



## **Project Charter and Scope Statement**

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### Executive Summary

The purpose of this project is to provide Solano Community College (SCC) a stable digital campus that meets the needs of the College and supports SCC's mission of providing the highest quality academic, occupational, cultural, developmental, and continuing education programs that are dedicated to the achievement of student learning outcomes and responsive to the needs of the community. This project directly supports the 2007 Solano Community College District Educational Master Plan.

During the period of April 2010 through August 2010, SCC will prepare for and implement a stable environment for the Finance, Human Resources, Student, Financial Aid, Operational Data Store, and Luminis components of the SunGard Higher Education Banner 7 Suite.

Upon the successful stabilization of the Banner 7 Suite, through the month of October 2010, SCC will prepare for and migrate to the Banner 8 Suite for all components listed above.

Beginning in November 2010 and continuing through April 2011, SCC will implement the Advancement module of SunGard Higher Education's Banner 8 Suite. Implementation of the Advancement module will enhance SCC's capability to run effective fundraising campaigns, resulting in additional revenue for the College

SunGard Higher Education will provide services that include Project Management, Application Management Services, Functional and Technical Training and Consulting, and Banner 7 to Banner 8 Upgrade and Migration Services.

### 1 Introduction

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This Project Scope Statement provides the definition of the project—what will be accomplished during the life of this project. This document addresses and documents the characteristics and boundaries of the project and the products and services purchased as well as the how products and services will be delivered and evaluated.

### 2 Project Objectives

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#### 2.1 *Mission*

The purpose of this project is to provide Solano Community College (SCC) a stable digital campus that meets the needs of the College and supports SCC's mission of providing the highest quality academic, occupational, cultural, developmental, and continuing education programs that are dedicated to the achievement of student learning outcomes and responsive to the needs of the community. The culmination of the project will result in a digital campus reflecting current technology and practice, meeting the needs of multiple users. The Banner system will support maintenance of accurate student data and transaction records and will facilitate fiscal and performance accountability processes while maximizing the usefulness and accessibility of data.

#### 2.2 *Objectives*

- Adopt a proven, integrated, and reliable information management system that supports improved institutional practices and facilitates data integrity and decision support.
- Provide technological tools for faculty and staff to perform their jobs in an effective and efficient manner.
- Allow flexible access to administrative and academic data to satisfy regulatory and institutional analysis needs.
- Allow access to historical data for efficient reporting to better understand the students and the institution.
- Provide personalized opportunities for access to relevant administrative and academic information.
- Improve efficiency in reporting information as required to external agencies while protecting the confidentiality of individual information.
- Implement a system that is owned by the functional departments, increasing functionality and accountability for faculty and staff.
- Provide a solution that facilitates student tracking, leading to increased student performance.
- Produce and maintain documentation to ensure continuity of processes.

### 3 Project Acceptance Criteria

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Project acceptance criteria provide specific measurement for determining that the objectives and deliverables defined for the project have been met. This definition would include criteria such as:

- All issues and action items have been completed and signed off
- All required work products have been produced
- All deficiencies have been logged and signed off
- Verification that the project has met project and Organizational Entity standards
- Validation that the product meets the requirements
- A project termination statement exists, if applicable
- A project cancellation statement exists, if applicable

The project success criteria have been met when the project has validated that all major commitments and deliverables have been closed.

### 4 Project Scope

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This section describes the work that is to be done during the project. This section can only be changed by following the Integrated Change Control Process.

SunGard Higher Education will provide the following Services. Each of the following Services is described in its own section:

- A Project Management Services
- B Digital Campus Systems Stabilization Services
- C Banner Version 7 to 8 Upgrade and Migration Services
- D Digital Campus Systems Post-Implementation Support Services
- E Application Management Services
- F Banner Advancement Standard Implementation Services

SunGard Higher Education will use a combination of remote services and onsite services to provide the Services and fulfill the tasks and duties defined in the project scope

For each Service, the following Sections detail the terms specific to that Service.

**A. Project Management Services.**

## Project Charter and Scope Statement

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SunGard Higher Education provides leadership, planning, guidance, and execution in delivering Project Management Services. These Services are primarily delivered by a SunGard Higher Education Project Manager. The SunGard Higher Education Project Management team uses MS Project for developing and maintaining project plans. They also follow the Project Management Institute (“PMI”) project management life cycle:

- Initiating
- Planning
- Executing
- Controlling
- Closing

SunGard Higher Education will provide Project Manager Services to coordinate the Services delivered under this section, to manage the SunGard Higher Education staff that deliver services to Solano Community College District as part of this project, and to assist Solano Community College District with the overall project direction. The Project Manager will also assist the Solano Community College District Project Manager with the coordination and execution of the project as specified below.

The SunGard Higher Education Project Manager will:

- Advise the Solano Community College District Project Manager on project management and the overall direction of the project;
- Provide direction and oversee the activities of the SunGard Higher Education staff assigned to the project;
- Coordinate the adjustment of resource levels to meet the needs of the project plan and the Solano Community College District;
- Participate in IT project change control process;
- Oversee SunGard Higher Education quality assurance and quality control activities;
- Work with the Solano Community College District Project Manager and Solano Community College District Executive Sponsor in adjusting the baseline project schedule as appropriate and mutually agreed to in writing by both SunGard Higher Education and the Solano Community College District;
- Manage SunGard Higher Education project closure activities;
- Assist the Solano Community College District Project Manager on project initiation, planning, execution and controlling activities;
- Assist the Solano Community College District Project Manager in scope verification and scope control;
- Assist Solano Community College District Project Manager in monitoring issue logs and track issues through resolution; and
- Assist Solano Community College District Project Manager in monitoring risk.

The SunGard Higher Education Project Manager will be responsible for:

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- Attending Steering Committee Meetings;
- Providing a written monthly project status report to the Solano Community College District Project Manager and Solano Community College District Executive Sponsor;
- Maintaining a SunGard Higher Education project schedule and making that schedule available to Solano Community College District at Steering Committee meetings; and
- Providing input into the development of an overall baseline project plan with milestones and a specific timeline to be developed jointly by the Solano Community College District and SunGard Higher Education.

Project Management Services will begin within approximately fifteen (15) days of the Effective Date of the Work Order and will continue until the end of the Service Period.

SunGard Higher Education will provide the resources appropriate to perform the Activities and Responsibilities specified above for the timeframe specified above.

The Solano Community College District Project Manager, in cooperation with the SunGard Higher Education Project Manager, will be responsible for managing project activities assigned to Solano Community College District project participants.

The SunGard Higher Education Project Manager is a member of the Project Management Team and of the Steering Committee. The SunGard Higher Education Project Manager reports project activities and progress against the project schedule to the Steering Committee.

The SunGard Higher Education Project Manager delivers Services using a mixed mode of onsite and remote Services, unless otherwise specified in this document.

In addition to the Project Management Services generally described above, SunGard Higher Education will provide the following additional services to the Solano Community College District.

Using the Higher Ground<sup>SM</sup> Project Management Methodology, the Project Manager will manage various aspects of Solano Community College District's implementation project to include integration and customization management (to the extent applicable), scope management, cost management, time management, quality management, human resource management, communications management, change management, and risk management. These project areas are standard disciplines and are further described below:

- Integration and Customization Management – Coordinates the various elements associated with integrations and customizations to the extent applicable to the project.
- Scope Management – Coordinates the SunGard Higher Education-assigned deliverables in relation to the overall project scope.

- Cost Management – Describes the approaches and activities the respective Project Managers will use for managing the agreed upon costs for the project.
- Time Management – Oversees that each party timely completes its assigned project activities.
- Quality Management – Oversees the activities necessary to design, develop, and implement project deliverables as assigned to SunGard Higher Education. Coordinates with the Solano Community College District Project Manager to assess the effectiveness of project deliverables and activities of both SunGard Higher Education and Solano Community College District.
- Human Resource Management – Manages the SunGard Higher Education resource pool assigned to specific tasks within the project.
- Communications Management – Oversees the planning, implementing, monitoring, and revision of channels of communication within the SunGard Higher Education organization and between the SunGard Higher Education and Solano Community College District organizations for the project.
- Change Management – Manages changes should they be needed during the project lifecycle.
- Risk Management – Manages uncertainty in the project related to potential threats by risk assessments, strategies to manage it, and mitigation of risks.

SunGard Higher Education will provide Project Management services to Solano Community College District using the Higher Ground<sup>SM</sup> Project Management Methodology. Processes to be performed by the Project Manager within each project phase, as well as the key deliverables for that phase are set forth below.

### **Implementation Phase**

This phase guides the management of the execution, monitoring, and control of the project. It is designed to provide an ongoing view into the health and progress of the project so that management can take effective, efficient, and timely actions when the project's performance deviates from the plan or when a proactive measure to manage risks is required.

The following processes are included in the Implementation Phase:

- Project Performance Reporting – Defines how, when, where, and who will receive project information on a periodic basis.
- Validate and Confirm Project Schedule – Focuses on managing the project schedule for those services to be provided to Solano Community College District.
- Confirms Project Budget – Refines resource estimating, defines the project budget, and monitors and controls project costs throughout the project's lifecycle.
- Manage/Develop Risk Identification Plan – Using the project's Risk Management Plan, documents, tracks, and monitors risks throughout the project's lifecycle.



- Confirm and Validate Project Scope Statement – Addresses and documents the characteristics and boundaries of the project.
- Conduct SunGard Higher Education Quality Audit – Internal standard project review designed to optimize quality of each party’s project deliverables.
- Direct and Manage Project Execution – Involves tasks and activities encompassing team management, quality assurance, and risk management and control.
- Performance Reporting – Details the collection, analysis, and reporting methods that monitor the ongoing performance of the project, the measurement of progress, and forecasting.
- Change Control Tracking/Plan – Follows the process as outlined in the Integrated Change Control Plan.

SunGard Higher Education will provide the following items in conjunction with the Implementation Phase:

- Project Schedule
- Project Budget Plan
- Risk Response Plan
- Solano Community College District Status Report
- Project Scope Statement sign-off by all stakeholders
- Integrated Change Control Process Plan
- Risk Management Plan
- Status Report
- Budget Report
- Risk Mitigation Plan
- Change Request Log

### **Achievement Phase**

This phase reviews the project deliverables in light of the project objectives. The project is concluded, and lessons learned are documented between the SunGard Higher Education and Solano Community College District teams.

The following processes are included in the Implementation Phase:

- Review Contract Deliverables – Validate that all services, per the Project Charter and Scope Statement produced during the Planning Phase and any approved change requests, were implemented in light of project objectives.
- Transition to SunGard Higher Education Production Support – If ongoing Baseline product maintenance is being provided, transition responsibilities to steady-state mode of the product(s) delivered.
- Administrative Project Closure – Perform administrative activities to conclude the project.
- Document Project Success – Survey Solano Community College District’s satisfaction.

SunGard Higher Education will provide the following items in conjunction with the Achievement Phase:

- SunGard Higher Education and Solano Community College District Project Sign-Off
- SunGard Higher Education Project Transition Planning
- SunGard Higher Education Lessons Learned
- SunGard Higher Education Solano Community College District Satisfaction Survey

With respect to all Project Management services described above, and in addition to all other responsibilities and obligations, Solano Community College District will responsible for the following:

- Solano Community College District will provide a Project Manager who will work directly with the SunGard Higher Education Project Manager and provide the required input and work product to the project deliverables for each project phase.
- Solano Community College District will assign Solano Community College District resources to complete Solano Community College District tasks required as part of the project's schedule.
- Solano Community College District will provide information to SunGard Higher Education project team that will contribute to the development of the project deliverables as listed above for each project phase.
- Solano Community College District will provide, on a timely basis, approval on all project deliverables based on the agreed sign-off criteria for each project phase.
- Solano Community College District will attend and participate in project status meetings as defined by the SunGard Higher Education and Solano Community College District Project Managers
- Solano Community College District will provide timely approval for all project change requests prior to the start of the project change.
- Solano Community College District will support and otherwise cooperate with SunGard Higher Education throughout all the steps in the production of the project deliverables.

### **B. Digital Campus Systems Stabilization Services.**

SunGard Higher Education will provide project management, and functional consulting services to support the stabilization of the following systems: Banner Finance, Banner Human Resources Systems, Banner Student System, Banner Financial Aid System, Luminis, Operational Data Store (ODS) reporting and single sign integrations, Degree Works, and Banner Document Management System. These Services are provided using the SunGard

Higher Education Implementation Methodology in order to realize project objectives and deliverables.

SunGard Higher Education will provide ERP System Stabilization Services to Solano Community College District for the listed systems and integrations. The limitation to implemented/stabilize and migrate of the ERP system is the availability of Solano Community College District resources, as addressed elsewhere in this document.

All Banner modules that will be implemented/stabilized and migrated are within the Baseline Banner Component System as delivered by SunGard Higher Education's California Community College Solution Center ("CAL-B"):

- Banner General version 7
  - Shared Data Session and Job Submission
  - General Security
- Banner Student version 7
  - Student modules
  - Accounts Receivable
  - Student Self-Service
  - Faculty Self-Service
  - Student Financial Aid Disbursements
  - Overview Training - Student
- Banner Financial Aid version 7
  - Board of Governors Grants setup changes
  - Student Disbursements
  - Miscellaneous Scholarships refining current process to maximize the use of Banner functionality
- Banner Finance version 7
- General Accounting – High Level Overview for new administrative personnel
- Accounts Receivable (including non-student receivables)
- Finance Self-Service
- Fixed Assets
- Budget Development/Position Control
- Grants & Contracts/Construction Accounting
- Banner Human Resources version 7
  - Position Control
  - Faculty Load Administration
  - MIS Reporting
  - STRS/PERS
  - Web Time Entry
  - Overview Training – HR and Payroll
  - PeopleAdmin Interface Consulting
  - EPAF
  - Employee Self-Service
- Luminis
  - Content Administration Consulting
  - Content Administration Follow up Consulting

- Organization Planning Consulting (Faculty Course Studio)
- Content Planning Consulting
- Content Planning Follow up Consulting
- Operational Data Store
- Single Sign on Integrations

SunGard Higher Education will assume responsibility for the above at the point in which the implementation process where Solano Community College District is on the Effective Date of the Work Order. Banner Student modules and sub-modules already implemented will be covered by Digital Campus Systems Post-Implementation Support Services described below.

Business-driven modifications to the Banner ERP System will only be considered through the appropriate mutually agreed upon change approval process. If the Solano Community College District approves modifications to the ERP System in writing, then SunGard Higher Education will charge the Solano Community College District for the modifications at SunGard Higher Education's then-current standard rates then in effect at the time SunGard Higher Education renders the service.

SunGard Higher Education is assuming responsibility for the Solano Community College District system implementation/stabilization/migration part-way through the process. Therefore, some of the steps of the implementation methodology have been completed. However, SunGard Higher Education is providing a description of its complete implementation methodology and will deliver any steps of that methodology that may have been overlooked or may be in need of revision. The decision to provide or revise such steps will depend on mutual agreement in writing between SunGard Higher Education and Solano Community College District that the step(s) under discussion are of value to improve the remaining implementation process.

The SunGard Higher Education Implementation Methodology is a template for implementing ERP applications (administrative systems suite) in a higher education environment. This methodology is the basis for a specific, tailored project plan for the Solano Community College District's implementation. There are four overlapping Phases in the SunGard Higher Education Implementation Methodology:

The Definition Phase develops the overall project scope for the Banner modules, Luminis, Operational Data Store (ODS) – Reporting, Banner Document Management Suite, DegreeWorks, and PeopleAdmin Implementations. During this phase, a project charter and scope statement will be developed to include the project definition, mission statement, goals and objectives, project assumptions, project timeline, project and role expectations for individuals involved in the project, organization and structure of the project, and the general approach to specific aspects of the project, such as how a system change gets approved, and how decision making and conflict resolution are processed (this document).

Detailed project plans and schedules are developed, resources are assigned to specific roles and committees, and tools and resources required to support the project are acquired.

The Implementation Phase identifies and describes current business practices; verifies and configures the application software and associated support software; configures the application for Solano Community College District operation; develops business processes that realize the benefits of the new application software; trains unit staff and supports initial system operation. A series of activities are performed by SunGard Higher Education and Solano Community College District resources during the Implementation Phase. Success in the Implementation Phase is dependent on the performance of these combined resources. The Solano Community College District must provide the necessary resources outlined in Solano Community College District Responsibilities for this Phase to be successful.

During the Close-Out Phase SunGard Higher Education will (i) identify outstanding issues and with the approval of the Solano Community College District in writing determine how (if) they will be resolved; (ii) archive relevant project working papers; and (iii) provide for the orderly termination of the project.

The SunGard Higher Education Project Manager will perform the following activities:

- Project Plan Development Assistance – SunGard Higher Education will assist with the planning to define the work breakdown structure, identify associated project tasks, deadlines for completion, critical milestones, and other tasks. The Solano Community College District will be required to identify individuals who will own each milestone and task.

