIO program</u>: Custom Banner screens and reports were needed to satisfy the new TRIO program in compliance with federal guidelines. A Banner solution was preferable to a stand alone system since many of the TRIO data elements being tracked are similar to other Special Services already tracked in Banner such as EOPS. <u>PERSON(S) RESPONSIBLE</u>: ITS, Special Student Services</p>	<p>Develop screens for Data Entry of TRIO data into Banner and create new reporting to satisfy regulatory requirements. Combined with other Banner functions customized by ITS staff for EOPS and CARE to accommodate unique data entry requirements for this TRIO program. Initial reporting provided and then major modifications were required based on government changes. Primary phase completed, but subject to updates if change in regulations occur.</p>	<p>Complete</p>
<p>30 Financial Aid upgrades to Banner System</p>	<p>Updates to the Banner Financial Aid module occurs at least 4-6 times per year to remain current with the mandated regulations. These upgrades or patches are above and beyond the standard Banner upgrades that are completed for all modules. Financial Aid drives the schedule for the other Banner module upgrades which must be done to support the Financial Aid software releases. These Financial Aid upgrades have increased in complexity since Banner 7.0 release.</p>	<p>Complete</p>
<p>31. Convert to California Version of Banner Baseline</p>	<p>CA Solution Center is providing a CA specific version of Banner called CALB. The goal of the CALB version is to reduce our local mods that we need to make and to come up with a product that more closely matches CCC needs. CA specific reporting and processing logic unique to CA will be added to the CALB version. Therefore, it is mandatory to move to CALB version in the future. The Banner 7.3 upgrade is a prerequisite. Next step will be to evaluate CALB changes and develop implementation plan to convert to CALB which may include processing and/or policy changes. Assessment to be done by ITS on whether to do CALB as part of Banner 7.3 release or future Banner 8.0 release.</p>	<p>No action July 08 -Dec 08</p>

Summary of Source Documents Used to Determine Banner Project Priorities

CABINET FINAL PRIORITIES AS OF 7/31/07 ITS RESEQUENCED GROUPS 1 & 2	Status Code	Cabinet Priority	KH Consulting	District Strategic Plan	School Services (FIN)
1. State MIS Data, HR Staff & IPEDS Reporting***	In Process	Y			
2. Convert TOP Codes from Edition 5 to 6***	Complete	Y			
3. Room Scheduling Software - Scheduler 25 or Astra (BOND)	In Process	Y	Y		Y
GROUP 1 - Primary Projects					
4. Crystal Reports Adhoc Reporting	In Process	Y	Y	Y	Y
5. Automate Timesheets	Hold	Y	Y	Y	Y
6. Web for Faculty - Needed for Waitlist	In Process	Y	Y	Y - Web Empl	
7. Administrative Justice Instructor Tracking	Hold	Y			
8. Student Degree Audit (CAPP)	In Process	Y	Y		
9. Third Party Products - SARS, STARS, PE	In Process	Y	Y		
GROUP 2 - Secondary Projects					
10. Web for Finance (Includes Budget)	In Process	Y	Y	Y	Y - reqs,budgets, bud transfers
11. Enrollment Management Custom Web Tool	Defer	Y	Y	Y	
12. Accounts Receivables Reconciliation	In Process	Y			
13. Applicant Tracking	In Process	Y	Y		
14. Strategic Cost Management System - KH Consulting	Defer	Y	Y		
Not ranked - Schedule as Needed:					
15. Review of Document Imaging Systems (*ADDED - BOND*) (Only Vendor demos in this phase - not implementation)	No Action	Y			
16. Upgrade from Banner 6 to 7 (first window Dec 2005 - defer to April 2006)	Complete	Y			

Summary of Source Documents Used to Determine Banner Project Priorities

CABINET FINAL PRIORITIES AS OF 5/18/05 ITS RESEQUENCED GROUPS 1 & 2	Status Code	Cabinet Priority	KH Consulting	District Strategic Plan	School Services (FIN)
Priority Projects Added by Cabinet in 2006 (After June 2005 Initial List):					
17. EPOS Credit Card Payment (Full Payment Option)	Complete	Y			
18. FACTS Deferred Payment Plan (Partial Pay Installments)	Complete	Y			
19. Luminus by Sungard (Portal, Single Sign-on, Student Email)	In Process	Y	Y- for email		
20. E-LUMENS Student Learning Outcomes	In Process	Y	Y		
21. Banner 7.3 Upgrade	Complete	MUST DO			
22. Online forms	In Process	Y	Y	Y	
Priority Projects Requested by VPs/Vice Chancellors after Sept 2006:					
23. Purchase Card	In Process	Y	Y	Y	Y
24. Parking Permits	In Process	VP	Y		
25. Prolog - Bond Project Management System	In Process	VC		Y	
26. Upgrade to M&O Work Order System - SPMS	In Process	M&O		Y	Y
27. "CONTACT" System for Marketing Efforts at Colleges	No action	PRES		Y	
28. Benefit Bridge for Human Resources	Complete	HR			
29. Need for new Sub-system to support the TRIO program	Complete	Y			
30 Financial Aid upgrades to Banner System	Complete	Y			
31. Banner CALB Upgrade (CA Version of Banner)	No action	MUST DO			