CTCLINK POST IMPLEMENTATION REPORT

CTCLINK PROJECT MANAGEMENT OFFICE

Washington State Board for Community and Technical Colleges, May 11, 2022

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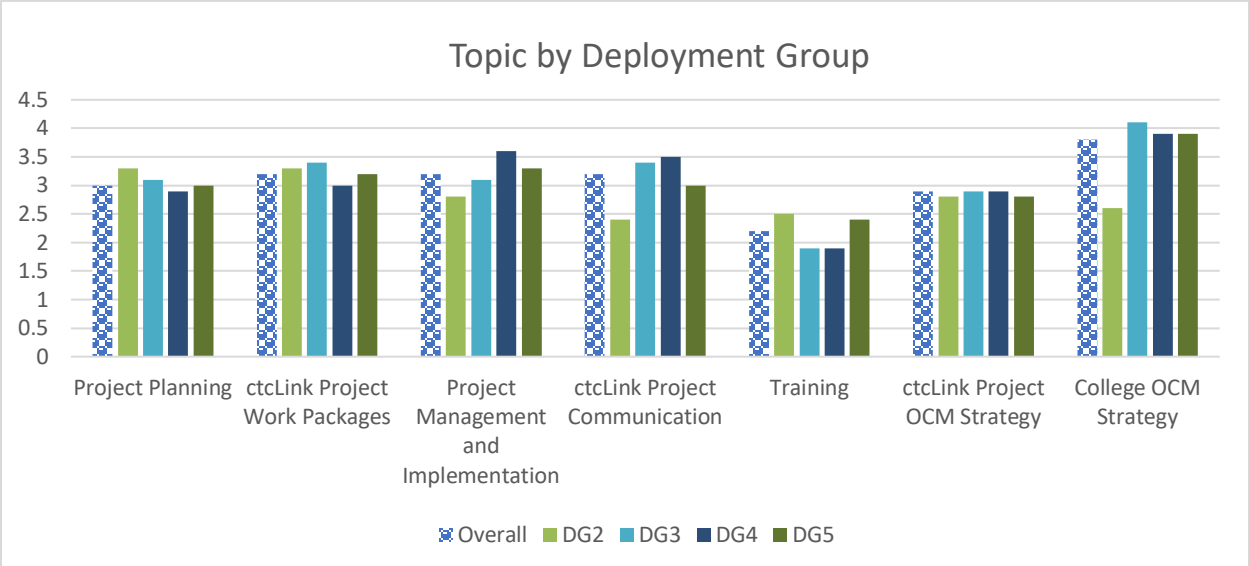# Executive Summary

Methodology

An electronic survey was administered to Deployment Groups (DG) 2-5 college districts and the State Board for Community and Technical Colleges (SBCTC). A total of 18 college districts completed the survey the results of which will be incorporated into the Final Project Lessons Learned Report. College responses were provided by a representative group of stakeholders, some of whom serve on the ctcLink Working Group and Steering Committee.

Summary by Topic

Individual statements were grouped together into topics on the survey. The average scores for all respondents in a topic are represented in the table below. Responses varied by deployment group. Overall, College's Organizational Change Management (OCM) Strategy was rated highest, while Training was lowest. This was consistent across DG 3-5, however, DG2 rated Project Planning as their highest area and ctcLink Project Communications as the lowest.

Rating scale: 5 - Strongly Agree; 4 – Agree; 3 – Neutral; 2 – Disagree; 1 - Strongly Disagree

Topic	Overall	DG2	DG3	DG4	DG5
Project Planning	3.0	3.3	3.1	2.9	3.0
ctcLink Project Work Packages	3.2	3.3	3.4	3.0	3.2
Project Management and Implementation	3.2	2.8	3.1	3.6	3.3
ctcLink Project Communication	3.2	2.4	3.4	3.5	3.0
Training	2.2	2.5	1.9	1.9	2.4
ctcLink Project Organization Change Management Strategy	2.9	2.8	2.9	2.9	2.8
College Organization Change Management Strategy	3.8	2.6	4.1	3.9	3.9

Topic by Deployment Group

Colleges were asked to provide their level of agreement for 53 statements. Overall, the topic *College Organizational Change Management Strategy* scored the highest level of agreement (3.8) followed by *ctcLink Project Work Packages*, *Project Management and Implementation*, and *ctcLink Project Communication* (all scoring 3.2). Six of the top individual items were from the *ctcLink Project Work Packages* with the other two from *College Organizational Change Management Strategy.*

Highest 8

Individual Items	Overall
Go-Live Weekend cut-over was completed according to the plan.	4.3
The college/agency completed at least 90% of all the UATs.	4.3
The college executive sponsor remained active and visible throughout the implementation process of ctcLink.	4.3
The college executive sponsor communicated messages about the need for change.	4.3
Our local college ctcLink team understood the readiness assessment and go-live decision-making process.	4.2
The college understood the Legacy shut-down process in enough time to plan for office and service closures.	4.2
The college executive leadership team demonstrated support for the Project in words and action.	4.2
The college prioritized and updated any errors that occurred in data validation.	4.1

The lowest rated topic was *Training* (2.2) followed by *ctcLink Project Organization Change Management Strategy* (2.9). However, only one of the lowest levels of agreement was from the Project OCM category. All five of the *Training* topics along with four from *ctcLink Project Work Packages* were among the lowest rated.

Lowest 10

Individual Items	Overall
The training offered adequately prepared the SMEs to perform their work in ctcLink.	1.9
The college understood the impact of the configuration decisions it made during the BPFG sessions.	2.1
The training adequately prepared employees to use ctcLink.	2.1
The user acceptance testing (UAT) activities were sufficient to prepare the college for ctcLink.	2.3
Training was offered when it was needed.	2.3
The training offered adequately prepared the SMEs to complete all of the preparation activities to go live with ctcLink.	2.3
Activities to assign security roles were sufficient to prepare the college for ctcLink.	2.4
The results of the Business Process Fit Gap (BPFG) sessions gave the college the necessary framework to develop the new business processes in ctcLink.	2.4
The training adequately prepared students to use ctcLink.	2.4
The state system's ctcLink decision-making process is well understood.	2.4

Core Functions

Colleges were asked to rate the core functions as "In Stabilization," "Functions as Expected," and "ctcLink Benefits Realized." In a fairly consistent pattern, the longer colleges were on the system, the higher they rated core functions.

Two or more colleges indicated they were realizing benefits in six core functions:

- Employee Self-Service
- Student Self-Service
- Course Catalog
- HCX Mobile App
- Manager Self-Service
- Purchase & Procurement

Lessons Learned

An important theme in the comments was around staffing. A project the size of ctcLink would benefit from SMES dedicated only to the project work and not working their regular job full-time plus all the ctcLink work.

Many activities were at peak times for colleges and added to the already heave workload. A focus on organizational change management is key to a large project with such a large scope and involving so many staff in key work. Projects should anticipate staff turnover.

> *"The SBCTC Project Office pulled together an outstanding team of bright dedicated professionals who have done an extraordinary job facilitating this comprehensive organizational and systemic change. It has been an honor and a privilege to serve on this project and witness (and participate in) such a massive statewide business process transformation project. College leadership and support ensured success at the local level. Highly engaged executive sponsors provided institutional focus and resources. Pillar Leads who stuck with this process from beginning to end deserve congressional medals of honor. ~ DG4 college quote*

Post Implementation Report

Survey Tabulation and Methodology

An electronic survey was administered to Deployment Groups (DG) 2-5 college districts and the State Board for Community and Technical Colleges (SBCTC). A total of 18 college districts completed the survey the results of which will be incorporated into the Final Project Lessons Learned Report.

Four organizations comprised DG2: the SBCTC agency, Clark College, and an upgrade to PeopleSoft 9.2 for Tacoma and Spokane districts. Of DG2, only Tacoma and Spokane (which went through an upgrade) responded and their experience differs from the DG3 to DG5 respondents (who went through conversion).

Deployment Group	# Responded	# College Districts in Group
DG2	2	3
DG3	5	5
DG4	3	5
DG5	8	8

College responses were provided by a representative group of stakeholders, some of whom are members of the SBCTC ctcLink Working Group and Steering Committee:

- Project Manager
- Executive Sponsor
- Pillar Lead
- Executive Leadership Team, e.g., president's or executive director's executive cabinet
- College Steering Team
- Business Analyst
- Subject Matter Experts
- College security leads, help desk coordinators, IT director and communications/OCM

The survey was organized into two main sections. The first was a set of statements in a topic area. Colleges were asked to rate their level of agreement with the statements based on their memory of the implementation process of preparing to go live with ctcLink. Colleges were able to provide comments after each topic.

The second was a list of core functions essential to operating a college. Colleges were asked to rate the core functions as "In Stabilization," "Functions as Expected," and "ctcLink Benefits Realized." If colleges indicated they were in stabilization they were asked for additional feedback.

Colleges were also asked what lessons they learned from implementing the ctcLink Project that they would like to share with other organizations or large projects and any additional feedback. The full comments are provided in the appendix, with a highlight of comments in each section of the report. All names are removed from comments and replaced with general roles.

The report is organized by topic. The statements within each topic are in a chart with the mean score for each deployment group. This provides the ability to see differences between deployment groups. The number of respondents in each deployment group is small and this data should be viewed with those small numbers in mind. A graph has also been provided in each section showing the distribution of responses from strongly disagree to strongly agree. This provides a way to see how responses are grouped together.

Summary by Topic

Individual statements were grouped together into topics on the survey. The average scores for all respondents in a topic are represented in the table below.

Rating scale: 5 - Strongly Agree; 4 – Agree; 3 – Neutral; 2 – Disagree; 1 - Strongly Disagree

Topic	Overall	DG2	DG3	DG4	DG5
Project Planning	3.0	3.3	3.1	2.9	3.0
ctcLink Project Work Packages	3.2	3.3	3.4	3.0	3.2
Project Management and Implementation	3.2	2.8	3.1	3.6	3.3
ctcLink Project Communication	3.2	2.4	3.4	3.5	3.0
Training	2.2	2.5	1.9	1.9	2.4
ctcLink Project Organization Change Management Strategy	2.9	2.8	2.9	2.9	2.8
College Organization Change Management Strategy	3.8	2.6	4.1	3.9	3.9

Responses varied by deployment group. Overall, *College Change Management Strategy* was rated highest, while *Training* was lowest. This was consistent across DG 3-5, however, DG2 rated *Project Planning* as their highest area and ctcLink *Project Communications* as the lowest.

Colleges were asked to provide their level of agreement for 53 statements. Overall the topic *College Organizational Change Management Strategy* scored the highest level of agreement (3.8) followed by *ctcLink Project Work Packages*, *Project Management and Implementation*, and *ctcLink Project Communication* (all scoring 3.2). Six of the top individual items were from the *ctcLink Project Work Packages* with the other two from *College Organizational Change Management Strategy.*

Highest 8

Individual Items	Overall
Go-Live Weekend cut-over was completed according to the plan.	4.3
The college/agency completed at least 90% of all the UATs.	4.3
The college executive sponsor remained active and visible throughout the implementation process of ctcLink.	4.3
The college executive sponsor communicated messages about the need for change.	4.3
Our local college ctcLink team understood the readiness assessment and go-live decision-making process.	4.2
The college understood the Legacy shut-down process in enough time to plan for office and service closures.	4.2
The college executive leadership team demonstrated support for the Project in words and action.	4.2
The college prioritized and updated any errors that occurred in data validation.	4.1

The lowest rated topic was *Training* (2.2) followed by *ctcLink Project Organization Change Management Strategy* (2.9). However, only one of the lowest-level of agreement statements was from the Project OCM topic. All five of the *Training* topics along with four from *ctcLink Project Work Packages* were among the lowest rated.

Lowest 10

Individual Items	Overall
The training offered adequately prepared the SMEs to perform their work in ctcLink.	1.9
The college understood the impact of the configuration decisions it made during the BPFG sessions.	2.1
The training adequately prepared employees to use ctcLink.	2.1
The user acceptance testing (UAT) activities were sufficient to prepare the college for ctcLink.	2.3
Training was offered when it was needed.	2.3
The training offered adequately prepared the SMEs to complete all of the preparation activities to go live with ctcLink.	2.3
Activities to assign security roles were sufficient to prepare the college for ctcLink.	2.4
The results of the Business Process Fit Gap (BPFG) sessions gave the college the necessary framework to develop the new business processes in ctcLink.	2.4
The training adequately prepared students to use ctcLink.	2.4
The state system's ctcLink decision-making process is well understood.	2.4

Project Planning

The *Project Planning* topic included five statements. The highest agreement was with two statements related to all major activities being in the project plan and colleges using the plans that they created during the initiation phase thought the project. The lowest agreement was with the statements about the PWA being east to understand and actionable, and a reasonable project timeline.