The SunGard Higher Education Functional Trainer will perform the following activities:

- Configuration Activities
  - Provides support and guidance to the Solano Community College District to configure the rules and validation tables;
  - Recommends standard practices to improve operations in the ERP environment;
  - Assists with identifying reporting needs;
  - Participates in system testing of each successive ERP configuration using test scripts based on the systems acceptance test, as described in the Baseline Project Plan (“Systems Acceptance Test”).
- Testing Activities
  - Assist with the review and development of testing plans, as described in the Baseline Project Plan (“Testing Plans”) (this assistance is in the form of leading a discussion and helping to develop sample test plans and scenarios) for the upgrade;
  - Assist with the review and development of Testing Plans (this assistance is in the form of leading a discussion and helping to

develop sample test plans and scenarios) for new Banner 8 features implemented.

- Go-Live Activities
  - Provide troubleshooting and assistance in identifying tasks required to go-live; and
  - Advise on key communications needs for each module as they go-live.

The SunGard Higher Education Project Manager will have the following responsibilities:

- Work Plans and sub-module checklists – SunGard Higher Education will provide templates or examples to each Solano Community College District Functional Team Lead in order to facilitate the creation of task lists in the project plan for each module. This will be used to track the status of progress on the project.
- Provide samples of Communications, Reports, Minutes, and Agendas to be customized by Solano Community College District Functional Team Leads as needed.

The SunGard Higher Education Functional Trainer will have the following responsibilities:

- Provides templates, advice, and share standard practices;
- Provides Specification Templates;
- Provides Test Plan Templates;
- Provides User Guide Templates;
- Provides Status Reports to the SunGard Higher Education Project Manager on the progress of projects and plans.

Implementation/Stabilization and Migration Services will commence within approximately fifteen (15) days of the Effective Date of the Work Order and will continue until May 7, 2011. The Solano Community College District will be responsible for determining and finalizing the critical dates for go-live activities and the Solano Community College District shall be responsible for deciding to go live for the specific modules being implemented.

For components listed in B above, SunGard Higher Education will provide the resources appropriate to perform the activities and fulfill the responsibilities. Resources will be deployed as determined by SunGard Higher Education to support the implementation schedules specified.

These Services do not include the programming or development of modifications to the delivered Banner software, or the development of reports, unless otherwise provided for in the Statement of Work.

### **C. Banner Version 7 to 8 Upgrade and Migration Services.**

The scope of the Banner Version 7 to Banner 8 Upgrade and Implementation Services includes the following Banner ERP areas:

- Banner General

- Banner Student
- Banner Financial Aid
- Banner Finance
- Banner Human Resources

The primary goal of these Services is to assist the Solano Community College District with upgrading to the new software version and validate that the Banner ERP performs the functions in Banner 8 that the Solano Community College District has currently employed, has configured and has working in Banner 7.

Upgrade services include transferring all Version 7-current interfaces and integrations and making any changes necessary to maintain the integrity of the related business processes.

The secondary goal of these services is to implement the new Banner 8 features identified by the Solano Community College District and agreed to by SunGard Higher Education as required for the go-live.

Banner ERP System Implementation Services do not extend to non-SunGard Higher Education products which are not specifically identified in the Statement of Work.

The SunGard Higher Education Project Manager will perform the following activities:

- Project Plan Development Assistance – SunGard Higher Education will assist with the planning to define the work breakdown structure, identify associated project tasks, deadlines for completion, critical milestones, and other tasks. The Solano Community College District will be required to identify individuals who will own each milestone and task.

The SunGard Higher Education Functional Trainer will perform the following activities:

- Configuration Activities
  - Provides support and guidance to the Solano Community College District to configure the rules and validation tables;
  - Recommends standard practices to improve operations in the ERP environment;
  - Assists with identifying reporting needs;
  - Participates in system testing of each successive ERP configuration using test scripts based on the systems acceptance test, as described in the Baseline Project Plan (“Systems Acceptance Test”).
- Testing Activities
  - Assist with the review and development of testing plans, as described in the Baseline Project Plan (“Testing Plans”) (this assistance is in the form of leading a discussion and helping to develop sample test plans and scenarios) for the upgrade;
  - Assist with the review and development of Testing Plans (this assistance is in the form of leading a discussion and helping to

develop sample test plans and scenarios) for new Banner 8 features implemented.

- Go-Live Activities
  - Provide troubleshooting and assistance in identifying tasks required to go-live; and
  - Advise on key communications needs for each module as they go-live.
  - Work with Solano Community College District to identify which Modifications and Scripts must be upgraded for compatibility with Banner version 8.

The SunGard Higher Education Remote Technical Consultant will perform the following activities:

- Assist Solano Community College District technical staff with assessing the impact of the Banner 8 technical changes;
- Provide Solano Community College District technical staff with the information on the technical changes in Banner 8 (knowledge transfer); and
- Upgrade the Banner components of Banner interfaces with other systems as needed to continue operation with Banner 8.

The SunGard Higher Education Functional Trainer will have the following responsibilities:

- Provides templates, advice, and share standard practices;
- Provides Specification Templates;
- Provides Test Plan Templates;
- Provides User Guide Templates;
- Provides Status Reports to the SunGard Higher Education Project Manager on the progress of projects and plans.

The SunGard Higher Education Remote Technical Consultant will have the following responsibilities:

- Provide Solano Community College District with templates to assist with assessing the impact of Banner 8 technical changes on Solano Community College District Banner modifications, enhancements and extensions.
- Conduct at least 2 technical briefings for the Solano Community College District's technical staff on the technical changes in Banner 8.
- Provide assistance with the upgrade of Banner interfaces with other systems as needed to continue operation with Banner 8.

Based on Solano Community College District's schedule, the approximate period during which these upgrade and migration Services will be provided is during a ten and one-half (10.5) month period, commencing within one and one-half (1.5) months from the start of the project, and ending no later than May 7, 2011.



SunGard Higher Education will provide the resources appropriate to perform the Activities and fulfill the Responsibilities specified in C above. Resources will be deployed as determined by SunGard Higher Education to support the timeframes specified .

Solano Community College District will:

- Establish Banner 8 hardware and software environments; and
- Identify the new Banner 8 features to be implemented for the go-live, with assistance from SunGard Higher Education.

An overall CAL-B Baseline Project Plan with milestones and a specific timeline will be developed jointly by the Solano Community College District and SunGard Higher Education prior to beginning the implementation.

Baseline CAL-B Banner 8 features will be implemented. Modifications to the base system will only be considered through the appropriate mutually agreed upon change approval process. If the Solano Community College District approves changes in writing, then SunGard Higher Education will charge the Solano Community College District for the modifications at SunGard Higher Education's then-current standard rates then in effect at the time SunGard Higher Education renders the service.

### **D. Digital Campus Systems Post-Implementation Support.**

Consulting resources are often needed immediately following the go-live. These consulting resources help the Solano Community College District handle day-to-day operational activities as they adjust to changes and overcome the learning curve associated with the transition to a new ERP. SunGard Higher Education provides Services to assist during the transition period by applying functional expertise to the many challenges of working with a new system.

SunGard Higher Education will provide Post-Implementation Support in the following Banner ERP modules:

- Banner
  - General
  - Finance
  - Human Resources
  - Student; including Accounts Receivable
  - Financial Aid
  - Advancement
- Luminis
- Operational Data Store (ODS) – Reporting
- PeopleAdmin

The SunGard Higher Education Functional Trainer will perform the following activities:

- Provide direction and training to staff on how to perform Banner functions as they relate to day-to-day office operations and as requested by the Solano Community College District Functional Team Leads;
- Participate in operational and planning meetings as requested by the Solano Community College District Functional Team Leads;
- Meet with the Solano Community College District Functional Team Leads to establish priorities, plan assignments and resolve issues;
- Assist with identifying possible areas for process improvement;
- Assist with clarifying business processes;
- Assist with developing report specifications; and
- Assist with planning and scheduling as it relates to Solano Community College District operations.

### **E. Application Management Services.**

**Definitions.** The defined terms below are applicable to the Application Management Services described in Section E.

- “Work Order” shall mean and refer to the specific Work Order between SunGard Higher Education and Solano Community College District that was passed by the Governing Board on 03/31/2010.
- “Statement of Work” shall mean and refer to the specific Statement of Work that was attached to the Work Order passed by the Solano Community College District Governing Board on 03/31/2010.
- “Application” or “Applications” shall have the same meaning as Solano Community College District’s Software.
- “Application Home” shall refer to the specific set of software code, or software code tree, used for the process of running a specific Application.
- “Application Configuration Administration” shall refer to the definition of and setting and adjusting of Application global, system, class, and/or user-specific defined data elements that affect the functionality or display of the Application, and for those which are modifiable only through vendor delivered Application entry screens, forms, pages, processes or utilities for the Applications supported under the Statement of Work.
- “Application Patch Coordinator” shall refer to a Solano Community College District named resource that performs the definition of and planning of the identification, timing, and location for Application patches and upgrades as requested or required by the Solano Community College District’s user community.

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- “Application Security Administration” shall refer to the provisioning of global, class, and/or user-specific data entry forms, pages, processes, and reports, through baseline and delivered Application screens and utilities for that which are available, accessed, and run by end users and/or used by the Applications supported under the Statement of Work.
- “Approve” or “Approval” shall mean and refer to Solano Community College District’s sign-off by Solano Community College District’s Contract Administrator (or his or her designee) as to deliverables under the Statement of Work that are tendered by SunGard Higher Education to Solano Community College District for its review and approval.
- “Solano Community College District’s Equipment” shall mean the computer and associated hardware owned or provided by Solano Community College District, and installed in Solano Community College District’s Space, supported under the Statement of Work.
- “Solano Community College District’s Software” shall mean the Applications software of whatever sort that are purchased or licensed by Solano Community College District, or provided by SunGard Higher Education for Solano Community College District’s benefit, and installed on Solano Community College District’s Equipment, supported under the Statement of Work.
- “Solano Community College District’s Space” shall mean the Solano Community College District’s physical location, data center or other space, which is used for the purpose of storing or housing the Solano Community College District’s Equipment supported under the Statement of Work.
- “Solano Community College District’s System” shall mean Solano Community College District’s equipment, software and data, which is installed on or resides on Solano Community College District’s Equipment located in Solano Community College District’s space, supported under the Statement of Work.
- “Contract Administrator” shall mean and refer to a Solano Community College District designated representative who is responsible for the execution and administration of the Statement of Work for Solano Community College District.
- “Database” shall refer to the physical data files tied to one or more Database Instances.
- “Database Instance” shall refer to the logical set of resources (CPU cycles and allocated memory) and Operating System specific configuration files required to operate a Database.

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- “Lifeline” shall refer to a SunGard Higher Education provided VPN connection device using IPSec/3DES encryption technologies for secure communication between SunGard Higher Education’s network and Solano Community College District’s main campus network.
- “Logical Partitioning or LPAR” shall refer to the sharing of physical Server hardware resources between different logical partitions each running their own independent Operating System.
- “Normal Business Hours” are defined as 8:30 AM Pacific time to 5:00 PM Pacific time and exclude all SunGard Higher Education documented holidays.
- “Operating System” shall refer to the software application required to make available the Server resources to Solano Community College District’s Software.
- “Server” shall refer to a single physical hardware device which is required to operate Solano Community College District’s Software.
- “Term” shall mean and refer to the “Service Period” as defined in the Work Order to which the Statement of Work is attached.
- “Tier 1 Troubleshooting” shall be defined as that first level of support interaction which is required after an initial incident or problem request.
- “Tier 2 Troubleshooting” shall be defined as that support which is required after the following has been performed or determined:
  - Solano Community College District has performed typical and reasonable self-diagnostic and Tier 1 troubleshooting procedures;
  - Solano Community College District has opened a support ticket with the appropriate application vendor customer support center who has determined that the Application is functioning properly;
  - Application vendor has determined that the support request is not the result of user error or lack of proper user and Application interaction;
  - Application vendor has determined that the support request is not due to functional Application configuration settings.
- “UDC” shall refer to SunGard Higher Education Application software products licensed by Solano Community College District for installation and support under the Statement of Work.
- “Virtual Machine or VM” shall refer to the sharing of a physical Server hardware resource between different Virtual Machines each running their own independent Operating System.

- “VPN” shall refer to an encrypted, secure virtual private network pathway used for the purpose of remote connectivity.

**Lifeline Secure Service.** SunGard Higher Education will provide one Lifeline VPN connection device using IPSec/3DES encryption technologies for secure communication between SunGard Higher Education’s network and Solano Community College District’s System on its primary campus network. SunGard Higher Education shall make commercially reasonable efforts to secure the Solano Community College District’s Software environment and Solano Community College District’s data against unauthorized access.

- SunGard Higher Education’s Lifeline provides for secure access by SunGard Higher Education support teams in a consistent and predefined manner using VPN technology in order to quickly engage support.
- SunGard Higher Education’s Lifeline VPN access will be restricted to SunGard Higher Education personnel and will allow access only to Solano Community College District’s designated Applications supported under the Statement of Work, within Solano Community College District’s restricted space. This access path will be for the purpose of providing the services defined hereunder in support of Solano Community College District’s Software Applications installed within Solano Community College District’s own campus network.
- SunGard Higher Education will:
  - Provide necessary hardware to enable Lifeline solution;
  - Work with Solano Community College District staff to deploy Lifeline device to Solano Community College District’s network;
  - Work with Solano Community College District staff to define the specific Solano Community College District Equipment that are to be accessible for the support services per the Statement of Work;
  - Maintain hardware and device operating systems, patches, and upgrades including preliminary testing of patches and upgrades in a test environment before deployment to production environments;
  - Provide for user provisioning and de-provisioning centrally; and
  - Monitor on a 24x7x365 basis the Lifeline system for availability.
- Licenses & Ownership. Lifeline and its elements shall remain the property of SunGard Higher Education. Solano Community College District shall have no right, title or interest therein except as specified above. Solano Community College District shall keep the Lifeline Router (and other SunGard Higher Education-provided software to which Solano Community College District does not hold title) free and clear from all liens, including direct or indirect charge, encumbrance, security interest, legal process, tax-related claim or lien, or direct claim. Solano Community College District suggestions for new features or functionality of the Lifeline Service are the property of SunGard

Higher Education. Repairs made to the Lifeline are property of SunGard Higher Education.

- Solano Community College District Responsibilities. The Solano Community College District shall:
  - Permit to be installed the Lifeline VPN device which must be installed as specified by SunGard Higher Education;
  - Provide SunGard Higher Education with access to supported equipment as needed for configuration activities;
  - Allow required firewall configuration changes for Lifeline Router authentication and access; and
  - Provide access to appropriate network personnel and resources required for the configuration and installation of the Lifeline device.

**Information Security.** SunGard Higher Education shall make commercially reasonable efforts to secure the Solano Community College District's Software application environment and Solano Community College District's data against unauthorized access.

SunGard Higher Education will:

- Maintain, at Solano Community College District's request, Operating System based firewalls to protect Solano Community College District's Systems from unwanted and inappropriate access. Access through those firewalls may be set for only those services explicitly necessary for secure operation of and access to Solano Community College District's Application environment.
- Maintain a regular patch management practice, so that that newly released security related patches are applied to Solano Community College District's Systems within Solano Community College District's requested timeframes and maintenance windows.

Solano Community College District Responsibilities. The Solano Community College District shall:

- Agree that they will create, maintain, and enforce a Solano Community College District-specific information security policy which covers all aspects of the Solano Community College District's operations, to include at a minimum, user provisioning, acceptable-use, administrative, operational, and technical.
- Agree that they will share the Solano Community College District-specific information security policy in whole with SunGard Higher Education.
- Agree that they will provide for all appropriate roles, tasks, and job functions to support and administer the enforcement and execution of Solano Community College District-specific information security policies and requests.
- Understand that from time to time, software and hardware vendors may release Critical Patches for their solutions meant to resolve identified vulnerabilities. Solano Community College District must agree to not unreasonably delay application of software or hardware patches identified by SunGard Higher Education.
- Agree that they will provide SSL Digital Certificates to support the Internet facing services in support of Solano Community College District's Software Applications.
- Solano Community College District shall maintain adequate security controls to govern access to the Solano Community College District's System via the internet necessary for data privacy and confidentiality, data integrity, authorization, authentication and non-repudiation, and virus detection and eradication.

**Administration Services.** So long as the service level is not materially affected, SunGard Higher Education will use remote services to provide the Application Management Services described in this Section E.

**Operating System Administration.** SunGard Higher Education shall provide Operating System ("OS") Administration for the Operating System environments covered as defined herein.

As part of these Services, SunGard Higher Education will:

- Provide consultation with site staff on the initial hardware configuration at Solano Community College District's request.
- Install and configure the OS environments for systems covered under the Statement of Work.
- Perform local system level security administration for OS environments covered under the Statement of Work.
- Maintain exclusive access and control of "ROOT" level passwords to systems and devices under the Statement of Work.
- Test and install patches and updates made available from OS vendor for OS environments covered under the Statement of Work.
- Perform log review and analysis to determine the stability of OS environments covered under the Statement of Work.

