

Peralta Community College District
PeopleSoft Resolution Team (PRT)
Administrative Procedure



Peralta Community College District

PeopleSoft Resolution Team (PRT)

Administrative Procedure

Organizational Structure, Roles, and Responsibilities for Resolution of PeopleSoft
Integration and Implementation Issues

Draft: August 25, 2010

Peralta Community College District
PeopleSoft Resolution Team (PRT)
Administrative Procedure

I. Introduction

This document describes the Peralta Community College District's *PeopleSoft Resolution Team (PRT)*. It details the organizational structure, roles and responsibilities of the group(s) of people involved in integration and implementation of PeopleSoft systems. It also details policies, procedures and communication protocols for resolution of PeopleSoft related issues.

Background:

The *PeopleSoft Resolution Team (PRT)* expands upon the work of the PeopleSoft Integration Team (PIT). PIT was established as a coordinating body that identified critical implementation functions and monitored implementation of the Student Administration System. PIT was comprised of representatives from stakeholder groups (Business Readiness Teams or BRTs) organized around key process areas. The BRTs included Admissions and Records, Counseling, Scheduling, Financial Aid, Student Finance, Faculty and Students.

Need:

Although PIT created an "Issues Log" that is designed to track the projects and tasks needing resolution, a significant number of critical functionality issues have not yet been resolved. It is unclear as to the priority assigned to resolution of individual issues or the estimated timeline for completion. Currently, resolution status is not conveyed to the various stakeholders in a systematic way.

The BRTs, which were active during early implementation, have met sporadically (with the exception of Counseling), if at all. Moreover, other key groups need to be included in resolution of the outstanding issues (Human Resources, Finance, Matriculation, and Library).

The previous PIT lacked the authority to ensure successful resolution of issues once they are identified. Additionally, it was unclear as to how PIT is situated within the District's governance and decision making structure. Additionally, there needs to be a clear flow of communication so that recommendations and decisions are transparent and logical. Therefore, the previous PIT recognized that priorities have shifted and endorsed the reconfiguration and enhancement of the following organizational structure, policies and procedures.

Peralta Community College District
PeopleSoft Resolution Team (PRT)
Administrative Procedure

Guiding Principles and Accountability:

1. Educational planning is the foundation of all decision-making.
2. Communication flow regarding priorities, recommendations and decisions will be transparent and logical.
3. The role of the PeopleSoft Resolution Team and the constituency subcommittees is to provide an organizational structure that assures consistency with decision-making and accountability.
4. The PeopleSoft Resolution Team has authority to make recommendations to the Vice Chancellor of Educational Services, the Vice Chancellor of Finance and the Chancellor.
5. As per existing PCCD policies and procedures, the Vice Chancellor of Educational Services, the Vice Chancellor of Finance and the Chancellor will provide responses to PRT if recommendations are not adopted or if recommendations are substantively modified.
6. All meetings, recommendations and decisions will be documented and publicized, using all available means.
7. Accountability mechanisms, self assessment and process improvement are integral to successful implementation. Therefore, at the end of each year, the PRT will be reviewed and evaluated, and any needed improvements or refinements will be put forward for adoption by all the various constituencies.
8. The District will provide support for the PeopleSoft Resolution Team. This includes providing appropriate technical and clerical support.

II. Process Overview

A. PeopleSoft Resolution Team (PRT):

The existing PIT will be reconfigured and renamed as PRT (PeopleSoft Resolution Team). The primary focus of PRT is to resolve functionality issues as identified by its constituency based subcommittees (PeopleSoft Functionality Teams).

Charge:

The PeopleSoft Resolution Team will meet on a monthly basis to:

- Identify and prioritize the functionality issues
- Create an ongoing “issues log”
- Monitor the resolution of the identified issues
- Create timelines and accountability measures for the resolution of the identified issues
- Communicate priorities to the Office of Information Technology, Office of Educational Services, Finance Office and the Chancellor.
- Communicate information to the PeopleSoft Functionality Teams.
- Receive status reports from the Office of Information Technology
- Make monthly reports to the Vice Chancellor of Educational Services, the Vice Chancellor of Finance, the PBIM Education Committee, the PBIM Technology Committee and the SMT (Strategic Management Team)
- Develop a communication plan for sharing information District-wide that includes a website and regular progress reports
- Develop a training plan based upon the needs identified by the PeopleSoft Functionality Teams
- Create a self-assessment and program improvement process for the PeopleSoft Resolution Team and its subcommittees

PRT Membership:

- **Chair:** Vice Chancellor of Educational Services, (**Dr. Debbie Budd**)
- **Co-chair:** Vice Chancellor of Information Technology, (**Minh Lam**)
- **Administrative Leads** from each of the twelve (12) PeopleSoft Functionality Teams (identified below)
- **District Academic Senate President, (Dr. Karolyn Van Putten)** (or representative)
- **District Classified Senate President, (Sheryl Queen)** (or representative)

The Chancellor, in consultation with the College Presidents will make the appointments for the Administrative Leads of the PeopleSoft Functionality Teams. Each College should have at least one representative on the PeopleSoft Resolution Team.