Project Planning	Overall	DG2	DG3	DG4	DG5
All major activities were accounted for in the plan.	3.4	3.5	3.2	3.0	3.6
The college used the plans created in the initiation phase throughout the duration of the project (e.g., communication plan, resource and budget plan, training plan, supplemental systems)	3.4	3.5	3.6	3.7	3.3
Shifts in the project timeline were clearly communicated in advance	3.0	3.5	2.8	3.3	2.9
The ctcLink Project plan in PWA was easy to understand and actionable.	2.7	3.0	3.2	2.7	2.7
The project timeline was reasonable.	2.7	3.0	2.8	1.7	2.9

While the overall average was the same for the highest and lowest agreement statements, the distribution of responses varied. *"All major activities were accounted for in the plan"* only had responses from disagree to agree with 40% being neutral. Whereas, colleges using the plans create during initiation had 60% in agreement, but also a smaller percentage of neutral responses and 10% indicated they strongly disagreed with the statement.
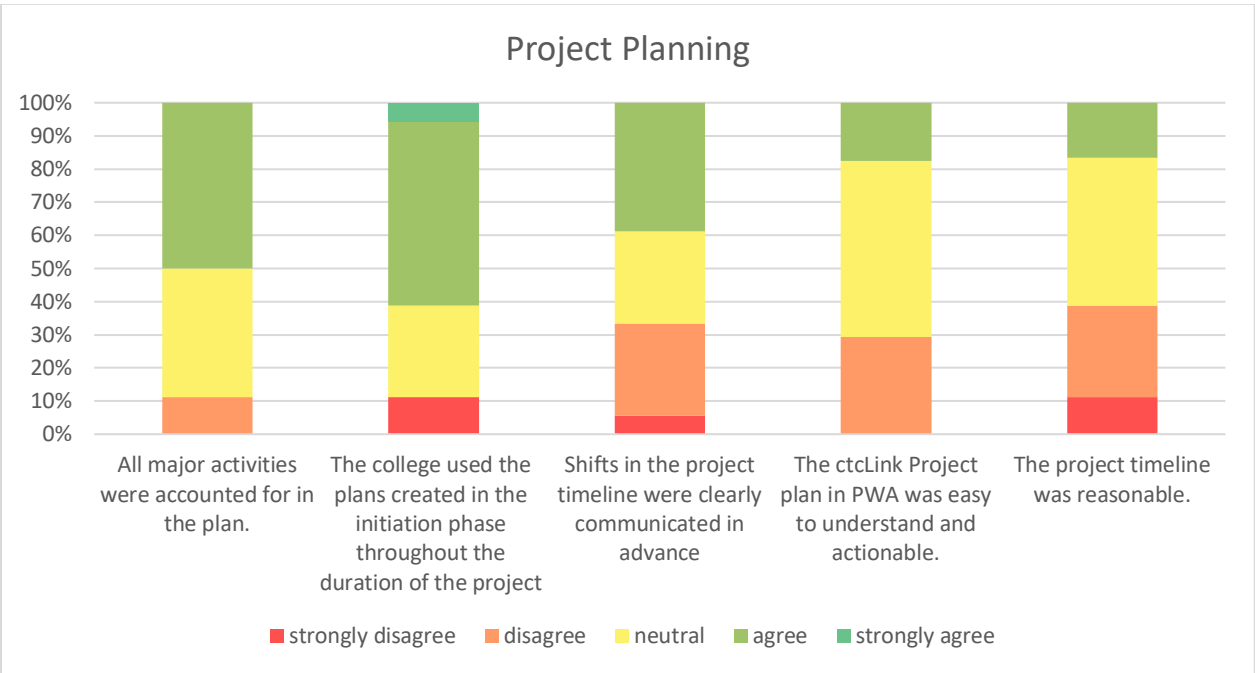
Highlights of Comments from Project Planning

- Timelines changed, sometimes without clear communication or enough notice, although this improved in later deployments.
- Colleges wanted more time on the project. When timelines changed the colleges did not get additional time. There were activities at peak times at the colleges making it difficult for many to engage and staff were expected to focus on ctcLink while still having their job to do. Small colleges had little backup for key positions. Timelines for homework were not reasonable.

- More information was needed at the beginning such as understanding why a Project Manager was needed for a project of this size, why were they doing activities such as validation, what was configuration going to impact, and what were overall downstream impacts?
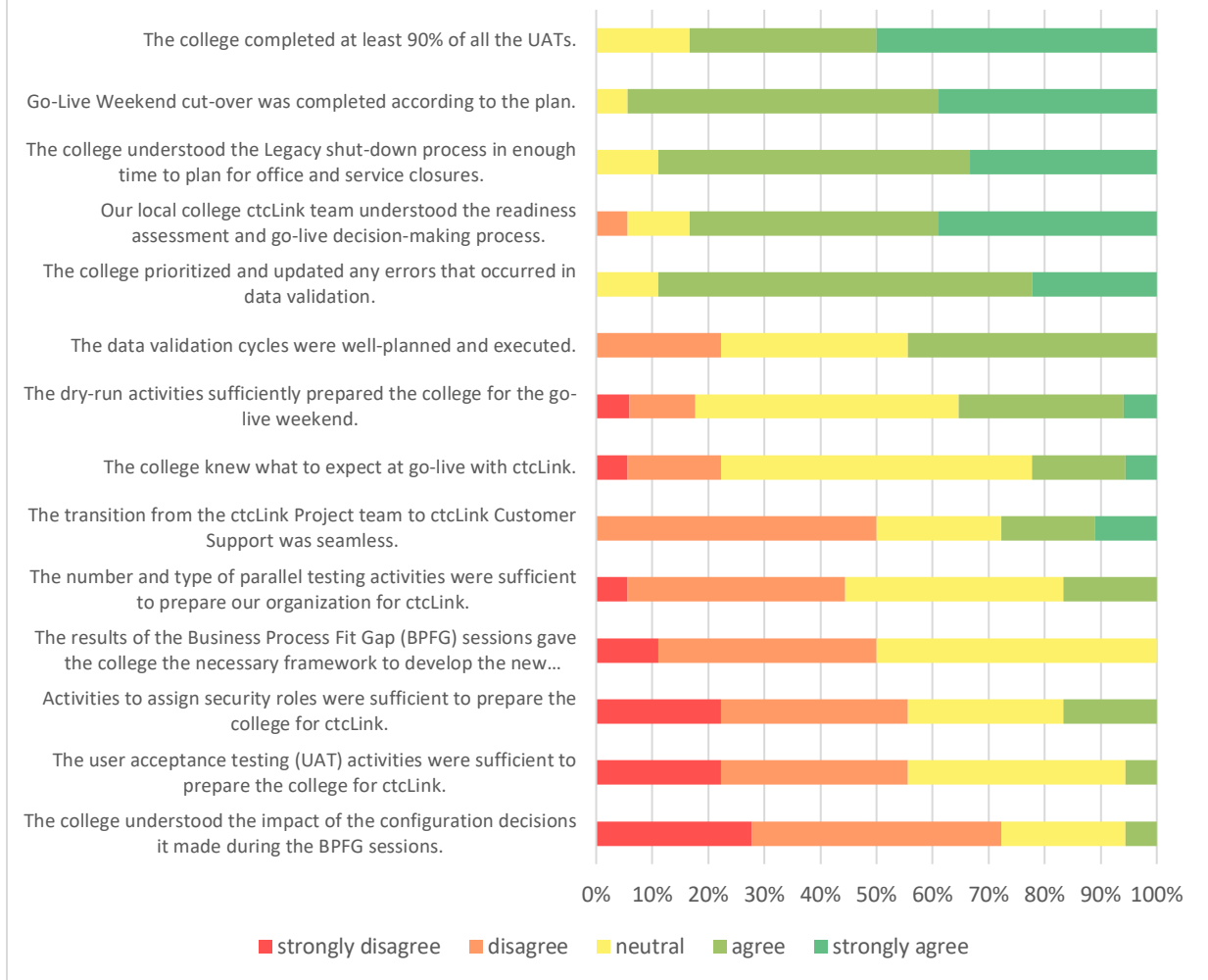
ctcLink Project Work Packages

DG3 and DG4 responded as agree (4) and strongly agree (5) on three areas: understanding Legacy shut down process, understanding readiness assessments, and that Go-Live weekend cut-over was completed according the plan. DG2 and DG5 were not as strongly in agreement on those statements. DG2 was in greater agreement with statements related to activities such as BPFG, UAT, configuration, and parallel testing than other colleges. They came into the upgrade with prior knowledge that made these activities more meaningful.

ctcLink Project Work Packages	Overall	DG2	DG3	DG4	DG5
The college/agency completed at least 90% of all the UATs.	4.3	3.5	4.4	4.0	4.6
Go-Live Weekend cut-over was completed according to the plan.	4.3	4	4.8	4.3	4.1
The college/agency understood the Legacy shut-down process in enough time to plan for office and service closures.	4.2	3	4.6	5.0	4.0
Our local college/agency ctcLink team understood the readiness assessment and go-live decision-making process.	4.2	3.5	4.8	4.7	3.9
The college/agency prioritized and updated any errors that occurred in data validation.	4.1	3.5	4.2	4.0	4.3
The data validation cycles were well-planned and executed.	3.2	3.0	3.6	3.0	3.1
The dry-run activities sufficiently prepared the college/agency for the go-live weekend.	3.2	3	3.0	3.3	3.3
The college knew what to expect at go-live with ctcLink.	3.0	3.5	3.4	3.0	2.6
The transition from the ctcLink Project team to ctcLink Customer Support was seamless.	2.9	3.5	3.6	2.0	2.6
The number and type of parallel testing activities were sufficient to prepare our organization for ctcLink.	2.7	3.5	2.2	2.3	2.9
The results of the Business Process Fit Gap (BPFG) sessions gave the college/agency the necessary framework to develop the new business processes in ctcLink.	2.4	3.0	2.0	2.0	2.6
Activities to assign security roles were sufficient to prepare the college for ctcLink.	2.4	2.5	2.4	2.0	2.5
The user acceptance testing (UAT) activities were sufficient to prepare the college/agency for ctcLink.	2.3	3.5	1.8	1.7	2.5
The college/agency understood the impact of the configuration decisions it made during the BPFG sessions.	2.1	3.0	2.4	1.3	1.9

The first 5 statements had overwhelming agreement from all deployment groups. The statement "The results of the Business Process Fit Gap (BPFG) sessions gave the college/agency the necessary framework to develop the new business processes in ctcLink" had a higher average score, yet there was not a single response in agreement with this statement.

ctcLink Project Work Packages

Chart: Horizontal stacked bar chart showing survey responses (strongly disagree, disagree, neutral, agree, strongly agree) for the following items:

- The college completed at least 90% of all the UATs.
- Go-Live Weekend cut-over was completed according to the plan.
- The college understood the Legacy shut-down process in enough time to plan for office and service closures.
- Our local college ctcLink team understood the readiness assessment and go-live decision-making process.
- The college prioritized and updated any errors that occurred in data validation.
- The data validation cycles were well-planned and executed.
- The dry-run activities sufficiently prepared the college for the go-live weekend.
- The college knew what to expect at go-live with ctcLink.
- The transition from the ctcLink Project team to ctcLink Customer Support was seamless.
- The number and type of parallel testing activities were sufficient to prepare our organization for ctcLink.
- The results of the Business Process Fit Gap (BPFG) sessions gave the college the necessary framework to develop the new…
- Activities to assign security roles were sufficient to prepare the college for ctcLink.
- The user acceptance testing (UAT) activities were sufficient to prepare the college for ctcLink.
- The college understood the impact of the configuration decisions it made during the BPFG sessions.

Legend: ■ strongly disagree ■ disagree ■ neutral ■ agree ■ strongly agree

Highlights of Comments from Work Packages

- All the prep work — Legacy Business Processes, Global Design Adoption (GDA), Business Process Fit/Gap (BPFG) sessions, User Acceptance Testing (UAT), Data Validations, Training — did not prepare us for reality and/or knowing how things worked in ctcLink.
- Colleges did not understand the end-to-end processes. Shown what to do, but not talked through the decision-making process. UAT tested processes, but not the whole picture. More cross-pillar involvement needed.
- Colleges needed more help with business process mapping. Did not understand the impacts of BPFGs and configuration. Wanted more college examples; not each college with unique configuration. Did not understand the global impacts of configuration decisions, because they did not understand the system.
- Needed more time and direction for data validation. Overlapping activities – parallel, data validation, UAT was difficult.
- Security: broad access in UAT did not prepare them for more limited access, so they can't see the whole process.
- Go-Live Weekend was well-organized and went well.
- Support: need drop-in times, not getting what they expected, conflicts with project info. Would like a basic list of roles needed for positions that college can add to.
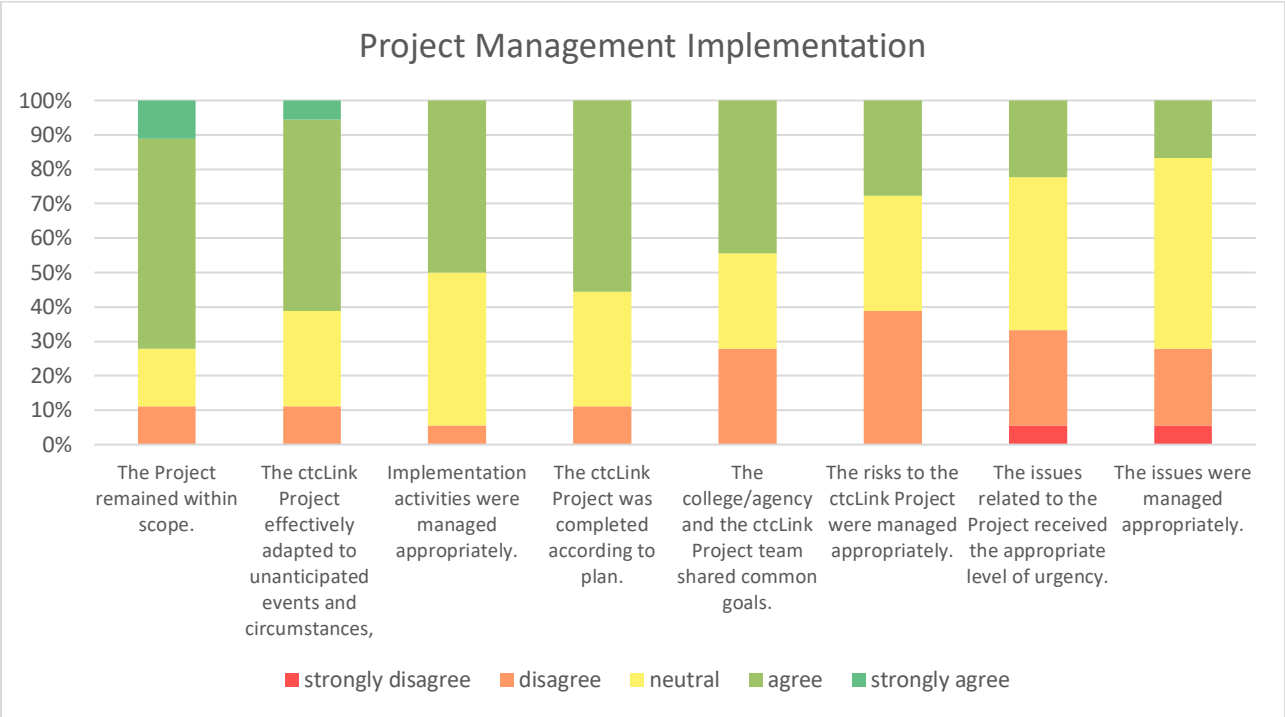
Project Management and Implementation

Overall most *Project Management and Implementation* statements were a mix between disagree and agree with only a few responses of strongly agree or disagree. Over half of the respondents on *"The issues were managed appropriately"* were neutral. DG3 was almost all disagree for statements related to risks and issues while later deployments moved to neutral and agree.