- Perform capacity management functions for OS environments covered under the Statement of Work, including monitoring of capacity utilization.
- Provide for general assistance with various issues that arise on a day-to-day basis requiring system administration knowledge and experience.
- Provide Tier 2 troubleshooting and diagnostic support for systems covered under the Statement of Work.
- Troubleshoot and resolve operating system errors and failures either detected by site staff or via SunGard Higher Education deployed monitoring tools.
- Communicate and work with third-party vendors to resolve escalated issues as they arise.

Solano Community College District shall be responsible for:

- Maintaining active hardware maintenance agreements for all devices supported under the Statement of Work for the duration of the Service Period and name SunGard Higher Education as an authorized agent on these agreements.
- Maintaining active software maintenance agreements for all operating system environments supported under this Statement of Work for the duration of the Statement of Work and name SunGard Higher Education as an authorized agent on these agreements.

**Database and Application Administration.** SunGard Higher Education shall provide Database Administration (“DBA”) and Application Administration for the Databases and Application Homes and environments covered as defined herein. Services are provided remotely through staff and resources provided by SunGard Higher Education. Based on SunGard Higher Education’s experience with systems used in higher education, SunGard Higher Education’s application resource team will provide technical support and administration so that the Solano Community College District’s supported systems are operationally maintained.

As part of these Services, SunGard Higher Education will:

- Install and configure, as defined in Attachment 1, Database environments for vendor-specific systems covered under the Statement of Work.
- Install and configure, as defined in Attachment 1, baseline Application Home environments for vendor-specific systems covered under the Statement of Work.
- Upgrade and patch Database Application Homes, associated Databases, and Database Instances for vendor-specific systems covered under the Statement of Work.
- Upgrade and patch Application Homes and supported subsystems for vendor-specific systems covered under the Statement of Work.
- Use its standard practices upgrade methodology, which includes the application of upgrades and patches in testing environments prior to migration to work-in-progress or production environments, as requested by Solano Community College District and scheduled by SunGard Higher Education staff in coordination with onsite staff.



- Perform Database system level security administration for the Database environments covered under the Statement of Work.
- Perform Database and Application Home clones, system refreshes, or replications, for the supported environments covered under the Statement of Work when necessary to facilitate implementation or other testing activities based upon mutually agreed schedules not to exceed (2) requests per month. An automated cloning or refreshing process may be implemented using vendor-available technologies on a mutually agreed to basis if requested by the Solano Community College District.
- Maintain exclusive access and control of “DBA” privileged or super-user level passwords, to include those software Application accounts that require such access, to Databases, Database Instances, and Applications covered under the Statement of Work.
- Perform log review and analysis to determine the stability of the Databases and software application environments covered under the Statement of Work.
- Provide Tier 2 Troubleshooting and Diagnostic Support for the Databases, Database Instances, and Database Homes covered under the Statement of Work.
- Provide Tier 2 Troubleshooting and Diagnostic Support for the Applications, Application configurations, and Application Homes covered under the Statement of Work.
- Provide typical and reasonable assistance with various issues that arise on a day-to-day basis requiring Database and Application administration knowledge and experience for the Applications covered under the Statement of Work.
- SunGard Higher Education will perform monitoring, tuning, and adjusting of Database, Database Instance, and Application parameters and configurations based on the specific vendor’s recommendations, input from users, and response time sampling based on SunGard Higher Education standard practices for the Applications covered under the Statement of Work.
- Communicate with third-party vendors or other SunGard Higher Education business units to resolve escalated issues as they arise for the Applications covered under the Statement of Work.

The Solano Community College District shall be responsible for the following:

- Appoint or provide a user liaison that will coordinate and perform the Application Security Administration functions and duties as requested by the Solano Community College District for the Applications covered under the Statement of Work.
- Appoint or provide a user liaison that will coordinate and perform the Application Configuration Administration functions and duties as requested by the Solano Community College District for the Applications covered under the Statement of Work.
- Appoint or provide a single named user liaison that will perform the Application Patch Coordination role and inform SunGard Higher Education which Application patches and upgrades are requested, to which Database and Application Instances they will be applied, and the dates they are requested for the Applications covered under the Statement of Work.

- Provide for programming, analyst, and user liaisons to research, review, develop and/or correct custom Application code, data level problems, or data integrity issues for the Applications covered under the Statement of Work; to include:
- Programming and Scripting – Programming or scripting which directly or indirectly reads or manipulates Solano Community College District’s data or modifies Solano Community College District’s Software Applications. This includes modifications to the delivered Application including vendor-provided batch and nightly processing and data integrity scripts, as well as integrations with other Applications.
- Report Writing – Report writing using supported or unsupported reporting tools or through the native available Database or Applications languages.
- Data research, analysis and troubleshooting – Troubleshooting of identified issues should be completed by either the Solano Community College District’s technical resource or other Solano Community College District assigned technical resources.
- Content Management – Creating, modifying, updating, publishing, and troubleshooting of Web, Portal, and Application Content for Solano Community College District’s Systems supported under the Statement of Work.
- Data manipulation – Programming or scripting which directly or indirectly manipulates Solano Community College District’s data which resides in Solano Community College District’s Databases. SunGard Higher Education will not manipulate Solano Community College District data using direct inserts, updates, or deletes, unless through an authorized vendor released upgrade or patch scripts.
- Documentation Creation – Application functional or technical training, usage and configuration documentation pertaining to the supported Applications or underlying technologies.
- Custom Development – Developing, modifying, or providing ongoing software maintenance for integrations, add-ons, bolt-ons, or other customizations to or from the supported Applications.
- Provide functional, technical, programming and user liaisons to provide Tier 1 or first level troubleshooting of Application issues and to communicate appropriately with the software vendor, including opening support contacts with the software vendor. Once the support contact has determined that further administration assistance or tasks are needed to be performed, SunGard Higher Education will engage to perform the requested task or process on the Solano Community College District’s behalf.
- Provide functional, technical or other appropriate user liaison that will perform the function of the job and job stream management role, if applicable. This role will be responsible for creating, maintaining, and troubleshooting Solano Community College District’s Systems Application jobs and job streams submitted either through the Application or in a supported scheduling system.
- Appointing or providing for any other Applications, roles, or job functions not supported under the Statement of Work as defined herein the necessary resources that will be responsible for all user functions, management and other Application required roles.

- Communicating any applicable Database or Application software standards and procedures for access to systems supported by this Statement of Work to participating students, faculty, staff and alumni.
- Providing all end user desktop and peripheral support for the Applications covered under the Statement of Work.

**Backups.** SunGard Higher Education will backup Solano Community College District's Systems supported under this Statement of Work in accordance with the following guidelines:

As part of these Services, SunGard Higher Education will:

- Install, configure, and validate Solano Community College District's enterprise-wide backup software agents as requested by the Solano Community College District for the Solano Community College District's Equipment supported under the Statement of Work.
- Install, configure, validate, and perform near-line (to disk) routine Database, and Application Data Store backup and recovery procedures as requested by the Solano Community College District for the Solano Community College District's Equipment supported under the Statement of Work.
- Coordinate with the Solano Community College District designated onsite backup and/or network administrator to facilitate timely backups and restores of the Solano Community College District's Applications and supported systems, so that the files and data resident on Solano Community College District's file system remains intact.
- Provide for backup provisions which may include the use of full, incremental, differential, exports, hot and cold Database backups, and various other forms of backups utilizing industry standard utilities and methods to promote effective Database recovery in the event of unplanned system failures.
- Perform emergency Database backup and recovery procedures such as database exports and various one-off Database restores. Emergency Database backups will be provided for as requested by the Solano Community College District.
- Promote integrity and recovery of the Solano Community College District's Systems supported under the Statement of Work by establishing appropriate backup procedures and regularly monitoring them to validate reliability.
- Work with the Solano Community College District to facilitate restore tests of system objects selected at random from server environments covered under the Statement of Work to validate backup practices.
- Work with the Solano Community College District to facilitate an annual restore of the production Database into a non-production environment to validate backup practices.
- Not be responsible for the accuracy of data in Solano Community College District's Databases, but shall only be responsible to appropriately back up the data in Solano Community College District's Databases, and Application data stores supported under the Statement of Work.

The Solano Community College District shall be responsible for the following:

- Install, configure, and manage Solano Community College District’s enterprise-wide backup software systems.
- Acquire necessary hardware and software required to perform daily incremental or differential and weekly full system-wide backups of supported Solano Community College District Systems.
- Maintain active support and maintenance agreements with all hardware and software vendors for backup environment and name SunGard Higher Education as an authorized agent.
- Provide the necessary infrastructure, resources and personnel required for the setup, configuration, implementation, monitoring, and troubleshooting of file and system level or hardware backups.
- Provide a technical staff resource that will perform onsite backup/restore support activities as requested from time to time by SunGard Higher Education Application Management Services.

**Systems Monitoring.** SunGard Higher Education maintains a multi-layered monitoring system to provide information about the Solano Community College District’s Systems and Application environment supported by SunGard Higher Education.

As part of these Services, SunGard Higher Education will:

- Monitor Solano Community College District’s externally facing Application components and environments for availability for Solano Community College District’s Systems supported under this Statement of Work.
- Begin appropriate remediation efforts when monitored Applications trigger alerts to SunGard Higher Education staff 24 x 7 x 365 when systems are unavailable or operating thresholds are reached.
- Monitor server hardware for Application and service availability.

The Solano Community College District shall be responsible to:

- Permit to be opened the site based firewall for a highly restricted set of access rules (single-port/IP) to allow the SunGard Higher Education based remote services monitoring tools access to the Solano Community College District’s Systems supported under the Statement of Work.

**General Conditions to Application Management Services.** In order for SunGard Higher Education to provide the Application Management Services, Solano Community College District must:

- Provide a Solano Community College District resource that will perform onsite “smart-hands” support activities as requested from time to time by SunGard Higher Education for such activities as system power cycles, inserting or changing installation media, and other reasonable tasks to allow SunGard Higher Education to provide its services supported under the Statement of Work.

## Project Charter and Scope Statement

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- Grant to SunGard Higher Education Application Management Services staff full, unrestricted, exclusive, administrator access to Solano Community College District's Systems supported under the Statement of Work.
- Communicate applicable hardware and Application software standards and procedures for usage of and access to Solano Community College District's Systems supported under the Statement of Work to participating students, faculty, staff and alumni.
- Provide timely notification (a minimum of 14 academic days) of upcoming events that will require Operating System, Database or Application system administration action. Large upgrade and installation projects and projects requiring end user testing and verification will require longer notification lead times, and SunGard Higher Education shall not be responsible for delays or failure to meet Solano Community College District's expectations if adequate lead time is not provided.
- Be responsible for consulting with SunGard Higher Education for projects to establish requisite lead times.
- Agree that they will assign an 8-hour weekly maintenance interval, during which time requested patches and other updates will be applied to Solano Community College District's Systems.
- Agree to schedules for Solano Community College District's Systems maintenance and known production requests for hardware and software supported under the Statement of Work.
- Provide end user desktop and peripheral support for Solano Community College District's Systems and Applications supported under the Statement of Work.
- Not require the installation of software on Solano Community College District's Systems supported hereunder which software is not recommended by SunGard Higher Education and not related to the provision of the Application Management Services provided by SunGard Higher Education.
- Not change system, Application initialization, or other administrative settings after being set by SunGard Higher Education. If changes made by the Solano Community College District result in additional labor expenses to SunGard Higher Education, Solano Community College District agrees to pay SunGard Higher Education for applicable additional services at SunGard Higher Education's then-current standard hourly services rates plus incurred travel and living costs.

## Project Charter and Scope Statement

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- Permit to be installed by SunGard Higher Education on Solano Community College District's Systems supported hereunder, the Applications and other necessary components as reasonably determined by SunGard Higher Education necessary to allow SunGard Higher Education to perform its services hereunder, or as otherwise agreed to in the Statement of Work.
- Acquire necessary hardware and/or software as required by state or federal law to keep Solano Community College District legal with regard to licensed software or hardware used by Solano Community College District and Solano Community College District's staff and as used by SunGard Higher Education for the exclusive purpose of supporting Solano Community College District under the Statement of Work defined herein.
- Pay for hardware and Application software and upgrades that are necessary to operate Solano Community College District's Systems to remain compliant with software or hardware vendors' support.
- Permit and schedule required downtime for Solano Community College District's Software and underlying systems for upgrades and maintenance. Solano Community College District shall not require SunGard Higher Education to perform systems maintenance to the production or non-production systems while end users, staff, faculty, or other users are using the supported systems.
- Name SunGard Higher Education as an authorized contact to act on Solano Community College District's behalf for hardware and Application software vendor maintenance contracts for the Solano Community College District's Systems, Equipment and Applications as listed in Attachment 1 attached hereto.
- Provide testing and/or non-production environments for the administration of the supported Solano Community College District Systems pursuant to the Statement of Work.
- Provide additional hardware required for the management and administration of the systems and Applications as necessary pursuant to the Statement of Work.
- Provide access to available hardware and software support channels by means of websites, login credentials, or otherwise appropriate to research or troubleshoot identified issues, and provide SunGard Higher Education with a Solano Community College District ".edu" specific email address upon request.
- Not require software upgrades and patches to be applied more than two (2) times for given software Application Home, Database Home, Database Instance, Database, Operating System or Server. Reasonable attempts will be

made to accommodate in-progress activities, including implementation projects.

- Not require Operating System, Database, and Application patches which are not directly related to identified security or Application vulnerabilities to be applied until discussions between SunGard Higher Education and Solano Community College District and that have determined to affect the Solano Community College District's business needs. Upgrades and patches which are not required for the Solano Community College District's typical and reasonable business needs will not be applied. Typically patches will be applied with "point releases" which contain a rollup of previously released patches.
- Provide or bear the cost of customizations, code enhancements and system changes required to operate in the Solano Community College District's environment to the extent not provided through the Statement of Work.
- Provide an out-of-band (alternate) method of Server access (terminal server or KVM).
- Appoint a designated site liaison with whom the SunGard services team will primarily communicate.
- Provide the necessary support resources that will be responsible for user functions, management and other Application required roles, for other Applications, roles, or job functions not explicitly defined herein.

**Communication Procedures.** Processes for communication between Solano Community College District and SunGard Higher Education support services.

- Onsite Solano Community College District/Staff communication to SunGard Higher Education support services staff.
  - All communications related to general service requests and problems should be directed to the SunGard Higher Education Support Center.
  - All communications related to emergency service requests should be directed to the SunGard Higher Education Support Center via telephone, which number will be provided upon Application Management Services engagement.
  - Escalation of any unresolved issues related to problems experienced with the SunGard Higher Education service solution should be directed to the SunGard Higher Education Account Manager.
- SunGard Higher Education Staff Communication to Onsite Solano Community College District/Staff.

- Status reports and major/emergency issues reports will be directed to the designated onsite liaison (typically a Director of Administrative Computing).
  - For all Solano Community College District initiated communications regarding general service requests, Application System support, or incidents, SunGard Higher Education will assign service support tickets to the appropriate services technician who will then contact the Solano Community College District point of contact via SunGard's service management system, email, or telephone as appropriate.
  - For all SunGard initiated communications regarding Enterprise or Network Operations Center notifications and alerts, SunGard will provide outbound communications via SunGard's service management system, email, or telephone as appropriate and as described in the Solano Community College District's site specific operational support manual.
  - Solano Community College District will provide appropriate contact information to SunGard Higher Education and inform SunGard Higher Education immediately upon changes to Customer contacts and contact medium.
- Conference calls and planning sessions:
    - SunGard Higher Education will participate in periodic planning sessions and conference calls not to exceed one (1), one (1) hour sessions per week.

**24x7 Central Help Desk for Emergency Support Services.** The Central Help Desk is the second level of contact for emergency-only support calls made to SunGard Higher Education to engage Application Management Services support and/or to contact service delivery contacts as defined in the Statement of Work.

- SunGard Higher Education will:
  - Provide a US based toll-free phone number.
  - Provide a point of contact available 24 hours a day, 7 days a week, 52 weeks a year, including site holidays for escalation of Application Management Services issues.
- Limitations:
  - The Emergency Central Help Desk does not provide end-user support for the Applications supported defined in the Statement of Work.
  - The Emergency Central Help Desk does not replace or supplement the SunGard Higher Education Application Customer Support Center or other Application vendor Customer Support Center.

**F. Banner Advancement Standard Implementation Services.**



SunGard Higher Education will provide the following training and consulting services to Solano Community College District in support of Solano Community College District's implementation of the baseline Banner Advancement Baseline Component System ("Banner Advancement System"). A SunGard Higher Education manager will be responsible for coordinating the resources and schedules for the services.

