

ASSIST
Technical Coordination Guidelines

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Background

Project ASSIST Purpose and Goals

The three segments of California public higher education have affirmed on a number of occasions that "the purpose for ASSIST is to empower students and counselors with accurate and timely information for making more informed decisions regarding postsecondary education (especially related to transfer) by establishing and maintaining a computerized information system which consists of a broad spectrum of statewide information"

The following statewide Project goals for ASSIST have been established to help guide the Project:

1. Development and maintenance of a complete database by participating institutions including Course Lists, Campus Information, Transfer Course Agreements, and Articulation Agreements; Development and maintenance of Degree Requirements and In Lieu of Tables (ILOTS) to support effective utilization of the Progress Check by participating community colleges; and
2. Effective utilization of ASSIST at each participating campus by students, counselors, articulation officers, advisors, evaluators, outreach officers and all others who are active in student transfer related activities.
3. Expansion of ASSIST to all public postsecondary institutions throughout the state;

Reaching and sustaining these goals over time depends upon a number of relevant factors including:

- Participating campus staff continuing their exceptional work in building and maintaining the database and implementing effective utilization plans;
- New campuses joining the Project with solid implementation plans and support from the ASSIST Coordination Site and current participating campuses;
- Maintaining the ASSIST Coordination Site to provide comprehensive Project services including project planning and coordination, technical and user support, and software development and maintenance;
- Software that continues to evolve to meet changing policies, needs, and technologies;
- Continuing commitment from the segmental offices and campus administrators to enhance student transfer activities via ASSIST; and
- Continuing support and additional resources from campuses, the segmental offices, and the legislature to enable participating campuses to build the database and to enable the ASSIST Coordination Site to provide required services.

ASSIST Oversight

ASSIST is governed by the ASSIST Board of Directors, comprised of representatives from the three segmental offices participating in ASSIST: California Community Colleges, California State University, the University of California, and a representative of the California Post-Secondary Education Commission (CPEC). The ASSIST Board of Directors sets the general direction for ASSIST and associated development projects.

The ASSIST Coordination Site (ACS) oversees and performs the detailed technical work associated with the development, enhancement, implementation, and support of ASSIST applications.

The ASSIST Technical Advisory Committee (TAC) oversees the development and maintenance of the ASSIST Technology Plan, reviews software development activities as defined in the ASSIST Software Development Framework, and, at the direction of the ASSIST Board of Directors, reviews technical issues related to Project ASSIST and makes recommendations for resolution of such issues. The TAC is composed of technical members of the ASSIST Board of Directors representing the California Community Colleges Chancellor's Office, the CSU Chancellor's Office, UC Office of the President, and the ASSIST Coordination Site.

Campus Advisory Committee

The ASSIST Board of Directors has established the ASSIST Campus Advisory Committee as a standing committee to discuss issues and make recommendations to the Board regarding end user issues at participating colleges and universities. This committee will meet at least twice annually to discuss issues regarding implementation, utilization, and database maintenance of Project ASSIST. These issues include, but are not limited to: definition and revision of the customer satisfaction survey instrument, annual campus review of components of the Technology Plan, and communication of campus needs regarding functional requirements.

Membership - The membership of the ASSIST Campus Advisory Committee includes representatives from the following agencies in addition to representatives from the ACS:

California Community Colleges

- 2 Student services representatives from different participating colleges, preferably managers of counseling;
- 2 Technical representatives from different participating colleges, preferably MIS directors;
- 2 ASSIST Project Managers from different participating colleges, preferably with articulation experience;
- 1 student representative, preferably from an existing community college student advocacy organization;

California State University

- 1 ASSIST Manager from a participating CSU campus, preferably with articulation experience;
- 1 Technical representative from a participating CSU campus;

University of California

- 1 ASSIST Manager from a participating UC campus, preferably with articulation experience; and,
- 1 Technical representative from a participating UC campus.

Scope

This document outlines guidelines for the coordination of ASSIST technical activities and projects, and the issues which arise from same, for the purpose of facilitating discussion on technical matters as they impact the overall goals for ASSIST. This guidelines document is a tool and is intended to facilitate the following:

1. Obtain Agreement on the Strategic Technical Directions of ASSIST - these guidelines provide a means for obtaining input, review, and approval of the general technical direction to be established for ASSIST and for evolution of technical direction.
2. Establish System Development Expectations - the guidelines establish an agreed upon means of communicating to ASSIST participants the technical environment, deliverables, and time frames for addressing different ASSIST projects and issues.
3. Measure Progress - the guidelines outline the specific project areas to be addressed and associated accomplishments. In doing so, it provides a means to evaluate whether progress is being made in addressing agreed-upon ASSIST goals.
4. Plan for Level of Customer Services - the guidelines provide a basis for estimating the necessary level of ASSIST customer services.
5. Identify the Computing Environment - by specifying that a forecasted technical environment for ASSIST be established, including the types of hardware, software, and communications, the guidelines serve to establish guidelines for selection of equipment and development of software which is compatible with and will integrate into the supported environment.

