District Strategic Plan - ITS Requests Only
August 2007

ITS Proj Priority, New, Mod	Person(s) Responsible (ITS for all)		SPECIFIC GOALS - SUBSET FOR ITS ACTION	ITS ACTION PLAN	ITS STATUS	Timeline/ Estimated Cost (External)
			GOALS PROPOSED BY COLLEGES & DISTRICT FOR STRATEGIC PLAN			
Priority, New,Mod	Budget Office	1	Reduce processing time for purchase requisitions: Program Banner to accept requisitions for processing only if the referenced account has sufficient funding. If NSF, then req will be routed back to originator to submit a budget transfer. Change order also needs NSF flag so budget review step is shifted from Budget Manager to initiator.	Change is best addressed by implementing the online budget transfer and online requisition process in Web for Finance so initiator sees edits real-time.	ITS released the Web for Finance to Business Services in Dec 2006 and held demos for staff. Web Finance won't let users input unless funds are available. Bus Svcs staff reviewing features to test and evaluate what written procedures are required and when can release to users outside Business Svcs.	Feb 08-Apr 08
Priority, New	Budget Office	2	Reduce processing time for purchase requisitions: Institute the Purchase credit card (P-card) program to transition some of high volume, low dollar purchases to P-Card.	Requires procedural setup by Business Services, but also requires ITS action to create a custom Banner interface from the credit card company so Business Svcs does not need to manual input the billing data.	ITS did analysis for what is required to interface Banner with outside credit card companies - is a custom mod that ITS will need to write.	Pilot: Apr 07-May 08, All Depts: June 08
Mod	Budget Office	3	Improve efficiency of Financial Aid processing. Reduce number of personnel involved in drawdown funds, account journals, check disbursement, bank reconciliation. Reassign duties so system is more efficient.	Could be just a user procedure change. However, assume some of the changes require ITS action to automate some manual processes or provide additional tracking/reconciliation reporting.	Some Fin Aid checks are local printed at District - those remaining at Chabot for print due to bank restrictions. Finance in process contacting banks for possible conversion for Checks & Positive Pay. Some ITS support for report enhancements for disbursements.	By July 08
Mod	Budget Office	4	Improve efficiency of revenue reconciliation/invoicing process for incoming checks for grants, etc.	Could be just a user procedure change. However, assume some of the changes require ITS action to automate some manual processes or provide additional tracking/reconciliation reporting.	No ITS actions identified yet.	By July 08
Priority, New,Mod	Budget Office	5	Improve efficiency & reduce processing errors in the budget transfer process. Automate budget transfer process in Banner with defaults to prevent entries when codes are incongruent and when budget transfers do not net to zero. Setup Banner to reject inputs from funding sources with NSF.	Implement new online Budget Transfer feature within the Web for Finance.	ITS released the Web for Finance to Business Services in Dec 2006 and held demos for staff. Bus Svcs staff reviewing features to test and evaluate what written procedures are required and when can release to users outside Business Svcs.	Fin Oct 07, Budget Dec 07-Feb 08, Online Reqs Oct 07 - May 08