SunGard Higher Education will provide product-related technical training to the Solano Community College District-assigned technical staff in the basic architecture and overview of the major tables, reports, and processes included in each major module of the Banner Advancement System; overview training in the Banner directory structure; and training in the primary database object creation scripts for each of the Banner Advancement System modules. Training will also include discussion of preliminary data conversion requirements. This session will generally include technical training in the following areas. The specific areas of training to be provided to Solano Community College District will be determined as part of the preliminary Project Planning activities.

- Review of data dictionary and referential integrity
- Examination of Banner Advancement System modules, including major forms, tables, reports, processes, directory structures, and contents
- Review system configuration: database server, Oracle, Banner
  - Review product owners, general person tables, data dictionaries
  - Naming standards, validation tables, constraints
  - Advancement/Development System
  - Key advancement tables by module
- Constituent
- Organization
- Membership
- Prospect Management
- Designation
- Solicitation
- Campaign Processing
- Pledge Processing
- Gift/Pledge Payment Processing
  - Advancement database schematics and process flow diagrams
  - Procedures, reports, processes, scripts
  - Views and temporary tables
  - Advancement interfaces to other Banner Baseline Component System(s)

SunGard Higher Education will provide a system and implementation overview in which the general plans and expectations for both the implementation team and for the assigned SunGard Higher Education resources will be discussed and guidelines for the implementation process will be established. In particular, the following topics will be covered in lecture format and hands-on exercises:

- Overview of the implementation process
- Review of the SunGard Higher Education organization

- Review of consultant/Solano Community College District responsibilities
- Introduction to the implications of rule and validation forms
- Overview of the concepts and functionality of each Banner Advancement System Module
- Discussion of how to relate current policies and procedures to the manner in which the Banner Advancement System works
- Discussion on the implications of shared tables/forms if other Banner systems have been or will be implemented
- Oracle/Banner terminology
- The definition, utilization, and maintenance of screens (application, query, validation, and rule forms)
- The use of the query function, on-line menus, and help features
- Navigation of the Banner Advancement System
- Discussion of shared data and the importance of institution wide policies and procedures

SunGard Higher Education will provide system education training and process consulting support on the features, functions, processing rules, operating cycles, and set-up requirements of the Banner Advancement System, anticipated to include training and process consulting support in the following areas. The specific areas and methods of training and process consulting support to be provided to Solano Community College District will be determined as part of the preliminary Project Planning activities.

### **Constituent and Organization Modules**

- Discussion and demonstration of the interface between the Banner Student System and Banner Advancement System
- Discussion and demonstration of a common matching process within the Banner Advancement System, which establishes rules to prevent multiple records from being created for one individual
- Creating records with multiple names and ID numbers
- Discussion and demonstration of house-holding process, which allows the user to use one form to manage the addresses of multiple Banner records living in the same household
- Maintenance of biographic and demographic information for constituents, including:
  - Addresses, phone numbers, and general biographic information
  - Academic history
  - Relationship data
  - Employment information
  - Activities, and mailing, exclusion, and other special codes
  - Comments
  - Contacts
- Maintenance of demographic information for organizations, including:
  - Addresses, phone numbers, and general business information
  - Organization contact personnel

- Matching gift rules
- Activities and mailing, exclusion, and other special codes

### **Campaign and Designation Modules**

- Discussion of various campaign structures and methods for tracking campaign information in the Banner Advancement System
- Creation and maintenance of campaigns
- Association of designations and solicitation data with campaigns
- Definition of Banner Advancement System designations
- Creation and maintenance of designations
- Link of Banner Advancement Development designations to Banner Advancement Funds – providing stewardship information
- Association of designations to Financial Aid data and recipients
- Designation accounting distribution and link to the Banner Finance System

### **Gift, Payment, and Pledge Processing**

- Entry and maintenance of pledge information, including:
  - Conditional pledges and FASB compliance
  - Associating pledges with appropriate campaigns and designations
  - Pledges made by third parties
  - Tracking solicitation information for pledges
  - Tracking payroll deduction pledges via the interface with the Banner Human Resources System
  - Feeding pledge information to the Banner Finance System
  - Adjustment of pledge information
- Entry and maintenance of gift and payment information, including:
  - Associating gifts and payments with appropriate campaigns and designations
  - Payments made by third parties
  - Tracking solicitation information for gifts and payments
  - Associating payments with appropriate pledges
  - Tracking payroll deduction payments via the interface with the Banner Human Resources System
  - Feeding gift and payment information to the Banner Finance System
  - Adjustment of gift and payment information
- Entry and maintenance of matching gift, including:
  - Establishing matching gift companies and linking employees to these companies
  - Establishing institutional matching gift rules
  - Maintenance of corporate matching gift rules
  - Running the Banner Advancement System matching gift reports and processes
  - Manually creating anticipated and expected matching gifts

- Entering matching gifts received from companies
- Entering matching gifts as third party payments
- Entry and maintenance of data to support the completion of the Voluntary Support of Education survey.

### **Gift Societies and Acknowledgments**

- Discussion of institutional policies regarding gift societies and recognition clubs
- Banner qualifying rules for gift societies
- Maintenance of society names for donors
- Discussion of institutional policies regarding acknowledgments and receipts for donors
- Creation and maintenance of the Banner Advancement System qualifying rules for gift and pledge acknowledgments and receipts
- Establishment of appropriate letters using the Banner Letter Generation Module

### **Solicitor Organizations (Staff and Volunteer Organizations)**

- Discussion of institutional procedures for tracking solicitor and volunteer organizations
- Discussion and demonstration of various methods for tracking solicitor information in the Banner Advancement System
- Creation and maintenance of solicitor organization structures
- Application of solicitor organizations to campaigns, gifts, payments and pledges

### **Prospect Management**

- Discussion of institutional policies and procedures for tracking prospects and prospect information.
- Creation and maintenance of prospect information, including:
  - General prospect information
  - Research data
  - Proposals and projects
  - Contacts, call reports
  - Strategic plans

### **Membership**

- Discussion of institutional policies and procedures for tracking memberships and membership programs
- Creation and maintenance of membership programs and interests
- Creation and maintenance of membership qualifying rules
- Entry and adjustment of membership dues

### **Events Management**

- Creation and maintenance of events and functions
- Scheduling functions and rooms
- Tracking invitees, attendees and participants
- Recording task assignments for an event or function

### **Population Selection, Letter Generation, Job Submission**

- Discussion and overview of the standard reports and processes that are part of Banner Advancement Development
- Submission of reports and processes using Banner Job Submission
- Definition of the Banner Advancement System population selections and a discussion of the various ways population selections can be used
- Creation of population selections, manually or via rules
- Overview of the Banner Advancement System letter generation process
- Creation of letters, including all components of a letter such as variables, objects and paragraphs
- Extraction of information from the Banner Advancement System and merging that information into a word processing document

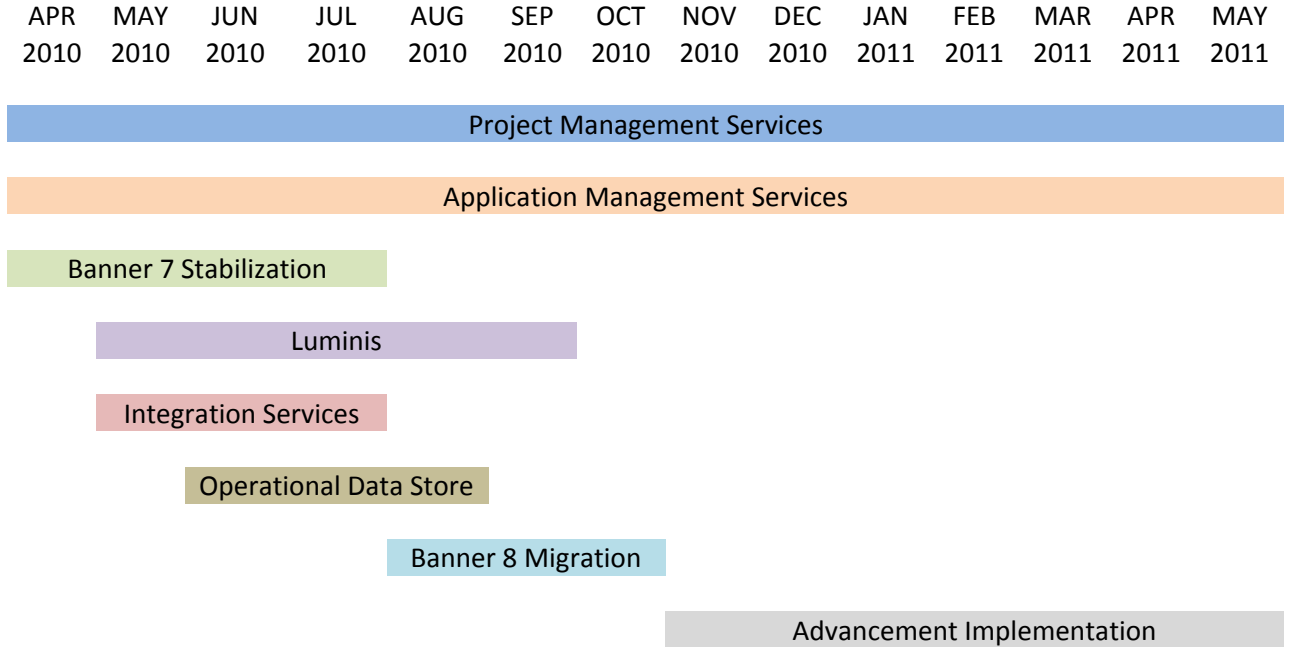
### **Advancement Self-Service**

- Establishing appropriate rules and codes in Banner Advancement System to support the self-service functionality
- Establishing appropriate rules and codes in WebTailor to support Banner Advancement Self-Service
- Navigation and functionality contained in the Banner Advancement Self-Service product available for constituents to view and update
- Navigation and functionality contained in the Banner Advancement Self-Service product for staff members to view and update
- Assistance in data mapping for conversion purposes
- Assistance in data conversion strategy and planning
- Go-live support
- Remote solution validation support

SunGard Higher Education will provide the following in conjunction with the Banner Advancement Standard Implementation Services described above:

- Training materials, as appropriate and available, in the form of workbooks, presentations, and scenario exercises.
- Training, consulting, or session agendas, as appropriate, generally to be provide in advance of each SunGard Higher Education-led session.
- Trip report, provided after the conclusion of each SunGard Higher Education-led training or consulting session, summarizing the objectives and accomplishments of the session, relevant issues to be addressed, and tasks to be completed.

## 5 Preliminary Timeline



## 6 Project Milestones, Deliverables and Approval Requirements

<b><u>Initiation Phase</u></b>			
This Phase will ensure all contractual obligations are understood and approved by the Project Team. It ensures the project is appropriately started and initially planned to manage expectations and to ensure successful delivery of all contractual obligations.			
<b><u>Initiation Phase</u></b>	<b><u>Initiation Phase Milestone Description and Deliverables</u></b>	<b><u>Initiation Phase Deliverables/ Milestones Due Dates</u></b>	<b><u>Responsibility</u></b>
Contract Approval	SGHE and SCC approve contract for work to be completed: <ul style="list-style-type: none"> <li>• Contract</li> <li>• Cost Model</li> <li>• Statement of Work (SOW)</li> </ul>	03/31/2010	SGHE Sales, Project Management Services, and Practice Leaders
Initiate Project	After contract approval, the Project Team will develop the following: <ul style="list-style-type: none"> <li>• Project Charter</li> <li>• Integrated Change Control Process</li> <li>• Resource Information Sheet</li> </ul>	04/23/2010	Project Team
Complete Project Scope Statement	Project Team will develop the Project Scope Statement which outlines, in more detail, the products and services included in the project. This document will be built preliminarily by the SGHE Project Manager and will be reviewed with the project Team. <ul style="list-style-type: none"> <li>• Finalize Project Scope Statement</li> </ul>	05/12/2010	Project Team
<b><u>Initiation Phase Approval Requirements:</u></b>			
The initiation phase will be completed when: <ul style="list-style-type: none"> <li>• Project Deliverables from the phase are reviewed and approved by all project stakeholders—both SGHE and SCC.</li> </ul>			

## Project Charter and Scope Statement

<b><u>Planning Phase</u></b>			
The purpose of the Project Planning Phase is to continue building out the project plan based on detailed and validated requirements that enable the project team to effectively manage the project and ensure successful delivery of the contract. The focus is to complete and finalize the Project Management Plan, Create the Project Schedule and Budget, Identify Risks, and begin execution of the project status reporting.			
<b><u>Planning Phase Processes:</u></b>	<b><u>Planning Phase Milestone Description and Deliverables</u></b>	<b><u>Planning Phase Deliverables/ Milestones Due Dates</u></b>	<b><u>Responsibility</u></b>
Complete Project Management Plan	<p>The Project Management Plan will describe how SGHE and SCC will implement the project.</p> <ul style="list-style-type: none"> <li>• Project Management Plan to include:               <ul style="list-style-type: none"> <li>○ Scope Management Plan</li> <li>○ Integrated Change Control</li> <li>○ Communication Plan</li> <li>○ Risk Management Plan</li> </ul> </li> </ul>	05/12/2010	SGHE Project Manager
Develop Project Schedule	<p>The Project Schedule will begin with the Work Breakdown Structure, then the actual milestones and tasks to be completed by the Project Team—both SGHE and SCC tasks:</p> <ul style="list-style-type: none"> <li>• Project Schedule</li> </ul>	05/12/2010	Project Team
Develop Project Budget	<p>The Project Budget Plan will include the forecasted resources, hourly or monthly rate based on the number of hours forecasted by month. This will include SGHE resources only.</p> <ul style="list-style-type: none"> <li>• Project Budget Plan</li> </ul>	05/31/2010	SGHE Project Manager and Account Manager
Develop Risk Identification	<p>The Project Team will complete a list of known project risks with documented risk response plan for each. This list will be updated, maintained, and used to control project risks proactively.</p> <ul style="list-style-type: none"> <li>• Project Risk Register</li> <li>• Project Risk Mitigation Plan</li> </ul>	05/31/2010	Project Team
<b><u>Planning Phase Approval Requirements:</u></b>			
The planning phase will be considered complete when all deliverables are reviewed and approved by SCC			



## Project Charter and Scope Statement

### **Implementation Phase**

The purpose of the Project Implementation Phase is to provide adequate visibility into the actual progress of the project so that management can take effective actions when the project's performance deviates significantly from what was planned.

<b><u>Implementation Phase</u></b>	<b><u>Implementation Phase Milestone Description and Deliverables</u></b>	<b><u>Implementation Phase Deliverable Due Dates</u></b>	<b><u>Responsibility</u></b>
Performance Reporting	Monthly Status Reports will be showing the status of: <ul style="list-style-type: none"> <li>• Project Schedule</li> <li>• Project Budget</li> <li>• Risk Mitigation/Management</li> <li>• Project Scope</li> <li>• Integrated Change Control</li> </ul>	Status Reports presented at regularly scheduled project team and executive sponsor meetings as per the Communication Plan.	SGHE Project Manager with input from the Project Team.
<b><u>GO LIVE Milestones</u></b>			
	Luminis (Portal)		
	Start Analysis & Assessment	05/03/10	
	Renovated Portal Go-Live	10/01/10	
	Banner 7 Stabilized	08/01/10	
	Banner 8 Go-Live	11/01/10	
	Banner Advancement Go -Live	04/18/11	
<h3><b><u>Implementation Phase Approval Requirements</u></b></h3> <p>The Implementation Phase will be considered complete when:</p> <ul style="list-style-type: none"> <li>○ SCC signs a Client Acceptance Letter after each Go Live milestone</li> <li>○ The application is free of operational errors</li> </ul>			

## Project Charter and Scope Statement

<b><u>Achievement Phase</u></b>			
The purpose of the Project Achievement Phase is to ensure the project team successfully delivered to contract and to ensure expectations were met. The project is properly closed down and lessons learned are reused from project to increase productivity.			
<b><u>Achievement Phase Processes:</u></b>	<b><u>Achievement Phase Milestone Description and Deliverables</u></b>	<b><u>Implementation Phase Deliverable Due Dates</u></b>	<b><u>Responsibility</u></b>
Ensure delivery to contract	At the completion of each module into Production, SGHE requests that SCC accepts the module through the approval of a Client Letter of Acceptance: <ul style="list-style-type: none"> <li>Client Letter of Acceptance</li> </ul>	Occurs after all modules are implemented into production and error free of product operational issues	SCC
Transition new modules to SGHE Operational Support	For any new maintenance agreements with SGHE for the continued management and operations of the product, SGHE will transition the modules to the SGHE operations teams. <ul style="list-style-type: none"> <li>Transition Plan</li> </ul>	Occurs at which time the SCC's maintenance agreement begins per the contract language.	Project Team
Document Lessons Learned	At the conclusion of the project, the project teams from both SGHE and SCC will review the project and document lessons learned. <ul style="list-style-type: none"> <li>Lessons Learned Document</li> </ul>	Occurs at the end of the projects and is held collaboratively with SCC and SGHE project team members.	Project Team
Conduct client satisfaction survey	SGHE will request SCC complete a Client Satisfaction Survey in order to identify needs for improvement from SGHE and SCC referencability. <ul style="list-style-type: none"> <li>Completed Client Satisfaction Survey</li> </ul>	Occurs at the end of the projects and is held collaboratively with SCC and SGHE project team members.	SCC
<b><u>Achievement Phase Approval Requirements</u></b>			
The Achievement Phase will considered complete when <ul style="list-style-type: none"> <li>SCC signs the Letter of Acceptance.</li> <li>SCC is seamlessly transitioned to the SGHE Help Desk for future product support</li> </ul>			

## **7 Project constraints, assumptions, dependencies**

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Constraints and assumptions are items being presumed and are generally outside the control of the project. The following lists the project's constraints and assumptions as deemed as true and accurate at this stage of the project. These will be updated periodically as the project progresses.

