



GROSSMONT-CUYAMACA
COMMUNITY COLLEGE DISTRICT

Colleague Financial Aid Project Charter

Project Description

In response to the 2019 Financial Aid audit findings and the recommendations that came out of the Business Process Analysis conducted in 2013, the District has decided to transition from the current Financial Aid system, Sigma, to Colleague Financial Aid. The goal would be to go live with the new system for the 2024/2025 Financial Aid Year. The District is confident that this transition will not only address the audit findings but will ultimately better serve students. This transition will require significant planning and commitment of resources.

Project Goals

- Compliance
- Data accuracy
- Student System Integration
- Sound business processes that enhance services to students
- Clear, easy access to information real-time 24/7 for students and staff including all transactions and student billing.
- Good stewardship of funds

Guiding Principles

- Student-centered
- Adopt native functionality of the system when possible and minimize customizations.
- Take full advantage of system functionality from the beginning

Keys to Success

- Executive and Management Support
- Understanding of the importance of the work; sense of urgency established
- Open minded with regards to change in process and structure
- Availability of resources when needed to complete the project
- Communication

Key Staff Who Will Need to be Available During the Project

- Financial Aid Directors and Staff at both Colleges
- District Fiscal Services Representatives
- Admissions and Records Staff
- Information Technology Department
- Others as Identified (Cashier, etc.)

Assumptions

1. Members of the Operational Group will meet weekly and/or as needed to keep the project on track.
2. Steering Committee Members will meet monthly to ensure project is on track.
3. Documentation of meetings will be kept (example: OneDrive share folder) and available to both Steering Committee members and Operational Group members.
4. Training on the Colleague FA system will be available to those who need it in a timely manner.
5. Dedicated support from in-house Programmer and Information Systems Business Analyst will be available.
6. Staffing backfill will be available for the colleges for the 2-year time frame.
7. Programming will be done in Colleague Studio.
8. Access to Colleague Financial Aid Consultant will be available.
9. FA Staff to be available for project work per the timeline.
10. Legacy data will be imported as needed.
11. Access to prior 4 years of data via SIGMA SAM or ODS will be available.
12. Ensure connection and communication with A&R. Consider using a sub-group of DIT (Date Impact Team).
13. Support for interface with other programs such as CampusLogic, BOG application, etc., will be available.
14. Colleague data cleanup projects will happen before FA is fully implemented.
15. Financial Aid Directors will have sole authority, along with the college FERPA administrators, to designate access to Colleague screens and data fields to individuals with an educational need to know.

Timeline Overview

See draft GCCCD FA Implementation Master Schedule document. Further discussion needs to occur to assess minimum staffing requirements for Financial Aid and IT during the transition.

Decision Making Structure

We will need to have a decision making structure established at the start of the project so all involved understand the process and who will ultimately make decisions to move the project forward. Decision making steps:

1. Problem Definition (what decision needs to be made)
2. Allocate timeframe for making the decision
3. Gather relevant information (from internal and external sources as needed)
4. Identify options/alternatives
5. Weigh the evidence
6. Choose option/alternative
7. Take action
8. Review decision and any consequences

Steering Committee Role & Composition

Vice President of Student Services, Cuyamaca College
Vice President of Student Services, Grossmont College
Associate Vice Chancellor of Educational Support Services (vacant)
Associate Vice Chancellor of Business Services
Associate Vice Chancellor of Technology (interim)
Project Lead
Director of Financial Aid, Grossmont College
Director of Financial Aid, Cuyamaca College
Senior Director of Fiscal Services
Project Manager

- Guide the transition to Colleague Financial Aid project to completion.
- Make strategic decisions regarding the project.
- Help ensure that resources are available when needed to complete the project.
- Provide feedback on the effectiveness of the transition.
- Act as advocates for the transition and report out to others in the institution regarding the transition.

Operational Project Team Role & Composition

Project Lead
SIG Consultant with expertise in the FA Colleague System
Director of Financial Aid, Grossmont College
Director of Financial Aid, Cuyamaca College
Dean of A&R, Grossmont College
Information Systems Business Analyst (IT)
Programmer Analyst Senior (IT)
District Projects Supervisor (Fiscal Services)
Senior Director of Fiscal Services

- Perform the work to make the transition to Colleague Financial Aid.
- Make operational decisions regarding the project.
- Elevate issues and practice decisions, specifically those that could potentially impact budget and timeline, to the Steering Committee
- Identify resources needed to complete the project and communicate those needs to the Steering Committee.
- Provide feedback on the effectiveness of the transition.
- Regularly report out to Steering Committee regarding the transition.

Next Step

Schedule a Kick-off meeting with the operational project team to review the project plan, the draft timeline and determine staffing needs.