Organizing the Work of Transformation

Board of Trustees – June 16, 2021

Approach to Transformation and Change

- People are at the center of transformation and change

- Teams can accomplish more than groups of individuals
  - Teams define a shared purpose
  - Ideas come from all sources
  - Diversity of views and perspectives is key to success
  - Representation from each function fosters better buy-in

- Change is hard, and people must understand the "why" and "how"

- Technology is the enabler, not the purpose

- The PM approach needs to match the culture of the organization

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Successful Practices

- Seek and reinforce frequent alignment of stakeholders at all levels

- Empower cross-functional teams to solve problems

- Monitor progress and challenges with full transparency

- Identify linkages/integration points early -- they drive timing and dependencies

- Involve people who "do the work" in all phases of the project

- Seek opportunities to engage grassroots leaders and support new ideas, especially those aligned with quality, learning, and student success

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Implementing Structure and Process

- A lot of Transformation work is already happening

    - Some Function or Task Teams are more high-functioning than others

    - The intent is to support existing work and add the cross-functional process dimension

- Not all Task work requires a Team

- Start by introducing two key tools to gain some consistency and discipline

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Initial Tools

Project Team Charter: [Name of Project]

Revised 00/00/2021

Team Purpose
[This purpose should be project-specific but should also reflect the desire for the work of the team to be student-focused and result in policies, processes, and practices that are informed by evidence-based best practices.]

Objectives/Deliverables
•   •   •   •   •

Key Process and System Dependencies
Institutions Impacted: Core/Functional Process: Sub-Process(es): Systems Impacted:

Team Members	Role/Expertise	Function	Institution

Project Status Dashboard: [Name of Project]

Date:

Core/Functional Process:

Sub Process(es):

Executive Summary	Status

Task/Deliverable	Description	Owner	Status

Accomplishments	Priorities Looking Forward
• • •	• • •

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Project/Team Governance Structure

Roles	People	Accountability
Project Sponsor(s)	Most senior individual or team with ownership for the core process/function (e.g. OC Leadership, Presidents).	• Final Decisions on recommendations • Approval to move to next stage • Removal of organizational or budget barriers
Functional Stakeholders	Functional leaders at the system or institution whose processes support the core/functional process impacted by the project (e.g. Deans, Dir. IT, Registrar, Dir of HR).	• Decisions related to internal function/institution processes • Consultation with Sponsors regarding recommendations • Removal of functional institutional barriers
Team Lead	Person selected as the designee of the core process owner.	• Decisions delegated to the team • Recommendations to bring to Stakeholders and Sponsors
Team Members	Listed in Charter.	• Full team participation • Communicate back to functional/institution teams • Collect input from functional/institution teams

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Stage-Gate Process

Gate   Gate   Gate   Launch

Discovery	Design	Development	Launch	Review
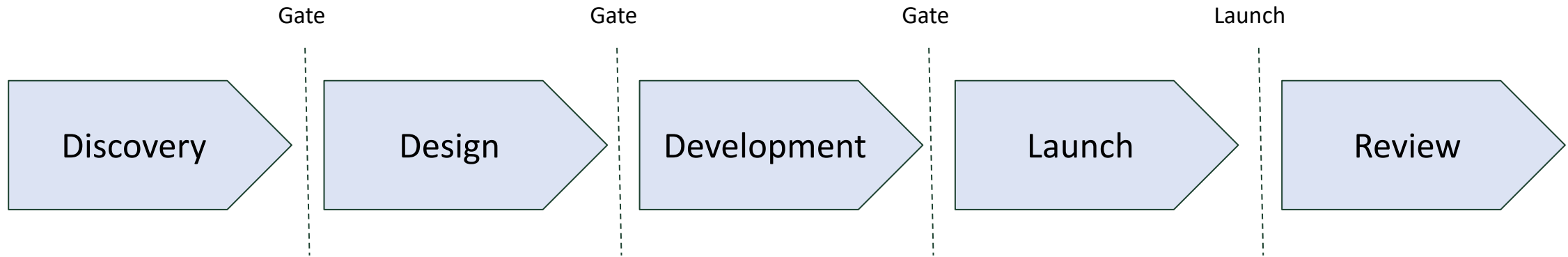
- Each Gate requires Leadership/Sponsor Approval to move to the next Stage
- Documentation required at each Gate:
  - Team-Level Status Reports
  - Stage-specific documentation (e.g. Research, Design Docs, Development Plan, Launch Plan)
  - Functional and Regulatory Checklist

