

Jolley, Kate

From: Jolley, Kate
Sent: Thursday, December 16, 2021 7:36 PM
To: Jolley, Kate
Cc: Webb, Don; Weatherly, Debbie; Durand, Gene; Saldana-Talley, Jane; Thompson, Julie; Snyder, Kevin; Avila, Pedro; Jarrett, Stephanie
Subject: SAVE THE DATES! Demonstrations for Enterprise Resource Planning / Student Information System (ERP/SIS)
Attachments: SRJC Draft Vendor Demonstration Agenda .pdf

Sent bcc: dl.staff.all

Dear SRJC Community,

As previously communicated, technology available in higher education to serve students, faculty and staff is evolving rapidly. Student expectations are increasing and they wish to have a single source for the things that are important to them: appointments with counselors, registration, personal calendars, financial aid, fees, account balances, program completion status, etc. Additionally, all systems are required to meet the Americans with Disabilities Act Standards for Accessible Design, which states that all electronic and information technology must be designed and accessible to people with disabilities.

Our current Student Information System (SIS) at SRJC is a home grown system developed by the college and originally designed for use by a consortium of colleges. Today, we are the sole college using the system as other colleges have migrated to commercial integrated systems. Our system impacts everything we do, including Payroll, Human Resources, Finance, Financial Aid, Registration, Curriculum, Scheduling and State Reporting. SRJC has greatly benefited from an extremely talented IT staff that have been able to respond to our needs to better serve students but it has taken an increasingly large effort to retain the integration between all the various programs. These technology factors, plus upcoming retirements, put our current technology on a near-term end-of-life path and brings us to this point in selecting a replacement.

The District is in the process of soliciting bids for an ERP/SIS (Enterprise Resource Planning / Student Information System). This software is meant to replace our current home-grown Student Information System, as well as possibly several other systems. Measure H funding has been allocated for this purchase.

The District plans demonstrations of different ERPs that meet our criteria based on results of the RFP process. Each demonstration will be virtual and will take a full week. We currently anticipate seeing demonstrations from three vendors and are planning for these demonstrations to occur during the following weeks in the Spring:

- March 14-18, 2022
- March 28-April 1, 2022
- April 11-15, 2022
- April 26-28, 2022 (technology and reporting sections only)

For your planning purposes, attached is a draft of how the demonstration lineups may occur. These are a draft and may need to be tweaked as we finalize planning but will hopefully allow you to block times for the areas you are interested in participating in.

We recognize that this decision touches every employee and student in this college and are committed to an inclusive, transparent and participatory process. The vendor demonstrations will be open to any employee interested in

participating. It will take a large group of District employees working together to effectively view and grade these products. Please save these dates as times where we will need your participation so that we can get the ERP that best suits our District needs. As we get closer to the dates, we will reach out again with additional details on the demonstrations and solicitation of feedback.

Sincerely,

The ERP/SIS Steering Committee

Debbie Weatherly
Don Webb
Gene Durand
Jane Saldana-Talley
Julie Thompson
Kate Jolley
Kevin Snyder
Pedro Avila
Steph Jarrett

Kate Jolley
Vice President, Finance and Administrative Services



1501 Mendocino Ave | Santa Rosa, CA | 95401
tel 707-527-4413 | fax 707-535-3769
kjolley@santarosa.edu
accounting.santarosa.edu

I acknowledge that Santa Rosa Junior College is on the territorial traditional land of the Pomo People in Santa Rosa and the Coast Miwok People in Petaluma, past and present, and honor with gratitude the land itself and the people who have stewarded it throughout the generations.

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Draft Vendor Demonstration Agenda

Day 1 Monday			
Module Area	Topics	Approximate Time	Location
General Session	Session 1 <ul style="list-style-type: none"> ■ Overview of Vendor Enterprise Solution, and General Navigation of System 	8:30AM – 10:00AM	
Break		10:00 AM – 10:15 AM	
Instruction Office	Session 2 <ul style="list-style-type: none"> ■ Catalog ■ Schedule of Classes ■ Faculty Load 	10:15 AM – 12:15 PM	
Lunch		12:15 PM – 1:00 PM	
Student	Session 3 <ul style="list-style-type: none"> ■ CRM Prospect and Recruiting 	1:00 PM – 3:00PM	
Break		3:00 PM – 3:15 PM	
Student	Session 3b <ul style="list-style-type: none"> ■ Admissions, Orientation, Assessment, Transcript Evaluation, Initial Ed Plan 	3:15 PM – 4:45 PM	

