

**Agenda**

1. Team organization review
  - a. Implementation team (attached)
  - b. Steering Committee (attached)
2. Team meeting schedule
  - a. Proposed schedule (attached)
3. Review project Goal and objectives (attached)
4. Review project scope (attached)
5. Review TouchNet Project Plan (attached)
6. Review Key Project milestones (attached)
7. Review project website (attached)  
[http://ets.fhda.edu/pay\\_to\\_stay](http://ets.fhda.edu/pay_to_stay)

Take away for next meeting

**Implementation team**

**FHDA  
Pay to Stay Implementation Team**

<b>Name</b>	<b>Role</b>	<b>E-mail</b>	<b>Phone #</b>
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**Steering Committee**

**FHDA  
Pay to Stay Project Steering Committee**

<b>Name</b>	<b>Role</b>	<b>E-mail</b>	<b>Phone #</b>
Joe Moreau	Vice Chancellor, Information technology	<a href="mailto:moreaujoseph@fhda.edu">moreaujoseph@fhda.edu</a>	650 949-6120
Kevin McElroy	Vice Chancellor, Business Services	<a href="mailto:mcelroykevin@fhda.edu">mcelroykevin@fhda.edu</a>	650-949-6201
Denise Swett	VP, Student Services, Foothill College	<a href="mailto:swettdenise@fhda.edu">swettdenise@fhda.edu</a>	650-949-7524
Stacey Cook	VP, Student Services, De Anza College	<a href="mailto:cookstacey@fhda.edu">cookstacey@fhda.edu</a>	408-864-8330
Chien Shih	Director of IT	<a href="mailto:shihchien@fhda.edu">shihchien@fhda.edu</a>	650 949-6139

INSTALLMENT PLAN/PAY TO STAY KICK OFF MEETING AGENDA JUNE 10, 2013

**Team meeting schedule**

FHDA Installment plan  
Implementation schedule

# 2013

**JANUARY**

M	T	W	T	F	S	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

**FEBRUARY**

M	T	W	T	F	S	S
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**MARCH**

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**APRIL**

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**MAY**

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**JUNE**

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**JULY**

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**AUGUST**

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**SEPTEMBER**

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**OCTOBER**

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**NOVEMBER**

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**DECEMBER**

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Red indicates team meeting schedule

**Project Goals and Objectives**

1. Implement Touchnet Installment Plan by September 3, 2013

Objectives

- a. Introduce the new installment plan to the students
- b. Keep everything else the same

2. Implement District wide pay to stay policy by Winter quarter 2014

Objectives

- a. Stabilize the new Installment plan
- b. Review the impacts to student enrollment
- c. Determine the optimal pay to stay drop method and schedule

**Project Scope**

1. Implement the District wide Installment plan with at least one down payment and two additional payment schedules for each quarter
2. Adopt District wide uniform payment plan fee, overdue charges, and send for collection procedures
3. Phase out the current Banner installment plan (old plan) and phase in the TouchNet Installment plan with no conversion between the two plans
4. Include or exclude certain charges to the student installment plan based on FHDA fee waivers and 3<sup>rd</sup> party payee situations.
5. Includes the specific features offered by the TouchNet Installment plan and agreed by the implementation team, this can include the loan to needy students, automatic roll over, penalty for late enrollment..etc.
6. Support the FHDA existing installment plan reporting and collection process

**Critical Success Factors**

1. Early communication to both students and staff of the installment plan implementation schedule
2. Secure and reliable connection between Touchnet secure payment center and FHDA
3. On time completion of the key project milestones
4. Ease of access to the Installment plan from student portal
5. Successfully pass the Alpha testing by staff and Beta testing by students
6. Accuracy of the student account balance
7. Self-service on-line training video and documentation

**TouchNet Installment Project Plan (Attached)**

**See Appendix**

**Key project milestones**

**TouchNet Installment Plan Key Project Milestone Dates**

Key project milestone	Completion date	Completion check list	Progress Bar
Project Kick off	6/10/2013	<ul style="list-style-type: none"> <li>• Kick off packet</li> <li>• Meeting minutes</li> </ul>	
Distribute TouchNet data gathering guide to FHDA	6/13/2013	<ul style="list-style-type: none"> <li>• Data gathering guide for technical team</li> <li>• Data gathering for functional team</li> </ul>	
Start configuration of technical interface between FHDA and TouchNet Data Center	6/13/2013	<ul style="list-style-type: none"> <li>• Engage of TouchNet technical consultant</li> <li>• Configuration plan</li> </ul>	
Conference call with TouchNet consultants	6/19/2013	<ul style="list-style-type: none"> <li>• Meet consultants</li> <li>• Role and responsibility definition</li> <li>• Meeting minutes</li> </ul>	
Complete of the technical configuration	7/9/2013	<ul style="list-style-type: none"> <li>• Test and production incidence</li> <li>• Certification and transfer to functional user</li> </ul>	
Prepare test incidence for training	7/10/2013	<ul style="list-style-type: none"> <li>• Ready the test environment for training by TouchNet consultant and FHDA system team</li> <li>• D270 readiness for training</li> </ul>	
TouchNet installment plan training	7/11/2013 – 7/17/2013	<ul style="list-style-type: none"> <li>• On site or remote training</li> <li>• Training schedule and logistics setup</li> <li>• D270 reservation</li> </ul>	
Initial configuration team testing	7/18/2013 – 7/26/2013	<ul style="list-style-type: none"> <li>• Integration testing with Portal</li> </ul>	

INSTALLMENT PLAN/PAY TO STAY KICK OFF MEETING AGENDA JUNE 10, 2013

		<ul style="list-style-type: none"> <li>• Single sign on</li> <li>• Team functional alpha testing</li> </ul>	
Student beta testing by students and staff	7/29/2013 – 8/9/2013	<ul style="list-style-type: none"> <li>• Students participation list</li> <li>• Test plan and test result</li> <li>• Punch list of issues</li> </ul>	
Review of go live plan	8/12/2013	<ul style="list-style-type: none"> <li>• Review punch list</li> <li>• Review readiness</li> </ul>	
Migration to production incidence	8/13/2013 – 8/23/2013	<ul style="list-style-type: none"> <li>• Configuration of the production incidence to match test</li> <li>• Test of the production incidence</li> <li>• Punch list of issues</li> </ul>	
Review Production punch list	8/23/2013	<ul style="list-style-type: none"> <li>• Review punch list</li> <li>• Address final go live issues</li> <li>• Meeting minutes</li> </ul>	
Project go live	8/23/2013	<ul style="list-style-type: none"> <li>• Team agreement to go live</li> <li>• Meeting minutes</li> </ul>	
Post go live review	9/9/2013	<ul style="list-style-type: none"> <li>• Post go live review</li> <li>• Meeting minutes</li> </ul>	
Post go live stabilization	9/16/2013 9/23/2013 9/30/2013	<ul style="list-style-type: none"> <li>• Punch list</li> <li>• Meeting minutes</li> </ul>	

This list is for major milestones of the project, it does not include to-dos, task lists and individual assignments, these will be discussed and evaluate in weekly project meetings.

This plan does not include the marketing and communication plan to students, this will be done by the college based on the 5/29/2013 group meeting sponsored by Denise Swett of Foothill College

Progress bar will indicate where actual task progression against target completion date.

Project will be updated every Thursday afternoon.