

March 28, 2024

To: Dr. Jonathan Eldridge, Superintendent/President, College of Marin

From: Scheduling Process Workgroup Contributing Members

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Re: Reimagined Scheduling Process Recommendations

Background

In September 2023, over 30 College employees gathered for a process mapping exercise, which led to a better collective understanding of the myriad facets of and intersections between our course schedule development, UPM collective bargaining agreement, faculty assignments, payroll, and other elements of what is a complex web of policies, processes, forms, and timelines that overlap between HR, Fiscal, Payroll, OIM, IT, and academic departments. In October 2023, an in-depth analysis of HR and Payroll processes that begin at the end of the scheduling sequence surfaced issues, areas in need of change, and areas to streamline toward a more effective and efficient approach to scheduling, staffing, and accurately paying our employees.

In November 2023, then Assistant Superintendent/Vice President of Student Learning & Success, Dr. Jonathan Eldridge, charged a cross functional group of stakeholders, experts, knowledge holders, and super users to re-envision, re-invent, and re-connect the course scheduling process to COM's mission and values. In December 2023, the Reimagined Scheduling Process Workgroup began their work. Contributing members met in person six times across four months and spent over 11 hours defining the problem, establishing a value framework, reviewing data, discussing processes, identifying opportunities, consulting with internal and external experts, and identifying solutions. The group has identified short-term, immediate refinements that should take place prior to the next schedule production. Medium-term solutions require additional consultation and cross-functional groups to

thoughtfully evaluate, demo, and move towards more holistic discussion and decision making; this includes a recommendation to select software purchases and innovations that replace existing Customer Relationship Management (CRM) and schedule tools. In our first meeting, the group identified and documented the values and items that should drive a new, more efficient process.

Values and Decision Framework

- Prioritize student access and success
- Move towards thoughtfully designed pathways – within each department and across departments to support degree completion and learning goals.
- Reduce inefficiencies to expand ability to be student-centered and focus more on student success.
- Ensure accuracy
- Recognize the array of student scheduling needs; think holistically to best serve all students
- Orient towards equity-mindedness; return to what would be an equity and student-centered approach
- Challenge assumptions, disrupt status quo when appropriate
- Clarify how each piece of scheduling is related but defined
- Data informed scheduling, data analytics that examines class trends
- Respect each department’s work and limitations during the process
- Honor roles of all involved, seeking consensus when possible

Resources, Research, and Consultation

Contributing members reviewed past artifacts (schedule mapping, HR/fiscal process flows), existing process flows for [payroll](#), fiscal, [HR](#), [OIM](#), referenced [literature](#), and conducted interviews with Santa Rosa Junior College, San Mateo Community College District, City College of San Francisco, and Chabot College. The group consulted with Dr. Patrick Ekoue Totou, Dr. Holley Shafer who attended discussions to provide expertise, historical context, and serve as guest contributors.

Recommendations

1. Shift to an annual schedule production effective next scheduling cycle.
2. Implement technical refinements to Schedule Builder and its interface with Banner fields, existing tools, and develop new supplemental reports, dashboards and workflows for improved efficiency, quality and integration.
3. Explore new CRM to replace schedule builder and modernize institutional technology.
4. Streamline processes, communications and forms and eliminate assignment sheets, offer forms, and unnecessary/duplicative communications. *
5. Implement process changes to mitigate pay issues related to late change orders and manual processes.

6. Conduct fiscal process audit, mapping to support fiscal automation.

**Areas and recommendations with CBA impact including those that require negotiation marked with an (N).*

Recommendation 1: Annual Schedule

Timeline: beginning April 2024 with full implementation by September 2025

Lead Implementers: OIM, Chairs, Coordinators, PRIE, Administrators

Shift to an annual schedule production effective next scheduling cycle, shift. Align current scheduling production timeline and processes towards this goal while transitioning to a new model. COM is among the early adopters of this model. Preliminary feedback from other local community colleges suggests some are beginning to explore annual and two-year models in alignment with a more student-centered, guided pathway approach.