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Mod	Fiscal Services	6	Update Banner software and other available tools to provide accurate cost accounting and reporting by program/area: Modify Banner chart of accounts to simplify reporting.	Major effort. User action for analysis and review of past history to decide new chart of accounts. ITS action will be required to assist in conversion of accounts and/or reporting changes if needed.	ITS changed TOP program codes back in 2006 and different usages of program codes by colleges which also affects accounts prohibited us from converting all codes that still needs to be reconciled by the colleges with District Business Svcs. Also, need to review impact on Accounts Receivables.	Apr 07 - June 08, **Cost**: $36K Consulting
Priority, New	Fiscal Services	7	Crystal Reports Ad-hoc reporting tool will be used for supplemental Fiscal Reporting.	Implement the Crystal Reporting tool for selected users in Finance. Users to determine data views needed from Banner before ITS can do the setup.	ITS installed Crystal Tool in November 2006 and is in the process of working with Financial Aid on their data views. Business Services will be the next group, estimated in April/May 2007. Users assigned to be able to give inputs for data views needed.	May 07 - Feb 08
Priority, New	Fiscal Services	8	The Banner self-service web based interface will provide inquiry, approval, requisition, purchase order, and budget transfer functions to remote users at both colleges.	Implement Web for Finance in phases - release query functions first, then updates for Approvals, Budget transfers, Budget worksheets, and finally requisitions (latter requires extensive procedures before it can be released).	ITS released the Web for Finance to Business Services in Dec 2006 and held demos for staff. Bus Svcs staff reviewing features to test and evaluate what written procedures are required and when can release to users outside Business Svcs.	Fin Oct 07, Budget Dec 07- Feb 08, Online Reqs Oct 07 - May 08
New	**Fiscal Services - Moved to Human Resources Due to Org Change	9	Better integrate and coordinate operations between Fiscal Services & Human Resources Services which will take full advantage of the functions provided by Banner and will better assist employees. It will also provide automatic integration and coordination of the HR and Payroll departments.	User action for procedure improvements, but may impact ITS if need to automate some manual processes or provide additional reporting.	No action until specific needs for automation are identified.	Moved to HR due to Org Change, July 07 - Nov 07, **Cost**: $30K Consulting
Priority, New	**Fiscal Services - Moved to Human Resources Due to Org Change	10	Implement electronic Web Time Entry to improve timesheet processing and accuracy.	Implement Web for Time Entry in phases based on employee groups.	ITS installed Timesheet module last year. Reviewed with HR, Payroll, College, and ITS team all the functionality and how CLPCCD would implement. Project put on hold due to Payroll & HR staffing. Now pending only Payroll staff to be available to continue process.	Moved to HR due to Org Change, 1st Phase Nov 07 - Mar 08, 2nd Phase Apr 08 - Dec 08

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New	Fiscal Services	11	Develop written procedures for all processes in Fiscal Services and provide training to District and College staff. Includes routine transaction processing, exceptions, Banner data entry standards, operational workflow using Banner, expanding usage of Banner features, document process improvements, implement comprehensive Banner training and functional cross-training.	User action for written procedures, but ITS will provide consultants or ITS District staff as needed to answer questions about the Banner system and its functions or to assist in training.	ITS has lined up a Finance consultant through Sungard, Mickey Hughes, to assist the users on training and Banner system understanding. Deferred due to recent Audit. Awaiting Finance availability to use consultant.	Jan 08 - Dec 08, **Cost**: $64K Consulting
New	Fiscal Services	12	Examine current relationship and account structure with existing banks and financial institutions to improve District's ability to manage cash, integrate cash operations with Fiscal Services and Banner, and maximize financial strength.	User action but may require ITS action for automation with banks, additional reporting, or change in check processing.	No action until specific needs for automation are identified. Change in check processing has been reviewed in the past and restrictions from the County or banks have prohibited changes. If outside orgs approve, then ITS can use Evisions to produce checks.	By July 08
Priority, New	Purchasing	13	Implement business process improvements for low-dollar purchase transactions. Plan for purchasing card (P-Card) program, revise current procedures, and target a high user adoption rate.	SAME AS #2 ABOVE	SAME AS #2 ABOVE	Pilot: Apr 07- May 08, All Depts: June 08
New, Mod	Purchasing	14	Establish new customer outreach and communication initiatives: Create procedure manual for customer use, Establish Intranet Web site, Publish manual.	Recommend completing manual in conjunction with future online requisition module in Banner. (Refer to #1 above)	ITS is in the process of working with Purchasing on their future documentation for the online requisition module in Banner. ITS is setting up an internal Web site with Purchasing for them to store pertinent content such as procedures and documentation.	June 07 - June 08
New	Economic Dev/Contract Ed	15	Coordinate a district-wide community outreach and referral system for Contract Education.	May be related to Marketing Outreach requirements from Public Information Officer, so the same automated solution could perhaps satisfy both departments.	ITS will work with Marketing and Contract Ed to determine what if any additional modules are available in Banner that can be purchased and satisfy this Outreach requirements. Based on a preliminary research by ITS, Banner does have other modules that CLPCCD does not have that appear to be in line with the Outreach needs.	On-going - Same as Contact Mgt System

