People Soft Student Administration

Organizational Change Management (OCM)

An approach to ensure people prepare for, embrace, and benefit from ERP Solutions
Process Orientation

HR  Fin  FA  SF  A&R  Catalog

Cross-Functional Leadership

Students & Faculty

Peralta is moving from a "data storage" system to a "process control" system.
Developing the OCM Strategy

ASSESS:

- Organizational readiness to provide needed skills and knowledge
- Capability to provide high-quality performance support at go-live
- Willingness to adopt the new processes & work in the new environment
- Potential resistance to change
- Ability to adopt the new changes by removing organizational barriers

Maximize the benefits of the solution

- Bill Withrow
- Charlotte Smith
- David Betts
- Dettie DelRosario
- Elihu Harris
- Frank Chong
- Gary Perkins
- George Herring
- Howard Perdue
- Jacob Ng
- Janet Cragin
- Jeff Heyman
- Joseph Bielanski
- Joyce Brown-Willis
- Judy Cohen
- Kerry Compton
- Matt Kritscher
- Minh Lam
- Shane Hackney
- Sheryl Queen
- Tom Smith
- Trulie Salcedo Thompson
- Wyman Fong
- Yvonne Dorrough
### Assessing the Peralta SA Project's Change Management Need

<table>
<thead>
<tr>
<th>Less Difficult to Implement</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smaller</td>
<td>1</td>
</tr>
<tr>
<td>How Large is the Population Affected</td>
<td>2</td>
</tr>
<tr>
<td>More Central</td>
<td>3</td>
</tr>
<tr>
<td>How Dispersed is the Population</td>
<td>4</td>
</tr>
<tr>
<td>Less Complex</td>
<td>5</td>
</tr>
<tr>
<td>How Complex is the Solution</td>
<td>1</td>
</tr>
<tr>
<td>Less Critical</td>
<td>2</td>
</tr>
<tr>
<td>How Central to the Core Business</td>
<td>3</td>
</tr>
<tr>
<td>Minor Changes</td>
<td>4</td>
</tr>
<tr>
<td>How Similar to the Existing System/Processes</td>
<td>5</td>
</tr>
<tr>
<td>Very Capable</td>
<td>1</td>
</tr>
<tr>
<td>How Business &amp; Technically Capable is the Population</td>
<td>2</td>
</tr>
<tr>
<td>Less</td>
<td>3</td>
</tr>
<tr>
<td>How Aggressive is the Implementation Timeline</td>
<td>4</td>
</tr>
<tr>
<td>Available</td>
<td>5</td>
</tr>
<tr>
<td>How Available are your Internal Resources</td>
<td>1</td>
</tr>
<tr>
<td>Flexible / Adaptive</td>
<td>2</td>
</tr>
<tr>
<td>What is your Company Culture Like</td>
<td>3</td>
</tr>
<tr>
<td>Consistently Successful</td>
<td>4</td>
</tr>
<tr>
<td>How Successful Have Past Projects Been</td>
<td>5</td>
</tr>
</tbody>
</table>

#### More Difficult to Implement

- Larger
- More Dispersed
- More Complex
- Critical to the Business
- Significant Differences
- Less Capable
- More
- Very Limited
- Well-Established / Rigid
- Challenged

**Total Score**: 43

*This is a highly complex project which requires significant change management.*
Governance Structure

Forum

Executive Steering Committee
- Elihu Harris
- College Presidents
- Howard Perdue (conducts)
- Tom Smith
- Gary Perkins
- College VPs of Student Services (as needed)

Project Integration Leadership Team
- Howard Perdue (conducts)
- College VPs of Student Services
- Gary Perkins
- Minh Lam
- Change Management Lead (TBD)
- Shane Hackney (CIBER)

Project Implementation Team
- Howard Perdue
- College VPs of Student Services (as needed)
- Gary Perkins
- Minh Lam (conducts)
- Janet Cregin
- Functional Project Leaders
- Change Management Lead (TBD)
- Project Analyst (TBD)
- Shane Hackney (CIBER)

Responsibility

Focus on Overall Project
- Endorsement and communication of importance
- Provide funding and resources
- Approve policy and procedural changes
- Hold VP's accountable for delivery

Focus on Process
- Drive cross college consistency
- Allocate resources to business teams
- Resolve process and college issues
- Ensure organizational readiness
- Leadership alignment

Focus on Functional Projects
- Overall direction of the program
- Manage project team and resources
- Day-to-day management of the project
- Monitor design of processes
- Manage resolution of issues and risks

Peralta has much of this structure already in place.
# Peralta BRT Structure

## Process areas which are changing

<table>
<thead>
<tr>
<th>Process Area</th>
<th>Faculty Represented</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admissions &amp; Records</td>
<td>Counseling</td>
</tr>
<tr>
<td>Campus Community</td>
<td>Student Government</td>
</tr>
<tr>
<td>Self Service</td>
<td>Classified</td>
</tr>
<tr>
<td>Schedule &amp; Course Catalog</td>
<td></td>
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<tr>
<td>Financial Aid</td>
<td></td>
</tr>
<tr>
<td>Student Finance</td>
<td></td>
</tr>
</tbody>
</table>

