PLAN ▷ REQUIREMENTS ▷ SOLUTION ANALYSIS ▷ DESIGN ▷ BUILD ▷ TEST ▷ TRAIN/DEPLOY ▷ MAINTENANCE

Colleague/Slate Integration Project Charter

Colleague/Slate Integration

Executive Summary

This project aims to select a vendor for professional services to integrate Ellucian Colleague and Technolutions Slate enabling the Admissions and Recruiting Department to easily track applications, document submissions, and interact with prospective students. Prospective students and applicants will receive an improved and efficient experience while fulfilling the requirements for admission. A project team has been formed to develop requirements and select a vendor. Information Systems and Services (ISS) will work through procurement and implementation under the advisement of the project team.

This project is a collaboration between three departments: Admissions and Recruitment; Enrollment Systems; and, Information Systems and Services. This project is expected to be completed in August 2024.

Business Need and Background

McLennan Community College (MCC) interacts with thousands of people per year through its admission process. In 2019, MCC selected Technolutions Slate as the main Admission and Recruiting Customer Relationship Manager application and began internal training and internal integration work. To date, capacity constraints and limited technical expertise have blocked staff's ability to complete this integration.

The current makeshift integration has caused additional work, and decreased efficiency for staff. At the same time, Slate has proven to provide a better experience for prospective students. Data is only shared from Slate to Colleague and no integration exists with the document management system automatically. Staff are forced to perform many manual tasks and, sometimes, double work in separate systems.

A complete and thorough integration is needed to provide automatic and fast data sharing between applications to streamline the enrollment process and provide a better end user experience Unfortunately, technical expertise and capacity constraints prevent the ability to perform this work in-house. A professional services vendor is needed.

Project Description and Scope

This project focuses on developing requirements for Admissions and Recruiting that address issues with the current integration and implement new features that will improve efficiency and aid prospective students in the admissions and enrollment process.

The project team will create and approve requirements. Those requirements will be sent to vendors with documented experience performing integrations between Colleague and Slate. The project team will participate in solution analysis. The project team will approve timelines, review/approve all communications, and help ensure the success of this project. After a vendor is selected, the project team will procure and work with the vendor to implement the solution.

Before deployment or updates to the integration, employees will be trained on the maintenance of the integration and documentation will be provided. The current integration will be removed and replaced or reconfigured with the new integration. Each requirement will be tested to ensure completion.

This integration is not focused on any other departments. However, the integration work done here will aid in adoption of other departments sometime in the future. Future department work may require additional training or work and are out of scope for this project. If the scope or additional requirements are added, the budget or timeline could be vastly impacted.

Admissions and Recruiting will continue to own the Slate application. ISS will continue to own the Colleague application. The two teams will work together when integration updates are needed. Updates outside of outages will be managed through the change management process.

The Executive Sponsors will review and approve this scope and any major changes to budget or requirements.

Project Goals

The primary success criteria for this project are defined in five goals.

Goal 1: All applications will be received and processed in Slate.

Goal 2: All applicants will be provided with an automated checklist for determining their status in the admissions process.

Goal 3: Test scores will be automatically imported, and Slate is updated with the TSI status

Goal 4: External transcript data will be automatically imported, from high school transcripts, college transcripts, or GED score reports.

Goal 5: Colleague, Slate and Etrieve will communicate to provide most up to date information on applicants regardless of system where data originated.

Project Schedule

This project schedule is estimated. Once a vendor is selected, the schedule could change significantly.

PHASE	Q1			Q2			Q3			Q4		
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Requirements	▓	▓										
Vendor Evaluation		▓	▓									
Procurement				▓								
Vendor Scheduling					▓							
Build					▓	▓	▓	▓				
Test									▓	▓	▓	
Train											▓	
Deploy												▓

Project Budget

$250,000 of institutional funds have been allocated for this project through the FY2024 budget process. These funds only include funds for the procurement of professional services to complete the integration.

Project Management and Governance

Role	Name(s)/Organization(s)
Executive Sponsor(s)	Johnette McKown, President Fred Hills, Vice President of Instruction and Student Engagement Stephen Benson, Vice President of Finance and Administration
Project Team	Karen Clark, Director, Director of Admissions & Recruitment Dustie Hamilton, Director of Enrollment Systems Mario Leal, Chief Information and Technology Officer (Project Manager) Vickie Peterson, Administrative Systems Manager (Technical Lead) Amanda Straten, Coordinator, Student Admissions
Information Security Officer	Mary Garcia, Cybersecurity and Online Technologies Manager
Infrastructure Point of Contact	Noah Daly, Infrastructure Manager
Customer Support Services Point of Contact	David Kuehne, Customer Support Services Manager
Stakeholder(s)	Admissions and Recruitment Department Enrollment Systems

Impact Analysis

The following individuals, business areas, and/or systems may be affected by the project.

- The Director of Enrollment Systems, along with admissions and Recruiting staff will need training, at different levels, to learn to use Slate after the integration is complete.
- ISS staff will need training about the integration, on Colleague, and on Slate.
- Informer may be impacted by additional information available for reporting.
- Prospective students will be impacted by having a more efficient way to complete the admissions process.
- The Document Management service will be impacted by receiving documents from Slate.

Assumptions

The following assumptions have been identified.

- A vendor can be found to implement the integration.
- Executive sponsor support for this work.
- ISS has the resources to perform this work.
- Admissions and Recruiting has the resources to perform this work.
- ISS staff will need to work on multiple priorities during this project. It is critical to have clear schedules and clear priorities.
- Any maintenance windows will be scheduled ahead of time giving the community ample notice.
- Admissions and Recruiting will continue to "captain" the Slate application.

Constraints

The following constraints have been identified.

- The project timeline may be constrained by the college's high processing periods.
- The project is constrained by staff who work forty (40) hours per week.
- The project is constrained by the schedule of the vendor performing the work.
- The project is constrained by the budget.
- This project is constrained by staff with multiple responsibilities and projects.

The following risks have been identified.

- ISS is capacity constrained. Any outage of an employee could jeopardize meeting deadlines.
- ISS has limited experience and institutional knowledge of Colleague and Slate. This risk is being mitigated by hiring a vendor with knowledge of both applications.
- The current Ellucian Colleague implementation may include customizations which may make integration more difficult or costlier.
- There could be things we do not understand now or new requirements needed during implementation. This could cause scope creep and/or increases in budget.

Revision History

Version	Date	Updater Name	Description
0.1	9/19/2023	Mario Leal	Initial draft completed
0.2	9/21/2023	Mario Leal	Added some things and finalized budget section.
0.3	9/21/23	Dustie Hamilton	Added comments
0.4	9/29/23	Karen Clark	Added comments and completed review
0.5	9/29/23	Dustie Hamilton	Added comments and completed review
0.6	10/3/23	Amanda Straten	Added comments and completed review
1.0	10/3/23	Mario Leal	Document finalized for Leadership team review and approval.
1.0	10/10/23	Mario Leal	Leadership team approved and document is ready for release.