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New, Mod	Educational Services & Planning	16	Strengthen recruitment and retention strategies.	User action for improvements, but may impact ITS if need to automate some manual processes or provide additional reporting.	ITS may also need to look at improved solutions for the current Enrollment Management System developed in-house. Banner may have future modules that we could purchase that would address the tracking and monitoring for recruitment and retention.	Short term: Nov 07 - Online registration for Contract Ed; Long term: On-going Same as Contact Mgt System
New, Mod	Educational Services & Planning	17	Strengthen its role in providing quality assistance in the enrollment management process. The department will place emphasis on providing timely and accurate FTEF allocations, enrollment targets, and enrollment monitoring reports.	User action for improvements, but may impact ITS if need to automate some manual processes or provide additional reporting.	No action until specific needs for automation are identified. No ITS actions identified to date.	
New, Mod	Educational Services & Planning	18	In collaboration with the Colleges and Human Resource Services, develop a process for tracking, monitoring, and reporting the Full-time Faculty Obligation. All state reporting will be identified to include relevant student data and characteristics. Improvements include mapping current process, reconciling Full Time Obligation reporting and IPEDS reporting, conduct audit of all reporting (VTEA, Basic Skills, FTES (P-1, P-4), Flexible calendar, reconciling curriculum, and instructional programs inventory.	User action for improvements, but may impact ITS if need to automate some manual processes or provide additional reporting.	No action until specific needs for automation are identified.	Analysis Sep 07 - Dec 07, Implement Jan 08 - Mar 08
New	Facilities Planning & Management	19	Enhance IT support through use of District ITS staff for the facilities modernization program. Define resources and system requirements for communication to IT.	Provide local District resources to replace the DMJM staff at Owens office for technical support (some support received from DMJM Los Angeles office)	District ITS has begun providing support for the previous DMJM services for PCs, servers, printers, FTP sites, backups, and support for office relocations as needed.	Mar 07 - Dec 07
Priority, New	Facilities Planning & Management	20	Streamline the Accounts Payable and Accounting processes and practices for the facilities modernization program.	Review current processes both procedural and through Banner to determine pertinent improvements.	District ITS is working with Vice Chancellor and Project Managers to evaluate potential Prolog interface with Banner and to provide additional Banner reports as needed for Bond Measure B.	Mar 07 - Dec 07

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Priority, New	Facilities Planning & Management	21	Streamline the Procurement processes and practices for the facilities modernization program.	Review current processes both procedural and through Banner to determine pertinent improvements.	District ITS is working with Purchasing on improvements for P-card and online requisitions which can be extended to Bond Measure B. New system features will be installed first for operational expenses and then once proven it will be extended to the more complex Bond Measure B process (also more comprehensive procedures will be required). Refer to #2, #13,. #14 above.	Purchase Card June 08, Online Reqs May 08
Priority, New, Mod	Maintenance & Operations	22	Improve the electronic work order system to help internal and external communications.	User action to coordinate with vendor on upgrade.	NEW action for District ITS - new system upgrade requires hardware for Web services and technical support for the software upgrade and maintenance. Request for purchase of upgrade by M&O processed.	Completed July 07
Priority, New	Public Information & Marketing	23	Create a publications budget to enhance and support outreach, advertising, and marketing efforts district-wide.	Requires new System to satisfy Marketing Outreach requirements for both colleges. The same automated solution could perhaps satisfy the PIO needs as well as the other departments with "outreach" goals such as Economic Dev/Contract Ed and Educational Services/Planning.	ITS will work with Marketing and Contract Ed to determine what if any additional modules are available in Banner that can be purchased and satisfy this Outreach requirements. Based on a preliminary research by ITS, Banner does have other modules that CLPCCD does not have that appear to be in line with the Outreach needs.	Interim Retention System Sep 07, New Contact System Oct 07 - Oct 08