Over half agreed that *"the ctcLink Project was completed according to plan"* and two-thirds agree or strongly agree that *"The project remained within scope."*

Project Management and Implementation	Overall	DG2	DG3	DG4	DG5
The Project remained within scope.	3.7	3.0	3.8	4.3	3.6
The ctcLink Project effectively adapted to unanticipated events and circumstances, e.g., fully remote work, loss of staff, vaccination mandate, etc.	3.6	3.0	3.8	4.0	3.4
Implementation activities were managed appropriately.	3.4	3.0	3.4	4.0	3.4
The ctcLink Project was completed according to plan.	3.4	2.5	3.4	4	3.5
The college/agency and the ctcLink Project team shared common goals.	3.2	2.5	3.4	3.3	3.1
The risks to the ctcLink Project were managed appropriately.	2.9	2.5	2.4	3.3	3.1
The issues related to the Project received the appropriate level of urgency.	2.8	3.0	2.2	3.0	3.1
The issues were managed appropriately.	2.8	3.0	2.2	3.0	3.1

The two statements related to issue urgency and management had the lowest level of agreement; garnering the highest percentage of neutral responses as well as strong disagreement.

Project Management Implementation

Legend: strongly disagree, disagree, neutral, agree, strongly agree

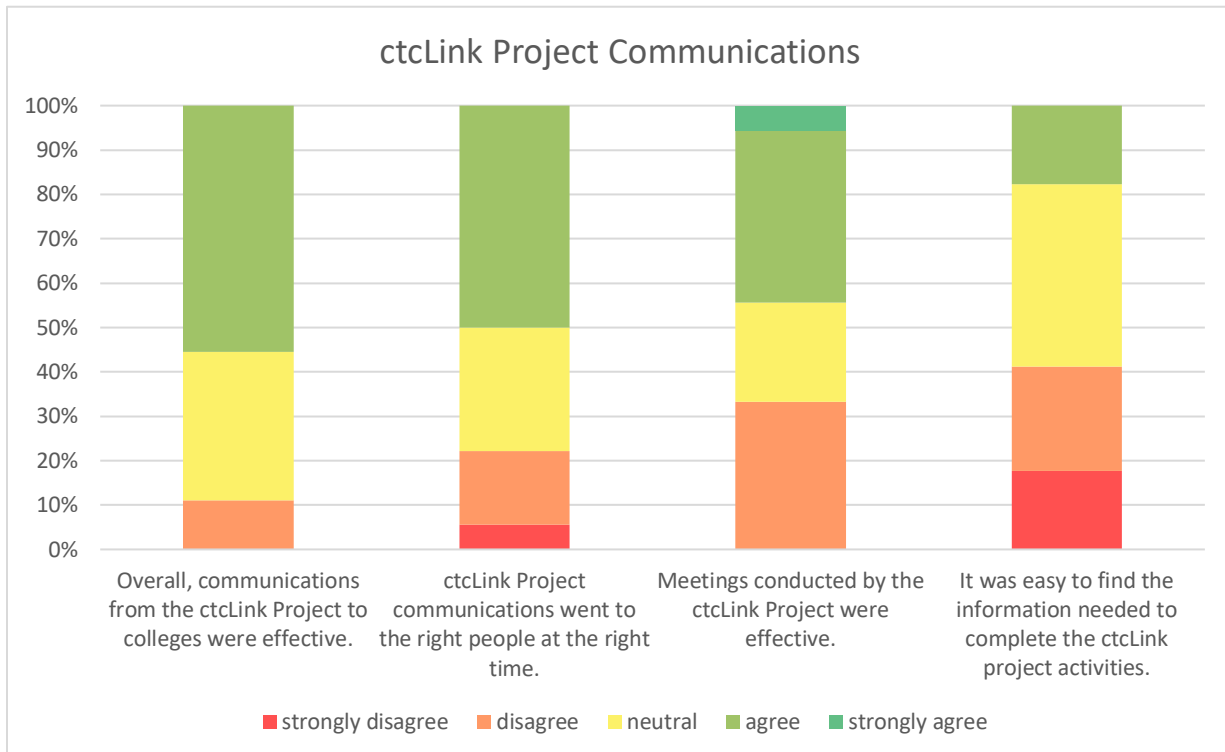## Highlights of Comments from Project Management

- Disconnect between college staff and project: The Project Team's goal was for colleges to go live; college goals were to feel confident and have a complete understanding of functionality at go live and to limit impact on students and staff. Colleges are trying to serve students and the Project didn't seem to support that.

- Timelines changed, but the colleges were not given additional time. Many activities were at high peak times for the college making it difficult to engage more people. Plans and dates were compromised due to this and colleges felt the impact.
- Project resources spread thin. Wanted to have SBCTC staff at colleges for Go-Live.
- Hard to find the right people with answers. Response time does not always match the urgency level at the college. Support varied by pillar.
- The pivot to remote work locally and at SBCTC was one of the greatest successes of the Project - it didn't feel like we missed a beat. This was an incredibly complex project that we pulled off together in spite of challenges along the way. We'll continue to refine as we go along. In spite of limited resources (here and at SBCTC), we did it. It wasn't easy, but we're hopeful this new system will realize benefits in the long run.

ctcLink Project Communication

The lowest level of agreement was with the statement "*It was easy to find the information needed to complete the ctcLink Project activities.*" 40% of the respondents were neutral, but nearly 20% strongly disagreed with this statement.

ctcLink Project Communication	Overall	DG2	DG3	DG4	DG5
Overall, communications from the ctcLink Project to colleges were effective.	3.4	3.0	3.4	4.0	3.4
ctcLink Project communications went to the right people at the right time.	3.2	2.5	3.4	4.0	3.0
Meetings conducted by the ctcLink Project were effective.	3.2	2.0	3.6	3.7	3.0
It was easy to find the information needed to complete the ctcLink project activities.	2.6	2.0	2.8	2.3	2.6

ctcLink Project Communications

Highlights of Comments from Project Communication

- There was a lot of information.
- Some information was difficult to find, particularly conversion information. Quick Reference Guides (QRGs) still remain difficult to navigate and challenging to search if you don't have the correct search term.
- Adequate communication; however, communications went mostly to PMs and they did not all distribute to others as stakeholders would have liked. SBCTC communications should go to key Pillar leads/SMEs in addition to the Project Manager. There were times when not all stakeholders were looped into project communications.

Training

Training was the topic area with the lowest level of agreement on statements. DG2's level of agreement on all five statements was higher than the overall. Since DG2 had some knowledge already about PeopleSoft this may have influenced their view of the training provided.

Training	Overall	DG2	DG3	DG4	DG5
The training adequately prepared students to use ctcLink.	2.4	3.0	2.4	2.3	2.4
Training was offered when it was needed.	2.3	2.5	1.8	1.7	2.8
The training offered adequately prepared the SMEs to complete all of the preparation activities to go live with ctcLink.	2.3	2.5	2.0	2.0	2.6
The training adequately prepared employees to use ctcLink.	2.1	2.5	1.6	1.7	2.4
The training offered adequately prepared the SMEs to perform their work in ctcLink.	1.9	2.0	1.6	2.0	2.0

Highlights of Training Comments

- QRGs: Not effective as a main training tool; sometimes inaccurate, and not easily searchable.
- Canvas: Videos were only accessible if you knew which Canvas course they were in and had enrolled and completed user agreement. Too difficult to get to information needed.
- Cross-pillar: Cross-pillar training and documentation, on the integration points between pillars and modules, was not sufficient to fully understand the system prior to implementation. Trainings went through processes, but users needed to understand how these processes work together and often cross across departments and pillars and really understand implications of decisions. Received conflicting information between pillars for cross-pillar transactions.
- Timing: Too much time between initial use of training materials, and BPFGs, and actively using the system.
- Focus of training: Training before go-live shows what the data entry that the system will need in the future, and implementation activities. The training didn't provide a why. Provided steps but no real-world situations or troubleshooting. The training did not allow sufficient opportunities for staff to practice activities, nor did it provide sufficient theory behind the activities so that people would understand why they were doing it. SMEs don't feel like the training for employees was adequate preparation for doing their work after Go-Live. Did not provide sufficient theory behind the activities so that people would understand why they were doing it. Need more trainings that revolved on how we did things before and how we need to
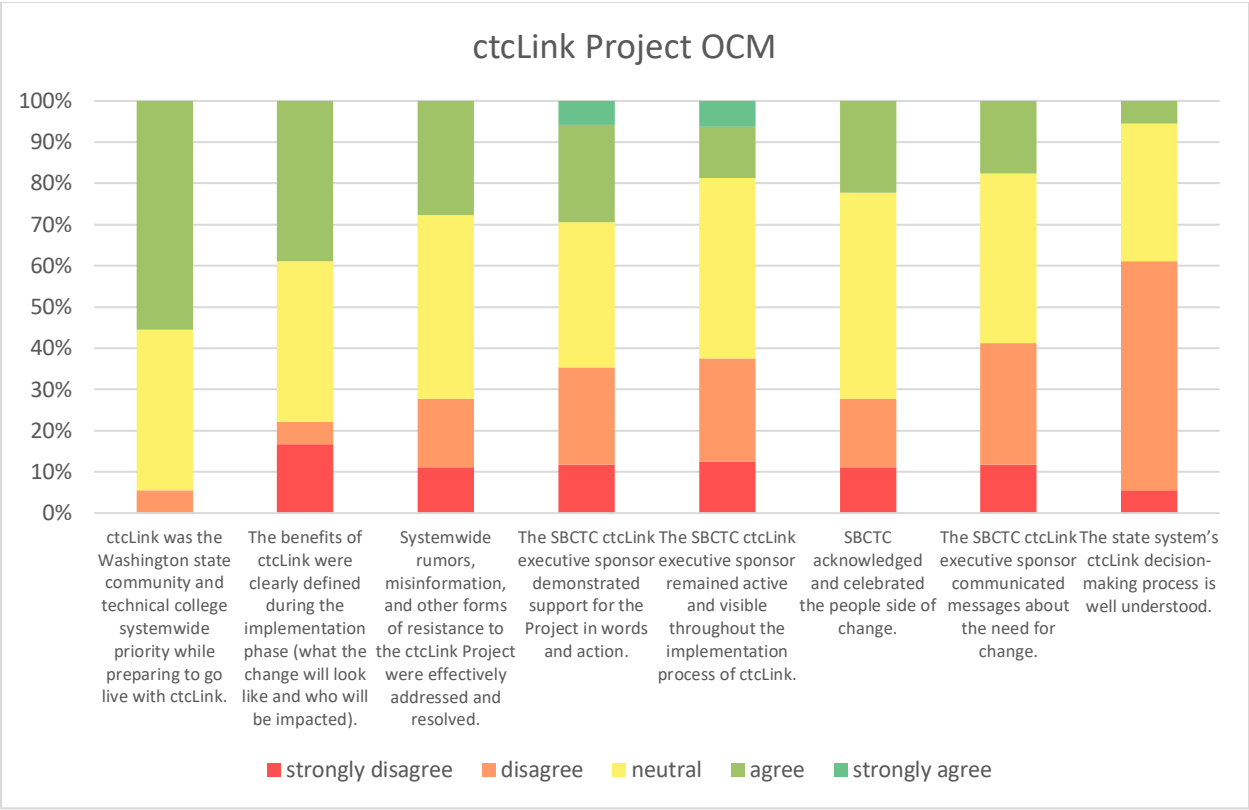
do them now. Include training that tells us what downstream effects will be if done one way versus another.

- Hands on training: Not be able to get hands on and practice activities. Once live with ctcLink and actually using the system was when staff and student were able to learn.
- Business process changes: Work did not prepare colleges for business process changes and colleges would have benefited from having a person to guide them on how to craft future process in BPFG sessions.
- Missing: The college needed to create guides for even basic processes like timesheets. This work fell on staff who had never been in the system to figure out how to do things to train other staff.
- Students: Colleges had to create their own student training information but they were learning how to use the system at the same time as students.
- Difficult for early deployment groups because training materials were not available to them.

ctcLink Project Organization Change Management (OCM) Strategy

There is agreement among all deployment groups that ctcLink was a priority for SBCTC, although none strongly agreed. There is also consistent disagreement that the decision-making process is well understood.

ctcLink Project Organization Change Management (OCM) Strategy	Overall	DG2	DG3	DG4	DG5
ctcLink was the Washington state community and technical college systemwide priority while preparing to go live with ctcLink.	3.5	3.5	4.0	3.7	3.1
The benefits of ctcLink were clearly defined during the implementation phase, including what the change will look like and who will be impacted by the change.	3.0	3.0	3.4	2.7	2.9
Systemwide rumors, misinformation, and other forms of resistance to the ctcLink Project were effectively addressed and resolved.	2.9	2.5	3.0	2.3	3.1
The SBCTC ctcLink executive sponsor demonstrated support for the Project in words and action.	2.9	3.0	2.5	3.7	2.8
The SBCTC ctcLink executive sponsor remained active and visible throughout the implementation process of ctcLink.	2.8	2.5	2.0	3.7	2.8
SBCTC acknowledged and celebrated the people side of change.	2.8	3.0	3.0	2.7	2.8
The SBCTC ctcLink executive sponsor communicated messages about the need for change.	2.6	3.0	2.5	2.7	2.6
The state system's ctcLink decision-making process is well understood.	2.4	2.0	2.6	2.0	2.5

ctcLink Project OCM

(Stacked bar chart showing responses for the following statements, measured from 0% to 100%)

Categories (left to right):
- ctcLink was the Washington state community and technical college systemwide priority while preparing to go live with ctcLink.
- The benefits of ctcLink were clearly defined during the implementation phase (what the change will look like and who will be impacted).
- Systemwide rumors, misinformation, and other forms of resistance to the ctcLink Project were effectively addressed and resolved.
- The SBCTC ctcLink executive sponsor demonstrated support for the Project in words and action.
- The SBCTC ctcLink executive sponsor remained active and visible throughout the implementation process of ctcLink.
- SBCTC acknowledged and celebrated the people side of change.
- The SBCTC ctcLink executive sponsor communicated messages about the need for change.
- The state system's ctcLink decision-making process is well understood.

