

Project Charter for  
Educational Plans, Degree Audit and AutoGrad

**INITIATIVE DESCRIPTION:**

*San Jose City College and Evergreen Valley College would benefit from having a clear understanding of the current processes “as is”, data dependencies and current systems available to assist students complete their educational dreams. To this end, it is important to make the process for their enrollment, transfer and graduation as easy as possible, leveraging the data available in the Student Information System of Record, which currently is Ellucian/Colleague ERP.*

*The most critical part of projects is to understand the current environment, document opportunities and then determine if technology, process changes or other modifications are needed.*

*Exec. Sponsors to describe the current limitations, business opportunity, and known issues in detail before the project Charter starts*

**INITIATIVE OBJECTIVES:**

San Jose Evergreen Community College District hopes to accomplish the following objectives with the successful completion of this project:

- *Modernization of business processes*
- *Improved efficiency of College operations and student experience*
- *Documentation of the processes end-to-end*
- *Determine hand-offs, dependencies and system limitations*
- *Simplify, automate, eliminate unnecessary steps that students need to complete their degrees or transfer*
- *Enhance the information available to Counselors and other staff so they can provide better services to students*
- *Define accountability, data governance and clear process ownership*
- *Publish and make the information of students comprehensive*
- *Allow other functions such as Financial Aid, Course Scheduling, Academic Affairs,, Student Services and Business Services to use the information for fiscal accountability and planning.*

**INITIATIVE CONSTRAINTS & RISKS:** *[This section may not be necessary for small projects]*

The following constraints and risks could have an effect on completion of the project objectives:

- *Availability and time commitment in campus functions: A&R, Academic Services, other*
- *Expectation of a Tight timeline to deliver and implement systems*



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- *Understanding of data and data dependencies*
- *Colleges may process forms and offer services differently*
- *Past and current practices at a process level i.e. how a course code is maintained in the system or how catalog information is cross-referenced; or how sections are scheduled; articulation agreements with UC/CSU; etc.*

**INITIATIVE SCOPE:**

*Define the boundaries of this project effort. What are the key areas to be included or excluded from this project effort?*

***In-Scope:*** *Ed Plans, Auto Grad or Degree Audits – the reason for bundling these three areas is that based on our knowledge, these independent projects most likely will use common data and are used by alike functions such as counselors.*

***Out-of-Scope:*** *processes and information not directly related or dependent on the Ed Plans, Auto Grad or Degree Audits.*

**PROJECT MILESTONES AND DELIVERABLES:**

Estimated project milestones and due dates are provided in the table below. Please note that all dates listed are tentative and may change depending on scheduling and availability of project resources. [The information below would become the preliminary project schedule]

<b>Milestone/Deliverable</b>	<b>Date</b>
<i>List project activities here</i>	<i>List project activity deadline here</i>
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**VERSION control**

**Version 1:** 02.25.2022 Jorge Escobar

**Version 2:** 03.06.2022 Jorge Escobar

Version 3:

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**PROJECT ORGANIZATIONAL STRUCTURE:** *[Portions of this section may not be necessary for small projects, or project team may only be 1-2 individuals][Project size criteria to be defined]*

The following roles and associated responsibilities have been defined for this project. These roles are essential for the success of the project and are intended to define the project reporting structure and lines of authority for decision-making.

Project Role	Names	Responsibility	Effort
Executive Sponsorship: College Presidents and ITSS Executive	Dr. Rowena Tomaneng, President SJCC  Dr. Tammeil Gilkerson, President EVC  Jorge Escobar, VCAS (until ITSS executive or other representative is in place)	<ul style="list-style-type: none"> <li>Maintain the project vision</li> <li>Energize the project leadership and teams</li> <li>Be visibly committed to the project</li> <li>Provide a strategic perspective when defining the needs for the project</li> <li>Remove project roadblocks</li> <li>Secure alignment across departments</li> <li>Review and approve steering committee recommendations</li> <li>Prioritize efforts and solutions</li> <li>Sign-off each phase of the project, including the project charter</li> </ul>	10%
Project Lead:	Rupinder Bhatia, Executive Director of ITSS	<ul style="list-style-type: none"> <li>Ensure that prompt and clear communications to department staff is conducted</li> <li>Act as the focal point for collection of needed documentation for review by the consultant</li> <li>Manage project milestones &amp; activities</li> <li>Manage the project budget</li> <li>Communicate project status, issues and risks to the appropriate stakeholders</li> <li>Oversee planning activities associated with project</li> <li>Document and track project issues and decisions</li> <li>Ensure that project deliverables are reviewed by appropriate District staff</li> </ul>	25%