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New, Mod	Human Resources	24	Convert all human resources forms to electronic format (PDF) so a user can complete them electronically and return either via email or as an attachment to an email message. Post forms on human resources website and communicate availability to District.	Evaluate Human Resource forms and identify if the Banner system provides the online form or if the form is external to any Banner functions. Select forms for the appropriate automation method and coordinate with District ITS as needed.	District ITS purchased Omniforms and installed. Human Resources needs to identify forms that are not contained in the Banner system that can be setup with Omniforms and these forms will be added to the pilot list. Human Resources is in the process of reviewing their forms for possible modifications, and this step should be completed prior to implementing on Omniforms. Any Banner online forms such as Timesheet will be implemented as part of the Banner projects and not using Omniforms.	Provide HR forms support as needed 1st Phase Omniforms Oct 07, PDF's Sep 07, Web based forms July 08
New	**Fiscal Services - Moved to Human Resources Due to Org Change	25	Implement process improvements to payroll function. Streamline procedures and clarify processes for employees. Assure compliance with staff and faculty collective bargaining agreement and Board of Trustees policies. Ensure accuracy and timeliness of payroll processes and utilize technology fully.	User action for procedure improvements, but may impact ITS if need to automate some manual processes or provide additional reporting.	No action until specific needs for automation are identified.	Moved to HR due to Org Change, July 07 - Nov 07, **Cost**: $30K Consulting
Priority, New	**Fiscal Services - Moved to Human Resources Due to Org Change	26	Implement electronic Web Time Entry system that allows employees to enter time sheet information directly into a secure web-based system. The web-based system will improve time sheet processing and accuracy and will allow managers to provide better oversight to the process.	Implement Web for Time Entry in phases based on employee groups.	ITS installed Timesheet module last year. Reviewed with HR, Payroll, College, and ITS team all the functionality and how CLPCCD would implement. Project put on hold due to Payroll & HR staffing. Now pending only Payroll staff to be available to continue process.	Moved to HR due to Org Change, 1st Phase Nov 07 - Mar 08, 2nd Phase Apr 08 - Dec 08
Priority, New	Human Resources	27	Install PeopleAdmin, an integrated web-based applicant system, to provide an integrated approach to application processing, screening, and selection. System includes position description module that allows full integration of position management, review, and requisition processing. PeopleAdmin system integrates with our Banner system, thus providing a coordinated and unified approach to these functions.	Implement ASP Model for PeopleAdmin screens first and then interface with Banner HR module.	Vendor contract for HR for Application Service Provider model has been completed. Vendor provides remote services for hardware and software. CLPCCD personalizes the system to suit their environment.	Initial Nov/Dec 07, On-going

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New, Mod	Human Resources	28	Develop a human resource webpage that is accurate, attractive, easy-to-use, and updated regularly.	HR Review of Web pages should be coordinated with District PIO for Internet and District ITS for Intranet.	District ITS can assist in the Web page additions or modifications once the enhancements are identified by Human Resources.	Sep 07, Support as needed
New, Mod	Human Resources	29	Develop and improve data and reports for effective decision-making within human resources and District-wide.	For ITS portion only to provide electronic tools, implement the Crystal Reporting tool for selected users in Human Resources. Users to determine data views needed from Banner before ITS can do the setup.	ITS installed Crystal Tool in November 2006 and is in the process of working with Financial Aid on their data views. Business Services will be the next group, estimated in April/May 2007, then followed by Human Resources group. Users need to be assigned to be able to give inputs for data views needed. It should be noted that Human Resources already has ad-hoc reporting capability that was developed by ITS years ago using a different tool, so the user groups without any ad-hoc reporting capabilities were selected first for Crystal implementation.	HR June 07 - Feb 08, Add Depts Aug 08
New, Mod	Human Resources	30	Make greater use of technology and current business practices to provide information and services to current and potential employees and general public.	Review current processes both procedural and through Banner to determine pertinent improvements.	District ITS will work with Director of Human Resources to identify the department future needs and research potential technology solutions to satisfy HR requirements.	On-going
New, Mod	Human Resources	31	Implement Benefit Bridge software program to provide employees access to their benefit information to make changes in a manner that is both easy and confidential.	Develop a custom Banner interface to send data to the vendor system, Benefit Bridge, for full time employees and retirees to create a supplemental system to track benefit changes. Banner will still be used by HR to store benefit data for usage in Payroll processing.	District ITS completed the programming and testing to provide a Banner extract to automatically load data into the Benefit Bridge System.	1st Phase Banner Interface Completed Summer 07, 2nd Phase Training Fall 07

