

KENNEDY & COMPANY Draft

**San Mateo County
Community College District**
*Evaluation and Recommendation of Student Supporting Software & Systems
Research Report*

DRAFT: For Discussion Purposes Only


2017 Kennedy & Company Education Strategies LLC

Project Deliverables Draft

As one of the three main deliverables for the Student Technology System Selection project, Kennedy & Company has developed a draft Research Report that will provide an overview of the current state of technology and operations at SMCCCD and the available technology landscape.

- 1 Research Report**
Kennedy & Co. will develop a comprehensive **Research Report** that captures a broad, yet intense and encompassing look at the various types of technology on the market for higher education, and currently in use at various institutions, both local to the district, as well as throughout the region.
- 2 Staff Report**
We will conduct a series of interviews with staff and students from the three campuses, as well as the district office to get a full picture of the needs and desires of the communities you serve, and use the information in a **Staff Report** that includes the technology recommendations.
- 3 Communications Plan**
We will also be responsible for developing and deploying a **Communications Plan** to inform the district community about the project, to gain buy-in and participation from the various constituencies for the interviews and/or surveys needed to complete the Staff Report and to keep everyone informed of our progress throughout the project.

This Research Report is in draft form and will continue to be updated and refined with input from SMCCCD employees, campus representatives, students, and technology vendors over the next two months.

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Initial Observations and Insights

- SMCCCD is currently running two stable systems which are cornerstones of any strong enterprise applications ecosystem:
 - BANNER: Though it is a challenge for SMCCCD to maintain, SMCCCD is relatively happy with Banner and is preparing for the transition to Banner 9 in 2018
 - CANVAS: the LMS system, is best of breed, supported by the state, and widely seen in a favorable light
- Where SMCCCD is lacking is in the student experience with technology. Kennedy & Company's testing, on-site discovery sessions, and the student survey told us that the online application is a major pain point, along with WebSmart and overall communication with SMCCCD, which are cumbersome and non-intuitive.
- Between the three colleges, there are many different types of technology in use – tools selected to help an individual person or department. These tools do not always integrate with one another, nor, in most cases, do they integrate with the two primary systems.

This report will identify and prioritize upgrades or replacement systems for SMCCCD to implement that seek to solve these identified challenges with supporting student technology.

▶ 3

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Initial Observations and Insights

- The lack of strong communication tools also creates a challenge for students and student-facing staff. Staff in admissions find themselves buried under manual work that keeps them from delivering higher-value engagements with students and proactive recruitment or follow-up measures.
- Students desire the availability of mobile applications that will allow them to conduct important tasks like registering for courses and paying for tuition via a mobile interface.

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SMCCCD Should Prioritize CRM Selection

While SMCCCD should consider how all the software and systems they acquire will work together to optimize the student experience, the order in which these systems are procured and implemented is important.

System	Reasoning	Priority
CRM (Recruitment, Retention)	CRM solution will be central to the goals of a better student experience. CRM will be the "system of engagement" while keeping Banner as the "system of record"	Highest (start early 2018)
Student Portal	Building out the student facing solution, replacing or augmenting WebSmart should be a top priority. Portal should be tightly coupled with Banner and the chosen CRM. This should be considered during the CRM selection, as the selected CRM could largely drive which portal solution would be best.	Higher (start early-mid 2018)
BI/Predictive Analytics Solution	Understanding the trends of the student behaviors via a predictive analytics solution that integrates with the CRM will help SMCCCD to better serve current and future students.	High (start mid-late 2018)

Because the CRM System will serve as the backbone of SMCCCD's student-facing software and interact the most with the Banner SIS, Kennedy & Company sees this as the highest priority to support the other technological systems.

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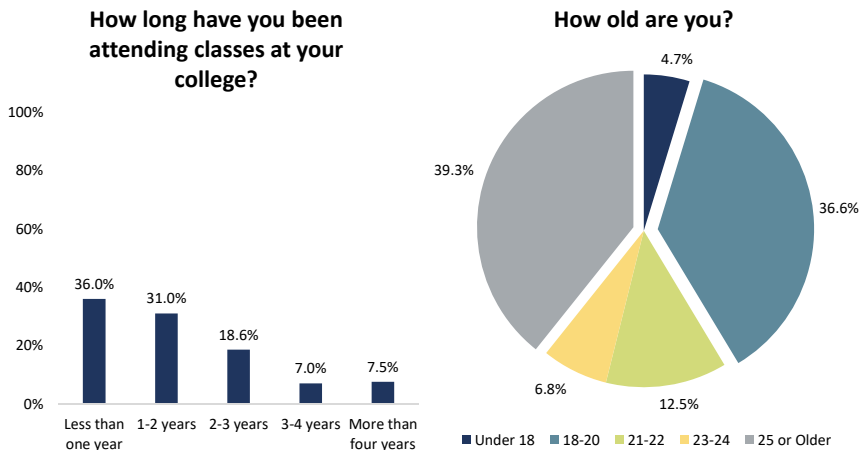
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Survey Insights

