

Session Summary

Project Kickoff Meeting

Banner Implementation

Executive Summary

The kickoff meeting of the Banner implementation was held on March 19, 2009 at the Alamo Colleges Advanced Technology Center. Participants included Chancellor Leslie, Vice Chancellor McLaughlin, and members of the project teams and governance committees. During the meeting, Dr. Cleary (Vice Chancellor for Planning, Performance, and Information Systems); Scott Hess (Consultant Project Manager); and Ken Phipps (Alamo Colleges Project Manager) provided a briefing to the participants, which included an overview of the implementation, leadership responsibilities for the committees and team leaders, areas impacted by the project, and the project timelines. Time was also allocated for breakout sessions.

Following the briefing, the participants formed teams of 12-15 people who met in separate rooms to discuss issues that will have an impact on the project. The discussions focused on four areas: achievements expected to be gained through the project; success enablers; anticipated barriers; and lessons learned from previous projects.

The ideas expressed during the breakout sessions were documented by the Banner team leads and SMART consultants. Those comments centered around 8 broad areas of concern that must be monitored and addressed to facilitate a successful implementation. They include staffing, training, business processes, data and data standards, reporting, security, portal/service, and communication. The specific items that were documented from the breakout sessions are listed in attachment 1. Feedback from the breakout sessions will be used to help establish a roadmap for success and identify risks to the project.

Overview

Meeting: Banner Project Kickoff Meeting

Date: March 19, 2009.

Location: The Alamo Colleges Advanced Technology Center, 312 Clarence Tinker Dr.

Time: 1:00 PM – 4:00 PM

Participants: Members of the following committees and implementation teams were invited.

- a. Executive Committee
- b. Steering Committee
- c. Financial Aid Team
- d. HR/Payroll Team
- e. Finance Team
- f. Student Team
- g. Student AR Team
- h. Technology Conversion Interface Team
- i. Technology Reporting Team
- j. Data Standards Team
- k. Training Team

In addition, Chancellor Leslie and Vice Chancellor McLaughlin were invited to make opening remarks to help demonstrate the AC commitment to the project and thank the team members for their support. All of the teams representing functional areas and supporting committees were represented at the meeting.

Objectives

The objectives for the kickoff meeting were as follows.

- a. Provide an overview of the Banner implementation
- b. Highlight the leaders' responsibilities
- c. Discuss what areas the project will impact
- d. Highlight project timeline and what's ahead
- e. Gather feedback & answer questions

During the breakout sessions, four questions were used to frame the discussion:

- Question #1 – What do we hope to achieve through this project?
- Question # 2 – What will enable us to be successful?
- Question #3 – What barriers / risks do we anticipate?
- Question #4 – What are our “Lessons Learned” from previous projects?

Outcomes

Participation in the kickoff meeting was high. 85 of the 94 people who were invited attended. Few questions were asked during or following the briefing. The assumption is that since many of the participants are actively engaged in the project teams they already have an understanding of the project's scope and their roles on the teams.

Most of the breakout sessions were productive and the members engaged in lively discussions. The validity of the information gathered in each breakout session is supported by the information gathered in the other sessions. Some recurring themes were present in all of the groups' responses. This shows all participants have similar expectations for the project and similar concerns for the risks to it.

Analysis of the information gathered during the breakout sessions shows recurring themes. The breakout of the responses to the four questions follows.

Question #1 - What do we hope to achieve through this project?

- Improved Reporting and Information Access – 6
- Consistent Business Processes – 36
- Enhanced Portal/Services – 12
- Quality Data/Data Standards – 8
- Stronger Security – 3
- Expanded Training – 2
- Efficient Staff Allocations – 0
- Improved Communication – 0

Question #2 - What will enable us to be successful?
Improved Reporting and Information Access – 1
Consistent Business Processes – 13
Enhanced Portal/Service – 9
Quality Data/Data Standards – 2
Stronger Security – 0
Expanded Training – 11
Efficient Staff Allocations – 13
Improved Communication – 32

Question #3 - What barriers / risks do we anticipate?
Improved Reporting and Information Access – 1
Consistent Business Processes - 11
Enhanced Portal/Service – 2
Quality Data/Data Standards – 2
Stronger Security – 1
Expanded Training – 9
Efficient Staff Allocations – 20
Improved Communication – 25

Question #4 - What are our “Lessons Learned” from previous projects?
Improved Reporting and Information Access – 0
Consistent Business Processes - 11
Enhanced Portal/Service – 1
Quality Data/Data Standards – 1
Stronger Security – 1
Expanded Training – 9
Efficient Staff Allocations – 15
Improved Communication – 36

Comments received following the meeting indicated that the participants understood the commitment the Alamo Colleges have made to this project. Most participants expressed support for the project and a desire for continued involvement.