### **7.1 Constraints**

Scope – the scope of this project is defined in this document and cannot be changed without going through the Integrated Change Control Process.

Cost – the services provided by SunGard Higher Education are part of a fixed cost contract as defined in the Professional Services Work Order adopted by the Solano Community College District Governing Board and signed by President Jowel Laguerre on March 31, 2010.

Schedule – the project is to be completed within the schedule timeframe. Critical milestones are clearly identified and are to be met.

Quality – a well defined project scope, cost control, and compliance to the schedule will result in a high quality outcome. Quality is not to be compromised.

### **7.2 Assumptions**

This success of this project is based upon the following assumptions:

#### **7.2.1 – Compliance**

- SunGard Higher Education and the Solano Community College District will adhere to all elements included in the Professional Services Work Order adopted by the Solano Community College District Governing Board and signed by President Jowel Laguerre on March 31, 2010.

#### **7.2.2 – Resource Allocation**

- This project will take priority over other job responsibilities for the Banner Steering Committee, Project Team, and all Work Team members. An established schedule will be strictly adhered to. Staff will make the Banner project their first priority. If a key project member should leave, SCC must replace him or her expeditiously to ensure the integrity of the project.
- SCC is subject to external pressures, e.g., from regulatory bodies, auditors, W2's, FAM regulations, student registration, etc. A project timeline (with blackout dates) will be established that will account for these external events, as well as the College's observance of holidays.

### 7.2.3 – Project Criteria

- The project’s demands on staff must always be recognized by the College’s administration.
- The project work will be performed in an open and participatory manner.
- The project will conform to all applicable federal, state, and local government regulations.
- The project does not provide for modifications to the Banner baseline software. Every effort will be made to conform SCC’s business practices with the functionality of the software components. SCC recognizes that modifying the Banner baseline software incurs a heavy maintenance burden, and should be avoided to the extent possible.
- If a conflict is discovered between what is needed for project success and existing College policy, the Project Team will make a recommendation to the Steering Committee which will advise on how to remedy the conflict.
- Necessary resources (e.g., facilities, people, supplies) will be identified and provided to ensure project success. Where possible, staff will make an effort to shift some everyday responsibilities to other resources in order to get time to work on this project.
- During the project, members of the project team should expect to spend time between consulting visits working on the project to complete assigned tasks.
- There will be inevitable obstacles in the implementation that may affect end-users and students, in spite of best good faith efforts.

### 7.2.4 – System Integration

- Being a relational database, Banner is an integrated system. The modules share information. This feature eliminates duplication of data and improves accuracy and efficiency because the data is entered into the system only once. Because of this, all information in Banner is considered “College Information” and is not owned by one specific department. Departments may be responsible to enter and maintain certain data, but all departments share the data as needed.
- Independent departmental shadow systems will be examined with the intent to utilize Banner to fulfill their current purpose.

### 7.2.5 – Decision Making

- Issue resolution will occur in a timely manner in order to maintain the project timeline.
- Decision-making must and will be delegated to the lowest level possible. It is expected that mistakes will be made, and these will be accepted as part of the learning process.
- Decisions will be documented as part of meeting minutes and communicated as defined in the Communication Plan.

### **7.2.5 – Communication**

- Communication of all items relating to the project will follow the Communication Plan.

## **7.3 Dependencies**

### **7.2.5 – Dependent Projects**

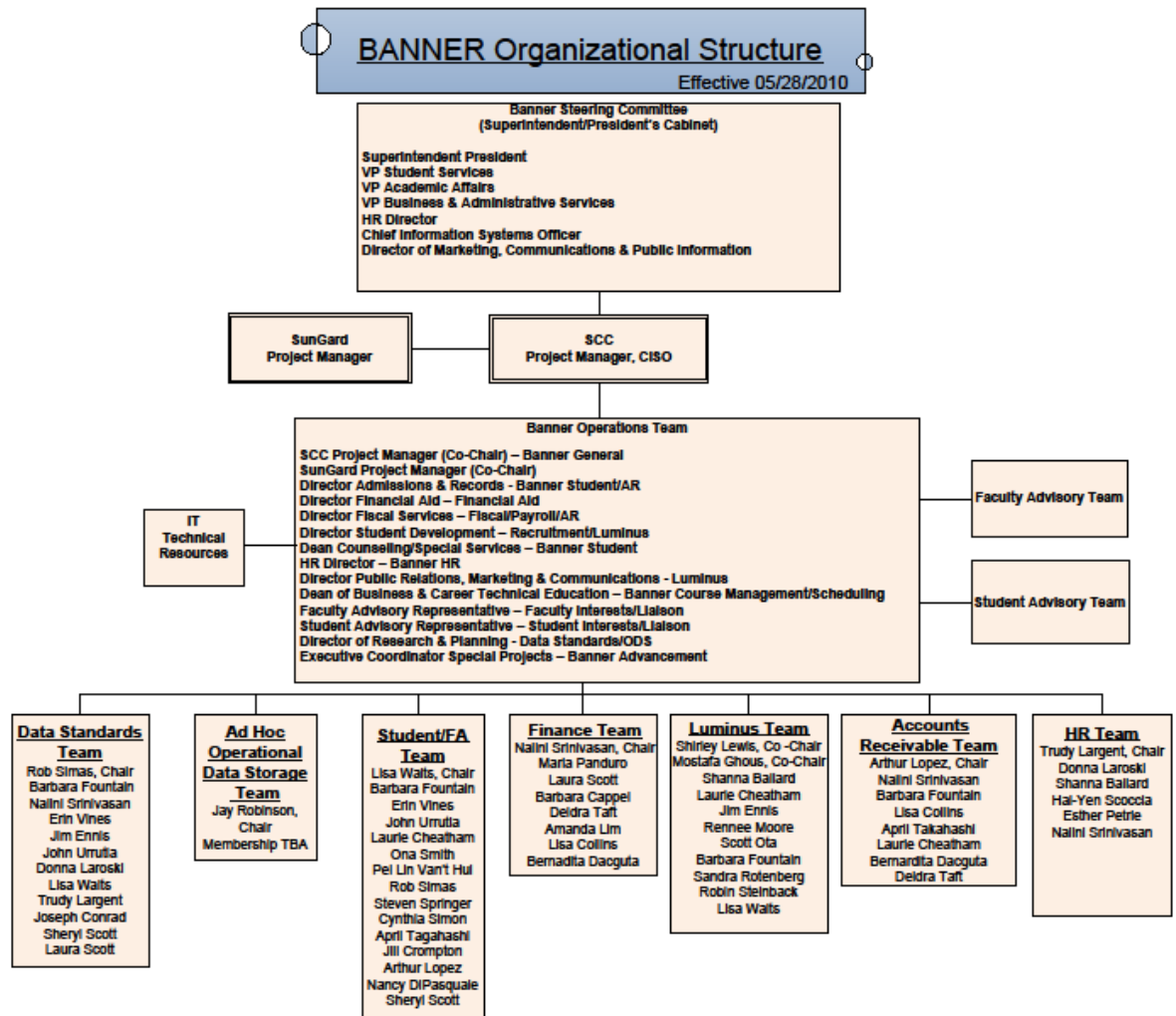
- There are no projects pending completion that affect the success of this project.

### **7.2.5 – Dependent Resources**

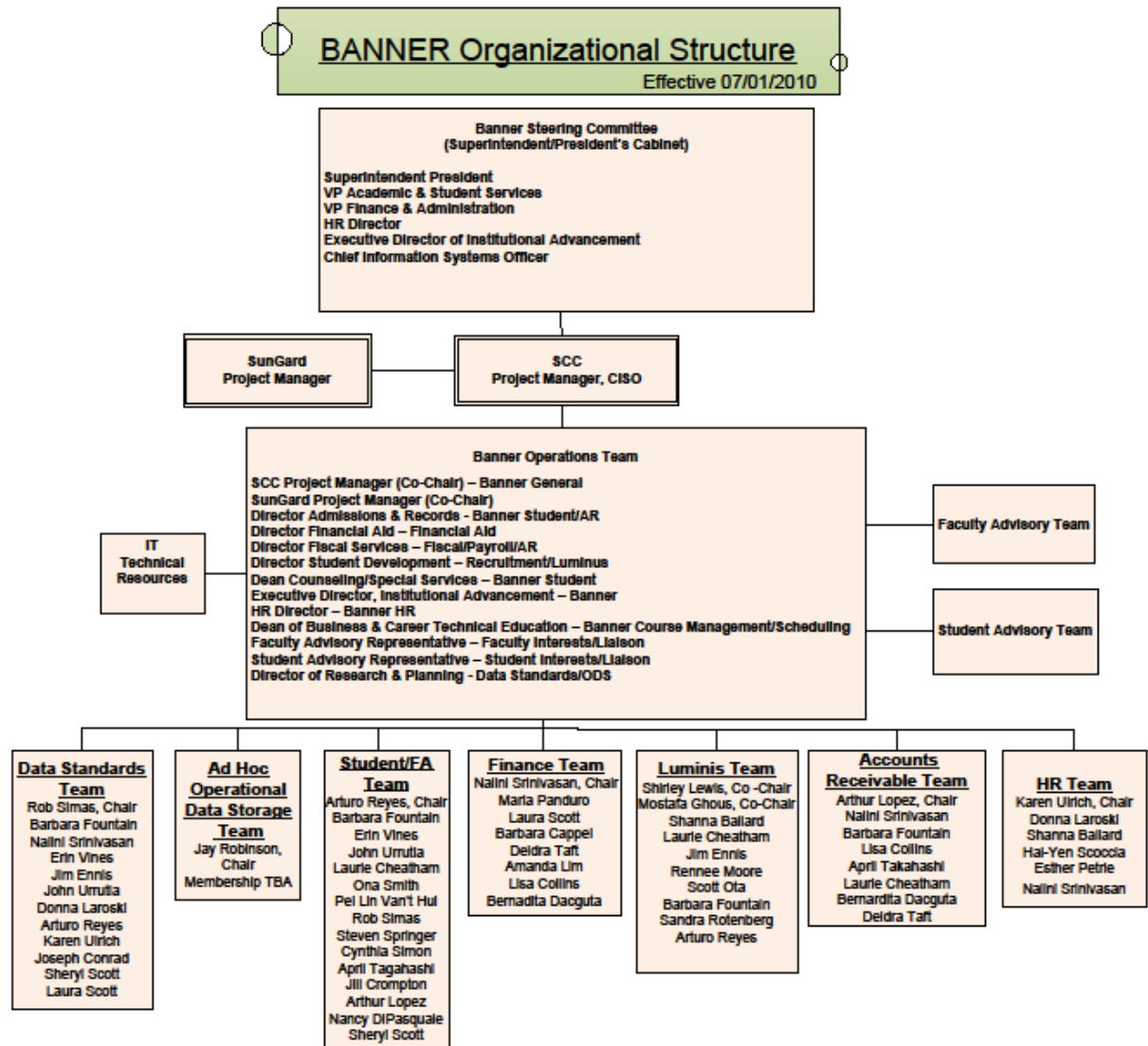
- The success of this project is heavily dependent upon members of the Project Team and Work Teams participating fully in all training, consulting, planning, and follow-up sessions.
- Members of the Project Team and Work Teams must not be called away from training, consulting, planning, and follow-up sessions and will not bring other work or allow themselves to be distracted from the subject matter.

## 8 Project Organization

### 8.1 Project Organization Chart



# Project Charter and Scope Statement



**8.2 Roles and Responsibilities**

Individuals, Groups	Name (s)	
Project Sponsor	Dr. Jowel Laguerre	
<b>Responsibilities:</b>		
<p>The Project Sponsor will work with SunGard and third parties to expedite and resolve issues that require the highest executive level involvement, such as contract amendments. He will be a project champion and promote the visibility and credibility of the project.</p> <p>The Project Sponsor will:</p> <ul style="list-style-type: none"> <li>▪ Ensure the project’s strategic significance</li> <li>▪ Provide approval and funding for the project</li> <li>▪ Promote support of key stakeholders</li> <li>▪ Support broad authority for the project managers and project team</li> <li>▪ Resolve conflicts that cannot be resolved by the Steering Committee</li> <li>▪ Encourage recognition of participants</li> </ul>		
Individuals, Groups	Name (s)	
Steering Committee	Dr. Jowel Laguerre Dr. Robin Steinback Lisa Waits Carey Roth Trudy Largent Ross Beck James Ennis Mike Schmidt	
<b>Responsibilities:</b>		
<p>The Steering Committee is the committee that provides leadership at the administrative level for the implementation of Banner at Solano Community College. The Steering Committee will make institutional policy decisions as necessary to ensure the success of the project. Since the President’s Cabinet serves as the Steering Committee, Cabinet Meetings will include a Steering Committee component as needed..</p> <p>The Steering Committee will:</p> <ul style="list-style-type: none"> <li>▪ Make policy decisions</li> <li>▪ Expedite decisions and issue directives</li> <li>▪ Approve priorities established by the Project Team</li> <li>▪ Approve allocation of resources and budget</li> <li>▪ Garner project support from their divisions</li> <li>▪ Work with the Project Team to facilitate overall project communication to campus constituents</li> <li>▪ Approve the project plans for the project</li> <li>▪ Oversee the overall implementation of the project</li> <li>▪ Provide direction and guidance to the Project Team</li> <li>▪ Review issues submitted by the Project Team for resolution</li> <li>▪ Consider and approve policy change requests</li> <li>▪ Evaluate issues and related risks</li> <li>▪ Ensure that the project stays on schedule</li> </ul>		



## Project Charter and Scope Statement

Individuals, Groups	Name (s)	
Project Team	James Ennis Mike Schmidt Barbara Fountain Nalini Srinivasan Trudy Largent Rob Simas Arthur Lopez Shirley Lewis Erin Vines Ross Beck Pei-Lin Van't Hul Lillian Nelson	
<b>Responsibilities:</b>		
<p>The Project Team serves as project advisors to the Steering Committee and is charged with the successful implementation of the project. Membership is comprised of both SCC and SunGard employees who work together to meet the obligations of both the College and SunGard.</p> <p>The Project Management Team will</p> <ul style="list-style-type: none"> <li>▪ Implement the project</li> <li>▪ Provide direction and guidance to the individual functional area groups</li> <li>▪ Review issues submitted by various implementation teams for resolution</li> <li>▪ Refer higher-level issues to the Steering Committee</li> <li>▪ Monitor the progress of all functional area groups</li> <li>▪ Provide status reports to the Steering Committee</li> <li>▪ Formulate and present policy change requests to the Steering Committee</li> <li>▪ Formulate and present project change requests to the Change Control Board</li> <li>▪ Recommend and establish functional and technical practices and procedures</li> <li>▪ Review and approve recommendations for data standards</li> </ul>		

## Project Charter and Scope Statement

<b>Individuals, Groups</b>	<b>Name (s)</b>
Project Manager(s)	James Ennis Mike Schmidt
<b>Responsibilities:</b>	
<p>The Project Managers are responsible for the overall success of the project and works closely with the Project Team and SunGard personnel to ensure that the project objectives are met. Specifically, the Project Managers will:</p> <ul style="list-style-type: none"><li>▪ Act as the central point of contact for all formal, project-related communication between SCC and SunGard</li><li>▪ Ensure that all Project Team members are aware of their responsibilities and that they perform as promised</li><li>▪ Ensure that all contractual commitments are fulfilled on time, within budget</li><li>▪ Ensure that a system is in place to document and control project performance</li><li>▪ Prepare a Project Charter and Scope Statement and obtain agreement from the Steering Committee and SunGard.</li><li>▪ Maintain a repository containing all applicable project information</li><li>▪ Control cost, schedules, and variances from the plan</li><li>▪ Report project status to the Steering Committee on a periodic basis</li><li>▪ Coordinate the timely resolution of issues</li><li>▪ Oversee timely and relevant communications to SCC constituencies according to the Communication Plan</li><li>▪ Perform other duties as necessary to complete the project</li></ul>	

## Functional Area Groups

Functional Area Groups are organized to correspond to the SunGard Banner and Luminis modules. The Functional Area Groups make process and procedural decisions related to the implementation in their areas. The Leader of each group is responsible for facilitating communication between team members and monitoring progress toward completion of assigned tasks and deliverables.