Implementing a Cross-Functional Team Approach

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Scope of Transformation Initiative

Portfolio	**VCS System Transformation**

	Student Experience	Academic Programs and School Ops	Administrative Operations	Workforce Development
Core Process Teams				

Sub-Projects/ Tasks

• Admissions
• FA/Registrar
• Mketing/Branding
• Student/Resident Life
• Athletics
• IT: Web & ERP teams
	• Academic Programs/ Curriculum Dev
	• Advising/Academic Support
	• Libraries
	• School Ops:
	  ○ Faculty Support
	  ○ Scheduling and Section Balancing
	• IT: Academic Tech
		• Facilities Planning and Management
		• Business Affairs/ Finance
		• IT Services
		• Human Resources
		• Procurement
		• Legal/Compliance
			• Industry Engagement
			• CE Program Portfolio
			• Customized Training/ Apprenticeships
			• Registration & Student Operations

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Note: Depending on capacity and dependencies, projects will be sequenced.

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Selecting the Teams and Team Leads

It is important to balance numerous factors:

- Expertise and experience with relevant processes and/or customers
- Ability to think student-centered and new institution-wide
- Ability to represent their function
- Ability to represent and share with others their institution's perspective
- Ability to represent the work of the team to their institution or function
- Energetic, mission-driven, forward-thinking mindset

Context:
- We need to continue the work of the existing institutions while we transform
- Other students, faculty, and staff will have opportunities to provide input
- Transformation will be a long process, and more people will have a chance

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Transformation Project Roles

Project Manager (Hired):
- Provide coordination, tools, and support to team leader.
- Drive schedule, transparency, communication, and accountability.
- Identify opportunities and risks.
- Manage dependencies and communication with stakeholders.

Business and Process Analyst:
- Understanding internal and external customer needs, document processes, and identify opportunities for process improvement.
- Translate business requirements to functional and system/technical requirements.

Cross-Functional Project Teams

6-8 Functional/Institutional Representative
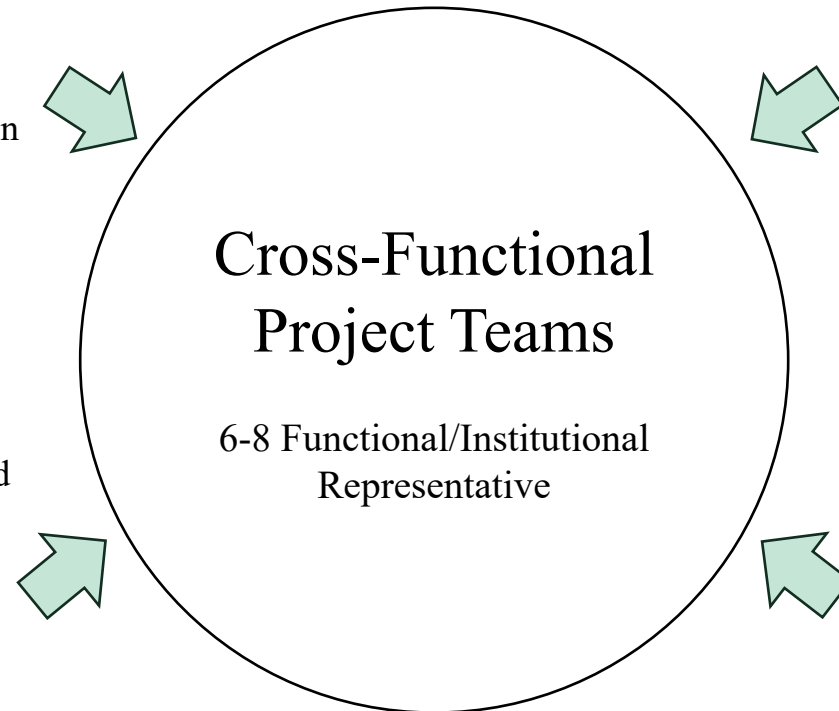
Business Intelligence (BI) Lead:
- Inventory current standard reporting requirements (internal and external).
- Identify new data needed to support strategic decision-making process and/or required transformation reporting.
- Identify institutionally stored data to be centralized for storage and reporting.
- Standardize datasets and documentation to support standard definitions and reporting needs (single versions of the truth)