Next Steps

The information gathered during the kickoff meeting will be used in several ways. First, it will be used to assess whether the project teams are meeting their own expectations of what they hope to achieve through this project. Although the Project Management Plan provides a formal description of the project’s purpose and scope, the answers to the first question will provide an informal summation of the implementation teams’ expectations.

Secondly, comments from the second and third questions will be used to expand the project’s risk log. The brainstorming that occurred during the breakout sessions provided an ample list of threats that have a potential impact on the project.

Finally, information about the lessons learned from previous projects will help the teams avoid mistakes and highlight potential problems.

Several initiatives, which address the concerns raised during the breakout sessions, are underway or planned. The areas and specific responses are listed below.

1. Improved Communications
 - a. The Project Management Office (PMO) is defining a communications plan that will be used for the duration of the project. It will include multiple communication channels and identify the target audiences to receive project messages and status updates. This plan will be reviewed and monitored by the Steering Committee.
 - b. A project web site has been established (<http://www.accd.edu/district/banner/index.htm>). The web site will serve as a key communication platform for project status.
 - c. An email account will be established to allow every member of the student body, faculty, and staff to communicate with the project team. The e-mail messages will be reviewed by the PMO to ensure concerns are addressed by the project team supporting the affected functional area. Once established, the e-mail address will be Project-Phoenix@mail.accd.edu.
2. Efficient Staff Allocations
 - a. The PMO is comprised of full-time dedicated resources. The PMO, along with core project team members and extended team members from the colleges and district offices form an implementation team of appropriately skilled personnel supporting this project.
 - b. A backfill plan has been established to support departments that are dedicating staff to the project. This plan will allow functional areas to augment their staff with temporary employees. This will not alleviate all staffing issues, but it should help to put in place a structure for the project to be completed successfully while normal operations continue.
3. Improved Reporting and Information Access
 - a. Core Team members from each functional area will identify and prioritize current reports. This reports inventory will be used to identify critical reports that are required for each module's go-live date.
 - b. A reporting strategy has been developed to provide end users with better access to data and consistency in information provided by the system. This strategy will be deployed during the Banner project and will continue after each module is deployed.
 - c. A process is underway to select a new end-user reporting tool. This new tool will be user-friendly and training will be provided to all end users.
4. Consistent Business Processes
 - a. The Business Process Analyses that are included in the project's deliverables will lay the foundation for consistent and streamlined processes across the colleges. Each Alamo employee will be responsible for implementing and supporting these changes.
5. Expanded Training
 - a. End-user training will take place approximately 6-8 weeks prior to each module's go-live date.
 - b. Training manuals, with detailed procedures, will be included in the training materials provided for each module.

- c. Project team members will receive training that will prepare them to train others in their functional areas. They will be responsible for conducting end-user training and providing critical support during each module's deployment.
 - d. Subsequent training will be available after each module's deployment, providing additional opportunities for end-users to understand the new procedures or address new processes.
 - e. On-line computer based training (Banner 8 Fundamentals) is available to all students, faculty, and staff who have PALS user accounts. The Banner 8 Fundamentals course provides training in the following areas:
 - i. Navigating in Banner
 - ii. Accessing Banner Forms
 - iii. Forms and Their Components
 - iv. Using Reports and Processes
 - v. Finding Data Using Queries.
 - vi. Using Online Help
 - vii. Using the Banner Bookshelf
 - viii. Creating Custom Quickflows