The Functional Area Groups will:

- Ensure completion of major tasks (such as completion of rule and validation forms, interfaces, and report development)
- Define and test user procedures for their area
- Develop policy and procedure manuals and end-user training documents
- Validate converted data in their area
- Review problems and issues and make recommendations to the Project Team when necessary
- Attend training and consulting sessions

## 9 Initial WBS

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Please refer to the SCC Master Project Calendar for the work breakdown structure.

## 10 Approval to Proceed

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Name: Dr. Jowel Laguerre, Executive Sponsor  
Title: Superintendent/President, Solano  
Community College  
Date

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Name: James Ennis, SCC Project Manager  
Title: Interim CISO  
Date

---

Name: Peggy Davis, SGHE Account Manager  
Title: Senior Account Manager  
Date

---

Name: Mike Schmidt, SGHE Project Manager  
Title: Senior Project Manager  
Date

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Name: Carey Roth  
Title: Vice President, Finance & Administration  
Date

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Name: Lisa Waits  
Title: Vice President, Student Services  
Date

## Project Charter and Scope Statement

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Name: Robin Steinback  
Title: Vice President, Academic Affairs  
Date

---

Name: Arthur Lopez  
Title: Interim Dean of Enrollment Management  
Date

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Name: Rob Simas  
Title: Director of Research & Planning  
Date

---

Name: Trudy Largent  
Title: Interim Director of Human Resources  
Date

---

Name: Tom Henry  
Title: Special Trustee  
Date

---

Name: Erin Vines  
Title: Dean of Counseling & Special Services  
Date

---

Name: Barbara Fountain  
Title: Director of Admissions & Records  
Date

---

Name: Pei-Lin Van't Hul  
Title: Curriculum Analyst  
Date

---

Name: Lillian Nelson  
Title: Student Representative  
Date

---

Name: Nora O'Neill  
Title: Executive Coordinator of Special Projects  
Date

---

Name: John Urrutia  
Title: Dean, Business, Computer Science &  
Career Technical Education  
Date

---

Name: Ross Beck  
Title: Director of Public Relations, Marketing &  
Communications  
Date

---

Name: Nalini Srinivasan  
Title: Director, Fiscal Services  
Date

---

Name: Shirley Lewis  
Title: Dean, Student Development & Outreach  
Date

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## Document History

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### Revision Record

Number	Date and Sections	Author	Notes
1.0	4/9/2010	Mike Schmidt	Initial Draft
1.1	5/6/2010	Mike Schmidt	Modified per Action Items from 04/28/10 Milestone Dates Preliminary Timeline Signature Block

= Proposed Date, no SunGard resource(s) scheduled

= Scheduled with a SunGard resource for this Date

Week of	General	Student	A/R	Financial Aid	Finance	HR	Luminis	ODS	Advancement	Integration
4/5/2010										
4/12/2010					Budget Mgt					
4/19/2010										
4/26/2010			A/R Training & BOGG			Dept Time Entry				
5/3/2010					Budget Dev					
5/10/2010	Shared Data (Remote)									
5/17/2010										
5/24/2010						DTE Attendance				
5/31/2010	Gen Security (Remote)									People Admin
6/7/2010				Return of Title IV Funds		Initiate Budget Roll (R)	Content Admin			eCollege
6/14/2010					Year End Processing					eCollege
6/21/2010							Content Admin	ODS		eCollege
6/28/2010						Position Budget Roll				SARS

= Proposed Date, no SunGard resource(s) scheduled

= Scheduled with a SunGard resource for this Date

Week of	General	Student	A/R	Financial Aid	Finance	HR	Luminis	ODS	Advancement	Integration
7/5/2010								ODS		SARS
7/12/2010										SARS
7/19/2010						New HR Director		ODS		SARS
7/26/2010						B8 FLAC Salary Plan	Organization Planning			SARS
8/2/2010					Fixed Assets Fiscal Issues			ODS		
8/9/2010										
8/16/2010					B8 Migration 1					
8/23/2010							Content Planning			
8/30/2010		B8 Consulting 1				Banner 8 Config & Test				
9/6/2010							Content Planning			
9/13/2010		B8 Consulting 2								
9/20/2010					B8 Migration 2					
9/27/2010		Academic History								

= Proposed Date, no SunGard resource(s) scheduled

= Scheduled with a SunGard resource for this Date


Week of	General	Student	A/R	Financial Aid	Finance	HR	Luminis	ODS	Advancement	Integration
10/4/2010			B8 A/R 1			Banner 8 Test EPAF				
10/11/2010				B8 Consulting 1	B8 Migration 3					
10/18/2010										
10/25/2010				B8 Consulting 2						
11/1/2010									Advancement Kickoff	
11/8/2010										
11/15/2010		Term Setup							Campaign & Basic Gifts	
11/22/2010	Thanksgiving									
11/29/2010			1098-T Remote							
12/6/2010									Initial Tech Training	
12/13/2010										
12/20/2010	Winter Break									
12/27/2010										




= Proposed Date, no SunGard resource(s) scheduled

= Scheduled with a SunGard resource for this Date

Week of	General	Student	A/R	Financial Aid	Finance	HR	Luminis	ODS	Advancement	Integration
1/3/2011										
1/10/2011					Spreadsheet Budgeting					
1/17/2011									Consulting 1	
1/24/2011									Advanced Gifts	
1/31/2011					Grants					
2/7/2011		Faculty Load and Comp				Faculty Load and Comp				
2/14/2011									Prospect Management	
2/21/2011		General Student							Consulting 2 (Remote)	
2/28/2011										
3/7/2011		Faculty Gradebook								
3/14/2011		Dup ID Resolution							PopSel and Letter Gen	
3/21/2011									Memberships	
3/28/2011										

 = Proposed Date, no SunGard resource(s) scheduled

 = Scheduled with a SunGard resource for this Date

Week of	General	Student	A/R	Financial Aid	Finance	HR	Luminis	ODS	Advancement	Integration
4/4/2011										
4/11/2011									Pre Go-Live Consulting	
4/18/2011									Remote Go-Live Consulting	
4/25/2011										
5/2/2011									Go-Live Follow-Up	



**Prepared by:** Mike Schmidt  
**Version:** 1.1  
**Last Revision Date:** May 27, 2010  
**Create Date:** April 1, 2010

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## 1 Purpose

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The purpose of the Communication Plan is to define and document the various communication needs of during this project. It aids in managing the communication between Solano Community College (SCC), SunGard Higher Education (SGHE), the Solano Community College Project Manager (SCC PM), the SunGard Higher Education Project Manager (SGHE PM), the college's project team and the rest of the college community.

### 1.1 Exclusions

No group is to be excluded from this plan. However, there will be some SunGard Higher Education and Solano Community College confidential material that will require a User ID and Password to access.

### 1.2 Related Documents

Document Name
Project Scope Statement
Communication Plan
Professional Services Work Order
Project Schedule
Integrated Change Control Process
Risk Management Plan
Education Materials

## 2 Communication

The following identifies the information needs and the mechanism for communication to/from each of the users for the project. Examples are provided in the table below.

### 2.1 Communication Plan Details

Item	Responsible Party	Purpose	Distribution	Frequency	Location
Project Scope Statement	Project Team	Project Definition	Steering Committee, SGHE	First 30 days of project	
Communications Plan	SCC PM SGHE PM	Inform	Steering Committee, Project Team	First 30 days of project	
Banner Operations Team Meeting Minutes	SCC PM	Inform	Steering Committee, Banner Operations Team	At least 3 days before meeting	
Banner Operations Team Meeting Agendas	SCC PM	Inform and Plan	Banner Operations Team		
Banner Operations Team Meeting Action Items	SCC PM SGHE PM	Follow-up	Steering Committee, Banner Operations Team	As Needed	
SGHE Education Agendas and Materials	SCC PM SGHE PM	Pre-work	Work Teams	As Needed	
Monthly Status Report	SCC PM SGHE PM	Inform or Alert	Steering Committee, SGHE	Monthly	
Client FAQ/Profile	SGHE PM	Inform Consultants	SGHE	As Needed	SGHE Project Tracking DB
Project Schedule	SGHE PM SCC PM	Inform	Banner Operations Team and Work Teams	As Revised	
Change Requests and Decisions	SGHE PM SCC PM	Modify Scope Document	Steering Committee, Banner Operations Team, SGHE	As Needed	
College-Wide Update	SCC PM	Inform	Public	Monthly	
Trip Reports	SCC PM SGHE PM SGHE Consultants	Inform Alert Follow-Up	Banner Operations Team and Work Teams	As Needed	

## **2.2 Global Communications Documents**

1. Every formal meeting shall have the following items:
  - o Agenda
  - o Minutes
  - o Task/action assignments with responsible person and due date
2. Every meeting shall be announced at least 2 weeks in advance
3. Every meeting will include the Banner Operations Team distribution list for all documents including those mentioned above
4. All written documents will be forwarded to IT for inclusion on web site.

## **2.3 Communicating Decision Making**

1. As stated in the Project Scope Statement, issue resolution will occur in a timely manner and decision making will be delegated to the lowest level possible.
2. All decisions made outside Banner Operations Team meetings will be communicated by the Functional Area Representatives in Banner Operations Team Meetings and will be documented in the meeting minutes.
3. When decisions that are made or communicated in Banner Operations Team Meetings result in Action Items to be addressed, these action items will be fully described in the meeting minutes and will include the person responsible for completing the action item and the deadline for when the action item is to be completed.

## **3 Procedures**

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The following outlines those procedures that will be followed in regards to issuing update to communication documents on the project.

### **3.1 Scribe**

- Each meeting will have a scribe appointed to keep minutes. Of special importance are the action items arising from the meeting
- Each action item will have a description of the item, an assigned name or names and a due date.
- It is the responsibility of the SCC PM and the SGHE PM to assure that all the action items are on task.
- Any action item that becomes overdue will be reported to the Steering Committee for appropriate corrective or disciplinary action.

### **3.2 Storage of Documents**

- All documents arising from meetings or are products of individuals or committees will be stored in the designated location.

- It is the responsibility of the project managers or the department manager (depending on the type of document) to make sure that the document and supporting material is appropriately stored (see above table, 2.1).
- Revisions and deletions of documents will be the responsibility of the project managers or department manager and shall be performed on an as needed basis when new versions are developed.
- IT will provide a web site and will upload all documents to that site. Responsible parties will be given instructions on storage locations for the original material.
- All responsible parties must notify IT when new or revised material is placed in designated folders and is ready for upload to the secure web site.

### **3.3 *Distribution of Documents***

- All documents will be electronically distributed per table 2.1.
- Although the Steering Committee, Banner Operations Team, and Work Teams will make every effort to notify effected college members of documents that may affect their work or their dealings with the college, it is the responsibility of all college personnel to periodically check the web site for documents that affect their work.
- It is the responsibility of IT to notify staff, electronically, when the web site has new material or has been updated. This applies to significant changes only. Significant changes will be defined by the Banner Operations Team.

## **4 Communication Flow**

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### **4.1 *Non-written communication***

- Non-written communication is as important to the successful implementation as written documents.
- As meetings, training sessions, fact finding meetings, testing trials, seminars, conference calls and other implementation events cannot possibly include all members of the Solano community, it is a responsibility of those who do attend to relay session information to those who cannot attend.
- All members who attend these events are representatives of those who are not in attendance and have the responsibility of representing all views at these sessions.
- For this project to be successful, information must flow in all directions and should be considered a responsibility of every team member. Relying on any single individual, regardless of position or title, for information is inappropriate. It is the responsibility of all Solano staff, faculty, administration and management to be proactive and aggressively pursue information that affects their department or the students that are ultimately served.



#### **4.2 Distribution of education materials**

- In order to provide the greatest possible dissemination of information, all education materials provided by SGHE consultants shall be distributed to staff who are attending the training and members of the Banner Operations Team.
- It is the responsibility of Banner Operations Team members to distribute materials to other interested parties as they see fit and to insure that those individuals sign up for the session.
- IT shall have the responsibility of maintaining and storing all training materials. This includes assuring that needed materials have been received, copied, distributed, and loaded into appropriate folders on the web site. Materials include:
  - Agendas
  - Workbooks
  - PowerPoint presentations
  - Supplemental Information (e.g. key stroke shortcuts)
  - Trip Reports
  - Evaluation forms
  - Other material as supplied by consultants
- Pre-session material should be in SCC's possession no less than 1 week prior to the expected start of class and trip reports should be in SCC's hands no later than 1 week after the end of the session.

#### **4.3 Education Session Cancellations**

- It is expected that all scheduled education sessions will be held per the training plan.
- All cancelations by Solano must be relayed to the SGHE PM no later than thirty (30) days before the start of the session.
- Session cancelation criteria:
  - Sessions canceled by either SGHE or SCC outside this window will be handled at no charge although rescheduling the session is subject to availability of the resources.
  - Sessions canceled by SGHE within the window are subject to concessions by SGHE (compensation) if requested by SCC in writing. Concessions should be based on loss of staff's time and any costs needed for the reschedule of the session.

## 5. Approval to Proceed

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Name: Dr. Jowel Laguerre, Executive Sponsor  
Title: Superintendent/President, Solano  
Community College  
Date

---

Name: James Ennis, SCC Project Manager  
Title: Interim CISO  
Date

---

Name: Peggy Davis, SGHE Account Manager  
Title: Senior Account Manager  
Date

---

Name: Mike Schmidt, SGHE Project Manager  
Title: Senior Project Manager  
Date

---

Name: Carey Roth  
Title: Vice President, Finance &  
Administration  
Date

---

Name: Lisa Waits  
Title: Vice President, Student Services  
Date

---

Name: Dr. Robin Steinback  
Title: Vice President, Academic Affairs  
Date

---

Name:  
Title:  
Date

## 6. Document History

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### Revision Record

Number	Date and Sections	Author	Notes
1.0	4/9/2010	Mike Schmidt	Initial Draft
1.1	5/27/10	Mike Schmidt	Changed SBUG to Banner Operations Team

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**7. Acronyms and Definitions**

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Acronym	Description
IT	Information Technology Department
SCC	Solano Community College
SCC PM	Solano Community College Project Manager (James Ennis)
SGHE PM	SunGard Higher Education Project Manager (Mike Schmidt)+
SGHE	SunGard Higher Education



# Risk Management Plan

Risk Identification, Response, and Mitigation

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**Prepared by:** Mike Schmidt

**Version:** 1.1

**Create Date:** April 9 2010

**Approval Date:**

**Last Revision Date:** May 6, 2010

**Project Manager:** James Ennis

**Project Sponsor:** Dr. Jowel Laguerre

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2	RISK IDENTIFICATION METHODOLOGY.....	4
3	PROJECT RISK IDENTIFICATION.....	5

# 1 Introduction

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This plan identifies the risks to the project, how those risks will be responded to and how mitigation plans will be outlined and controlled. Examples of risk include potential loss of a critical resource, technology changes, regulatory changes, dependence on a third party, project sponsorship or management changes.

For high-probability and high-impact risks, a plan will be specified for reducing the likelihood/impact of the risk (mitigation).

Approaches to responding to risks include:

- **Deflection** (transferring the risk to another party),
- **Control** (minimize the effect),
- **Retention** (accept the consequences), and
- **Avoidance** (eliminate the cause of the risk thru changes in plans or other constraints).

Risks are tracked using the Risk Register. As the project is proceeds, additional risks will be added to the Risk Register template, identifying the risk based on Probability and Impact to the overall project.

## 2 Risk Identification Methodology

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Risks identified before and during the project will be defined using the methodology presented below.

Risk	Probability of Occurrence (A)	Estimated Project Impact (B)	Weight B+(A-1)	Risk Control No.
<i>Description of the risk.</i>	1 - 3	1 - 3	1 - 5	000
	<i>Mitigation</i>	Deflect / Control / Retain / Avoid		
	<i>Possible Consequences</i>	What are the possible consequences should this risk come to occur?		
	<i>Contingency</i>	What actions will be taken to mitigate the risk?		

Probability of occurrence is defined as follows:

- Very Likely            70-100%        A = 3
- Probable                40-70%         A = 2
- Unlikely                0-40%          A = 1

Impact guidelines for scope, cost, schedule, or quality are defined as follows:

- Catastrophic        B = 3
- Critical                B = 2
- Marginal              B = 1



### 3 Project Risk Identification

Risks identified during the project should be added to this section as well as the work products database. Anticipated project issues at the beginning of the project should be logged as risks. Risks can be escalated to Project Issues or Jeopardy Items after the project is initiated. If a risk becomes an issue or jeopardy, it must be designated as such below.