A yearly schedule production model:

- Provides chairs, faculty, and leadership more time for thoughtful, data driven, student centered scheduling
- Reduces existing duplicative entries
- Shifts to more holistic, student centered view of educational experience and views a student's journey across an entire major, degree, and program
- Provides predictability for students, counselors, faculty
- Provides visibility to annual load determination up front and may mitigate potential for payroll errors (N)
- Allows part time faculty to choose COM assignments first, early, and dependably (N)
- Provides potential to revisit PT faculty benefit eligibility if planning annually (N)
- Reduces emails between departments and various offices to conduct labor intensive accuracy checks
- Balances compressed timelines with high pain points and bottlenecks
- Provides a longer window of time to manage the smaller areas of scheduling with the greatest variability

What is needed to create new year-round process?

The ideal faculty production timeline begins in June and concludes in August with a culminating event during flex week allowing chairs, coordinators, and departments one more round of review and calibration prior to submission to the Office of Instruction in September. A chair/coordinator June kick-off summer gathering surfaced as an opportunity to assemble a core group of schedule leaders to consult and conduct preliminary data review prior to initial schedule creation with key facilitators:

Chairs, PRIE, OIM as an example. To support meaningful schedule creation, a number of items must be resolved no later than July 1 to support chair schedule building:

- Data packets provided to support strategic decisions (June)
- Completion of hiring decisions
- Settled non-instructional assignments **(N)**
- Identification of redundant courses, historically low enrollment classes
- Assessment of conflicting or overlapping A-G courses, major requirements, other items that impede student progress

The reimagined scheduling workgroup members identified key areas, features, and tools to modify, maintain, and eliminate, labeling these as: [change, keep, and remove](#) items.

Change:

- Assignment sheets; eliminate, automate, blend payroll/leave model (additional discussion/exploration required to support Team Dynamix or other custom-built workflow) **(N)**
- SRJC model: published schedule is contract **(N)**
- Existing schedule production timeline
- Department Chair election and service periods **(N)**
- UDWC report – tracking overloads, non-instructional assignments manual process **(N)**
- Facilitron-automate nightly feed of academic schedule from Banner
- Schedule builder

Keep:

- OIM as Central Point of Contact
- Banner (for now and with update)
- Schedule builder (for now)

Remove:

- 2x schedule input (schedule builder then banner/schedule builder pre-load more efficient)
- Inputting errors 2 times
- Errors in schedule that require manual validation
- Manual validation
- Forms: assignment sheets, offer forms **(N)**

Recommendation 2: Implement Technical Refinements

Timeline: Phase 1 technical refinements, including schedule builder and EAPF builder upgrades, beginning April 2024 with full implementation of all technical refinements by December 2024. Phase II refinements to be re-evaluated following the outcome of Recommendation 3.

Lead Implementers: IT, OIM, HR, Fiscal

Implement technical refinements to Banner and existing tools, and develop new supplemental reports, dashboards and workflows to streamline duplicative and labor-intensive processes, improve efficiency, increase quality of products, enhance communication methods, and integrate process workflow. Refer to supplemental documents and resources for itemized list of enhancements.

Resources: [Proposed Changes to Schedule Builder](#), author, Jim Stopher; [Contract to Pay](#), author, Burton Schane

Recommendation 3: Advance Major Upgrades-New Customer Relationship Management (CRM) & Enterprise Resource Planning (ERP) System

Timeline: Demo, preview, cost, timeline, feasibility, and implementation plan by May 2025.

Lead Implementers: Cross functional team of technical experts with systemwide view and College CRM super users. Recommended inclusion of IT, OIM, HR, PRIE, Fiscal, Chairs, Coordinators, Administrative and Classified staff representatives.

Explore new CRM/ERP to replace schedule builder and modernize institutional technology. Continued inquiry and exploration of other options besides both banner and schedule builder should be conducted by a cross functional group to assess best fit, engage in broad consultation, determine cost, identify resources, and present to College community.

Provides predictive modeling for student schedules, added enhancements, and schedule generators. Per San Mateo Community College District (SMCCD) VC, a full CRM adoption like Salesforce requires colleges to conduct and complete a full guided pathway/degree mapping for each program and must be coupled with more requirements around educational plans. Salesforce then draws directly from Banner to produce student centered schedules based on program, major, certificate and degree requirements.