Legend: ■ strongly disagree ■ disagree ■ neutral ■ agree ■ strongly agree

Highlights of Organizational Change Management (OCM) Strategy Comments

- Don't know who the SBCTC Executive Sponsor is. Have never received information from them.
- Messaging from deployment to deployment did not view each deployment as a separate stakeholder, so communications were not tailored. No differentiation between larger and smaller colleges, and the differences in the number of roles some staff may have.
- Change management, following the PROSCI methodology, was not evident to colleges. The idea that there were changes and that people would be impacted, and that the ctcLink Project was a change management project was highlighted. Benefits were clearly defined, but colleges are not seeing those benefits. PMs shared OCM successes, but these were not incorporated into the SBCTC plan. Change management for specific roles was not identified.

College Organization Change Management (OCM) Strategy

This topic is similar to the last topic except that it focuses on the college's OCM strategies and not the SBCTC project team. There is little neutrality and primarily agreement and strong agreement regarding the college's organizational change management work. Colleges had much more agreement with the college OCM statements than they did the project OCM work.

College Organization Change Management (OCM) Strategy	Overall	DG2	DG3	DG4	DG5
The college executive sponsor remained active and visible throughout the implementation process of ctcLink.	4.3	2.5	4.4	5.0	4.5
The college executive sponsor communicated messages about the need for change.	4.3	2.5	4.2	5.0	4.5
The college executive leadership team demonstrated support for the Project in words and action.	4.2	2.5	4.4	4.3	4.4
The college acknowledged and celebrated the people side of change.	3.8	2.5	4.2	3.3	4.0
ctcLink was the college's priority while preparing to go live with ctcLink.	3.7	3.5	4.0	3.7	3.6
The college community was well-informed about the steps to go live with ctcLink.	3.6	3.0	4.2	3.3	3.5
College areas or individuals resistant to the change to ctcLink were identified and strategies were employed to overcome resistance.	3.6	2.0	4.0	4.3	3.4
ctcLink was clearly defined during the implementation phase for the college, including what the change will look like and who will be impacted by the change.	3.5	2.5	3.8	3.3	3.6
Adequate resources were allocated to support college ctcLink project activities.	3.3	2.0	3.4	3.0	3.6

College OCM is the only topic area in which colleges expressed strong agreement with the statements.
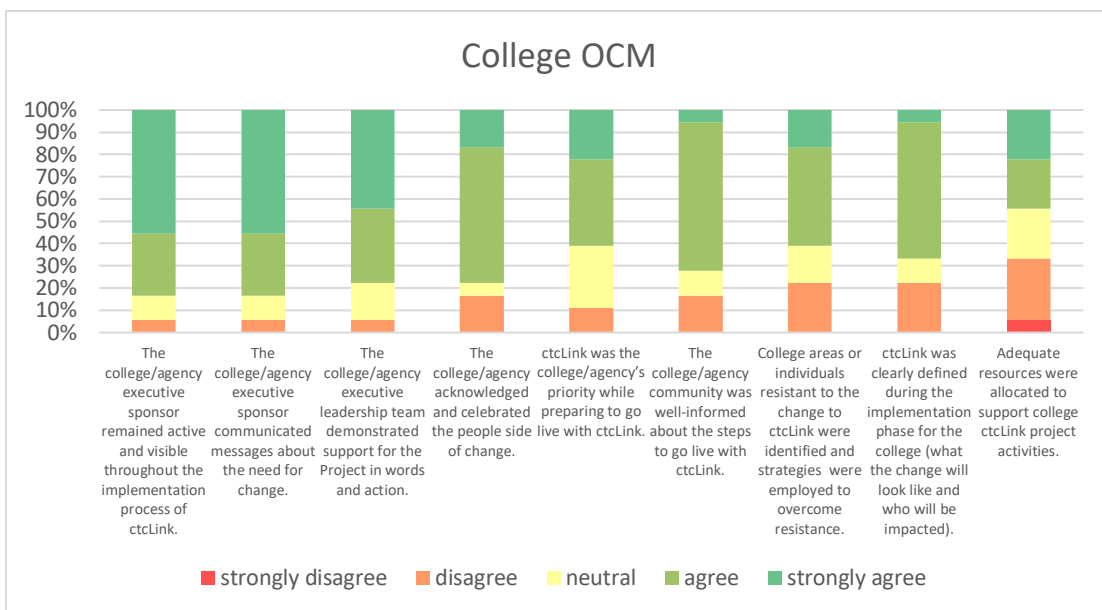
Highlights for College Organization Change Management (OCM) Strategy Comments

- Staffing: It would have been nice if SBCTC could have provided the funding for a Business Analyst - it would have eased the burden on all the SMEs who donated long hours to ctcLink. Finance area was under-

resourced to support the complex and more labor-intensive business processes. Needed more backfill and to hire more staff. This was a huge lift and people are feeling overworked and burnt out. Limited financial investment impacted the mental wellbeing of SMEs and leaders.

- Leadership: Some college's ctcLink leaders did a great job of communication, advocacy, and acknowledgment of the team. Some Executive Sponsors were very hand-on, others just wanted to be kept informed.
- Competing Priorities: The pandemic often took a front seat in planning and focus of the leadership team and competed for resources while working remotely. The impacts of COVID and other commitments/priorities were difficult to juggle. Priority during project was pandemic, enrollment, and ctcLink
- SBCTC Guidance: I think some college departments expected more guidance from SBCTC on new procedures. The messaging seemed to indicate that we were going to be more uniform on how to process transactions, but there was no guidance and many processes were left up to the colleges. College made significant attempts to identify what the change would look like, but did not have adequate information from SBCTC to support the effort. I don't feel that anyone was prepared for the amount of change. It was difficult to understand the impact of the change until we were live. Many day-to-day details were not covered, and therefore we were not prepared. E.g., the need for new transcript paper.
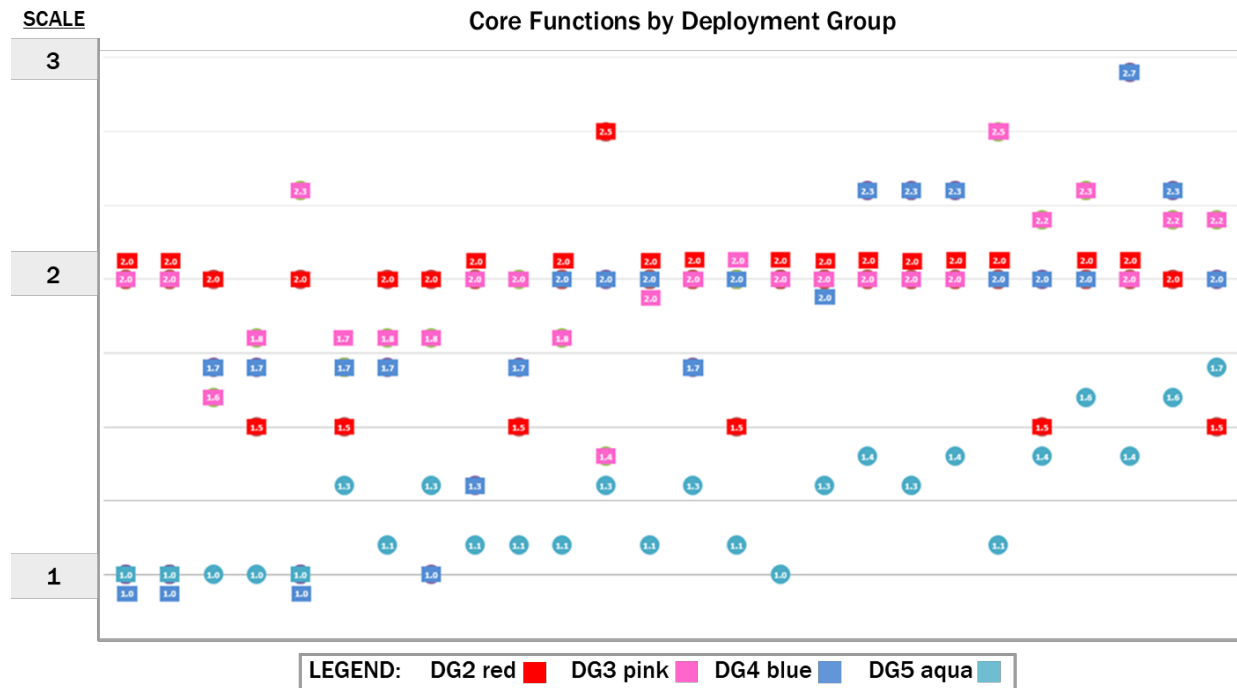
Core Functions

Colleges were asked to rate the core functions as "In Stabilization," "Functions as Expected," and "ctcLink Benefits Realized." The responses were converted to a scale of 1 to 3, with 1 being stable, 2 as expected, and 3 benefits realized. Averages are reported below. Some colleges did not provide a response for each function which has an impact on the averages being reported. In a fairly consistent pattern, the longer colleges were on the system, the higher the average.

Two core functions are of concern, *View Student progress for Advising Purposes* and *Class Requisites*. Both have averages for all deployment groups below 2.0 indicating that even in the colleges which have been on ctcLink for a while these areas are not yet stable.

Core Functions	Overall	DG2	DG3	DG4	DG5
Employee Self-Service *	1.9	1.5	2.2	2.0	1.7
Student Self-Service *	1.9	2.0	2.2	2.3	1.6
Course Catalog *	1.9	2.0	2.0	2.7	1.4
HCX Mobile App *	1.9	2.0	2.3	2.0	1.6
Manager Self-Service *	1.8	1.5	2.2	2.0	1.4
Purchase & Procurement *	1.8	2.0	2.5	2.0	1.1
Class Schedule	1.8	2.0	2.0	2.3	1.4
View Student Info: Demographics, Classes, Grades, etc.	1.8	2.0	2.0	2.3	1.3
Class Rosters	1.8	2.0	2.0	2.3	1.4
Grading	1.7	2.0	2.0	2.0	1.3
Close Books at End of Month	1.6	2.0	2.0	2.0	1.1
Pay Tuition	1.6	1.5	2.0	2.0	1.1
Produce Transcripts	1.6	2.0	2.0	1.7	1.3
Award Degrees	1.6	2.0	2.0	2.0	1.1
Online Admissions Application Portal (OAAP) *	1.6	2.5	1.4	2.0	1.3
Hire to Retire	1.5	1.5	2.0	1.7	1.1
Employee Pay and Payroll	1.5	2.0	2.0	1.3	1.1
Faculty Workload	1.5	2.0	1.8	1.0	1.3
Billing	1.5	2.0	1.8	1.7	1.1
View Student progress for Advising Purposes	1.5	1.5	1.7	1.7	1.3
Compliance-Related Reporting	1.5	2.0	1.8	2.0	1.1
Assets	1.4	2.0	2.3	1.1	1.0
Class Requisites	1.4	1.5	1.8	1.7	1.0
Award Financial Aid	1.4	2.0	1.6	1.7	1.0
Travel Request and Authorization	1.3	2.0	2.0	1.1	1.0
Travel Reimbursement including Travel Advance	1.3	2.0	2.0	1.1	1.0
Register for Continuing Education Courses	1.3	2.0	1.0	1.3	1.3

* At least two (2) colleges reporting they have reached the stage of seeing benefits in these core functions.

Graphing the score for each core function by deployment group shows that groups which have been in ctcLink longer (DG2 red, DG3 pink) have most of the business processes near the 2.0 line for "functioning as expected" or above for "realizing benefits." Groups with less time in the the system (DG4 blue, DG5 aqua) are still in stabilization.

Core Functions by Deployment Group

LEGEND: DG2 red ■   DG3 pink ■   DG4 blue ■   DG5 aqua ■

Highlights of Core Functions Comments

- Some areas work quite well and offered many improvements, while others are not utilized to the full extent of their capability. Some colleges recognize that many stabilization issues are training- and security-related. Others are not sure if the issues are system issues or training issues due to lack of training and understanding.
- Colleges are working on changing business processes, or making tweaks, and know that one more round of collective business process drafting might be helpful. This would also help those colleges who are not aware of how the system works. Colleges are struggling with maintaining staffing and resources, and knowledge transfer.
- Accessibility compliance and usability for students and employees continues to be a priority.
- Managing issues and support tickets is time consuming and there are tickets that are not resolved and there are glitches in the system.
- The full comments provide lots of specific examples of areas that are not yet seeing benefits.

Additional Comments

Colleges were asked to provide any additional comments. The full responses are in the appendix. Some additional comments that may be helpful as the project transitions to SBCTC support:

- Update QRGs to add additional guidance which is being provided.
- Develop common processes based on best practice.
- Support staff who understand both Legacy and PeopleSoft are valuable.
- Colleges still have questions they would like answered.

