

Session Summary

Project Phoenix Update Meeting

Banner Implementation

Executive Summary

The Project Phoenix Update meeting was held on October 21, 2009 at the Northeast Center at 8300 Pat Booker Road. Participants included Dr. Leslie, Chancellor of Alamo Colleges; Dr. Cleary, Vice Chancellor for Planning, Performance, and Information Systems; members of the Governance Committee; project teams; and other senior managers. During the meeting, Dr. Leslie provided opening remarks and thanked all of the participants for their support to Project Phoenix. He also explained the importance of the project to the district. Dr. Cleary addressed the group and provided details of the milestones and tasks completed to date. He also spoke on the need for continued support and commitment.

After the opening remarks, the participants took a brief intermission and returned for a gallery walk, where members of the Steering Committee and functional team leads provided an update on the status of the Student, Finance, and HR/Payroll modules. The participants were divided into three groups where simultaneous presentations were provided to each group. Dr. Diana Muniz and Jill Weston provided information on the status of the Student module; Diane Snyder and Albert De Barros presented the information on the Finance module; and Linda Boyer-Owens and Peggy Scott presented the status of the HR/Payroll module. The gallery walk discussions were conducted in 15-minute intervals and were coordinated to start and end in unison. At the end of each discussion, the groups rotated to the next station. The process was repeated two more times to allow the participants to visit all three stations.

The final portion of the Project Phoenix Update meeting was the breakout sessions. After the gallery walk, participants formed five smaller groups who met in separate rooms to discuss the lessons learned from their experiences so far. The discussions focused on three major areas:

1. Identifying what has been successful to date.
2. Determining what is needed from the project team to ensure success.
3. Defining the roles of participants in the implementation processes.

The breakout discussions were led by functional managers, and the ideas expressed during the discussions were documented by the functional team leads. Those comments centered around 6 broad areas that will be monitored and addressed to facilitate a successful implementation. They include staffing, training, business processes, standardization, communication, and commitment. 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 the next phase of the implementation and identify risks to the project.

Overview

Meeting: Project Phoenix Update Meeting

Date: October 21, 2009

Location: 8300 Pat Booker Road (Room 134-138)

Time: 2:00 PM – 5:00 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. Senior managers for the colleges and district offices
- l. Members of the extended implementation teams

In addition, Chancellor Leslie and Vice Chancellor Cleary were invited to make opening remarks to help demonstrate the Alamo Colleges commitment to the project and thank the team members for their contributions.

Objectives

The objectives for the update meeting were:

- a. Provide an update on Project Phoenix.
- b. Discuss the implementation status of the Student, Finance, and HR/Payroll modules.
- c. Gather feedback on the lessons learned and answer questions related to any aspect of Project Phoenix.

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

- Question #1 – What has been successful to date?
- Question # 2 – What do you need from the project team going forward to be successful?
- Question #3 – What is my role in the process?

Outcomes

About 62% of the people invited actually attended; 134 were invited and 83 attended. There was active participation in the gallery walk with thought-provoking questions and very good dialogue. Following the activities, most of the comments were positive and expressed the participants' satisfaction with the information that was provided.

Most of the breakout sessions were productive and the members engaged in lively discussions. Some recurring themes were present in all of the groups' responses. This shows common experiences, lessons learned, and expectations by most of the participants.

Analysis of the information gathered during the breakout sessions shows the following recurring themes/comment types.

Question #1 - What has been successful to date?

- Commitment to the Project
- Improved Communications
- Business Process Analysis
- Adequate Staffing
- Standardization Across Colleges
- Expanded Training

Question #2 - What do you need from the project team going forward to be successful?

- Improved Communications
- Expanded Training
- Commitment
- Staffing
- Business Process Analysis
- Standardization Across Colleges

Question #3 - What is my role in the process?

- Improved Communications
- Commitment
- Staffing
- Expanded Training

Other comments received following the meeting indicated that the participants understood the commitment the organization has made to this project. Most participants expressed support for the project and a desire for continued involvement.

Next Steps

The information gathered during the update 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. The lessons learned will help identify what is working well and what needs to change. The deployment of the HR/Payroll module and the Finance COA changes provided many of the lessons learned. These modules are much farther along in their deployment timeline than the other modules, so the lessons learned will be a greater benefit to the design and deployment of the Student, Accounts Receivable, and Financial Aid modules.

Secondly, comments from the second question will be used to help focus the core team's tasks to concentrate on the areas where the extended team members have identified the greatest need for support.

Finally, the third question highlights the need to continuously provide a consistent message to senior managers, team members, and end users regarding the status of the project, upcoming activities, and the impact of pending changes.

Task assignments and processes are in place or under development for addressing the concerns raised during the breakout sessions. The areas of concern, identified during the breakout sessions, and specific responses are listed below.