Recommendation 4: Streamline Processes, Communications, and Forms

Timeline: Design and develop workflows to support automation of assignment sheets and contracts by December 2025. Eliminate assignment sheets, offer forms, and unnecessary communications and forms.

Lead Implementers: OIM, Chairs, Coordinators, Deans, IT

Assignment sheets are frequently completed incorrectly, difficult to edit, routed multiple times, and cause significant delays, inefficiencies, and additional work for chairs, faculty, the office of instruction, and administrators. The scheduling work group recommends developing custom workflows to support automation of assignment sheets and contracts. Refer to supplemental documents and resources for current design requirements. Additional design scoping will be needed.

- Offer forms are not currently used uniformly among Chairs. The form, the window of waiting, and the routing cause significant delays, inefficiencies, and additional work for chairs **(N)**
- Assignment sheet, contract, offer letter documents with purposes that overlap. See SRJC model: published schedule is contract **(N)**
- Revisit or eliminate PT form; originally instituted to prevent confusion between official offer and just a discussion on scheduling. **(N)**
- Automate discussion on when faculty is available instead of discussion back and forth by email **(N)**
- Revisit part time 7-day window to respond to an offer **(N)**
- Perform EPAF updates: can add a grace period at the end of a job – have added 14 days before hire, 3 months after buffer to log into account (can be adjusted)

Recommendation 5: Implement process changes to mitigate pay issues

Timeline: With consensus among Deans/Directors, considering impact on student access and success—Implementation Fall 2024

Lead Implementers: OIM, HR, Deans/Directors/Chairs

Implement process changes to mitigate pay issues related to late change orders.

- Impose a cancellation deadline – week before start of semester
- Move payment of Overload to MD payroll or end of spring semester **(N)**
- This would allow enough time for OIM/HR/Payroll

Immediate process changes – April 2024

- Departments cc HR on notification to OIM about change order
- Upon receipt of revised unit allocation from OIM, HR moves forward with updating pay information

Recommendation 6: Fiscal Automation

Timeline: September 2024 – July 2025

Lead Implementation Team: Fiscal, IT, HR

Independent process mapping and internal control assessment of Payroll and Human needed to support fiscal automation and process refinement.

- Utilize resources by Ellucian Consultant, such as Strata Information Group (SIG)
- A 3rd Party “Audit” of both the HR entry side and Payroll processing side would delineate opportunities to automate and or create procedural changes to increase efficiency and effectiveness, and most importantly, ensure accuracy.
- Identify gaps in internal control with recommendations for better review and error mitigation strategies.
- Explore other Enterprise Resource Planning (ERP) system packages for HR & Fiscal
- Consider a more suitable ERP solution for Fiscal & HR while retaining Banner for the Student facing side.
- Implement digital timecard reporting in Banner to automate the processing of physical timecards

Areas of Deviation

Areas and recommendations with CBA impact including those that require negotiation marked with an **(N)** above. Additional items below indicate how this new design deviates from existing policy and CBA language.

Annual schedule implications to overload (yearly vs semester)

- Move payment of Overload to MD payroll or end of spring semester
- Eliminate Offer forms, assignment sheets, assignment request forms (F8.A), Article 6.4.8
- PT faculty and Stipend Noninstructional assignment request form; needs to be filled out, can also be done by email. This is the step before the schedule. PT form was instituted to prevent confusion between official offer and just a discussion on scheduling.

Part time 7-day window to respond to an offer Article 6.4.8

- Potential to revisit PT faculty benefit eligibility if planning annually

- Assignment sheets; eliminate, automate, blend payroll/leave model
- SRJC model: published schedule is contract
- Department Chair election and service periods
- UDWC report – tracking overloads, non-instructional assignments manual process
- Provides visibility to annual load determination up front and mitigates potential for payroll errors
- Potential to revisit PT faculty benefit eligibility if planning annually

Needed Resources

Funding for CRM/ERP TBD upon further inquiry and consultation

Additional time and support for short term tool refinements to schedule builder and process/workflows

Exploration of Super User Groups to support medium- and long-term goals and lift short term implementation (e.g. faculty/chairs willing to beta test)

Review of [inventory](#), tools, and enhancement costs