Lessons Learned

Colleges were asked for any lessons learned. The full responses are in the appendix. Some lessons learned that may be applicable to other projects:

Project-Related

- It is important to include key players/stakeholders in communication, perhaps even erring on the side of overcommunication. Gaps in communication cause a lack of understanding and can lead to rumors and misinformation.
- Staff do not have enough time to do their job AND complete the activities required by a major implementation. This needs to be recognized and accommodations made.
- An organization must fully understand the flow of data from beginning to end to ensure a successful implementation and leverage the benefits of the system.
- Need a fully functional test environment.
- Urgent trumps important every time and if the hierarchy does not compel (via setting non-negotiable time aside to do project learning/work) the result is going to be under-preparation and chaos. Timelines need to be set on project goals. Expect things to take significantly longer than you think they will. Be prepared for a significant loss of workforce during and after implementation.
- Where there's a will (and sufficient funding plus careful oversight, and a heck of a comprehensive repeatable plan, and an endless supply of motivation/dedication/collaboration) there's a way.
- More training and resources earlier in the project would be useful. A testing environment early on would have helped with staffing change management, and business process re-design.
- Leadership and Presidents at the colleges underestimated the amount of organization change that is required for a project of this depth and breadth.
- The protection time we were given prior to go live would have been better post-go live. We barely had time to learn the new system when we had to return to full services for students. We have had to work out all the snags on top of our normal duties and it's been too much.
- Make the commitment upfront to have dedicated employees working on the project by backfilling positions to ensure employees stay engaged, avoid burnout, or health issues due to the higher stress level of having to do two full time jobs
- Build in staffing turnover into planning process, and be prepared to pivot if turnover picks up
- Use the test environment prior to conversion to get to know where all your key processes will take place and then practice.
- OCM work is key to these large projects and is easy to send people to training in OCM, but is very hard to implement if these people all have other work/responsibilities on top of the OCM work. We found the OCM work in the project was the first thing that would slip since the project management and functional work all had deadline and requirements to be completed where the OCM work did not.
- During the planning phase of a project of this size, ensuring that you have truly assessed the needs of stakeholders will benefit the deliverables in the long run.
- Communication system needs to be in place for timely and support input and a way to provide feedback
- A college's chances of having a successful go-live will lie in their ability to cooperate, communicate, and examine their processes completely.

Post Go-Live

- Expect some failures. Get over the failures. Fix the failures.
- Build in time for reporting/tracking/resolving issues

Appendix of Comments

Project Planning Comments

Changes to timelines were not always communicated with advance notice. A centralized place to view timelines with consistent notification of changes would be an improvement. - When changes were made, the updated information was not reflected in the PWA in a timely manner. This led to an inability to trust future dates that were in PWA and schedule accordingly.

Could have used additional time. SBCTC was still writing QRGs and developing training material during implementation.

For the fifth question, we answered that we agree we used our own internal planning documents. If this question is about SBCTC documents, please advise.

From the perspective of a DG4 college, the project plan in PWA for the Initiation phase was easy to understand and actionable because it was developed by college Project Managers in collaboration with the SBCTC and was entirely geared toward college deliverables. However, the project plan developed by SBCTC for the Implementation Phase was used primarily by the SBCTC to manage internal PMO deliverables. The DG4 colleges repeatedly brought this up as both a risk and an issue in terms of tracking detailed work packages at the college level.

Impacts to the colleges based on the plan were not accounted for. Our college had a business process change plan, but when the project was delayed, the timeline changed, and staffing had changed at the college.

More training should have been provided up front regarding item type set up, trees, nodes etc. Also, more training on how to do validation and the WHY we're doing what we're doing in the instructions. Often times the instructions told us to do something but we didn't understand why or the downstream affect. Go-Live trainings offered critical information that would have been useful when creating our initial set-ups. The project should have been delayed for COVID. The project timeline was always unreasonable given the lack of financial and human resources provided by the State of Washington, and was exacerbated by layoffs due to COVID. The human cost never seemed to be a serious consideration; money drove this bus. Specific live trainings were scheduled after the work was done. Directions for UAT were missing important steps. Trainings are all over the place and not prepared. A lot of I don't know when questions asked...or up to your business process. The fact that the COVID pandemic caused so much unplanned chaos was unavoidable, and I think that the employees on the ground did the best that they could do. But we were significantly understaffed, and this impacted our ability to be as good as we should have been. I think a shorter time frame with more focused how to do things would be better. I think they should tell colleges to double up on the Accounts Payable staff prior to go live. This system takes a great many more manhours than Legacy did to get checks out to suppliers.

Project Plan/Schedule - Timelines changed, but the colleges were not given additional time. Many activities were at high peak times for the college making it difficult to engage more people.

SBCTC had many gaps in the plan, very much like building a 747 in midair. - Then the college took a bit too long to fill the PM position, largely because none of us really understood the value of such position in a project like this. - Project planning relied heavily on SMEs to drop any other job-related activities and focusing on the ctcLink implementation. This piece was not necessarily reflected on the individual college's resource and budget plan. We have been in the catch-up mode for the longest time. The plan did not account for the extenuating circumstances, such as COVID pandemic. The implementation hit middle-management level the hardest.

The HCM group should have learned Legacy PPMS initially to understand how the system we have been using for decades worked, this would have been a tremendous help converting to HCM system. Dates changed without clear communication, timelines for homework (on top of full-time jobs) were unreasonable. Our Project Manager did an excellent job communicating with the project leadership team.

The project plan items were mostly understandable, but dates didn't always match other documents, and dates were sometimes changed on very short notice, although this improved for DG5 once it was brought to

the project team. Some of the local college plans were useful through the project, but some were more of an exercise and not useful.

Timeline communication improved as the project went on. We created plans as a college but didn't really use them. We DID use the plans prepared by the SBCTC.

Trainings were incomplete, sent to QRGs & videos in CANVAS after understanding training was to be in person. Finance pillar activities related to Treasury and Bank Reconciliation as well as Budgetary Reporting were not developed prior to deployment. Lots of read-only training and content. Hard to retain information without application

We generally agree with these statements. The timeline was reasonable on paper, but at a small college like ours, there was little backup available for key positions. When one pillar lead departed during BPFG, it placed insurmountable stress on other staff in that pillar to try to keep up with Project tasks while doing their everyday work. We were fortunate to have very experienced staff in the other pillars who were willing to work many extra hours to prepare for ctcLink, while carrying out their normal job duties.

Work Packages Comments

- Regarding the last question--we thought we knew. Really, we didn't know what we didn't know. - Statements made by Project Team led us to believe that Customer Support would be able to assist us more than the reality of their actual role; I don't feel that the literature or expectations set by Project Team gave me a clear idea of what the first week was going to be like; they made it sound like there were going to be a lot more automation during first week, but it was actually just manual work 100%. - The BPFGs were good for giving us some ideas of what new processes should be, but none of us are used to creating processes from scratch. So to expect that BPFGs are sufficient for people like us is really short-sighted on SBCTC's part. And then to expect that colleges can perfect their drafted BPFG processes during validation and subsequent show-and-tell webinars is even more unreasonable. - I remember not being able to recruit all the parties necessary for UAT activities, because they ended up prioritizing their current work tasks and did not learn things necessary for a shift. Those participating in UAT ended up being well-prepared for the post-transition activities. The pool of employees involved needed to be pretty extensive and this was not the case. - Documentation and training were heavily geared toward Undergrad (UGRD) and when questions were asked about Continuing Education (CNED) there were very few answers available.

- There was a disconnect between BPFG results and Work Packages. The UAT activities for CS were too limited and not inclusive of what all was necessary for Enrollment activities and processes. - It was difficult to know how decisions in one area would impact other areas, as the BPFG work did not actually address and resolve the gaps that were identified. - There were many aspects of go-live weekend that our division was not a part of, but for the most part things seemed to go smoothly and were relatively close to our expectations. The one MAJOR hiccup we encountered centered around gaining access to dataLink, and we were not prepared for the amount of time it was ultimately going to take to have access to the data on our servers. Relying solely on PSQuery as a means of pulling crucial college data severely hampered us, and although we never were given an explanation as to why the connection was not working, I do wonder if it had to do with us being a technical school and if this could have been prevented with more careful planning on behalf of SBCTC.

All the prep work (Legacy BP's, GDA's, BPFGs, UAT, validations, Training, did not prepare us for reality and/or knowing how things worked in ctcLink. Security roles - no not comprehensive- for dry runs and Go-Live, we were not provided all roles, SACR and UPD's to complete our tasks. Two-week post go-live support FA and dual processing did work well at two weeks after go live. HR/Payroll did assist via emails after two-week go live. Entry and enrollment support were useful. Fin/SF didn't have the support to get things up and running. needed 2 weeks after 2 weeks.

BPFG sessions prepared us well for course & class and degree record conversion. Overall very basic processes were covered in BPFG sessions, but overall, we weren't very well prepared to know the full processes, cross-pillar or very complicated processes in ctcLink. Most of the emphasis at that time was on determining configuration and understanding the configuration homework assignments. Data validation for finance - there was a lot of duplication of the same validation and errors occurring each cycle, without being resolved from cycle to cycle. Student financials parallel testing activities were not sufficient, financial aid parallel was sufficient. UAT was sufficient in the area of FWL (all scenarios were covered and we felt well-prepared). Other area UAT was problematic with security issues and environment changes that made end-to-end testing

impossible without backtracking and repeating earlier tests in a new environment. Go-live - student financials did not convert correctly, needed to re-do the conversion a few days after we went live to correct issues. We benefited a great deal from having a few people attend Clark's go-live and having key staff from live colleges helping at our go-live.

BPFG sessions were supposed to create a common business process that would be global. However, we've found that processes are unique to each college. It was impossible to understand the impact of configurations that were made before actually understanding the new system (ctcLink). How to use individual screens was explained, however, how those screens interacted to form processes was not clear and is still not clear. It would have been nice to have more assistance with business process mapping and reengineering. Although we learned a lot about the subject during the BPR sessions, we did not learn how to break down our current process/system and rebuild with ctcLink. In part that was because we were blind going into it – not truly knowing how things operated or were tied together. We still don't know what ripples we make when we do something in the system. Recommend more cross-pillar involvement during multiple phases of the project so that everyone understands the configuration and impacts from end to end. Security – Inconsistency of access between environments that were supposed to be the same. Security training was confusing. Each pillar was trained separately by different individuals so the consistency was lacking. One pillar received thorough training and understanding of the different roles (ZZ vs. ZC vs. ZD) while another pillar was left to read slides with no explanation. Security training was via WebEx (prior to COVID). This needs to be in-person for a training that is so complex. Would be helpful to have a general/basic list of roles that for certain groups of staff such as admissions, or registration Colleges could add to that dependent upon their business practices. Better tools for Security Administration. Having to complete training and input data for WorkFirst, Worker Retraining, Early Achiever's Grant, international and veteran residency coding the first week of go live was overwhelming. This data needs to be converted rather than manual entry. UAT testing – Need overview of test processes just prior to testing. Had been too long since BPFG/training sessions to understand requirements. UAT - Confusion about which environment to use since they kept changing. Data conversion/validation - Gap between data and validation time too long. Difficult to perform validation when there were conflicts as there was no ability to know the global impact that created the conflict. Data validation periods were short and notification of period to validate did not provide enough lead time to organize and prepare for the work that needed to be done. Additionally, the data being validated was months old which made clean-up efforts challenging. Support during transition: Would've liked if they could've had module specific support. Many times had to log in and listen while waiting in the que to areas outside to wait turn. Which is distracting in and of itself but – if we could've at least been listening to other FIN things we would've known what issues other colleges were having. Improved communication is needed between the ctcLink Project staff and the ctcLink post go-live support staff. There was LOTS of miscommunication, conflicting information and incorrect information given to the colleges because the two SBCTC groups were not communicating with each other before communicating to the colleges. One of biggest issues is that the project team provided advice or instruction on how to do things in ctcLink, but then when working with the customer support team, the advice or instruction is completely different. Has led to many errors and mistakes that could've been avoided had both sides of that house been in alignment.

BPFG: The experience varied by pillar, with CS and HCM having a better grasp of the new business processes than FIN/SF (due to aforementioned staffing issues). Across all pillars, though, there is a feeling that the impact of configuration issues was not well understood. We had to undo and/or add to a number of configurations after Go-Live (often well after Go-Live). My view of this is that SBCTC put too much emphasis on us building our configuration from scratch, without reference to other colleges. If we had seen more examples from already-live colleges that really knew what they were doing (like Tacoma), it would have saved us from shortcomings in our configurations. UAT: The experience varied by pillar, but I didn't get much of a sense that people felt confident after going through UAT. FIN/SF had the most difficulty in completing UAT successfully. Security/Roles: The people involved in role assignment spent a lot of hours putting together their role assignment workbook, and most people had the roles they needed at Go-Live. However, roles are only the start of what is needed in CS and FIN. It took a long time after Go-Live to appreciate how important SACR and user preferences are to the performance of job duties in those pillars, and how complicated they can be. It isn't just us - a Production BI report that can display every last SACR setting for an employee hasn't existed until yesterday - nearly two years after DG3A went live. The issues surrounding institutional security and how to deal with employees and students moving between schools or working at/attending multiple schools was not understood at all until well after Go-Live.

BPFGs were completed so far in advance of having hands-on training and access to our college-specific data, which led to decisions being made at the time that did not work well once we were live on the system. Much of the configuration has had to be changed or we have had to work around it once we truly understood how it is

used. Then parallel activities and then UAT gave us access more like production to get a feel for the system, but with so much to complete in a short period and having limited college resource time, much of that work was rushed as a rush to complete as quickly as possible instead of fully learning/investigating the processes. We were able to use the UAT environment for some learning/training/testing beyond the required tests, which did help fill some of that gap. The go-live process/weekend went as planned, but the post go-live transition to support should have been much longer with more individual college sessions or even group sessions. We did ask for more and did receive some extended sessions in DG5, but there was not enough time/focus to address the more complicated issues.

Data validation cycles were too tight and depending on the pillar, we had various amounts of struggle / challenge. The size of Seattle Colleges created challenges for data validation.