1. Improved Communications

- a. A Change Management Architect has joined the implementation team. One role of the Change Management Architect is to prepare the organization for the changes that will result from the Banner implementation by sharing information about the project and its impact on the organization. The Change Management Architect has recruited end users from the functional areas to form a network of change agents and a team of super users. The change agent network and super users will serve as communication vehicles to deliver information to their respective areas and to provide feedback regarding the organization's concerns, questions, and issues.
- b. The communication plan that was developed at the outset of the project will be revised to include additional target audiences and information categories to address the concerns expressed in the feedback regarding business processes, staffing, commitment, and training.
- c. The project web site that was established shortly after the project's inception will be updated with the latest information on the implementation project. A Project Coordinator and the Change Management Architect have been assigned the responsibility of keeping the web page updated with accurate information and directing personnel to it as a source of information about the project. (<http://www.accd.edu/district/banner/index.htm>).

2. Commitment/Staffing

- a. The Banner Office is staffed with systems analysts, subject matter experts, core team members from the functional areas, and consultant implementation partners. Extended team members from the functional areas are brought in from time to

time to participate in business process analyses, training, and testing as each module progresses through the design, testing, and implementation phases.

- b. Funding has been allocated for temporary employees to augment the staffs of those departments that are dedicating personnel to the Banner implementation.
3. Business Process Analysis
 - a. The consultant implementation partners developed a two-phased approach to Business Process Analysis (BPA). The first phase involves conducting BPA sessions to capture the current state in process flow diagrams and narrative descriptions. For the second phase, the consultants will analyze the current-state processes, propose a future-state with consistent and streamlined processes across colleges based on best practices, and present them in the form of process flow diagrams and narrative descriptions for review and approval by functional managers and subject matter experts from the functional areas.
 - b. BPAs will be conducted in conjunction with the design and deployment of each Banner module (Student, Financial Aid, Accounts Receivable, HR/Payroll, and Finance). On the day of the update meeting, 356 current-state BPAs were completed and signed off, while 133 future-state BPAs were done. The remaining BPAs will be completed as the design and deployment of the Banner modules progress.
 4. Standardization Across Colleges
 - a. A Student Center of Excellence (COE) has been established to plan, guide, and coordinate cross-college student processes to assure consistency in Apply Texas maintenance, registration rules, curriculum rule maintenance, degree audit rule maintenance, validation table updates, IPEDS data requirements, TCC requirements, transfer articulation rule maintenance, transcript evaluations, schedule maintenance, and registration calendar maintenance.
 - b. The Data Standards team, with representatives from each of the functional areas, meets regularly to develop and maintain a standardized listing of values for Banner tables that are shared across multiple functions. This team has been working for more than a year and will continue to address issues related to data standards through implementation and after cutover.
 - c. The consolidation of data from multiple SIS PLUS systems into one Banner system will require cleaning key data elements. A team of personnel from SPC, SAC, PAC, and NVC has been formed to identify and resolve issues related to duplicate records in the systems. This team has been working since May to eliminate duplicate records within colleges and across colleges. As of the update meeting, the known duplicate records had been reduced from more than 25,000 to less than 1,200. These are the details of the team's progress:
 - i. Duplicates within colleges had been reduced from 12,448 to 358.
 - ii. Duplicates across colleges, due to discrepancies in the names, had been reduced from 6,874 to 195.
 - iii. Duplicates across colleges, due to discrepancies in the SSN, had been reduced from 6,172 to 605.

The team will continue working to eliminate as many duplicate records as possible before the data is converted prior to go-live. They will also expand their duties to focus on other issues involving data integrity.

- d. To help minimize the creation of duplicate records, Common Matching has been 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.
5. Expanded Training
- a. Training of the core team members and end users coincides with the deployment of the Banner modules. As of the update meeting, all core team members had received training, and end users for the HR/Payroll module had completed training. **End users of the other modules are scheduled to receive training approximately 6-8 weeks prior to each module's go-live date.**
 - b. A technical writer was added to the implementation team to work with the core team members to develop training manuals with detailed procedures for each module.
 - c. Super users from each of the functional areas will receive training to 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 from super users and members of the implementation team, after each module's deployment, to provide 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.

Conclusion

The objective of the update meeting was met. During the gallery walk, participants received an update on the project's status from members of the Steering Committee and the functional team leads. The gallery walk also provided a forum for participants to ask questions and discuss any aspect of the project that interested them. The breakout sessions, led by functional managers, allowed the project team to gather valuable feedback on the lessons learned and to gather more details about the participants' concerns. The information gathered will be used to focus the implementation team's activities based on the lessons learned, what has worked well, and what needs to be improved. The feedback will also be used to help track the team's progress.

The next steps identified above are responses and solutions to most of the concerns identified during the breakout sessions. Shortly after the Student module is implemented, another meeting of the same participants will be held to review lessons learned, close the project, and discuss plans for any follow-on work that may be necessary; such as reviewing and revising the BPAs, implementing document imaging, converting historical data, implementing system enhancements, or identifying any new or unanticipated requirements.