ASSIST Internal Coordination

Project Selection & Priorities

Development or enhancement projects proposed for ASSIST must be consistent with the goals of ASSIST as well as available technology. To insure that proposed projects are consistent with ASSIST goals, the review of project proposals will be coordinated according to the specific process identified in the *ASSIST Software Development Framework*.

Project Reporting

With a multitude of potential and actual development or enhancement projects, setting expectations for the scope of each product as well as the schedule for delivery must take into consideration the balance of all active and pending projects. As a means of communicating overall status of all ASSIST projects, two tools should be used:

1. Project Priority List - which lists projects in two groups: "Active" - those projects which are actively being worked on; and, "Pending" - those projects which have been approved but for which work has yet to begin. Individual projects within each group should appear in priority sequence, with the highest priority projects appearing at the top of the list.
2. Timeline of Projects - which graphically presents a timeline of "Active" and "Pending" projects, in the same priority sequence as on the Project Priority List, but with added detail of the projected phases (Requirements, Design/Build, Implementation) represented on the timeline for individual projects.

Project Monitoring

Since each project will be subject to review at various stages during the project, whether or not the review occurs at the end of a given project step, two status reporting mechanisms shall be maintained for each project:

An up-to-date project plan, which includes revised estimated start and end dates along with actual start and completion dates. Revisions to the project plan may include the addition of detailed project steps as necessary.

A list of issues which are not addressed in the requirements but represent some deviation or clarification of the requirements, along with comments as to the status and resolution of each issue.

Both the up-to-date project plan and the issues list will facilitate review of project status and resolution of issues.

Project Evaluation

As a means of measuring satisfaction with ASSIST development and enhancement projects, an overall assessment of customer support will be conducted annually. This assessment will focus on support to customers, specifically:

- Support to existing customers, including:
 - satisfaction with existing products
 - satisfaction with help desk responses
 - satisfaction with product response times
 - validation of existing customer requirements in light of evolving technology (in the context of TAC efforts to advance the *ASSIST Technology Plan*)

- Progress on all projects, including:
 - an inventory of all projects completed during the year, including a summary of customer satisfaction surveys associated with each project
 - an inventory and current status of all projects active at the end of the year, with projections for completion of each
 - an inventory of projects planned to start in the coming year, with projections for completion of each

- Potential value to prospective customers, including:
 - knowledge of products
 - obstacles to use of products
 - perceived value of products

Customer Coordination

Annual Customer Satisfaction Survey

The value of ASSIST and its direction can only be established by soliciting feedback from its customers. Therefore, as a means of assessing the value received by ASSIST customers and of identifying future directions, an annual customer satisfaction survey will be conducted via a single survey instrument. Feedback from the survey will be used to validate product usefulness, identify problems, assess technology directions and strategies, and assess whether the appropriate set of services is being provided.

Key analyses to be drawn from the Annual Customer Satisfaction Survey include:

- **Assessment of Campus Technical Abilities** - Just as technology advances, so too do the campuses advance with respect to implementing new technologies, though with varying lags behind newer technologies. The assessment of campus technical abilities will measure how near campuses are to newer technologies to help shape the evolution of the ASSIST Technology Plan.
- **Annual Product Support Evaluation** - As new products are proposed or new technologies adopted, support for existing products must be evaluated for ongoing value. With finite resources, ACS can provide support for its products up to a point. Therefore, the extent to which ACS provides ongoing support for products must be periodically evaluated in the context of the customer value received for the ACS resources invested. Where appropriate, customers with key understanding of a product will be brought together in a product focus to examine a product and provide feedback to the ACS regarding product support.

Technical Coordination

Technology Assessment

Computing technology is constantly changing. New technologies that are developed will make it possible to meet additional needs and to improve upon existing solutions. For new technologies to be effective, ASSIST products must be positioned for evolution from older technologies to meet ASSIST goals while remaining operable in the customers' computing environments. To insure that ASSIST products are viable and cost-effective, the Technical Advisory Committee will assess the technological environment on an annual basis in the form of an *ASSIST Technology Plan*. The Technology Plan will set the technical direction for ASSIST development and maintenance activities which will occur in the following year. By keeping an up-to-date Technology Plan and reviewing new technologies, it will be possible to keep ASSIST products current with the technologies that customers expect to use.