Day 2 – Tuesday			
Module Area	Topics	Approximate Time	Location
Student	Session 4 <ul style="list-style-type: none"> ■ Registration 	8:15 AM – 10:30 AM	
Break		10:30 AM – 10:45 AM	
Student	Session 5 <ul style="list-style-type: none"> ■ Academic Records – Rosters, Grades & Transcripts 	10:45 AM – 12:15 PM	
Lunch		12:15 PM – 1:00 PM	
Student Counseling & Advising	Session 6 <ul style="list-style-type: none"> ■ Academic Advising, Counseling, Student Educational Plans 	1:00 PM – 2:45 PM	
Break		2:45 PM – 3:00 PM	
Student Accounts	Session 7 <ul style="list-style-type: none"> ■ Fee Assessment ■ Cashiering and Application of Payments ■ Student Accounts Receivable 	3:00 PM – 4:45 PM	

Day 3 -Wednesday			
Module Area	Topics	Approximate Time	Location

Draft Vendor Demonstration Agenda

Financial Aid	Session 8 <ul style="list-style-type: none"> ■ Financial Aid – General Processing 	8:00 AM – 10:30 AM	
Break		10:30 AM – 10:45 AM	
Financial Aid	Session 8b <ul style="list-style-type: none"> ■ Funds Management/Work Study/ Scholarships/ Loans 	10:45 AM – 12:15PM	
Lunch		12:15 PM – 1:00 PM	
Financial Aid	Session 8b - continued <ul style="list-style-type: none"> ■ Funds Management/Work Study/ Scholarships/ Loans 	1:00 PM -2:30 PM	
Break		2:30 PM – 2:45 PM	
Finance	Session 9 and 9b <ul style="list-style-type: none"> ■ Chart of Accounts/General Ledger ■ Budgeting Planning and Management 	2:45 PM – 5:00 PM	

Day 4 Thursday

Module Area	Topics	Approximate Time	Location
Finance	Session 10 and 10b <ul style="list-style-type: none"> ■ General Accounting, Journal Entries, Cash Management & Period and Fiscal Year Closing ■ Grants Management and Accounting 	8:00 AM – 10:15 AM	
Break		10:15 AM – 10:30 AM	
Finance	Session 13 <ul style="list-style-type: none"> ■ Procurements - Purchasing - Requisitions - Accounts Payable-Fixed Assets. 	10:30 AM – 12:30 PM	
Lunch		12:30PM – 1:15 PM	
Finance	Session 14 <ul style="list-style-type: none"> ■ Travel and Expense Management 	1:15 PM – 2:15 PM	
Break		2:15 PM – 2:30 PM	
HR and Payroll	Session 15 <ul style="list-style-type: none"> ■ Position Control/Position Management 	2:30 PM – 4:00 PM	

Day 5 – Friday

Module Area	Topics	Approximate Time	Presenter(s)
HR and Payroll	Session 16	8:15 AM – 9:45 PM	

Draft Vendor Demonstration Agenda

	<ul style="list-style-type: none"> ■ Applicant Tracking and On-boarding 		
Break		9:45 AM – 10:00 AM	
HR and Payroll	Session 17 and 17b <ul style="list-style-type: none"> ■ General HR and Salary Management ■ Benefits Management 	10:00 AM – 12:30 AM	
Lunch		12:30 PM – 1:00 PM	
HR and Payroll	<ul style="list-style-type: none"> ■ Session 18 ■ Time – Leave Tracking and Payroll Processing 	1:00 PM – 3:45 PM	
Break		3:45 PM – 4:00 PM	
HR and Payroll	Session 18b <ul style="list-style-type: none"> ■ Performance Management 	4:00 PM – 5:00 PM	

Day 6 – Tuesday, Wednesday, Thursday the week after Functional demonstrations

Module Area	Topics	Approximate Time	Location
General Session	Session 19 <ul style="list-style-type: none"> ■ Reporting Analytics and Institutional Research 	8:30 AM – 10:30 AM	
Break		10:30 AM – 10:45 AM	
IT Session	Session 20 <ul style="list-style-type: none"> ■ Technology Review 	10:45 AM-12:00 PM	
Lunch		12:00 PM – 12:45 PM	
IT Session	Session 20 – Continued <ul style="list-style-type: none"> ■ Technology Review 	12:45 PM – 3:30 PM	