Risk	Probability of Occurrence (A)	Estimated Project Impact (B)	Weight B+(A-1)	Risk Control No.
<i>Lack of support for the project among employees, students, and/or community members.</i>	2	2	3	001
	<i>Mitigation</i>	Control		
	<i>Possible Consequences</i>	Low institutional morale. Low sense of teamwork across the institution. Pressure for reduction of resources allocated to the project. Resistance to training and use of the new system.		
	<i>Contingency</i>	<ol style="list-style-type: none"> <li>1. Keep all important constituencies informed and involved in decision-making as appropriate. Devise and implement a communication plan.</li> <li>2. Promote and deliver the benefits of the Banner system to various constituencies.</li> <li>3. Increase training campus-wide to alleviate fears and promote knowledge and self-confidence.</li> </ol>		

Risk	Probability of Occurrence (A)	Estimated Project Impact (B)	Weight B+(A-1)	Risk Control No.
<i>Turnover among executive leaders, key staff implementers and trained staff users.</i>	3	2	4	002
	<i>Mitigation</i>	Retain		
	<i>Possible Consequences</i>	Loss of critical skills and capabilities gained through investments in training. Loss of critical talent. Inability to maintain operation of all parts of the system on a timely basis.		
	<i>Contingency</i>	<ol style="list-style-type: none"> <li>1. Maintain employee loyalty through positive work environment and equitable compensation.</li> <li>2. Recognize that turnover will occur; cross-train employees where possible and be prepared to deliver needed training to new employees.</li> <li>3. Document critical systems information that can be used in the future for trouble shooting and other functional manipulation of the system.</li> </ol>		

Risk	Probability of Occurrence (A)	Estimated Project Impact (B)	Weight B+(A-1)	Risk Control No.
<i>Loss of personnel who possess essential skills or knowledge, including network administration and system administration functions on which operation of the Banner system depends.</i>	1	2	2	003
	<i>Mitigation</i>	Retain		
	<i>Possible Consequences</i>	Loss or impairment of the network on which all SCC information technology functions depend would cripple operation of the Banner system.		
	<i>Contingency</i>	<ol style="list-style-type: none"> <li>1. Recruitment and retention of skilled IT personnel, including some not directly involved with Banner implementation, is critical.</li> <li>2. Cross-training and documentation for these essential functions is critical.</li> <li>3. It is imperative that SCC identify contingencies for sudden loss of skilled personnel on whom network and system operations are dependent.</li> </ol>		

Risk	Probability of Occurrence (A)	Estimated Project Impact (B)	Weight B+(A-1)	Risk Control No.
<i>Frustration and/or conflict among key staff implementers and users could hinder successful implementation and use of the system.</i>	2	2	3	004
	<i>Mitigation</i>	Control		
	<i>Possible Consequences</i>	Unresolved frustrations and conflicts could lead to discouragement, poor morale, and withdrawal from supportive involvement. Time and resources could be wasted as staff lacks clarity and unity of direction.		
	<i>Contingency</i>	<ol style="list-style-type: none"> <li>1. Acknowledge and respect the roles, responsibilities, and concerns of all persons involved with the project.</li> <li>2. Promote open communication of problems, then move ahead with a solution, or if none is available, just acknowledge and move on.</li> <li>3. Maintain functionality of the SBUG and Steering Committee and other structures that can provide for orderly resolution of differences.</li> </ol>		

Risk	Probability of Occurrence (A)	Estimated Project Impact (B)	Weight B+(A-1)	Risk Control No.
<i>Insufficient hardware to accommodate Banner software and provide for smooth operation of the system.</i>	1	2	2	005
	<i>Mitigation</i>	Control		
	<i>Possible Consequences</i>	Banner and database software do not run properly for lack of hardware capacity.		
	<i>Contingency</i>	<ol style="list-style-type: none"> <li>1. Consult with SunGard staff and carefully inventory hardware capacities and needs to ensure adequate planning for acquisition of needed hardware.</li> </ol>		

Risk	Probability of Occurrence (A)	Estimated Project Impact (B)	Weight B+(A-1)	Risk Control No.
<i>Regulatory changes may cause delay in implementation.</i>	2	2	3	006
	<i>Mitigation</i>	Retain		
	<i>Possible Consequences</i>	Data definitions and other system elements may have to be adjusted. Functionality may be lost while changes are being made. If adjustments are not made, inaccurate output data could affect students adversely and expose the institution to liability.		
	<i>Contingency</i>	1. Plan with functional users for best time to make any changes, and to identify possible manual operations to maintain the function while changes are being made.		

Risk	Probability of Occurrence (A)	Estimated Project Impact (B)	Weight B+(A-1)	Risk Control No.
<i>Resources may be overextended through efforts to do too much with available funds and staff. The project may exhibit "scope creep," a tendency to keep adding to the scope of the project.</i>	3	3	5	007
	<i>Mitigation</i>	Control		
	<i>Possible Consequences</i>	Funds are not available to properly meet all project needs; staff is overwhelmed and unable to fully support the system.		
	<i>Contingency</i>	1. Be aware of the implications of all proposed changes in project implementation. 2. Exercise discipline through deliberation and approval of significant changes by the Change Control Board and other appropriate bodies. 3. Dr. Laguerre will issue directive to SCC stressing the importance of the project and that the resources assigned to the project will address project priorities over other campus initiatives.		

Risk	Probability of Occurrence (A)	Estimated Project Impact (B)	Weight B+(A-1)	Risk Control No.
<i>The importance of the project and its requirements and benefits are poorly communicated, especially to groups outside key persons and groups involved in implementation</i>	1	2	2	008
	<i>Mitigation</i>	Control		
	<i>Possible Consequences</i>	Broad-based buy-in does not occur. Misinformation in the absence of adequate, accurate information confuses important constituencies. Negative criticism undermines efforts to move the project ahead.		
	<i>Contingency</i>	1. Develop and implement a communication plan. 2. Promote open communication and maintain an ethic of honesty and openness among those involved in the implementation effort. 3. Ensure that key executive and administrative staff is fully informed concerning project progress and success, as well as any difficulties.		

Risk	Probability of Occurrence (A)	Estimated Project Impact (B)	Weight B+(A-1)	Risk Control No.
<i>Departments may not fully support the training regimen required for successful implementation.</i>	1	2	2	009
	<i>Mitigation</i>	Control and Retain		
	<i>Possible Consequences</i>	System users are not able to function independently because they are not properly trained. Demands on system support personnel are unnecessarily increased.		
	<i>Contingency</i>	<ol style="list-style-type: none"> <li>1. Competing time demands of departments are taken into account by means of a master calendar.</li> <li>2. Managers must exercise control over leave approval and other staff activities to ensure availability of staff for training.</li> </ol>		

Risk	Probability of Occurrence (A)	Estimated Project Impact (B)	Weight B+(A-1)	Risk Control No.
<i>New institutional initiatives or other items deemed to be an "emergency" may divert resources from the project.</i>	2	3	4	010
	<i>Mitigation</i>	Control		
	<i>Possible Consequences</i>	Emerging demands could dilute institutional resources and leave the project inadequately funded and staffed to allow for successful completion.		
	<i>Contingency</i>	<ol style="list-style-type: none"> <li>1. Project key leaders must maintain and communicate clear information on project progress and resource needs.</li> <li>2. Executive and fiscal officers must maintain priorities and exercise fiscal discipline to "stay the course" and see the project through to completion.</li> </ol>		

Risk	Probability of Occurrence (A)	Estimated Project Impact (B)	Weight B+(A-1)	Risk Control No.
<i>Significant schedule slippage may occur.</i>	2	3	4	011
	<i>Mitigation</i>	Control and Retain		
	<i>Possible Consequences</i>	The project pushes against its defined end date, additional financial and staff resources are consumed, and availability of beneficial functions of the system is delayed.		
	<i>Contingency</i>	<ol style="list-style-type: none"> <li>1. The SBUG and Steering Committee must regularly review project progress, solve problems, and ensure that the project stays on track.</li> </ol>		

## Document History

### Revision Record

Number	Date and Sections	Author	Notes
1.0	04/09/2010	Mike Schmidt	Document Creation
1.1	05/06/2010	Mike Schmidt	Modified per Action Items from 04/28/10 Risk Item 007 – added directive Risk Item 010 – added to description Estimated Risk Scores



## **Integrated Change Control Process**

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**Prepared by:** Mike Schmidt

**Version:** 1.0

**Create Date:** March 30, 2010

**Approval Date:**

**Last Revision Date:** April 9, 2010

**Project Manager:** James Ennis

**Project Sponsor:** Dr. Jowel Laguerre

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## 1 Introduction

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The purpose of this document is to define the procedure for managing change requests that affect the project. Change is defined as any change to the project's scope, schedule, or budget. Further explanation into what a changes to initiate, track, and complete are listed below.

The Project Managers will utilize this Integrated Change Control process to initiate, record, and receive change approval, track, and complete change requests throughout the project's lifecycle.

## 2 Objective

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The objective of the Integrated Change Control process is to outline the processes used for changes to the project scope that will assist the project team to control the project's triple constraints of Scope, Schedule, and Cost. This ICC process provides the following benefits to the project team by successfully delivering those products and services defined in the project plan:

- Maintains control of the project's scope, schedule and costs throughout the duration of the project.
- Maintains a continuous benchmark of project's milestones, schedule, and costs
- Justifies, through the approval process, variances within the project's triple constraints of Scope, Schedule, and Cost.
- Effectively communicates SCC's expectations for delivery
- Drives integration of one plan, one schedule, and one budget
- Change can proactively be planned
- Impact to change can proactively be reviewed and approved by project stakeholders
- Quality is improved through a formalized change process

## 3 Change Control Board

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Based on the size and complexity of the project, SGHE and SCC will establish a formal project Change Control Board. The objective of the project's Change Control Board is to review and approve change requests that have been created either by SCC's request or by recommendation of the SGHE project team. The Change Control Board members will include key project stakeholders who have the authority to approve changes to scope, schedule and budget. It will include:

- Dr. Jowel Laguerre, Project Sponsor
- James Ennis, SCC Project Manager
- Client Key Business/Functional Leaders
- Peggy Davis, SGHE Account Manager
- Mike Schmidt, SGHE Project Manager



The SGHE Project Manager is responsible to setup, coordinate and facilitate standard Change Control Board meetings using input from SCC.

## **4 What is Change?**

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During Project Initiation, the Project's Core Team will develop a Project Charter and Project Scope Statement which outlines the project's scope, timeline, and high level budget. The Project Scope Statement defines the project objectives and details the tasks to be accomplished as planned. The Scope Statement will also include the overall project milestones and timeline in which those milestones will be managed and implemented. Upon SCC's approval, this information will contribute to the creation of the baseline schedule.

As changes are requested throughout the project's lifecycle, and those changes affect the baseline Scope Statement, Schedule, and Budget, the SGHE Project Manager and SCC Project Manager will initiate a Change Request to the Change Control Board, outlining the purpose of the change, the description, and the impact to project scope, schedule, and budget.

Changes can be classified through the examples below:

- Change to the standard product
- Change to standard services as outline in the original contract
- Change to milestone timeline
- Change to product components
- Change to scheduled client workshops and planning sessions
- Change to duration efforts and timeline for product builds
- Change to project resources
- Change to test plans
- Changes to project deliverables

The above are only examples of change and a guideline to following as changes are identified.

## **5 Change Procedures**

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The following describe the change procedures for recording a change request, processing a change request, and monitoring the change request.

### **5.1 Recording a Change Request**

- Change Requests will be recorded using the SCC Change Request Form template.

- Change Requests can be requested by completing and submitting the form electronically to both the SGHE Project Manager and the SCC Project Manager or sending them an e-mail with enough detail that the form can be properly completed.
- Change Requests submitted by e-mail will be entered into the Change Request Form and then e-mailed to the originator. If not correct, the originator and the project managers will adjust.
- The Change Request will be recorded in the Change Request Log.

### ***5.2 Processing a Change Request***

- Change Request will be reviewed by the Project Team for feasibility.
- The Project Team may need to engage functional consultants for input and project impact to determine feasibility.
- If not technically feasible, the Project Team will update the Change Request with an explanation as to its feasibility, documenting optional solutions to be reviewed.
- If feasible, the Change Request will be updated with an explanation of what needs to occur and impact to the scope, schedule, and cost.
- The Change Control Board will be convened to review the Change Request. The SGHE Project Manager and the SCC Project Manager will present the Change Request to the Change Control Board along with the recommendation of the Project Team.
- The Change Control Board will either approve or disapprove the change request.
- If approved, the Project Team will adjust the project scope statement, project schedule, and project budget to reflect the change.
- The change request approval will be updated in the Change Control Log.
- Project resource(s) will be assigned to complete the change, and/or, the change will be activated.

### ***5.3 Executing a Change Request***

- If approved, the Change Request will be planned and integrated into the project schedule.
- The Change Request will remain open and tracked until all documentation has been completed.

### 5.4 Filling out the Change Request Form

The SGHE Project Manager will complete the Change Request form.

## 6.0 Approval to Proceed

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Specify the approvers of Project Change Requests from client and SGHE project teams here.

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Name  
Title  
Date

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Name  
Title  
Date

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Name  
Title  
Date

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Name  
Title  
Date

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Name  
Title  
Date

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Name  
Title  
Date

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Name  
Title  
Date

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Name  
Title  
Date

## Document History

### Revision Record

Number	Date and Sections	Author	Notes
1.0	03/30/2010	Mike Schmidt	Document Creation

## Change Request

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<b>Project Change Request Name:</b> <i>Name the change request to a name that helps identify the CR</i>		<p style="text-align: right;"><b>CR Status</b></p> <i>Status options are:</i> <ul style="list-style-type: none"> <li><i>Initiate: Used when the CR is initially created</i></li> <li><i>Under Review: Used when the CR is under review by SGHE consultants for feasibility</i></li> <li><i>Approved: Used when project stakeholders approve the CR</i></li> <li><i>Active: Used when the CR is actively being worked</i></li> <li><i>Closed: CR is completed</i></li> </ul>
<b>Originator:</b> <i>The name and organization of who is requesting the change.</i>	<b>Assigned To:</b> <i>The name and organization of who the CR is assigned once approved.</i>	<p style="text-align: right;"><b>CR Number</b></p> <i>PM will apply a naming standard to all CR</i>
<b>Change Request Short Description:</b> <i>Describe in a sentence or two a summary of the CR.</i>		
<b>Change Request Detailed Description:</b> <i>Once more analysis is completed by the project core team, apply more detail as to the CR.</i>		

**Work Products Impacted:**  
*List the SGHE modules impacted by the CR*

**Impact of CR:**  
*Describe in detail the impact of the CR to the project scope, schedule, and/or budget*

**Action Plan:**  
*Describe in detail the recommended action plan*

**Alternative Options:**  
*If the CR is not technical feasible, or it requires major customizations that impact other standard modules, or if the project team has an alternative option for the client, list in detail what these are.*

**Resolution:**  
*Describe the resolution of the CR.*

## Change Request

<b>Requested Date</b> <i>Add the date the CR was requested</i>	<b>Target Baseline Date</b> <i>List the date that the requestor requires the CR to be completed.</i>	<b>Approved Date</b> <i>Add the date the CR was approved</i>
---	---	---

<i>Project Stakeholders</i>	<i>Names</i>	<i>Approval Information (Signature and Date)</i>
Change Control Board Member 1:		
Change Control Board Member 2:		
Change Control Board Member 3:		
Change Control Board Member 4:		
Change Control Board Member 5:		
Project Manager:		
Project Sponsor:		