[SBCTC project staff] were a huge reason our HCM-Payroll and Time/Labor team was successful with our conversion. Would have not been able to complete without them two! When doing homework, the implications of decisions was not understood by college. We were shown what to do but not talked through the decision-making process. More guidance around what to validate was needed in UAT process. There was basic guidance, but again it was difficult at the college level to grasp what we needed to test and the prep that needed to be done. Also structure of data validation was lacking of how to operationalize at the college level. UAT was very process specific and didn't help visualize the full process and, most importantly, how those processes cross to other departments and pillars. Unable to test FA dual processing. We ran into many issues that could have been resolved prior to go live. Staffing for customer support (compared to project team) is not adequate. Having drop in times past go live is needed and response time to support tickets needs to be improved with additional staffing. BPFG-I don't think we had enough information to understand the ramification of the changes at the BPFG meetings. I think we could have used more direction on how to do Data Validation from previous deployments. I think we could have spent more time on UAT. The Conversion Go Live Adjustment was introduced very late in the project.

I feel that the security work should have started much sooner, local security teams needed to be building accounts from scratch to fully understand basic security, SACR and UPD configurations. The rollout of ctcLink suffered from insufficient understanding of security roles (which is still not fixed), insufficient UAT testing (staff turnover hurt substantially), and data validation remains a hot mess. The decision not bring over class attributes prior to Fall of 2021, and an insufficient documentation of how students reach ACAD_PROG will create a headache for staff for the next year. From 2013- our launch November 2021: all of the meeting, process mapping/lucid charting, all the sessions, Canvas intensive courses and scored quizes and the UAT...were all SO FAR in advance of our November 2021 launch - that no one can retain that much info when you need it! At the end of each Webex and Canvas training course, we read or heard at the conclusion of XYZ Training, you will be able to XYZ. When learning a new technology, you need to shorted the learning and studying time between the course and implementation, and get your hands on it to test, practice. Sometimes I was a little lost as to what was needed during UAT. BPFG identified problems, however we did not have solutions presented to us. UAT did not reveal that we can no longer easily link together requisitions, purchase orders receipts and payments. There are so many limits to who can see what that no one can see the big picture. We had super user access in UAT so this was not fully understood. COVID was a huge unplanned issue. However, we knew for years that this project would be incredibly difficult, and we knew staffing would be an issue. We knew that keeping offices open and serving students while at the same time learning a completely new system would require additional staffing support, and while the college did make a marginal effort for that, there was simply not enough staffing to get things done. Staff (particularly classified and exempt) were stretched thin (and continue to be so). Students are negatively impacted when emails and phone calls take days/weeks to respond to. Three months later, we are still feeling the impacts of that. Two things come to mind: (1) We did not have enough information about real-world consequences of BPFG after go-live (the things we planned out did not always work well in go-live), and (2) The quality (and quantity) of support from SBCTC after go-live has been lacking, with some exceptions. It is mind-boggling that we are in the middle of the pack in terms of go-live and these things have not been fixed, especially after the large sums of money we've paid.

Many of the issues the college had with project planning and understanding was due to major turnovers and lack of preparedness on our part more so than the project materials.

Most of the questions in #4 are framed in a context of conversion from Legacy to ctcLink. SFCC is a FirstLink school, which means DG2 was really a software upgrade for us. For this reason, I feel many of these questions simply do not apply to SFCC, except the one that asks about UAT. I am also just a SME with no seat at the

decision-making table, which means I lack the broader context some of these questions require. My preferred answer to most of these questions would be: N/A (I chose neutral instead)

Security roles-SBCTC did not provide adequate documentation for validating roles or understanding complexity.

The BPFGs required making decisions without context. Parallel testing was layered on top of other activities which made it difficult to focus. UAT testing overlapped with Data Validation, and Parallel testing. The Security team was not as prepared as well as should have been to understand what was needed to do the testing.

The DG4 Business Process Fit Gap (BPFG) sessions did not give colleges the necessary framework to develop new business processes in ctcLink. A small percentage of the sessions took place in December of 2020, and three months had passed before the project team responded with feedback because they were heavily involved with UAT and Go-Live activities for DG3. As local PMs relayed to the SBCTC project team in the DG4 Lessons Learned feedback, some project analysts, specifically in the CS Pillar, were better able to build context for SMEs between the functionality of the old system and the new. In other pillars, a deluge of information (2-3 days straight of lecture-style PowerPoint delivery) with no hands-on activities did not engage SMEs in assimilating the information. A recommendation was made by DG4 colleges to focus on configuration homework assignments separately from the process change sessions for future deployment groups.

The testing of limited processes prior to go-live did not fully prepare the college for the scope of end-to-end process change due to the new system. The event of go-live weekend was well organized with responsibilities and expectations outlined ahead of time. The BPFG were a waste of our time. The goal for these sessions was to create a collaborative process so that all colleges would be using the same process. The end results (the QRGs) are so vague, each college is still manipulating the system to get it to do what they want and not following any special step-by-step process. Go-live weekend plans prepared us, however unexpected closures due to COVID did change local plan at the last minute, not able to fully prepare campus for cut-over.

UAT: Basic data entry was sufficient. For running process like payroll or FA distribution or security, no.

Project Management Comments

- PM was sharp and on top of it. A great partner in the process. - No project will be perfect. If it is good enough, then I'd call it a success, especially for something on this scale. But it does feel that the Project Team's idea of good enough doesn't match ours. - Managing the first post go-live (and the second, for this matter!) enrollment cycle has proven to be a burden. Not everyone within our college was well-prepared to complete the shift. Those who ended up being an expert in whatever ctcLink area handled a heavy burden of requests. - The college planning and implementation was handled very well, but I did not think we got sufficient information or responses from SBCTC.
Again, our struggles were our own, but they did affect the project as a whole. Project Team supported us more than should have been necessary.
Could have been a better plan. Response time to issues was often not adequate for urgency at college level. Dave Ortega did an excellent job and continues. The transition from being a BA to Project Manager was professionally handled and did not cause any delay in the project.
During the pandemic and all of the changes along the way the project was pushed through without concern that staff was prepared. The trainings after go live are not prepared and are rushed through and back to back days so staff are unable to do their daily work or try to catch up on the work from the prior day-specifically New Year set up. SMEs didn't have enough time or training using the system before it went live and continue to experience difficulty. SMEs didn't have enough time or training using the system before it went live and continue to experience difficulty. There is NOT enough training time or specific support for Dual Processing, we still have to figure everything out on our own, or file SBCTC support ticket. Everyone seemed to be working and keeping busy. However It is still hard to find the right people who have real answers to the best practices piece of using this software in an efficient manner. I wish that the daily support team could have been there for 2 months instead of 2 weeks. It took us 2 weeks just to get the budget entered. By the time the rest of the campus was allowed to start working in the system the transition team had move on to the next group. I believe the good folks at the SBCTC did the best they could. However, we needed dedicated humans on the ground here on campus for the weeks leading up to go-live, and dedicated humans after go live to respond immediately to solve and anticipate problems. Again, it comes down to staffing resources, and just as the college was under-staffed, so was SBCTC.
Financial Aid and Student Financials were the areas that experienced the most issues, many compliance-related that needed additional attention and we expected more of a sense of urgency to resolve. We also had significant issues with National Student Clearinghouse reporting (compliance enrollment reporting), due to inaccurate/incorrect configuration.
For #5, I answered the one question I felt qualified to respond to (were implementation activities managed appropriately). The other questions require a broader context that I lack as a SME. My preferred answer to most of these questions would be: N/A (I chose neutral instead) The main issue that continues to be a pain point is that of application security.
I think that risks and issues were tracked well and managed well by the Project team. The pivot to remote work locally and at SBCTC was one of the greatest successes of the Project - it didn't feel like we missed a beat.
Issues were sometimes responded to quickly, some were not. Varied by functional area. Scope: Exceeded budget and timeline. The college's goal was to limit impact on students and staff; The Project's goal was to get us live.
Project Plan/Schedule - Timelines changed but the colleges were not given additional time. Many activities were at high peak times for the college making it difficult to engage more people. Problems with Financial Aid have still not been appropriately addressed or mitigated.
Project resources were spread thing to deal with multiple colleges in a deployment group and having to deal with multiple groups at the same time. Plans and dates were compromised due to this and colleges had to bear the brunt of that. Moving much of the work to fully online/remote may have actually made many activities better by allowing more college resources to be included and reduce time and costs associated with in-person activities.
Support varied by pillar. CS was well managed-far more issues in Finance and HCM.
The PC IT team were the stars in unanticipated events. Colleges are trying to serve students and project didn't seem to support that.
The Project Team's goal was for colleges to go live, college goals were to feel confident and have a complete understanding of functionality at go live. These were not in sync.
This was an incredibly complex project that we pulled off together in spite of challenges along the way. We'll continue to refine as we go along. In spite of limited resources (here and at SBCTC), we did it. It wasn't easy, but we're hopeful this new system will realize benefits in the long run.

We did not feel that there was enough time spent with each college in DG5 to implement the software solutions; it felt as if the focus was to shift quickly to DG6 and complete state implementation within the timeline. There seemed to be a lot of confusion and unanswered questions considering the number of deployment groups that had been through this process before our institution.

Project Communication Comments

My answers to #6 relate to my personal UAT experience, and communications with our Project Manager and SBCTC. The scripts for UAT work were vague but testing was still able to be completed. There were consistent times when not all stakeholders were looped into project communications.

It was often confusing and difficult to find information for conversion. QRGs still remain difficult to navigate (challenging to search if you don't have the correct search term.)

Overall, we feel Project communications were timely and informative. Some pillar SMEs feel that it wasn't always easy to find the information that they needed to complete activities.

Ticket response was poorly handled in the beginning. Communication issues in Finance-waited a long time for information/issue resolution. SBCTC should have pursued & led Communities of Practice and cross-functional communications.

All of the formal communication tools came out well after we went live. The communication from leads in each functional area was effective throughout project activities. There were timing issues, with some communications, we didn't learn about an activity or requirement until after it was due.

There was a ton of information to convey. It's obvious the Comms team did as much to provide information to the right people as best they could.

Most of the QRGs during DG4 were for 9.0, when we were going into 9.2, so they were already out of date.

- It seemed as though communications to colleges were not equally distributed amongst the DG. - Frequency and timeliness was largely OK, I think. But I do keep going back to what I feel is over-promising on the part of Project Team.

Much more communication would have been helpful. Communication of changes, updates, and reminders were hard to keep track of. It was easy to miss important communication pieces. Most communication went to PM level and relied on being forwarded down several levels to ensure everyone had the information. When looking for guidance on how to complete an activity, it often felt like a treasure hunt and a lot of time was wasted trying to find answers by over worked staff and leaders at the college level.

The communication templates and guides were very useful for later DGs in being able to take topics/information that had worked and adapt them for our college.

- Cross-pillar communication was hit or miss. The suggested target audience felt designed for larger institutions, and there was a disconnect at just how many roles each employee at smaller colleges may have.

Many Webexes were reading/reviewing the QRGs. Webexes not timely SBCTC communications should go to key Pillar leads/SMEs in addition to the Project Manager. All Pillars- all day workshops were very useful, but the training Webexes not helpful or timely

Meetings: Security meetings were effective.

Training Comments

All of the pre-go live training was a waste of time. Until there were real life scenarios and hands on work in the system, we had no idea what we were really doing. We realized security roles had to be fixed, homework submitted 2 years prior needed updating, etc. - Training before go-live shows what the data entry that the system will need in the future. Colleges would have benefited from having a person to guide us on how to craft future process in those same sessions. Every time we asked for guidance on our process, the response from Project Team was basically they can't help us craft our process. So colleges were supposed to create future process while still being half-blind. - The training did not allow sufficient opportunities for staff to practice activities, nor did it provide sufficient theory behind the activities so that people would understand why they were doing it. There is also insufficient training and documentation of cross-pillar activities and connections.

For financial aid processes, training sessions were occasionally not in line with the timeline for when we would be completing the steps. On one occasion, we spent hours reviewing auto packaging even though we were told it doesn't work. When staff are putting in extra hours and wearing thin, providing training at the right time would benefit our learning process. - Although I felt that the training provided by SBCTC related to query development was adequate, the tools related to query content and where to find data are severely lacking. The state's main tool - metaLink - is missing loads of critical information describing what fields mean, how they are related, and how they should be used. Without access to our data on the back end, this limited us to using the listservs, word of mouth, and combing through other queries in PSQuery to figure out where to find data and how it should be used. The possibility that we are misinterpreting some of the data and how it should be used is quite high as a result.

A number of our SMEs don't feel like the training for employees was adequate preparation for doing their work after Go-Live. This feeling is strongest in HCM and FIN/SF.

College Pillar Leads and SMEs reported too much time elapsed between initial exposure to the training material and actively using the system. Directors of core functional areas stated: Job duties and responsibilities at the colleges did not fit the sequencing of training courses established by SBCTC. Disconnect between course designers and college SMEs. The training team locked down the resources and required users to complete a User Agreement for each course, which meant that our staff could not follow links to videos or other material--had to first figure out which course the video was stored in, then get enrolled in the course, then sign the user agreement. When time is in short supply the training needs to be easily accessible - not Fort Knox.

[SBCTC Project Staff] were a huge reason our HCM-Payroll and Time/Labor team was successful with our conversion. Would have not been able to complete without them two! The Canvas courses were a waste of time for many employees. FA training went through processes, but needed to understand how these processes work together and often cross across departments and pillars and really understand implications of decisions. Canvas trainings was very lacking. The college needed to create guides for even basic processes like timesheets. This work fell on staff who had never been in the system to figure out how to do things to train other staff. The stress on our SMEs and leaders to support the college at Go Live and beyond was at a unacceptable. SMEs and leaders needed live examples and a functional test environment not just QRG and videos of someone showing the process. For FA, the Canvas trainings were for when we move fully, but little testing or training on dual processing. Nothing beats using the system to learn the system. The training was well done, but the SVX was more helpful and then once we went live with ctcLink actually using the program was what truly helped students and staff to learn it. It would have really helped if we would have had another similar sized school to bounce questions on. The support team was not always available to answer my questions and they didn't have the FMS understanding that an employee at another school.