To access the training, simply logon to PALS, click on the Employee tab, then click on "Banner 8 Fundamentals (CBT)" in the Employee Resources menu box along the left-hand side of the window.
6. Quality Data / Data Standards
- a. A Data Standards team has been established to develop a standardized listing of values for tables that are shared across multiple functions. This team will continue to address issues related to data standards even after implementation is complete.
 - b. The consolidation of data from multiple SIS PLUS systems into one Banner system will require cleaning key data elements. Project team members will be responsible for cleaning data from the PLUS system before it is introduced into the new Banner system.
 - c. Consistent processes and procedures will be established to ensure similar transactions consistently capture the same types of data items.
 - d. To help minimize the creation of duplicate records, Common Matching will be turned on for all forms that allow the creation of IDs for new people. Common Matching is a process that checks for existing identification records before a new record is added to the database or an existing record is updated.

Conclusion

The breakout sessions provided valuable feedback that will be used to help identify risks to the project, develop strategies for dealing with those risks, and establish criteria for measuring the team's success. The feedback will also help keep the teams focused on the objectives, and provide another method of tracking the team's progress.

The initiatives identified above are solutions to most of the concerns identified during the breakout sessions. Responses to the concerns regarding enhanced portal/services and stronger security will be developed during follow-up sessions with IT and the Security Manager.

Several months into the implementation, when sufficient progress has been made on the project, another meeting of the same participants will be held to gauge the team members' perception of the project's progress and to determine if adjustments are needed in the responses.

Attachment 1. Breakout Session Feedback.

Question 1: What do we hope to achieve through this project?		
	Responses	Themes
1	Report Accessibility	Reporting
2	Uniformity	Business Processes
3	Reduce stress from implementation	Business Processes
4	Streamline processes	Business Processes
5	Better service for students	Portal/Service
6	Single source for DATA	Data/Data Standards
7	Better appreciation of Security Roles	Security
8	Centralized Database	Data/Data Standards
9	One-Stop single login for faculty and students	Portal/Service
10	Greater efficiency-all operations/processes	Business Processes
11	More out of BPAs than Banner	Business Processes
12	Standardizing data itself – values, information from all	Data/Data Standards
13	Way to come together & work together + District -> Ownership is “ours”	Business Processes
14	Capture all necessary data and information, especially to government and reporting to (HS) Fed and State government, dual credit (ex. Tech Prep)	Data/Data Standards
15	Unified objectives/priorities	Business Processes
16	Way to get data they want – give input on processes	Reporting
17	Opportunity to obtain feedback	
18	Master List to identify all areas/processes that will be addressed by Banner project -> point of contacts	Business Processes
19	Project management plan – Banner implementation doc on website to view points of contact	Portal/Service
20	For students: recruit, retain & graduate	
21	Make our lives easier	Business Processes
22	Streamline processes Admin & Students	Business Processes
23	No more second guessing a task	Business Processes
24	Doing our job better	Business Processes
25	Efficiency	Business Processes
26	More security – e.g. not using ssn as a primary ID	Security
27	Autonomy -- Technology in the hands of the functional user	Portal/Service
28	More innovation; not using out of date system	Portal/Service
29	Breaking silos-open communication & networking	Business Processes
30	Technology up-to-date with what students are using today	Portal/Service

31	Cross-training among colleges	Business Processes
32	More consistencies in policies & structures	Business Processes
33	No more duplicating work	Business Processes
34	One Academic Transcript	Portal/Service
35	One Student bill	Portal/Service
36	Consistency of process	Business Processes
37	Streamline processes	Business Processes
38	Common language	Business Processes
39	Efficiency	Business Processes
40	Consistent quality of admission/registration regardless of College	Business Processes
41	Improved Portal/PALs dynamic relevant to student	Portal/Service
42	Be able to have specific reports to aid student recruitment	Reporting
43	Reporting out sharing data	Reporting
44	Better reports – improve process	Reporting
45	Systematic approach to what we do	Business Processes
46	Fully utilize new system	Training
47	Consistent data (data entry)	Data/Data Standards
48	Improve business practices	Business Processes
49	Improve security & role definitions	Security
50	Documentation (Decisions, procedures)	Business Processes
51	Improve services for students – student life cycle	Portal/Service
52	Improve services for employees	Portal/Service
53	Gain efficiencies	Business Processes
54	Better tools for staff	Business Processes
55	Think long-term to ID the best solution	Business Processes
56	Ease of use, accessibility, training	Training
57	Faster processing – Less paper	Business Processes
58	Consistency-accuracy a. Practices b. Data c. Same process whether C/E or regular	Business Processes
59	Simpler-yet controlled	Business Processes
60	Ownership/accountability -Systems Data	Data/Data Standards
61	Ease of reporting a. Ad Hoc b. Formal	Reporting
62	Close control gaps	Business Processes
63	Eliminate shadow systems	Business Processes
64	Opportunity for change	Business Processes
65	Timely responses	Business Processes
66	More useable info w/o manipulation	Data/Data Standard
67	Forecasting info	Data/Data Standards
68	Thinking out of the box	Business Processes
69	Solution works across other systems (E-Catalog, etc.)	Portal/Service