Keeping perspective with what we want to accomplish

Respondents Were Mostly New at SMCCCD

Almost 2/3 of the responding students have been attending classes in the District for less than two years, and almost 40% were over the age of 25.



n = 2,093

7

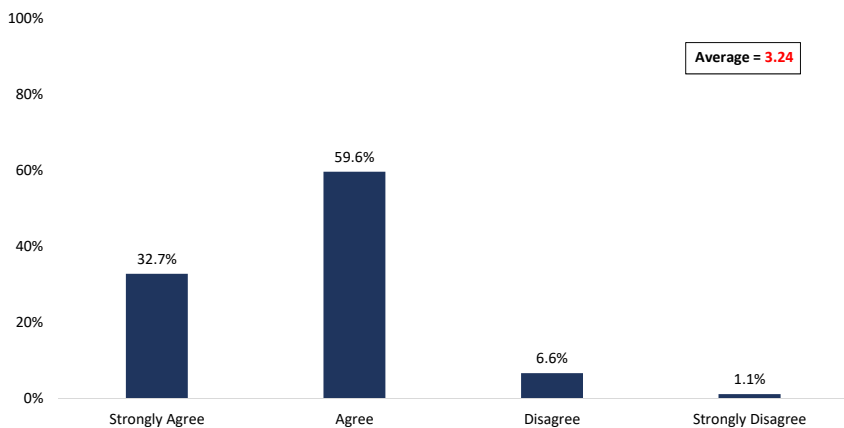
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Negative CCCApply Experiences Are Not Captured in Survey

Students appear to be relatively happy with the online application, however the survey obviously doesn't consider the opinions of any students that failed to begin or complete the process of applying and/or enrolling; further, SMCCCD does not have a CRM or supporting technology / business processes that allow it to reach out to the population of incomplete applicants.

The process of applying to my college was easy for me.



n = 2,093

8

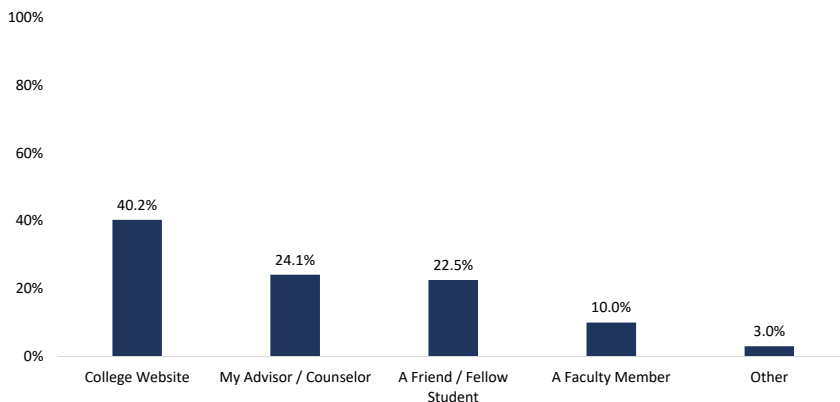
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Students Primarily Rely on Website for Information

Respondents indicated that they were already comfortable with finding pertinent information about campus resources online, which further supports the idea that a student portal with the most relevant items would be useful to them.

When you have a question about campus resources, where do you typically turn first for information?



n = 2,093

9

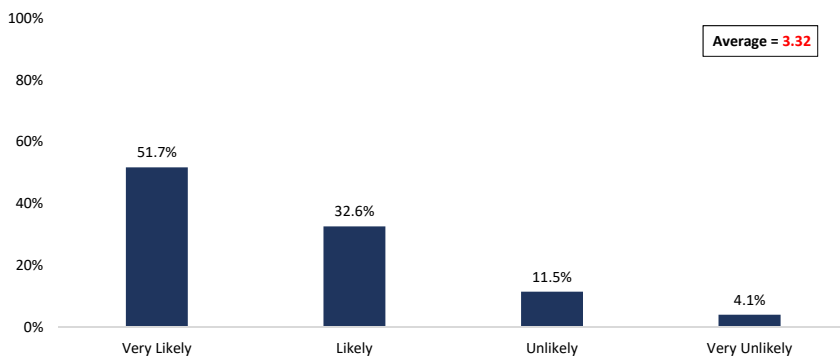
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Students Want a “One-Stop Shop” Mobile App

Over 80% of respondents would be likely to use an app for all student services functions if it was available, which confirms student feedback for higher levels of service on mobile platforms from our discovery sessions.