## Other impacted stakeholder groups

<table>
<thead>
<tr>
<th>Stakeholder Group</th>
<th>Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Berkeley City College</td>
<td>Loretta Newsom, Paula Coil, Fabian Banga, Johnny Dong, Robert Vergas, John Pang, Joseph Bielanski</td>
</tr>
<tr>
<td>College of Alameda</td>
<td>Marcean Bryant, Trulie Thompson, Mary Shaughnessy, Min Wu, Angelita Finlayson, Muriel Montague</td>
</tr>
<tr>
<td>Laney College</td>
<td>Rene Rivas, Ron Moore, David Reed, Eleanor Liu, Judy Cohen, Kinh Tran, Yvonne Thompson</td>
</tr>
<tr>
<td>Merritt College</td>
<td>Suzanna De La Torre, Anika Toussaint-Jackson, Alexis Alexander, Jane Fong, Alice Freeman, Jaqueline Bell, Tom Branca (Lead), Patricia Rom</td>
</tr>
<tr>
<td>Others As Needed</td>
<td></td>
</tr>
<tr>
<td>International TBD</td>
<td></td>
</tr>
</tbody>
</table>
# Communication Plan

## Key Stakeholder Groups
- Sponsors
- SMT
- End User's Mgmt
- Project Team / BRTs
- System End Users
- General Employees
- Students
- Faculty

## Important Media Types
- Website
- Video
- Info Events
- Department Meetings
- Email
- Regular mail
- Posters
- Focus Groups
- Quantitative Survey

<table>
<thead>
<tr>
<th>Communication Opportunities</th>
<th>Target Audience</th>
<th>Purpose</th>
<th>Message/Content</th>
<th>Delivery Method</th>
<th>Frequency</th>
<th>Person/Group Responsibilities</th>
<th>Timing</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Leadership Kick Off</td>
<td>X X X</td>
<td>Understand roles, project team structure</td>
<td>Project organization, impact analysis</td>
<td>Presentation &amp; discussion</td>
<td>Beginning of Project</td>
<td>Perdue/Salisbury</td>
<td>14-Sep-07</td>
<td>Underway</td>
</tr>
<tr>
<td>Project Team Kickoff</td>
<td>X</td>
<td>Establish the project leadership team</td>
<td>Establish operating guidelines, review team goals, project timeline, and project deliverables</td>
<td>One Team Meeting</td>
<td>Beginning of Project</td>
<td>Perdue/Salisbury</td>
<td>2-Oct-07</td>
<td>Scheduled</td>
</tr>
<tr>
<td>Project BRT Kickoff</td>
<td>X</td>
<td>Establish the project Business Readiness Team</td>
<td>Team goals, timeline, who is affected, when and how they can expect to be involved, PeopleSoft overview</td>
<td>Presentation &amp; discussion</td>
<td>Beginning of Project</td>
<td>FFL/Salisbury</td>
<td>Complete by 10/12</td>
<td>Proposed</td>
</tr>
<tr>
<td>Initial Communication to the Organization</td>
<td>X X X</td>
<td>Initial broad communication / start of change management strategy</td>
<td>Project goals, who is involved, timeline</td>
<td>Project Web Site and after</td>
<td>Beginning of Project</td>
<td>Comm Lead</td>
<td>Week of 10/15</td>
<td>Proposed</td>
</tr>
<tr>
<td>Initial Communication to the Facility</td>
<td>X X X</td>
<td>Initial broad communication / start of change management strategy</td>
<td>Project goals, who is involved, timeline</td>
<td>Snail mail and posters</td>
<td>Beginning of Project</td>
<td>Comm Lead</td>
<td>Week of 10/15</td>
<td>Proposed</td>
</tr>
<tr>
<td>General Updates</td>
<td>X X X</td>
<td>Begin educational sequence of project</td>
<td>Glossary, implementation process, details and content of each module being implemented, goals/projects outcomes of the project, training schedules</td>
<td>Emails, web site</td>
<td>Bi-Weekly</td>
<td>Comm Lead</td>
<td>October thru January</td>
<td>Proposed</td>
</tr>
</tbody>
</table>
Sample Faculty Training Curriculum

- PeopleSoft
  - Student Administration Basics and Navigation
  - Web Based Training: 30 Minutes

- Faculty Self-Service
  - Instructor Led Training: 90 Minutes
  - Web Based Training: 45 Minutes
  - Accessing the Portal
  - Faculty Center Page Orientation
  - Viewing My Schedule
  - Viewing Catalog
  - Viewing Schedule of Classes
  - Rosters (Attendance, Census, Grade)
  - Grades