Question 2: What will enable us to be successful?		
	Responses	Themes
1	Check egos at the door	
2	More explanation/details	Training
3	Deeper understanding	Training
4	Timeliness of training	Training
5	Functional experts in training	Training
6	Remove fear of failure	Training
7	Devoted resources	Staffing
8	Consistent communication- 2 Way	Communication
9	A tracking timeline	Communication
10	Timely notice of scheduling	Communication
11	Website-Project	Communication
12	Define support resources	Staffing
13	Interactive workshops (“Show Me How”)	Training
14	Thorough documentation	Communication
15	Posting of project-communications on website	Communication
16	Posting tips/best practices on website	Communication
17	Special pay for overtime required to avoid having to hire backfill employees	Staffing
18	Defined respect for departments challenges due to return of service commitments	Staffing
19	Information sharing & accessibility to data (with ease)	Data/Data Standards
20	Adequate resources, budget, personnel, technology, etc.	Staffing
21	Prioritize & prioritizing allocation of funds & institution objectives	Communication
22	Communication to all levels throughout all project – information sharing (two way)	Communication
23	End user input opportunity	Business Processes
24	Planning and attention to detail	Business Processes
25	Think outside the box	Business Processes
26	General e-mail to contact on concerns/suggestions – mechanism/process	Communication
27	Ability to review collective inputs from teams – shared with everyone	Communication
28	Acceptance of change	Business Processes
29	Active participation, speaking up with needs	Communication
30	Good support system within the department	Staffing
31	Good support system within the department when participants are working on the project	Staffing
32	Communication with colleagues who use Banner between AC campuses and students	Communication
33	Think “out of the box” – be creative	Business Processes
34	Be Flexible	Business Processes

35	No question is a dumb question – BE NOT AFRAID	Communication
36	Have fun, be kind to each other	
37	PATIENCE	Communication
38	Ease of enrollment for “swirling” students	Portal/Service
39	Increase grad rates	
40	Better constituent service	Portal/Service
41	Timeliness of processes – employee processing	Business Processes
42	Improved metrics, reporting	Reporting
43	Improved degree audit/student success tracking	Portal/Service
44	Improved aid/disbursement	Portal/Service
45	Case management approach for monitoring challenged students/counseling	Communication
46	Greater access to information	Portal/Service
47	Cost savings, prevention of costs related to unintended problems	Business Processes
48	Streamlined enrollment	Business Processes
49	Greater institutional awareness memory with shared IS	Business Processes
50	Greater collaboration among users	Communication
51	Get rid of paper/Go Green	Portal/Service
52	Attitude, willingness to change	Communication
53	Becoming “student-centered” as opposed to college-centered	Portal/Service
54	Good start, momentum, project organization	Communication
55	Coaching, mentoring, training	Training
56	Stamina, endurance for long haul commitment	Training
57	Collaboration, communication in abundance	Communication
58	Leadership, executive advocacy	Communication
59	Working as a team, compromising when necessary	Business Processes
60	Partnership with consultants	Staffing
61	Benchmarking, peer schools best practices	Communication
62	Communication with AC community to encourage patience with change	Communication
63	Marketing the change, articulating the benefits – feedback mechs from students/faculty/staff	Communication
64	Training	Training
65	Trust	Business Processes
66	Regular updates to community on project progress	Communication
67	Data cleanup (cleanup now)	Data/Data Standards
68	Improve business process	Business Processes
69	Remove doubt/change management/ communication	Communication
70	Comprehensive training – timely	Training
71	Opportunities for continuous input -through website – extended team – communication back to schools	Portal/Service
72	Team makeup	Staffing
73	Acceptance – look to the future	Communication
74	Follow through – meet timelines – make it a priority	Staffing