Later DGs received more training than earlier training. QRGs were/are not accurate. Students were not prepared. Students had issues with caching.

QRGs often were missing steps / had errors. The basic training for staff was too time-consuming and not relevant for the work that needed to be done. The SBCTC did not offer any training for students of which we are aware. We ended up creating many of our own training materials for students and specific staff issues. As things continued to change with future deployments, on-going communication to live colleges did not (does not) happen.

QRGs were the main training tool and not effective. No training was available to students - unless developed at the last minute & it was too late. Rather than end-to end business process training, there was instruction on navigating screens to perform a task. Cross-pillar training on the integration point between pillars and modules was not sufficient to fully understand the system prior to implementation.

The Canvas trainings came on late in our deployment. We would have liked to see training available earlier that was geared toward project activities. BPFGs took place too far in advance for actual implementation.

QRGs could be better interrelated with the Canvas training course. The xontent of the Canvas courses should be better explained and defined on the sign-up page. Not all QRGs are available for managers to take action for optimization.

the trainings often occurred after the UAT was done or done multiple days in a row when we were in the middle of a pandemic and CARES funding and working remotely with one monitor. We didn't have enough time actually using the system and understanding how it works before we went live. The training sessions were good, but that doesn't help if colleges if they're churning through staff. I find the training for employees to be really cumbersome. I wish I could search for how to report overtime on a webpage or a Google doc rather than trying to find it in Canvas. I've worked with many students who've struggled with the system since day 1. A big part of the problem was we were learning how to use the system at the same time as students. More trainings that revolved on how we did things and how we need to do them now. Include training that tells us what downstream affects will be if done one way versus another. Especially regarding item types and how powerful they are. More training on 2nd journal sets, how to reconcile them and what to do if they are off.

Training not effective, did not prepare us for business process changes. Poor quality or inexperienced instructors. SBCTC always assumed the college staff knew what/how ctcLink worked.

Training was at times ineffective due to not be able to get hands on

Training was mostly adequate for SMEs involved in the project to get through the implementation activities, but were not enough for most employees or students to be ready to use the system after go-live. Many of the self-paced training courses are too detailed for the average employee or student, simplified guides had to be created or copied from earlier deployment groups. Much of the training content was either too early in BPFG or too late in ILT to be useful at go-live, having that level of training right before or after go-live would have been better for our community.

Training was not adequate leading up to go-live, but has improved since.

We created and provided our own training for employees and students. It would have been helpful to have individual meetings before go-live rather than meetings will all of the colleges together. We frequently received conflicting information between pillars for cross-pillar transactions. The training didn't provide a why; provided steps but no real-world situations or troubleshooting.

Organizational Change Management (OCM) Strategy Comments

- Who is the SBCTC ctcLink Executive Sponsor? Christy? Grant? Last I was told, neither have taken Prosci courses so how would they know to do these things? - This was not super visible to colleges. - Changes and who will be impacted were mentioned during trainings, but with so many changes, we were bound to miss a few. I don't know if there would have been something that could have been done to mitigate that, since we are only humans, but the effect of missing a few of those crucial changes is a lot of stress now. - If you replace SBCTC with college, then I could have a positive response, but I don't even know who the SBCTC ctcLink executive sponsor is.

As a SME, I do not know the definition of SBCTC ctcLink Executive Sponsor. I know who our local project manager was, and I remember receiving many emails from a variety of people at SBCTC at various stages of the UAT. I don't recall any of those emails being signed by SBCTC ctcLink Executive Sponsor. I am sorry if this answer seems obtuse. I am just being frank.

Colleges were charged with defining benefits to their own campuses, however there was no way to demonstrate what the change would look like. Messages from colleges were mixed, and misunderstandings were evident from all statewide commission and council meetings. Colleges were reminded that the ctcLink Project was a change management project, and examples were given of successes in PM meetings, however these messages did not radiate outwards.

Could have better prepared the individual pillars leads/SMEs.

I'm not sure who the SBCTC ctcLink executive sponsor was during our implementation, so they could hardly be called active and visible.

Specific comment to Finance leadership at North: I was introduced to the project at Seattle while at North via a request to design the chart of accounts. As best I could tell there was no OCM around that part of the project. The assignment was given without context (what the move to a relational database would enable, what needed to be taken into consideration, etc.). There was scant evidence of broader engagement around the question of standardization. There was no evidence of the identification of the skill development needed at the position level to adapt to the absence of Trans codes etc. Were gaps ID'ed coming out of the business mapping process? There was no evidence of that.

The amount of work needed to implement was overwhelming, especially for a smaller institution. This did not seem to be acknowledged at the state level.

The benefits were clearly defined by SBCTC, and we may eventually see those, but information from colleges already live on ctcLink conflicted with that information. When this was brought up with SBCTC, it would be addressed, but again it didn't match what the live college experience. We had little interaction with SBCTC executive sponsor at the college level.

We don't know who the SBCTC ctcLink executive sponsor was. Messaging from deployment to deployment remained the same and didn't recognize those actually within that deployment.

College Organization Change Management (OCM) Strategy Comments

While we did everything we could to prepare the campus, the impacts of COVID and other commitments/priorities were difficult to juggle. Our PM and ES went above and beyond, but some on campus did not get as much support as they could have through reprioritization of job duties and overtime opportunities. - I think the college did give the resources that it could give, but it wasn't going to be enough. - The college's team did a great job. There was just a lot that they did not know.

College made significant attempts to identify what the change would look like, but did not have adequate information from SBCTC to support the effort. Finance area was under-resourced to support the complex and more labor-intensive business processes.

It was difficult to understand the impact of the change until we were live.

Many day-to-day details were not covered, and therefore we were not prepared. E.g., the need for new transcript paper. The pandemic often took a front seat in planning and focus of the leadership team. And competed for resources while working remotely.

My answers to #9 assume that our college/agency executive sponsor is synonymous with ctcLink Project manager. If this is not true, then I don't know who our executive sponsor is/was, and my answers to this section are invalid.

Our executive sponsor and (second) project manager were extremely helpful. Financial resources were provided by the college, but during a time of COVID and declines in enrollment made this investment difficult and limited in ways that impacted the mental wellbeing of SMEs and leaders. I don't feel that anyone was prepared for the amount of change. I think some college departments expected more guidance from SBCTC on new procedures. The messaging seemed to indicate that we were going to be more uniform on how to process transactions but there was no guidance and many processes were left up to the colleges.

Our executive sponsor changed mid-course from someone who was very hands-on with the project to one who mainly wanted to be kept informed, though the latter was supportive of the PM team and all staff who gave their time to the project. We only had one individual who was visibly opposed to the change to ctcLink, and he took himself out of the picture by retiring before Go-Live. We had limited resources compared to larger colleges because our Executive Team would not fund even one Business Analyst position to aid with the implementation. It would have been nice if SBCTC could have provided that funding - it would have eased the burden on all the SMEs who donated long hours to ctcLink.

Priority during project was pandemic, enrollment, and ctcLink. Another priority competing with ctcLink was opening a student union space (Orca Central). There was an explicit expectation for many of us to keep working to get the space ready and open at the same time we were preparing for ctcLink go-live.

The college's ctcLink leaders did a great job of communication, advocacy, and acknowledgment of the team. We needed more staff capacity and it was a priority because it had to be, however other work was not deprioritized to make room. Needed more backfill and to hire more staff. This was a huge lift and people are feeling overworked and burnt out.

Core Functions Comments

*Hire to Retire - consistency on what is expected to be completed on hired and separations is not clear. * Manager Self Service - not well understood or utilized, will require additional training for managers. *Employee Self Service in HCM: especially on absence, partial days and cancellations and resubmissions are not intuitive or clear. Tiles go missing [known issue with Chrome & Edge browsers]. * Employee Self Service in FSCM: Travel & Expense does not work as intended. Colleges were advised by SBCTC not to use the T&E tile because it was not reliable. *Employee Pay and Payroll - inaccuracies in transmissions to Department of Retirement Systems (DRS) under certain conditions - ctcLink needs to be updated. Processes still glitch randomly with no explanation. *Faculty Workload - tedious and time consuming. Performance issues (delays) noted in contract calculation time when an employee has multiple job records. * Assets - SMEs report that Asset Management does not work for

capital assets. Still tracking assets with DirectLine and spreadsheets. Cannot add capital assets, i.e., a vehicle - ctcLink needs to be updated. * Travel & Expense end-to-end business processes are not well developed or defined. Lack of clear reference material and/or adequate training. *Billing - the chart strings are still not accurate on the submodules, so billing cannot be automatically closed in the system and SMES must review and make manual entries to fix - ctcLink needs to be updated. * Class Requisites - steep learning curve, new issues crop up each quarter. *Register for Continuing Education Courses - CampusCE/ctcLink integration issues with duplicate students, duplicate payments. ----------------------------- **TAM - Direct from SMEs: Not operating up to the sales pitch. Losing applicants through this online application.

Billing - ctcLink system needs to be updated Class requisites - college is still working on changes to configuration to stabilize View Student progress for Advising Purposes - college is still working on changes to configuration to stabilize Register for Continuing Education Courses - need to implement phase II of integration with CampusCE, also additional functionality is needed in a phase III of that integration. Compliance Related Reporting - ctcLink system needs to be updated Award Financial Aid - ctcLink system needs to be updated Online Admission Application Portal - ctcLink system needs to be updated

ctcLink system needs to be updated

Currently have tickets that are not resolved in this area. Two examples: When jobs converted from PPMS they were converted in reverse order. This causes issues and ctcLink needs to be updated. Flag that comes up if you have something pending. The flags are not working. Have had to determine a work around for the Enter Time tile that does not always load. Needs a better way to explain a faculty's pay. It rolls up together everything including stipends and other pay reasons. Faculty and others are unable to determine what they are paid for. So much more labor intensive then it should be. Way too many steps prior to running the automated job. There was also not enough training in this area. Still working through EvCC processes however the new system is very time consuming. PCard attachments, splitting of transactions. Functions as expected but can't use to calculate depreciation or assets. Just using as a second step to ensure reporting. Module doesn't do calculations. Working on changing our business processes. In previous system jobs ran to complete records. ctcLink needs to do this banking part. Must go back and manually post. Still learning and determining business process. Having to manually touch and clean up every course is labor intensive. We are stable but courses should not have all come over as active. We had end dates in the Legacy system and these were not converted. Still learning and determining how these work in ctcLink. Prerequisites for linked courses are currently not working. Not sure if this is a system issue or not - still learning. Issues with GL to SF - able to find pieces but unable to match and reconcile with GL. Item Types were not all set up correctly. Having to do extensive clean up. Extensive work that must be done after conversion. Non-Converts is very labor intensive. Transfer Credit is not working correctly. This depends on what compliance reporting. Working on business processes for enrollment reporting. SEVIS CIP Code Reporting is not set up correctly for International Reporting. Some finance reporting has queries. Mass packaging still does not work in ctcLink. Not loading ISIRs yet. Students must log into ctcLink first in order to then use the Mobile App to pay tuition.

Employee Pay & Payroll – Holiday pay and processes have been inconsistent and continue to cause issues. Faculty Workload - Our faculty contract has created unique challenges with faculty workload that we are still working through at Seattle Colleges. Assets / Travel – Not yet using modules. Compliance – still working through issues on this due to lack of training / understanding at go live. ctcLink app – have had issues with updates recently. Continue hearing of glitches.

In all cases, stabilization has been impacted by the need to change college business processes. We have also struggled with maintaining staffing and resources, and knowledge transfer.

Many of the finance processes used by employees outside of the business office have been very challenging to implement due to complication of process steps (Travel, purchasing, etc.). Hire to retire and pay/payroll need both business process changes as well as ctcLink system changes/updates/fixes in order to work. Faculty workload does work as expected for the most part; the main issue is with business processes and the increased statement of work to manage contracts compared to Legacy. CS areas that need improvement: Students Self Service: Graduation Application (transition from supporting system), AARs (complete entering them, not enough resources before go-live for the amount of work), Resolve the permission require pop up box issue during enrollment (ctcLink system) Class Requisites (fully understanding how they work, could not really test them before go-live, so students end up being testers in production) Student Progress for advising: AAR, Graduation Applications (noted above) Award Degrees: Graduation Applications (noted above)

OAAP: Needs major modifications: Running Start, asking for residency information, Race/ethnicity demographics, High School Completion date – required field – not all students graduated high school so they have to falsify an answer to submit the OAAP, International student applications, Dual credit students (College in the High School and CTE Dual Credit) are NOT transitional study students, and should not be pigeonholed into this program.

Much of our stabilization issues are training and security issues.