**Attachment 1.
Breakout Session Feedback.**

Question 1:		
What has been successful to date?		
	Responses	Themes
1	BPA Meetings- review of current process, share practices across institutions, involve staff & stakeholders, and timeline to create a roadmap	Business Processes
2	Hiring a consultant firm that had a clue!	Staffing
3	Commitment throughout the Organization- \$\$ and people	Commitment
4	Training- Phases (multiple)	Training
5	Communication across Colleges & District Personnel- Key & Consistent policies developed	Communications
6	Hiring a Change Agent	Staffing
7	Actually doing BPA's	Business Processes
8	Much improved support from top down	Commitment
9	Standardization	Standardization
10	Communication among colleges	Communications
11	Shared pain in process	Commitment
12	Data Standards	Standardization
13	Support with backfill	Commitment
14	24/7 access-closer	Business Processes
15	Steering Committee- over site at high level	Commitment
16	Communication added to success	Communications
17	Access to SharePoint to see documentation as we progressed	Communications
18	Milestones have been met- A testimony to efforts of teams	Commitment
19	Outside Resource- SMART	Staffing
20	Timeline works	Commitment

21	Engaged Stakeholders	Commitment
22	Focus on Process	Business Processes
23	Collaboration	Communications
24	Staff support & supporting staff	Staffing
25	BPA's	Business Processes
26	Team work "attitude"	Commitment
27	Change of mindset	Commitment
28	Welcoming Spirit by the consultants developed ownership and buy in by AC stakeholders	Commitment
29	Engagement of end users	Commitment
30	Gained trust of end users	Commitment
31	Improved communication	Communications

Question 2:		
What do you need from the project team going forward to be successful?		
	Responses	Themes
1	More Training	Training
2	Commitment of Resources- Continued	Commitment
3	Sharing of information w/End users	Communications
4	Develop a communication plan & roll out- 2 way communication	Communications
5	Commitment to Change Agent Plan/Process	Commitment
6	Evaluation mechanism to provide continuous improvement	Business Processes
7	Help Center- online, experts, subject experts, and manuals/references	Communications
8	Central Coordinator in place- define role, impact on colleges, communication about it, and vision	Communications
9	Front line Staff have a responsibility to report back to Administrators about decisions made and future needs	Communications

10	Training needs to be an ongoing effort- need online training	Training
11	How will the training be structured	Training
12	Sand box- Need database for all folks to go and practice	Training
13	Definite scheduling of remaining tasks	Communications
14	Project team to conduct brown bag lunch's to increase awareness	Communications
15	Alamo Colleges home webpage- streaming announcements of updates and links to updates	Communications
16	Staffing	Staffing
17	Communication immediacy (road show for Staff and Students)	Communications
18	Change Agents	Staffing
19	Communicate timing of needs	Communications
20	Timely training	Training
21	Mandatory training	Training
22	Advanced scheduling of training	Training
23	Continued communication	Communications
24	District wide progress report	Communications
25	Wider level of engagement from academic side	Commitment
26	Training	Training
27	Systematic improvement after go-live (Review/update improve BPA's)	Business Processes
28	Structure preventive maintenance (Planning & resources) and program review	Standardization
29	Address fear factor associated with GO-LIVE	Commitment
30	Feedback loop FAQ's daily updates	Communications
31	Commitment to provide staffing	Staffing
32	Celebrate small wins	Communications

Question 3:		
What is my role in the process?		
	Responses	Themes
1	Everyone takes ownership	Commitment
2	Communicate w/staff & stakeholders at all levels including Administrators	Communications
3	Provide support from a mgmt. perspective	Commitment
4	Recognize- Critical review of work and have open and honest dialogue	Communications
5	Understand Banner will not solve all of our problems- may get worse before it gets better	Communications
6	Continued commitment to the project beyond go-live	Commitment
7	Establish a culture of commitment to continued improvement	Commitment
8	Trust in and an appreciation for staff doing the front line work	Staffing
9	Maintain 2-way communication	Communications
10	Take off on Town Hall meetings- some training and general discussion	Training
11	Be upbeat in communicating with others	Communications
12	Increase communication	Communications
13	Look ahead- Be sure you have the needed resources to be successful	Staffing
14	Change Management - need to travel and spread the word- Change is Good	Communications
15	Future Stage- Job may change, not go away (need to convey this message at beginning to put them at ease)	Communications
16	Change Agent	Staffing
17	Positive attitude	Commitment
18	Build excitement	Communications
19	What is going to change, what is going to stay the same?	Communications
20	What is the impact on how we are currently staffed	Staffing
21	To ask questions	Communications
22	To be a constructive "Change Agent" & owner	Commitment