75	Resources – balance project and op roles	Staffing
76	Executive Support	Communication
77	Hold-off on nec initiatives	Staffing
78	Communication (various types) – especially the benefits	Communication
79	Leadership	Communication
80	Support	Staffing
81	Training	Training
82	Partners – Best Practices	Communication
83	Buy-In (Understanding how things tie together)	Communication
84	Attitude	
85	Empower Users	Portal/Service

Question 3: What Barriers or Risks to anticipate?		
	Responses	Themes
1	Resistance to change	Communication
2	Quality of training	Training
3	Ample training	Training
4	Loss of continuous support	Staffing
5	Availability of continued support when needed (consultants)	Staffing
6	Migration & cleanup of data	Data/Data Standards
7	Time management-conflicting priorities	Staffing
8	Learning & Adapting	Training
9	Availability of backfill support- training the backfills	Staffing
10	Reimbursement for mileage	Staffing
11	Poor customer service to students	Portal/Service
12	Frustration for faculty, staff, and students	Communication
13	Getting buy-In by all	Communication
14	Time to work on project	Staffing
15	Insufficient resources – in office with project	Staffing
16	Constant naysayer during implementation – resistance to change, pushback	Communication
17	Lose expertise/knowledge comfort level	Staffing
18	Fear of unknown	Business Processes
19	Communicate milestones to employees to improve anxiety (Keep (quick pic/quote) short and to the point!!)	Communication
20	Lose control of information provided	Business Processes
21	Inadequate training to all across levels	Training
22	Inadequate training documentation & processes/procedures	Training
23	Product & system breakdowns	
24	Negative reactions	Communication
25	Scope creep	Communication

26	Time management	Staffing
27	Backfill of resources – hiring and training day to day	Staffing
28	Current resource allocation limitations in IT	Staffing
29	Resignation with no replacements – work is added to current employees	Staffing
30	Damitol depleted	
31	Overcoming silos to move toward integration & data sharing	Business Processes
32	Quality & resistance to training	Communication
33	Being open-minded- lack of acceptance to change	Communication
34	With efficiencies put in place – aligning tasks to jobs	Staffing
35	Common Processes defined remain after go-live	Business Processes
36	Long learning curve	Training
37	System goes down/ Response time delays	Communication
38	Flexibility of system to change based upon needs	Business Processes
39	Define a plan to keep training manuals up to date with release	Training
40	Release management-- who owns, tests, provides it...etc.	Communication
41	Resistance to change	Communication
42	Fear	Communication
43	Time as a resource—tight schedule	Staffing
44	Complacency, lack of urgency – procrastinate	Communication
45	Lack of support from management	Communication
46	Work overload	Staffing
47	Problems at cutover, working out links	Communication
48	Lack of flexibility in implementation	Business Processes
49	Employee turnover	Staffing
50	Employee apathy—how will this really help me?	Communication
51	Lack of adoption of new self-service resources	Business Processes
52	User support/tech support	Portal/Service
53	Exception allowed without enforcement of policy	Business Processes
54	Lack of timely reporting	Reporting
55	Lack of understanding of what it takes to realize benefits of new business procedures	Business Processes
56	Loss of historical data	Data/Data Standards
57	Perception of going backwards not fulfilling grand objectives	Communication
58	History of prior implementation	Communication
59	Challenge of ops vs. project rest. a. Exec Commitment i. importance – communication b. Plan – schedule in advance, com. Req'ts, be sensitive to HE Cycles	Communication
60	Scepticism a) Communication b) Celebrate wins c) Website – visibility	Communication