**Enter Comments:**

=

ID	Task Name	Duration	Work	Remaining Work	Actual Work	Start	Finish
0	<b>Solano Community College District, CA, Banner 8 Consulting Services, 2010</b>	<b>301d</b>	<b>4,053h</b>	<b>3,826h</b>	<b>227h</b>	<b>Thu 4/1/10</b>	<b>Thu 5/26/11</b>
1	Project Management	294d	800h	617h	183h	Mon 4/12/10	Thu 5/26/11
2	<b>Banner 7 Stabilization</b>	<b>125d</b>	<b>1,404h</b>	<b>1,360h</b>	<b>44h</b>	<b>Mon 4/12/10</b>	<b>Fri 10/1/10</b>
3	<b>Banner General</b>	<b>21d</b>	<b>68h</b>	<b>68h</b>	<b>0h</b>	<b>Mon 5/10/10</b>	<b>Mon 6/7/10</b>
4	Shared Data (Remote)	5d	40h	40h	0h	Mon 5/10/10	Fri 5/14/10
5	General Security (Remote)	5d	28h	28h	0h	Tue 6/1/10	Mon 6/7/10
6	<b>Finance Module</b>	<b>85d</b>	<b>160h</b>	<b>120h</b>	<b>40h</b>	<b>Mon 4/12/10</b>	<b>Fri 8/6/10</b>
7	Budget Management	5d	40h	40h	0h	Mon 4/12/10	Fri 4/16/10
8	Budget Development	5d	40h	0h	40h	Mon 5/3/10	Fri 5/7/10
9	Year End Processing / Fiscal Issues	5d	40h	40h	0h	Mon 6/14/10	Fri 6/18/10
10	Fixed Assets / Fiscal Issues	5d	40h	40h	0h	Mon 8/2/10	Fri 8/6/10
11	<b>HR Module</b>	<b>65d</b>	<b>184h</b>	<b>184h</b>	<b>0h</b>	<b>Mon 4/26/10</b>	<b>Fri 7/23/10</b>
12	Department Time Entry	5d	40h	40h	0h	Mon 4/26/10	Fri 4/30/10
13	DTE, Attendance Tracking	5d	40h	40h	0h	Mon 5/24/10	Fri 5/28/10
14	Intiate Budget Roll/Fringe (Remote)	5d	24h	24h	0h	Mon 6/7/10	Fri 6/11/10
15	Position Budget Roll	5d	40h	40h	0h	Mon 6/28/10	Fri 7/2/10
16	Training for New HR Director	5d	40h	40h	0h	Mon 7/19/10	Fri 7/23/10
17	<b>Student Module</b>	<b>115d</b>	<b>80h</b>	<b>80h</b>	<b>0h</b>	<b>Mon 4/26/10</b>	<b>Fri 10/1/10</b>
18	Student Accounts Receivable	5d	40h	40h	0h	Mon 4/26/10	Fri 4/30/10
19	Academic History	5d	40h	40h	0h	Mon 9/27/10	Fri 10/1/10
20	<b>Operational Data Store</b>	<b>35d</b>	<b>160h</b>	<b>160h</b>	<b>0h</b>	<b>Mon 6/21/10</b>	<b>Fri 8/6/10</b>
21	ODS Consulting	5d	40h	40h	0h	Mon 6/21/10	Fri 6/25/10
22	ODS Consulting	5d	40h	40h	0h	Mon 7/5/10	Fri 7/9/10
23	ODS Consulting	5d	40h	40h	0h	Mon 7/19/10	Fri 7/23/10
24	ODS Consulting	5d	40h	40h	0h	Mon 8/2/10	Fri 8/6/10
25	<b>Luminis Portal</b>	<b>95d</b>	<b>202h</b>	<b>198h</b>	<b>4h</b>	<b>Mon 5/3/10</b>	<b>Fri 9/10/10</b>
26	Luminis Startup	12d	4h	0h	4h	Mon 5/3/10	Tue 5/18/10
27	Content Administration 1	5d	38h	38h	0h	Mon 6/7/10	Fri 6/11/10
28	Content Administration 2	5d	40h	40h	0h	Mon 6/21/10	Fri 6/25/10
29	Organizational Planning (Course Studio)	5d	40h	40h	0h	Mon 7/26/10	Fri 7/30/10
30	Content Planning 1	5d	40h	40h	0h	Mon 8/23/10	Fri 8/27/10
31	Content Planning 2	5d	40h	40h	0h	Mon 9/6/10	Fri 9/10/10
32	<b>Integration</b>	<b>50d</b>	<b>550h</b>	<b>550h</b>	<b>0h</b>	<b>Mon 5/24/10</b>	<b>Fri 7/30/10</b>
33	People Admin Integration	45d	40h	40h	0h	Mon 5/31/10	Fri 7/30/10
34	eCollege SSO and Data Integration	45d	160h	160h	0h	Mon 5/31/10	Fri 7/30/10
35	<b>SARS Integration</b>	<b>50d</b>	<b>350h</b>	<b>350h</b>	<b>0h</b>	<b>Mon 5/24/10</b>	<b>Fri 7/30/10</b>
36	SARS Design - Baseline Messages	10d	10h	10h	0h	Mon 5/24/10	Fri 6/4/10
37	SARS Design - Baseline Messages	10d	10h	10h	0h	Mon 5/24/10	Fri 6/4/10
38	Unallocated SARS Integration	45d	330h	330h	0h	Mon 5/31/10	Fri 7/30/10
39	<b>Banner 8 Migration</b>	<b>252d</b>	<b>1,393h</b>	<b>1,393h</b>	<b>0h</b>	<b>Thu 4/1/10</b>	<b>Fri 3/18/11</b>
40	<b>Finance Module</b>	<b>125d</b>	<b>276h</b>	<b>276h</b>	<b>0h</b>	<b>Mon 8/16/10</b>	<b>Fri 2/4/11</b>
41	<b>Finance Consulting</b>	<b>125d</b>	<b>200h</b>	<b>200h</b>	<b>0h</b>	<b>Mon 8/16/10</b>	<b>Fri 2/4/11</b>

ID	Task Name	Duration	Work	Remaining Work	Actual Work	Start	Finish
42	Consulting - B8 Finance Session 1	5d	40h	40h	0h	Mon 8/16/10	Fri 8/20/10
43	Consulting - B8 Finance Session 2	5d	40h	40h	0h	Mon 9/20/10	Fri 9/24/10
44	Consulting - B8 Finance Session 3	5d	40h	40h	0h	Mon 10/11/10	Fri 10/15/10
45	Consulting - B8 Spreadsheet Budgeting	5d	40h	40h	0h	Mon 1/10/11	Fri 1/14/11
46	Consulting - B8 Grants	5d	40h	40h	0h	Mon 1/31/11	Fri 2/4/11
47	<b>Finance Configuration &amp; Testing</b>	<b>39d</b>	<b>76h</b>	<b>76h</b>	<b>0h</b>	<b>Mon 8/23/10</b>	<b>Thu 10/14/10</b>
48	CALB 311 / 320 Reports	5d	40h	40h	0h	Mon 8/23/10	Fri 8/27/10
49	Effort Certifications and Grant Budget	17d	20h	20h	0h	Mon 8/30/10	Tue 9/21/10
50	Grant Billing Enhancement	17d	16h	16h	0h	Wed 9/22/10	Thu 10/14/10
51	<b>Financial Aid Module</b>	<b>80d</b>	<b>144h</b>	<b>144h</b>	<b>0h</b>	<b>Mon 7/12/10</b>	<b>Fri 10/29/10</b>
52	<b>Financial Aid Consulting</b>	<b>15d</b>	<b>80h</b>	<b>80h</b>	<b>0h</b>	<b>Mon 10/11/10</b>	<b>Fri 10/29/10</b>
53	Consulting - B8 Financial Aid Session 1	5d	40h	40h	0h	Mon 10/11/10	Fri 10/15/10
54	Consulting - B8 Financial Aid Session 2	5d	40h	40h	0h	Mon 10/25/10	Fri 10/29/10
55	<b>Financial Aid Configuration &amp; Testing</b>	<b>36.5d</b>	<b>64h</b>	<b>64h</b>	<b>0h</b>	<b>Mon 7/12/10</b>	<b>Tue 8/31/10</b>
56	BOGG Waivers including multiple exemptions	27.5d	40h	40h	0h	Mon 7/12/10	Wed 8/18/10
57	ROAINST/ROAUSIO Form Setup	1d	8h	8h	0h	Wed 8/18/10	Thu 8/19/10
58	Scholarship and Athletics	8d	16h	16h	0h	Thu 8/19/10	Tue 8/31/10
59	<b>HR Module</b>	<b>65d</b>	<b>224h</b>	<b>224h</b>	<b>0h</b>	<b>Mon 7/12/10</b>	<b>Fri 10/8/10</b>
60	<b>HR Consulting</b>	<b>55d</b>	<b>120h</b>	<b>120h</b>	<b>0h</b>	<b>Mon 7/26/10</b>	<b>Fri 10/8/10</b>
61	Consulting - B8 HR FLAC, Salary Planner, Other B8 Features	5d	40h	40h	0h	Mon 7/26/10	Fri 7/30/10
62	Consulting - B8 HR Config and Testing	5d	40h	40h	0h	Mon 8/30/10	Fri 9/3/10
63	Consulting - B8 HR Banner & Testing, EPAF	5d	40h	40h	0h	Mon 10/4/10	Fri 10/8/10
64	<b>HR Configuration &amp; Testing</b>	<b>31d</b>	<b>104h</b>	<b>104h</b>	<b>0h</b>	<b>Mon 7/12/10</b>	<b>Mon 8/23/10</b>
65	Labor Redistribution	7d	24h	24h	0h	Mon 7/12/10	Tue 7/20/10
66	Combined Benefit Limits	2.5d	8h	8h	0h	Wed 7/21/10	Fri 7/23/10
67	Multi Year Encumbering (depends on FI)	5.5d	8h	8h	0h	Fri 7/23/10	Fri 7/30/10
68	Effort Reporting	5.5d	8h	8h	0h	Mon 8/2/10	Mon 8/9/10
69	Faculty Load & Compensation	5.5d	16h	16h	0h	Mon 8/9/10	Mon 8/16/10
70	CALB MIS / STRS / PERS	5d	40h	40h	0h	Tue 8/17/10	Mon 8/23/10
71	<b>Student Module</b>	<b>180d</b>	<b>582h</b>	<b>582h</b>	<b>0h</b>	<b>Mon 7/12/10</b>	<b>Fri 3/18/11</b>
72	<b>Student Consulting</b>	<b>145d</b>	<b>274h</b>	<b>274h</b>	<b>0h</b>	<b>Mon 8/30/10</b>	<b>Fri 3/18/11</b>
73	Banner 8 Student Session 1	5d	40h	40h	0h	Mon 8/30/10	Fri 9/3/10
74	Banner 8 Student Session 2	5d	40h	40h	0h	Mon 9/13/10	Fri 9/17/10
75	Banner 8 Student A/R	5d	40h	40h	0h	Mon 10/4/10	Fri 10/8/10
76	Term Setup (Remote)	3d	24h	24h	0h	Mon 11/15/10	Wed 11/17/10
77	1098-T Train/Consult (Remote)	2d	10h	10h	0h	Mon 11/29/10	Tue 11/30/10
78	General Student Refresher	5d	40h	40h	0h	Mon 2/21/11	Fri 2/25/11
79	Faculty Gradebook	5d	40h	40h	0h	Mon 3/7/11	Fri 3/11/11
80	Duplicate ID Resolution	5d	40h	40h	0h	Mon 3/14/11	Fri 3/18/11
81	<b>Student Configuration &amp; Testing</b>	<b>41d</b>	<b>308h</b>	<b>308h</b>	<b>0h</b>	<b>Mon 7/12/10</b>	<b>Mon 9/6/10</b>
82	<b>Catalog / Schedule Build</b>	<b>5d</b>	<b>36h</b>	<b>36h</b>	<b>0h</b>	<b>Mon 7/12/10</b>	<b>Fri 7/16/10</b>
83	Fee Assessment	1.5d	12h	12h	0h	Mon 7/12/10	Tue 7/13/10



ID	Task Name	Duration	Work	Remaining Work	Actual Work	Start	Finish
84	SSRROLL	1d	8h	8h	0h	Tue 7/13/10	Wed 7/14/10
85	Reserved Seating	2.5d	16h	16h	0h	Wed 7/14/10	Fri 7/16/10
86	<b>Registration</b>	<b>12d</b>	<b>96h</b>	<b>96h</b>	<b>0h</b>	<b>Mon 7/19/10</b>	<b>Tue 8/3/10</b>
87	Registration Error Message	3.5d	24h	24h	0h	Mon 7/19/10	Thu 7/22/10
88	Minimum/Maximum Reg Hours	2.5d	24h	24h	0h	Thu 7/22/10	Mon 7/26/10
89	Registration Mass Entry	1d	8h	8h	0h	Tue 7/27/10	Tue 7/27/10
90	Registration Overrides	1d	8h	8h	0h	Wed 7/28/10	Wed 7/28/10
91	Waitlisting	4d	32h	32h	0h	Thu 7/29/10	Tue 8/3/10
92	<b>Academic History</b>	<b>4.5d</b>	<b>32h</b>	<b>32h</b>	<b>0h</b>	<b>Wed 8/4/10</b>	<b>Tue 8/10/10</b>
93	Repeat Checking	1d	8h	8h	0h	Wed 8/4/10	Wed 8/4/10
94	Incomplete Grades	2d	16h	16h	0h	Thu 8/5/10	Fri 8/6/10
95	Catalog Extract	1.5d	8h	8h	0h	Mon 8/9/10	Tue 8/10/10
96	<b>Graduation</b>	<b>5d</b>	<b>40h</b>	<b>40h</b>	<b>0h</b>	<b>Tue 8/10/10</b>	<b>Tue 8/17/10</b>
97	Manual Roll of Learner Records	1d	8h	8h	0h	Tue 8/10/10	Wed 8/11/10
98	Graduation Mass Entry	1.5d	12h	12h	0h	Wed 8/11/10	Thu 8/12/10
99	Graduation Application	2.5d	20h	20h	0h	Fri 8/13/10	Tue 8/17/10
100	<b>Miscellaneous</b>	<b>14.5d</b>	<b>104h</b>	<b>104h</b>	<b>0h</b>	<b>Tue 8/17/10</b>	<b>Mon 9/6/10</b>
101	Admissions Mass Entry	2d	16h	16h	0h	Tue 8/17/10	Thu 8/19/10
102	General Student Mass Entry	2d	16h	16h	0h	Thu 8/19/10	Mon 8/23/10
103	General Enhancements	3d	24h	24h	0h	Mon 8/23/10	Thu 8/26/10
104	Faculty Load (NOT FLAC in HR)	3d	24h	24h	0h	Thu 8/26/10	Tue 8/31/10
105	IPEDS	1d	8h	8h	0h	Tue 8/31/10	Wed 9/1/10
106	CALB MIS / 320 Reports	1d	8h	8h	0h	Wed 9/1/10	Thu 9/2/10
107	Athletic Tracking	2.5d	8h	8h	0h	Thu 9/2/10	Mon 9/6/10
108	<b>Integrated Testing</b>	<b>137d</b>	<b>167h</b>	<b>167h</b>	<b>0h</b>	<b>Thu 4/1/10</b>	<b>Fri 10/8/10</b>
109	<b>Develop Integrated Test Plan</b>	<b>6d</b>	<b>44h</b>	<b>44h</b>	<b>0h</b>	<b>Thu 4/1/10</b>	<b>Thu 4/8/10</b>
110	Write User Acceptance Test Plan	5d	40h	40h	0h	Thu 4/1/10	Wed 4/7/10
111	Establish Testing Issue log	1d	4h	4h	0h	Thu 4/8/10	Thu 4/8/10
112	<b>Execute Integrated Plan</b>	<b>30d</b>	<b>123h</b>	<b>123h</b>	<b>0h</b>	<b>Mon 8/30/10</b>	<b>Fri 10/8/10</b>
113	<b>Test Cycles</b>	<b>30d</b>	<b>123h</b>	<b>123h</b>	<b>0h</b>	<b>Mon 8/30/10</b>	<b>Fri 10/8/10</b>
114	Test Cycle 1	5d	40h	40h	0h	Mon 8/30/10	Fri 9/3/10
115	Refine and Tune	5d	1h	1h	0h	Mon 9/6/10	Fri 9/10/10
116	Test Cycle 2	5d	40h	40h	0h	Mon 9/13/10	Fri 9/17/10
117	Refine and Tune	5d	1h	1h	0h	Mon 9/20/10	Fri 9/24/10
118	Test Cycle 3	5d	40h	40h	0h	Mon 9/27/10	Fri 10/1/10
119	Refine and Tune	5d	1h	1h	0h	Mon 10/4/10	Fri 10/8/10
120	<b>Advancement Implementation</b>	<b>135d</b>	<b>456h</b>	<b>456h</b>	<b>0h</b>	<b>Mon 11/1/10</b>	<b>Fri 5/6/11</b>
121	Advancement Kick-Off	5d	40h	40h	0h	Mon 11/1/10	Fri 11/5/10
122	Campaign and Basic Gifts	5d	40h	40h	0h	Tue 11/9/10	Mon 11/15/10
123	Advancement Technical Training	5d	40h	40h	0h	Mon 12/6/10	Fri 12/10/10
124	Advancement Consulting 1	5d	40h	40h	0h	Mon 1/17/11	Fri 1/21/11
125	Advanced Gifts	5d	40h	40h	0h	Mon 1/24/11	Fri 1/28/11

ID	Task Name	Duration	Work	Remaining Work	Actual Work	Start	Finish
126	Prospect Management	5d	40h	40h	0h	Mon 2/14/11	Fri 2/18/11
127	Advancement Consulting 2 (Remote)	4d	32h	32h	0h	Mon 2/21/11	Thu 2/24/11
128	Population Selection & Letter Generation	5d	40h	40h	0h	Mon 3/14/11	Fri 3/18/11
129	Memberships	5d	40h	40h	0h	Mon 3/21/11	Fri 3/25/11
130	Pre Go-Live Consulting	5d	40h	40h	0h	Mon 4/11/11	Fri 4/15/11
131	Go-Live Support (Remote)	3d	24h	24h	0h	Mon 4/18/11	Wed 4/20/11
132	Advancement Follow-Up	5d	40h	40h	0h	Mon 5/2/11	Fri 5/6/11