- Campus Community
  - Instructor Led Training: 120 Minutes
  - Web Based Training: 45 Minutes
  - What is Campus Community
  - Search/Match
  - Bio/Demo Information Inquiry
  - Identification Information Inquiry
  - Participation Information Inquiry
  - Health Information Inquiry
  - SEVIS Information Inquiry
  - Changing Data on Student Records
  - Assign and Update Checklists
  - Assign and Update Comments
  - Assign, Generate & View Communications
  - Assign and View Service Indicators
Post Go Live Support Structure

**Process - Technology - Organization - People**

**Process Oversight**
- Standardization
- Decision making

**End User Support**
- Help desk
- Super user network

**Master Data Maintenance**
- Faculty and student data
- Course catalog

**Technical Support**
- Hardware and software
- Coding and security

**Process Improvement**
- Productivity
- Value realization

**On-going Training**
- New SA end users
- Improve overall skill level

**Communication & Change**
- Publicize learning and successes
- Job and role changes
## High Level Change Management Timeline

<table>
<thead>
<tr>
<th>2007</th>
<th>2008</th>
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<tbody>
<tr>
<td>Jul</td>
<td>Aug</td>
</tr>
</tbody>
</table>

### Prepare
- Change Management Strategy (complete)
- Functioning project governance structure (complete)
- Peralta resources assigned (in process)
- Communication strategy (complete)

### Align
- Communications execution
- Organization adjustments to structure, jobs, policies, metrics, process flows, and incentives
- Final training plan
- Developed training and performance support documentation

### Engage
- BRT startup
- Leadership Alignment meeting #1
- Change management plan (detailed)
- Communications plan (detailed) (complete)
- Communications execution
- Training assessment and strategy (complete)
- Business readiness assessment
- 'To be' business process flows and user roles

### Ready
- Key stakeholder ownership
- Business readiness
- Communications execution
- Trained end users
- Success criteria defined
- Lessons learned process defined
- Set up command center structure

### Reinforce
- Post Go-Live communication execution
- Post Go-Live end user performance support
- Performance management strategy execution
- Documented lessons learned
- Exit strategy

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## Project Progress Scorecard

**Updated:** September 19, 2007

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<tbody>
<tr>
<td>Admissions and Records</td>
<td>Matt Knitscher</td>
<td>Charlotte Smith</td>
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<td></td>
<td></td>
<td></td>
<td>Complete: ✔️</td>
<td>Ciber is completing configuration</td>
</tr>
<tr>
<td>Campus Community</td>
<td>Tony Powell</td>
<td>Joyce Brown-Willis</td>
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<td></td>
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<td></td>
<td>Corrective Action in Place: ✗</td>
<td></td>
</tr>
<tr>
<td>Faculty &amp; Student Self Service</td>
<td>Mario Rivas</td>
<td>TBD</td>
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<td></td>
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<td></td>
<td>On Schedule: ✔️</td>
<td>Ciber is completing configuration</td>
</tr>
<tr>
<td>Schedule and Course Catalog</td>
<td>Jannett Jackson</td>
<td>Sheryl Queen</td>
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<td></td>
<td>Deadline in Jeopardy: ✗</td>
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<tr>
<td>Financial Aid</td>
<td>Kerry Compton</td>
<td>Judy Cohen</td>
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<td>Kerry Compton</td>
<td>Deltie Del Rosario</td>
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</table>

IS responsibility

Business responsibility

Complete: ✔️  Corrective Action in Place: ✗  On Schedule: ✔️  Deadline in Jeopardy: ✗
Questions?
Appendix
What people need to be successful

- Communication from their management that describes what will be changing and when
- Communication from their management on specific changes to their role
- Clear expectations from their management on their performance
- Good training to navigate the system and enter transactions
- Performance support materials available to them on demand, at their desk
- Follow-up by their management, enforcing process discipline (the use of performance support tools to eliminate errors and correctly follow processes)
Many Factors Impact Success

- Change Management: 16%
- Internal Staff Adequacy: 8%
- Project Team: 7%
- Training: 7%
- Prioritization/Resource Allocation: 6%
- Top Management Support: 6%
- Consultants: 5%
- Ownership (of benefits to others): 4%
- Discipline: 2%
- Program Management: 8%
- Process Reengineering: 4%
- Stage/Transition: 2%
- Benefit Realization: 1%
- Software Functionality: 4%
- Application Portfolio Management: 3%
- Enhancements/Upgrades: 2%
- Data: 2%
- Reporting: 1%

Top issues organizations face during systems implementations are NOT technical

- People: 62%
- Process: 16%
- Technology: 9%
- Knowledge Assets: 3%

Note: Rounding percentages; not all categories are shown as bars.
RWD Change Management Model

- When you address
  - Leadership
  - Organization
  - End user readiness factors
- You accelerate
  - Business acceptance
  - Improve the ROI
- for the business.
1. **Engage as many people** in the target audience as possible
   - Maximize usage rate
   - Employee engagement impacts organizational productivity

2. **Accelerate change** in the organization
   - Increase rate of adoption
   - Faster adoption means benefits are obtained sooner = $ gained

3. **Expected performance** levels are met
   - Maximize performance & proficiency
   - Degree of adoption impacts performance and hence value received = $ gained or lost