Peralta Community College District
PeopleSoft Resolution Team (PRT)
Administrative Procedure

B. PeopleSoft Functionality Teams (PFT):

PeopleSoft Functionality Teams are constituency based and comprise the following areas:

- **Admissions and Records**
- **Budget/Finance**
- **Counseling**
- **Financial Aid**
- **Human Resources**
- **Institutional Effectiveness**
- **Instructional Faculty**
- **Library**
- **Matriculation**
- **Scheduling**
- **Student Finance**
- **Students**

Charge:

Each PeopleSoft Functionality Team will meet on a monthly basis, or as needed, with a minimum of two meetings per semester to:

- Identify and prioritize functionality issues related to their area of operation
- Monitor the resolution of identified issues
- Provide recommendations to the Office of Information Technology and the PeopleSoft Resolution Team (PRT)
- Communicate information to their constituency
- Record and distribute minutes of their meetings
- Post meeting agendas and minutes on the website

Membership:

- **Admissions and Records:** Lead Admissions and Records staff person from each college, District Director of Admissions and Records, Vice Chancellor of Student Services, chair (**Dr. Jacob Ng**)
- **Budget/Finance:** Business Office Manager from each college, Associate Vice Chancellor of Finance, chair (**MaryBeth Benvenuti**)
- **Counseling:** One counseling representative from each college, a Vice President of Student Services, chair (**Dr. Kerry Compton**)
- **Financial Aid:** One Financial Aid representative from each college, District Director of Financial Aid, chair (**Judy Cohen**)

Peralta Community College District
PeopleSoft Resolution Team (PRT)
Administrative Procedure

- **Human Resources:** One representative from each: payroll, benefits, human resources; Director of Human Resources, Vice Chancellor of Human Resources, chair (**Trudy Largent**)
- **Institutional Effectiveness:** One administrative representative from each college, Associate Vice Chancellor of Academic Services, chair (**Dr. Mike Orkin**)
- **Instructional Faculty:** One faculty representative from each college, District Academic Senate President, Professional Development Coordinator, Dean of Instruction, chair (**Linda Sanford**)
- **Library:** Head librarian from each college, Vice President of Instruction, chair (**Krista Johns**)
- **Matriculation:** One matriculation counselor from each college, assessment coordinator from each college, Vice President of Student Services, chair (**Dr. Donald Moore**)
- **Scheduling:** Program specialist from each college, PCCD system analyst for curriculum (Office of Educational Services), Vice President of Instruction, chair (**Dr. Linda Berry**)
- **Student Finance:** Bursars from each college, a Business Office manager, chair (**Connie Willis**)
- **Students:** Associated Students Presidents from each college, PCCD student trustees, a Vice President of Student Services, chair (**Dr. Eric Gravenberg**)

Appointments:

The Chancellor (or his representative) shall make all administrative appointments.

Faculty appointments are by position, to be confirmed by the Academic Senate President at each college.

Classified appointments are by position, to be confirmed by the Classified Senate President at each college, in association with the approval of the appropriate supervising manager.

Peralta Community College District
PeopleSoft Resolution Team (PRT)
Administrative Procedure

III. Communication

A. Identifying and Routing Issues:

PRT (PeopleSoft Resolution Team):

- Create an ongoing “Issues Log” based upon recommendations from the functionality teams.
- Track the number of months an item remains on the “Issues Log.”
- Send the prioritized “Issues Log” forward, by the 20th day of each month, to the Office of Information Technology, Vice Chancellor of Educational Services, Vice Chancellor of Finance and the Chancellor for their review and feedback.
- Maintain a record of meetings, decisions, and recommendations.
- Develop a comprehensive communication plan, by the end of the first semester of implementation that includes templates for monthly reporting, mechanisms for dissemination of training information, website development and maintenance responsibilities, and communication processes for functional and operational changes.

PFTeams: (PeopleSoft Functionality Teams):

- Identify and communicate issues, in writing, to the PeopleSoft Resolution Team.
- Communicate resolution of issues to their constituencies.
- Identify and communicate training needs to the PeopleSoft Resolution Team.
- Maintain a record of meetings and recommendations.

B. Website:

The Associate Vice Chancellor of Academic Affairs will be responsible for:

- Development and maintenance of an “e-Peralta” website for the PRT.
- Posting all meeting notes, issues logs, status reports, resolutions, training materials, self-assessment surveys, and other documents on the website.

C. Monthly Reports:

Monthly reports will be forwarded to:

- **VC Educational Services**
- **VC Finance**
- **PBIM Education Committee**
- **PBIM Technology Committee**
- **SMT**
- **PCCD Community**

Peralta Community College District
PeopleSoft Resolution Team (PRT)
Administrative Procedure

IV. Training

- The functionality teams (PFTeams) will send recommendations for specific training needs to the PRT (PeopleSoft Resolution Team).
- The PRT will prioritize training needs and develop a comprehensive training plan that includes initial trainings and ongoing trainings for all PCCD employees.
- Specific trainings will be identified and implemented, dependent upon the needs of the users.
- Overview trainings will be held each semester for all new employees.
- Trainings will be held whenever new modules are utilized or significant modifications to the existing systems take place.
- Training materials and documents will be posted on the PRT website.

V. Self Assessment and Process Improvement

- A “kick-off” meeting that details the new PRT process will be held at the beginning of the first semester of implementation (**Fall 2010**).
- Thereafter, an annual planning meeting that includes all constituencies will be held at the onset of each academic year.
- A “self-assessment” survey will be developed that measures the effectiveness of the PRT (PeopleSoft Resolution Team), the PFTeams (PeopleSoft Functionality Teams) and the overall resolution of identified issues from the “Issues Log.”
- The self-assessment survey will be administered no later than May of each academic year.
- An annual progress and process review meeting will be held each summer to review survey results and make recommendations for improvement.
- The VC of Educational Services is responsible for monitoring the effectiveness of the PeopleSoft Resolution Team.