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Project Manager: Vice President of the Division (Academic Affairs, Student Affairs, Administrative Services)	William Garcia and Howard Willis	<ul style="list-style-type: none"> <li>Manage all phases of the project</li> <li>Apprise the project executives of current and potential project risks and discuss risk mitigation</li> <li>Document and validate the current business processes of the functions</li> <li>Provide best practices from other Districts/Colleges including which systems or processes are followed that ought to be considered by SJECCD as potential new solutions</li> <li>Develop and approve project deliverables or changes</li> <li>Schedule project-related meetings</li> <li>Ensure availability of appropriate resources to support project meetings</li> <li>Ensure project communications are distributed</li> <li>In collaboration with project lead, develop current and future process flows before implementing solutions</li> <li>Engage and assign subject matter experts</li> </ul>	25%
Functional/Technical Teams: ITSS enterprise applications	Sergio Oklander, ITSS programmers, Outside consultants	<ul style="list-style-type: none"> <li>Provide guidance of current ERP functionality and other applications related to the project</li> <li>Share and document any past/active efforts to improve the processes in the charter</li> <li>Share any past attempts to improve the processes in the charter</li> <li>Explain/document data or processing issues that may be affecting the effective use of the ERP or current applications</li> <li>Explore alternative solutions once the processes and objectives are defined</li> <li>Provide data feeds and integration support for the ultimate solution, if that includes technology</li> </ul> <p>* Once the documentation defines a new technology solution, an implementation plan will be developed showing redistribution of effort and expectations to manage the project.</p>	15% *

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Project Role	Names	Responsibility	Effort
Subject Matter Experts: A&R, outreach/enrollment, Counselors, Academic Services, Curriculum folks, special programs such as EOPS, researchers and IESS ITSS staff	See below	<ul style="list-style-type: none"> <li>Provide all details for current business processes</li> <li>Provide examples of each step required for processing and ed plan, a degree audit, graduation</li> <li>Provide metrics i.e. number of plans reviewed per semester</li> <li>Define the manual efforts required by different roles i.e. Counselors to provide effective guidance to students</li> <li>Provide current system processing</li> <li>Provide and document ideas for potential changes in: functional assignments</li> <li>Explain in a documented manner the limitations that exists/ opportunities for improvement based on experience</li> <li>Attend SME meetings</li> </ul>	25%

**San Jose City College (SJCC)**

Name	Role	Phone	Email
Teresa Paiz	Director of Admissions and Records		
Xiomara Martinez	Outreach and Recruitment Coordinator		
Jennifer Green	Supervisor, Academic Services		
Kristen Ruano	Curriculum Coordinator		
JoAnn McGowan	College Schedule Coordinator		
Gabriel Santiago	Articulation Specialist/Counselor		
Shusaku Horibe	Acting Dean Research, Planning, and Institutional Effectiveness		
Brooke Duran	Evaluation Specialists		
Yi "Mindy" Huang	Evaluation Specialists		

**Evergreen Valley Community College (EVC)**

Name	Role	Phone	Email
Song-Ho Tran	Director of Outreach & Recruitment		
Sam Ho*	Dean Enrollment Services		
Tina Nguyen	Supervisor, Academic Services		
Vicki Brewster	Curriculum Specialist		
Jovita Valdez	Academic Services Analyst		
Laura Garcia	Articulation Specialist/Counselor		
Victor Garza*	Dean, Student Success		
Hazel De Ausen	Research Analyst II		
VanPhuong Nguyen	Evaluator		
Yvonne Chang	Evaluator		



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**PROJECT BUDGET (estimated): [is this project outlined in Program Review][source of funding]**

Enter project budget information here.

Soft costs

Hard costs

**PROJECT TIMELINE:** milestones, deadlines and responsible names

**APPROVAL:**

*Dr. Rowena Tomaneng, President SJCC*

*Dr. Tammeil Gilkerson, President EVC*

*Jorge Escobar, Vice Chancellor Administrative Services and Information Technology, acting*