Notes: Due to FIN turnover, we don't have anyone who was willing to say whether FIN tasks were working as expected. We are going in a different direction for handling advising (EAB/Navigate), so we have nothing to say about viewing student progress for advising purposes. We don't do continuing ed.
Other processes still in stabilization = Grants, Financial Reporting, Bank Reconciliation, Treasury, AR (all require ctcLink system updates) Continuing Ed-College still integrating (concerns about duplicate IDs OAAP-oldest record in ctcLink trumps new record on the application
There are items that Ctclink system needs to change, one is employer side of OASDI/Medicare on payroll check advices, Absent Management needs attention too. Many of the functions take additional processing time. It is a mix of business process changes and inadequacies with ctcLink. In a likelihood, we will just have to adapt to ctclink. Dual processing for FA-Still not functioning as expected. Unknown impacts between departments, determining how QRGs fit together for full processes, including how they intersect with other departments/pillars. FA-new year setup. The immense amount of work needed to complete the setup, in addition to managing the issues in the dual processing stage. Managing issues and support tickets is a full-time job which is resting on FA staff with other full-time jobs.
There are some functions that we have not yet been able to see in operation yet, so the options provided are not reflective of where we are at as a college. - Accessibility compliance and usability for our students and employees will continue to be a priority. Until the software solutions meet the requirements and needs of our end-users, the above functions will continue to be In Stabilization - Compliance-related reporting - Due to dual processing, unable to assess whether system functions as expected. - Award Financial Aid - Due to dual processing, unable to assess whether system functions as expected.
Though I am not a SME in these areas, I do work as an employee and manager in HCM and I believe that these areas are not utilized to the full extent of their capability: absence balances and requests are not posted in real-time or dynamic, we are unable to use features like paycheck modeler, we lost the use of CPAS classified staff evaluation interface at go-live, etc., I am not sure if that is a local business process change that needs to be developed or if ctcLink itself needs updating. There are multiple issues with Advisor Center; It cannot be used for a mass email communication because with one error in an email, there is an error for this function and the email will not send. The advisor center does not show a student ID # without toggling to another screen. /We cannot add any other functions like FA or Placement to the advisor center. This information is needed to advise a student and keep them on track otherwise there is a need to toggle to the Student Center. CtcLink cannot mass assign students to an advisor nor can we mass remove students. Advisors cannot be assigned primary and secondary to student accounts. The Academic Advising Report is not accurate. The Education Planner is not easy to use for students. There should be a function for advisors to access this and modify information. For #10, I responded only to those categories with which I have some familiarity. My specialty area is the catalog. Based on what little I've seen of the Legacy system, I feel ctcLink catalog actually works quite well and offered many improvements. Though I am not a SME in these areas, I do work as an employee and manager in HCM and I believe that these areas are not utilized to the full extent of their capability: absence balances and requests are not posted in real-time or dynamic, we are unable to use features like paycheck modeler, we lost the use of CPAS classified staff evaluation interface at go-live, etc., I am not sure if that is a local business process change that needs to be developed or if ctcLink itself needs updating. Core Requisites - ctcLink needs to be updated to allow BEdA classes with the new BGB grading basis to be set with pre- and co- requisites.
We need to tweak processes on Hire to Retire and FWL because we are still learning and understanding the system. I expect that that some further system modifications will be required as we go along. - My experience has been that the business processes we jotted down prior to going live have been incomplete. One more round of business processed drafting might take us a long way, as right now most of SMEs know what they are doing. - There are still challenges with the CE integration with CampusCE. Error codes that are not documented, multiple EMPLIDs and search/match not functioning as expected.
We've been in the system for 3 months, and we still have many items in stabilization. There are some benefits that might not be fully realized until configuration is updated by the SBCTC - specifically for T&L.

Lessons Learned

What lessons have you learned from implementing the ctcLink Project that you would like to share with other organizations or large projects?

A college's chances of having a successful go-live will lie in their ability to cooperate, communicate, and examine their processes completely.
An organization must fully understand the flow of data from beginning to end to ensure a successful implementation and leverage the benefits of the system.
Desperate/Urgent emails did get response, but in general we had slow response for assistance. Communication system needs to be in place for timely and support input and a way to provide feedback. More guidance needed on the business process - especially end to end. Did not know how things worked in ctcLink. Cannot learn a new

software via presentations/training. Has to be hands on with our real data. SBCTC lost functional experts, which hurt support and effective training Finance/SF - Best practices not communicated well. Reporting had very little support for transitioning to new reporting. Doesn't appear that SBCTC really knows what advisors do. Couldn't help us plan for go-live. Only had one key concepts - very little Advisor training.

General thought: Urgent trumps important every time and if the hierarchy does not compel (via setting non-negotiable time aside to do project learning/work) the result is going to be under preparation and chaos. Timelines need to be set on project goals. Expect things to take significantly longer than you think they will. Be prepared for a significant loss of workforce during and after implementation.

It is imperative that there is a clear understanding of differences between comprehensive and technical colleges, especially around benefits and payroll. During the planning phase of a project of this size, ensuring that you have truly assessed the needs of stakeholders will benefit the deliverables in the long run. BTC experienced numerous challenges with the HCM pillar due to a lack of understanding of how TCs differ from the comprehensive institutions when it comes to bargaining units, benefits, payroll, etc... While communication from SBCTC was OK, it could have been improved - Not all the communication went to the correct recipients or wasn't timely enough. We also need to have better documentation of things that change during the implementation process

It is important to include key players/stakeholders in communication, perhaps even erring on the side of overcommunication. Gaps in communication cause a lack of understanding and can lead to rumors and misinformation.

More training and resources earlier in the project would be useful. A testing environment early on would have helped with staffing change management, and business process re-design. Planning for agility is always advised. We could not have predicted the pandemic, but we could have been better prepared to adapt and address unexpected risks. Leadership and Presidents at the colleges underestimated the amount of organization change that is required for a project of this depth and breadth. It would have been extremely helpful for Oracle to have been more present early on to demonstrate and 'sell' to college leadership the benefits and advantages that would be possible with this system, as opposed to other third-party competing products.

Need more SME functional testing before implementation to make sure it meets user needs Need fully functional test environment SBCTC needs better understanding of how Colleges function Need more common business processes

OCM work is key to these large projects and is easy to send people to training in OCM, but is very hard to implement if these people all have other work/responsibilities on top of the OCM work. We found the OCM work in the project was the first thing that would slip since the project management and functional work all had deadline and requirements to be completed where the OCM work did not. Communication is key in as many ways possible and more than less so people can find what they need in the way that works best for them. If you can find ways to compensate your key leads and SMEs for the project work, that is a great boost for morale that their work is being recognized. But at some point, other means of compensation beyond pay are needed as it can only go so far when most people have to do their day job and project work at the same time; breaks/vacations or small gifts of thanks, written notes, etc. Bringing back as many retired/experienced employees for backfill during the project is very beneficial to have people that can do the daily work right away instead of having to try to train people in both the technology and local processes. Get as much hands-on training as you can. Try to proactively identify impending issues and makes plans for mitigation

Post go-live: Everything takes longer - Security is a heavy lift & very time consuming. - Communication between departments is extremely important - every change has downstream effects & you're not always aware - Build in time for reporting/tracking/resolving issues - Commit to a best practice before onboarding all colleges - more specific than an overall common practice

Staff do not have enough time to do their job AND to complete the activities required by a major implementation. This needs to be recognized and accommodations made. Back-filling does not work in many areas.

The common process workshops, BPFGs, data validation, etc. all did nothing to really prepare the college and staff to work in ctcLink. The protection time we were given prior to go-live would have been better post-go live. We barely had time to learn the new system when we had to return to full services for students. We have had to work out all the snags on top of our normal duties and it's been too much. We have no time to conduct proper training of our staff. The ctcLink reference center guides do not provide adequate information for real life scenarios. Rather than large group training, it would be better to have each college provided with training on their actual data and with a mixed group - for example financial aid staff with Finance staff, etc. Post go live we are working more in siloes and it has been hard to find time and space for us to work through complex issues. - Expect some failures. Get over the failures. Fix the failures. - All the groups of stakeholders need to be involved in the project prep to a larger extent - data validation, UAT, BPFG. College administration, as well as the project's implementation, creates a huge disconnect between the level of understanding between different groups, as far as what is possible and what is a limitation of the new system.

The directions should be tested prior to asking staff to do the process as the directions are missing pieces which means you need to go back to the start multiple times. They said they were aware of the issues but after so many

go-lives why wasn't it updated already? Jobs that we need to run in HP should be sent out prior to the set ups so that it doesn't put colleges behind in the set ups and add more stress to try and catch up. The staff for CTC were fantastic but they are unable to stop the trainings or reschedule as they are on a tight schedule regardless of the happenings in the world. Make the commitment upfront to have dedicated employees working on the project by backfilling positions to ensure employees stay engaged, avoid burnout, or health issues due to the higher stress level of having to do two full time jobs Overly optimistic communication plans are not helpful in terms of establishing credibility of new systems. Build in staffing turnover into planning process, and be prepared to pivot if turnover picks up. Spend less time on high level future state workshops and more time helping front line staff own the nuts and bolts of new systems. Remember that front line workers are ground zero for implementation, so reporting out based on their experience (as opposed to a VP five to six degrees removed) provides more actionable data. Actually test through student facing UI, as well test through business process to determine break points. This takes much longer than you think. The transition work continues for long after go-live. Dual Processing is not only inefficient, it causes more glitches and errors. Also, the time between implementation and the hands-on training needs to be scheduled closer, so that the information and training is relevant and can be put in practice. Make sure the right staff is at the right trainings! Have more walk-through training type workshops instead of just videos in the beginning. I learned more in trainings after go live than in all the BPFG's in the beginning. The Canvas trainings were overwhelming at first. It is best to get in mind what your daily, weekly, monthly processes are in advance to get a fighting chance at understanding what your role(s) and function(s) you will be doing in ctcLink will look like. I suggest also to go back and do refreshers! COVID was apparently unavoidable. However, we were woefully unprepared for the amount of work it would take to keep serving students and employees while learning a new system. Hire people, hire folks who know the system, and that can handle the training and the issues so that employees can tend to their day-to-day jobs and learn the new system in a meaningful and sustainable way. held open virtual calls for students to call in and gain help with login/account issues. This helped due to the ability to screen share and get students through the process.

The main question at our college is Aren't we DG5, why is it so difficult to obtain information that should have been sent, instead of constantly reaching out asking what to do or how. Communication is key, especially with front line staff. Need to hire multiple staff whose full job is implementation and support so the extra work is not shouldered by staff with full time jobs doing daily operations of the organization. Use the test environment prior to conversion to get to know where all your key processes will take place and then practice. It is better to troubleshoot problems in the test environment than after go live. If the pandemic would not have happened. I think it would have been helpful to have gone to other colleges and watched them use the system. It would have been easier to ask questions to frontline employees who were proficient with both FMS/SMS and ctcLink.

There are not adequate step-by-step guides on how to do standard processes.

Where there's a will (and sufficient funding plus careful oversight, and a heck of a comprehensive repeatable plan, and an endless supply of motivation/dedication/collaboration) there's a way.

Additional comments related to the ctcLink Project implementation

Any additional guidance that has been released should be attached to the QRG. For example, there is additional guidance on entering names (i.e.: students with a single letter name). This information is not attached to the QRG.
Every College still does their work different from others. Should have focused more effort on developing state wide best practice solutions Financial Reports still pulling inaccurate data
I fear that as a SME, my answers to this survey are of limited value. Many of the questions require a 30,000-foot view of the DG2 implementation that I simply do not have. Most of my work is down in the weeds. There were also some acronyms and position titles in this survey with which I was unfamiliar. I also felt that many of the questions in this survey don't apply well to a FirstLink school (which we are). For us, the painful transition from Legacy to ctcLink is in the distant past. DG2 was really just a software upgrade. Mixed availability of messaging for DG3-6 impacts.
I wish we had been able to integrate more supplemental systems from the start. This has really hampered communications with current and prospective students during enrollment periods. When it comes to end-user training by SBCTC, it should come from folks who have actually worked in both Legacy and PS.
Some of the basic functions we do as CTC's are not working well in ctcLink and its surprising that we were DG5 and these issues are still unresolved. Examples: BEdA, Continuing & community education, financial aid processing, accounts payable issues, budget reporting for revenue and enterprise accounts.
The challenges inherent in having 3 independent colleges go live together created significant challenges for us as a system and for SBCTC since the framework was designed for individual college implementation. On-going updates continue to have an impact on the colleges that are live. Some of these impacts are creating issues for systems like Payroll and are significant.
The SBCTC Project Office pulled together an outstanding team of bright dedicated professionals who have done an extraordinary job facilitating this comprehensive organizational and systemic change. It has been an honor and a privilege to serve on this project and witness (and participate in) such a massive statewide business process transformation project. College leadership and support ensured success at the local level. Highly engaged executive sponsors provided institutional focus and resources. Pillar Leads who stuck with this process from beginning to end deserve congressional medals of honor.
There are bound to be some bumps in implementing this large of a project, but it often felt like we were reinventing the wheel. I firmly believe some of the bumps our college experienced could have been avoided. - During BPFG, Validation, UAT, and Training sessions we were often informed that the answer to our questions or concerns would come later on. Now that we are live in the system, those questions are still waiting for answers. In other cases our ability to move through a process was hampered because we did not have the knowledge to resolve the issue.
We are hoping [SBCTC Project Staff] will transition to the HCM-Customer Support team once all colleges have converted. He is one of the most knowledgeable individuals on the system, was easy to work with understanding both Legacy and HCM. Responses completely clear, always willing to assist. The run up to the project was too long and there were too many meetings involved with the cross over. As busy as everyone is, I wish a more targeted approach to meetings would have happened.
We would have appreciated more preparations for the colleges to communicate easily with each other - especially for Local Security Admins (our role). If this system is to be shared, we need to work together. It also seems dangerous to have one system, especially without having MFA from the onset. - If I am being honest, I felt like this project was steam rolled and we had no choice but to implement no matter the cost. I am seeing a lot of people leaving the system over the level of work ctcLink requires and that we are not adequately given time nor staff to fully manage. The fact that we have been working remotely and struggling with mental health issues was not factored and staff are burning out. We are being asked to do more and more and something has to give. Most of the time devoted to training with SBCTC has been worthless. While I have appreciated the SBCTC staff, I do not feel like we were able to gain any real knowledge during the webinars. It has really been as each situation arises that we discover how to do things and often, things need to be fixed. It's also been frustrating that we no longer have local control over the configurations and having to wait for it to be done for us. We are taking the brunt of the student frustration over the system and we will likely lose student enrollment and staff as a result. - I have developed a huge level of respect for our Project Manager, Sponsor, and the entire Core Team, I think these individuals have gone above and beyond their call of duty to make the project a success. I think the long tale of issues has been very disheartening on the faculty and students, therefore, it indicates a discrepancy between an expectation and a reality. If other colleges could build an expectation ahead of time that the enrollment issues might take up to a year to resolve, it would take much of the stress away. - I was really disappointed in the pedagogy that SBCTC chose to use for ctcLink training. I do understand that there are challenges, but very few teaching best practices were utilized.