Financial Analyst (Redeploy Existing):
- Support the annual financial plan and budgeting across processes and institutions.
- Create and financial models to optimize core processes to enable quality, efficiency, and growth.
- Analyze budget vs actual results to inform transformation efforts.

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Sequencing Recommendations

- Work should be sequenced so load on key functional leaders is manageable

  - Year 1: Focus on consolidation of NCE (with representation/expertise of CCV where needed)

  - Prioritize Tasks based on student/institution needs and potential impact on enrollment or cost

- Be mindful of dependencies between Processes, Data, and Systems

Process → Data → Systems

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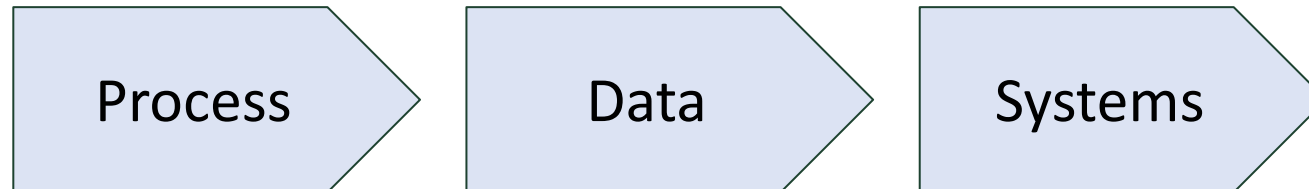
Process Questions that Need to be Answered

- How do we manage accountability when functional and cross-functional processes intersect?

- Which processes should be common, and which should be unique

  - Unique processes driven by student or institution needs that drive better value

  - Common processes should drive quality and efficiency when needs are shared

- How do we use process to create better efficiency and effectiveness (e.g. reduce system and software customizations)

Data Questions that Need to be Answered

- How do we construct a shared data and reporting architecture that ensures transparency and accountability (trustees, legislators, and accreditors)?

- How do we prioritize a data-first strategy that starts with the questions and works backwards towards ensuring proper data gathering and input into official systems of record?

- How do we ensure common data standards, data definitions and single versions of truth?

System Questions that Need to be Answered

- How do we ensure our systems align with determined business process redesign?

- How do we ensure our systems are agile and flexible enough to adapt to the needs of our system over-time?

- How do we align our teams, resources and future governance to best realize the value of the systems we have invested in?

- How does the process and vision work inform our next generation system choices (e.g. ERP, CRM, Scheduling, Advising, Reporting, LMS, Enterprise Content Management, etc.).

Colleague is the hub and system of authority, but not the only solution used
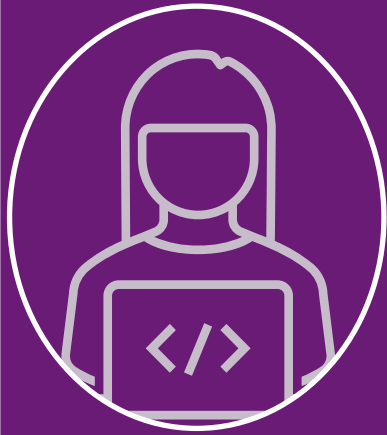
Supported by 1.5 FTE Colleague Programmers (down from 5)

415,000 customizations in Colleague, with limited documentation

Few expert users remain; lack of expertise across business areas

Systemwide governance is lacking

Reporting complexities due to customizations and business process changes

VSC Current State: Ellucian (Colleague)

Next Steps

- Assemble project teams (now)

- Kick off Brand Identity work

- Process discovery and planning (student-centered approach)

- Project planning and prioritization