If there was an app available to register online for courses, pay your tuition, or access other services on campus, how likely would you be to use the app for those purposes?



Average = 3.32

n = 2,093

10

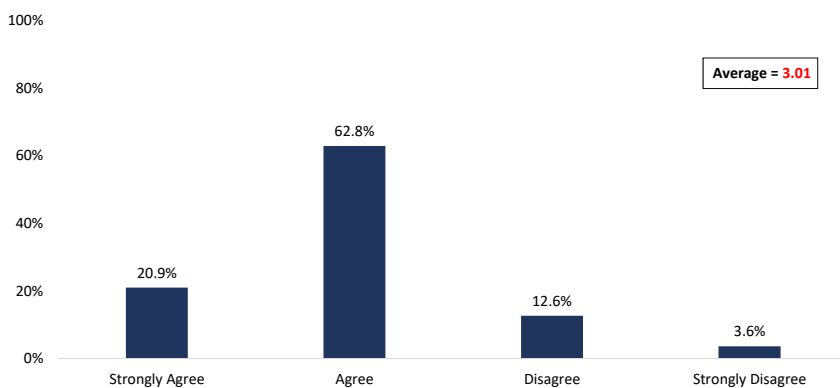
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Students Want More Financial Aid Availability Draft

The number of students that indicated they "Disagree" or "Strongly Disagree" with the timeliness and accuracy of Financial Aid assistance is almost as high as those that indicated "Strongly Agree," suggesting more information could be provided without the need for an appointment.

If I have a problem with financial aid I can get help in a timely and accurate manner



n = 2,093

▶ 11

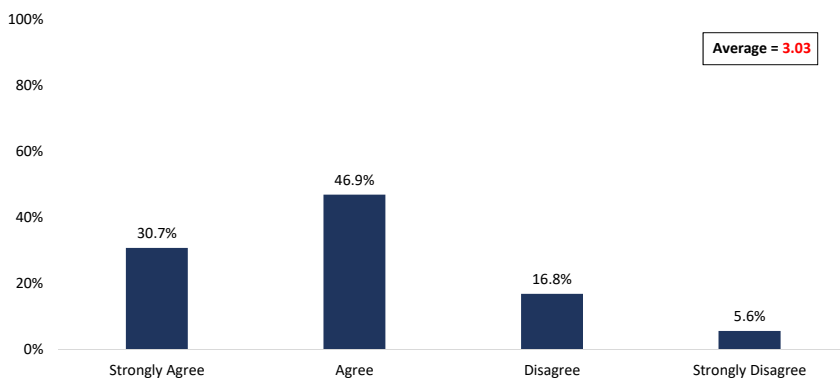
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Response to Live Chat Function Was Tepid Draft

Interestingly, respondents did not indicate a strong desire to use a chat function where they could talk with a staff member in real-time; however, this could be due to students being unaware of what they need from an academic advisor or financial aid representative.

I would use a live chat function where I could talk to an academic advisor or other staff member (such as academic advising, registrar, financial aid) if it were available.



n = 2,093

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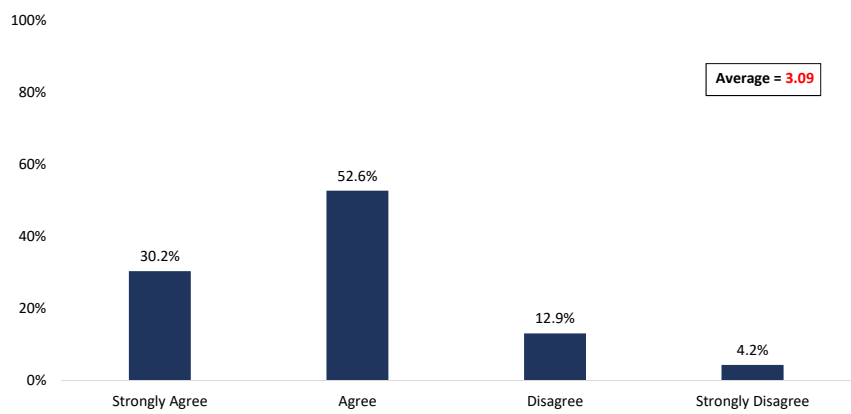
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Student's Appointments with Counselors Are Easy to Set

The students who responded to the survey are likely the most engaged and therefore need the least assistance from an academic counselor, but this does not account for the students who are disengaged and therefore considered at-risk; SMCCCD will need to identify technology and supporting business processes that will allow it to more easily identify these at-risk populations.