61	Emotions/Change a) Offer multiple training opps b) Provide time for training	Training
62	Change/conformance to same processes	Communication
63	Security Changes	Security
64	Funds – Budgets	Staffing
65	Turnover	Staffing
66	Always done it this way!	Business Processes
67	Funding Resources	Staffing
68	People a. Hours b. Overwhelmed c. Getting the regular job done d. Understanding leaders e. Fear of failure	Staffing
69	Not celebrating successes	Communication
70	Partial implementations/integrations (2 systems)	Business Processes
71	Maintaining momentum	Communication
72	Scope creep	Communication
73	Timely training	Training

Question 4: What are our Lessons Learned from previous projects?		
	Responses	Themes
1	BPA's from Day 1	Business Processes
2	Develop core team	Training
3	Include functional trainers a. Subject matter experts from relevant offices b. Different than navigational trainers	Training
4	Clarified roles/responsibilities/ownership	Communication
5	Proper planning	Communication
6	Lack of communication	Communication
7	Poor rollout	Communication
8	Website for resources	Portal/Service
9	Communicate procedure changes	Communication
10	Jamming down throat doesn't work	Business Processes
11	No replications of legacy processes – tough decisions must be made	Business Processes
12	Transparency of data	Data/Data Standards
13	Hands on training with soon availability to system	Training
14	Timely training with feedback	Training
15	Testing	Communication
16	Understanding flow of system & dependencies from other	Business Processes

17	Eliminating silo's	Business Processes
18	Do not assume the worst	Communication
19	Make it a priority	Staffing
20	Previous project IT driven, now it is "US"	Communication
21	Developed tools & templates for standardization & communication	Business Processes
22	"SMART Consultants on site weekly to make us "SMARTIES"	Staffing
23	New RX from Damitol to "SMARTIES" at the first milestone of the project.	
24	Need of End-User training Manual	Training
25	Defined Methodology	Training
26	This time, executive support	Communication
27	A defined plan with a PMO	Staffing
28	Communication plan – website	Communication
29	Project Team structure	Staffing
30	Defined roles & responsibilities	Staffing
31	Process in place to address issues such as policies	Communication
32	Proper timely training	Training
33	Adequate support	Staffing
34	Exclusion of key stakeholders in process design	Staffing
35	Lack of documentation	Training
36	Remote, unengaged technical conversion support	Staffing
37	Project release for IT folks, need backfill	Staffing
38	Communication-never enough	Communication
39	Losing focus on project goals	Communication
40	Follow through, closure on objectives	Communication
41	Benchmarks, progress measurement contingency planning, conservative	Communication
42	Scope creep	Communication
43	Proper expectation setting and resetting	Communication
44	Right people in right roles	Staffing
45	Scheduling of resource to be involved at the right time	Staffing
46	Open communication – reality good/bad	Communication
47	Ensuring students are engaged so they see/influence what they are getting in improved service	Business Processes
48	Better, thorough understanding of all that Banner & companion solutions can do	Communication
49	Consistent message from exec level	Communication
50	Shared experiences of other Banner institutions	Communication
51	Not utilizing product to fullest potential	Business Processes
52	More forums for open sharing – not just kickoff	Communication
53	New staff/faculty on-boarding training for new systems	Training
54	Clearly defined goals & objectives	Communication
55	Back up, contingency planning for when things go wrong	Communication

56	Lack of system security, wrong access security	Security
57	Prayer	
58	Gain buy-in/include customers/users	Communication
59	Go beyond in communicating	Communication
60	Multiple communication channels	Communication
61	Understanding characteristics/limitations	Business Processes
62	Follow-through/transparency/issues/ concerns	Communication
63	Timelines/plans	Communication
64	Communicate to students (Ranger)	Communication
65	Listening to stakeholders/customer needs	Communication
66	BPAs missing	Business Processes
67	No commonality across schools	Business Processes
68	Leadership - Support - Imposed - Direction - Guiding principles	Communication
69	Partner-support-knowledge-focus	Staffing
70	It wasn't fun	Communication
71	Poor communication of capabilities	Communication
72	Varying levels of support needed	Staffing
73	Engagement of people to get committed.	Staffing
74	Backfill problems!!!	Staffing
75	Why can't we? Not "we can't!"	Communication
76	Collaboration across teams	Communication