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New, Mod	Human Resources	32	Develop online tools for supervisors and employees that provide them with direct and immediate access to a wide-range of human resource information.	Review current processes both procedural and through Banner to determine pertinent improvements.	District ITS will work with Director of Human Resources to identify the department future needs and research potential technology solutions to satisfy HR requirements.	Initial Nov 07, On-going
New, Mod	Human Resources	33	Implement human resources Listserv to inform potential applicants of employment opportunities.	Evaluate various Listserv options that are available for features and costs. Assess both the subscription service models and the local server models based on the CLPCCD load requirements. Select a solution that can be applied District-wide as new Listserv requirements arise.	District ITS setup Listserv subscription services for human resources as well as other college functions such as Chabot Performing Arts. Released to Human Resources staff for production usage in February 2007.	1st Phase - Setup Listserv Spring 07, 2nd phase Fall 07, **Cost:** $500
New, Mod	Human Resources	34	Implement in-house training program in current technology and software products to enhance productivity, efficiency, and service to customers (e.g., Microsoft products, Adobe Creative suite, Dreamweaver, data management, communication tools, PeopleAdmin, JobElephant, Banner, etc.).	ITS can coordinate Banner training and onsite assistance from Banner consultants for system usage and system documentation. Users must address written policies & procedures for their department.	ITS has provided consultant services for HR and Payroll in 2006-2007 with Melinda Wibby-Bryant to assist with problems, document current processes and procedures for the Banner functions for HR and Payroll, and make recommendations for potential changes for improvement. ITS has purchased CBT's (Computer Based Training) for each of the Banner modules "vanilla" system. ITS provides Banner training classes internally as needed for new hires and can coordinate with the Banner vendor for more formal classes if desired.	Consultant services Nov 06 Nov 07 for HR and Payroll, On-going, **Cost**: $36K Consulting

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	ITS, Budget Office, Fiscal Services, Purchasing, Human Resources, Economic Dev/Contract Ed, Educational Services & Planning, Facilities Planning & Management, Maintenance & Operations, Public Information & Marketing	35	ADDITIONAL GENERAL RECOMMENDATIONS FROM SCHOOL SERVICES OF CA FOR FINANCE: (1) USERS DO NOT FULLY UTILIZE ALL OF THE EXISTING FEATURES OF BANNER SO PROVIDE TRAINING AND EVALUATION OF PROCEDURES TO TAKE ADVANTAGE OF THE SYSTEM CAPABILITIES AND IMPROVE PRODUCTIVITY. (2) CREATE WRITTEN PROCEDURES AND DEPARTMENTAL MANUALS. (3) ESTABLISH STAFF DEVELOPMENT PLAN TO PROVIDE TRAINING AND CROSS-TRAINING ON BANNER SYSTEM AND WRITTEN PROCEDURES.	User action to develop written procedures. Training content and schedule to be coordinated by users with ITS and Banner vendor.	For training, ITS has purchased CBT's (Computer Based Training) for each of the Banner modules "vanilla" system and ITS has posted these on the Web for Banner users. For full utilization of Banner, ITS is working with the Banner vendor to provide consultant services as user schedules permit to review the Banner System and make recommendations on potential changes for CLPCCD. New offering was announced at Summit starting in March 2007 by Sungard called "Step 2" Services designed for older customers of Banner to identify gaps in system usage, which would be beneficial to CLPCCD.	On-going, **Cost**: $64K Consulting and/or Training Offsite

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