When I need to see an academic counselor, the process of making an appointment to do so is easy.



▶ 13

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User Test of Online Application & WebSmart

Getting Started

```

    graph LR
      CCCApply --- SchoolA[School A]
      CCCApply --- SchoolB[School B]
      CCCApply --- SchoolC[School C]
      SchoolA --- Openccc
      SchoolB --- Openccc
      SchoolC --- Openccc
    
```

1

<https://home.cccapply.org/es>

2

<http://www.skylinecollege.edu/>

3

<https://www.opencccapply.net/>

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OpenCCC Application Process: Registration

Pro's	Con's
<ul style="list-style-type: none"> ▪ Straightforward flow ▪ Immediate email confirmation for account creation 	<ul style="list-style-type: none"> ▪ Too many questions for a registration process that could lead to a high bounce rate. ▪ Unclear if partially completed registrations count as inquiries ▪ Password, PIN, 3 security questions, and CAPTCHA overburdens the applicant ▪ Misleading multilingual option

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Application: The Good

Canada College

Welcome Jeremy Lipkin | CCCID: AWL6745 | Sign Out | My Applications | Help

For your security always sign out before leaving.

My Applications
Jeremy Stephen Lipkin | Edit My OpenCCC Account

Your last application was submitted to Canada College on 11/15/2017

Yes No To save time, would you like to copy this information into your new application?

Note: Fields left blank are to be filled in by you to determine your Residency status.

[Start A New Application](#)

Applications in Progress
If you have previously started an application but not yet submitted it, you can resume it or delete it at any time.

College	Current Page	Began	Last Modified	Confirmation No.	Action
Skylark College	Account Information	11/15/2017 12:40 PM	11/16/2017 8:34 AM	7508637	Resume Delete
College of San Mateo	Personal Information	11/15/2017 12:45 PM	11/15/2017 12:46 PM	7508691	Resume Delete

- Straightforward flow, quick to complete
- Ability to copy data from one application to the next
- Clear visual connection to registration site
- Mobile-friendly, if not mobile optimized
- Clear language and instructions
- Good survey and next steps at the end of the process
- Easy process for save/resume
- Immediate email about interest in sports after application submission

▶ 17

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Application: The Bad

Programs & Services

Check the programs and services in which you are interested. (Not all college campuses offer every program and service listed.)

- Academic counseling/advising
- Basic skills (reading, writing, math)
- CalWorks
- Career planning
- Child care
- Counseling - personal
- DSPS - Disabled Student Programs and Services
- EOPS - Extended Opportunity Programs and Services
- ESL - English as a Second Language
- Health services
- Housing information
- Employment assistance
- Online classes
- Re-entry program (after 5 years out)
- Scholarship information
- Student government
- Testing, assessment, orientation
- Transfer information
- Tutoring services
- Veterans services

- Out of date entries, typos
- Some questions had too many, possibly confusing options
- Spanish multilingual option is not working and apparently has been broken for months
- No ability to vary questions and/or answers between campuses
- No email/text confirmation upon application creation or submission, except for a Title IX survey for applications expressing an interest in athletics

▶ 18

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Student Technology Landscape

Banner 9

Banner 9 is the current major release of SMCCCD's student information system. SMCCCD is on Banner 8 and is in the process of upgrading, with full conversion completed by December, 2018.

The upgrade to Banner 9 must be considered in any roadmap conversation. The upgrade to Banner 9 has implications for the rest of the SMCCCD enterprise application ecosystem because it will include:

- New integration data points that will need to be considered for any replacement systems
- New functionality that may address some of the needs outlined elsewhere in this document

Banner 9 research is ongoing and will be added to this document as we develop a greater understanding of how it will impact SMCCCD's other supporting technology systems.

Deciding on an Application is a Crucial Step

Kennedy & Company recommends SMCCCD's first step is to implement a CRM, which will likely take more than a year after issuing an RFP. All of the recommended vendors have an available online application module for SMCCCD to consider and decide whether to pursue.

CCCApply vs. Going Independent with an Online Application

CCCApply	Going Independent
Poor student experience	Presumably better student experience—how much better will it be if the questions are the same?
Not well maintained or supported (i.e., Spanish language not broken for almost a year)	Large IT maintenance undertaking
State promising improvements	Need to report same data back to state, additional challenges on the back end
Data lake of all applicants	CCCApply is currently a requirement for Canvas integration.

It is hard to determine the state's commitment to improving CCCApply.

Kennedy & Company recommends evaluating online application modules as a part of the CRM selection process, but not yet committing to the purchase or implementation of an online application module until these questions are answered more fully.

Why is a CRM Solution so Important?

SMCCCD's CRM solution will be the backbone of the student technology systems that will serve as the hub for student engagement.

Any viable CRM solution should provide at least:

- Integrated broadcast email and SMS capabilities with ability to determine efficacy of campaign and templates
- Integration with staff email and calendaring solutions
- Event and appointment scheduling
- Import of prospects
- Tracking of all automated and individual communications with students, a 360° view of engagements
- Automated task management, ability for system to create tasks for staff to complete based on defined rules, ability for managers to monitor staff performance on tasks and measure effectiveness of certain types of tasks on enrollment and retention
- Ability to integrate with external systems, have an automated early alert system where at-risk student in various categories (financial, academic, interpersonal) are identified and appropriate tasks assigned with minimal dependencies on manual work
- Online application
- Student-facing mobile apps or mobile-optimized websites
- Ability to collect inquiries at fairs or other recruiting events
- String reporting functions, principally the ability to represent a student funnel and enrollment/retention trends
- Strong integration tools, which are critical for:
 - 360° view of the student within the CRM
 - Receipt of key data in external systems (Banner first and foremost)

CRM Build vs. Buy Considerations

If SMCCCD chooses to move forward with Salesforce with or without a packaged solution from a vendor, it may also choose to have some independent development firms to do the custom work for them, which creates both opportunities and challenges.

Build from Scratch	Buy
Pros <ul style="list-style-type: none"> Choosing an independent development firm is always an attractive option, because the institution will get 100% of its priority business requirements met. 	Pros <ul style="list-style-type: none"> Off the shelf solution can typically address 70% - 90% of business needs, giving schools opportunity to fill the gaps with custom development New enhancements come on a regular basis
Cons <ul style="list-style-type: none"> Being tied to that vendor for ongoing support Future enhancements come at an additional cost Strong Salesforce developers are in high demand There is a notion of "reinventing the wheel" Past system builds at SMCCCD have not been as widely-adopted due to gaps in functionality (e.g., Early Alert) 	Cons <ul style="list-style-type: none"> Ongoing maintenance costs Closely evaluate the packaged solutions to make sure that they meet 100% of your critical business requirements and at least 80% of your overall requirements. Building custom solutions on top of packaged solutions may require periodic rework.

Generally, custom development works best for institutions with deep pockets working in niche markets where the external implementation consultants are not a good fit (i.e., study abroad or a conservatory).

▶ 23

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CRM Build vs. Buy: Risk Mitigation Steps

If SMCCCD determines that Salesforce custom development is an attractive option, the District can mitigate some or all of these risks by taking a number of steps during the procurement and implementation process.

Risk Mitigation Steps Include:

- Conduct extra due diligence during the proposal process. Insist on seeing the resumes of the team who will be assigned to your project. In addition to standard references, get demonstrations of some similar implementations from other schools, perhaps even making site visits.
- Use a custom development shop to augment the solutions from one of the ISV accelerators instead of reinventing the wheel.
- Insist the the vendors provide source code and extensive documentation.

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Setting Up for Success

As SMCCCD is building an end-to-end student success ecosystem, the leadership team should remember that technology is a single – but substantial – portion of the puzzle that must be supported by strong business processes in order to maximize its investment.

Systems Are Hard to Implement

- These are not the kinds of systems that SMCCCD will be able to pass off to IT to develop a working system in a few months. In fact, implementing CRM systems in particular mostly involve IT only when it comes to integration.
- The student-facing staff will heavily support the implementation process, mapping out business processes, validating data sets, signing off on layout designs, and other similar tasks.

IT Systems are Tools to Implement Business Processes

- While many of SMCCCD's systems are antiquated, new systems are only as good as the work that is put into designing optimal business processes and implementing them.
- These technology systems shine a bright light on inefficient business processes and SMCCCD should keep an open mind and be ready to question long-held assumptions if it wants to maximize its resource investment.

Investing in your People

- The investment in a stronger technology ecosystem is not only software licenses, but in training and/or hiring dedicated staff (internal or outsourced) to support these systems.
- The most impactful CRM implementations have one thing in common—wide user adoption. A good implementation plan should incorporate a strategy for driving staff and student adoption.