Los Angeles County Office of Education  
Business Enhancement System Transformation (BEST) Project  
Core Advisory Team (CAT) Meeting  
October 2, 2015 – 9:00 AM –11:00 AM  
9300 Imperial Highway, Downey, CA – EC-296

MINUTES

Attendees: See Attached.

INFORMATION

I. WELCOME AND INTRODUCTIONS

Paul Landry, BEST Project Director, welcomed all CAT members. The BEST Core Team introduced themselves.

II. SITE VISITS – LESSONS LEARNED

The BEST Core Team presented lessons learned from their site visit on August 14, 2015, to San Diego County Office of Education (SDCOE). The purpose of the site visit was to learn from the MITI Project’s experiences. Topics covered during the site visit included: Pre-implementation – Sales Cycle, Project Management, Project Strategy, Organizational Change Management, Systems Applications, various technical topics, Training, Help Desk – Support, and Output Management – Reporting. Members of the BEST Team conducted a roundtable discussion to apprise the CAT members of specific lessons learned, and answered CAT member questions regarding the site visit.

III. MARKET ANALYSIS – SOFTWARE DEMONSTRATIONS

Paul Landry advised that 7 software vendor companies completed demonstrations of their software solutions in July and August, 2015. The demonstration’s scope included key processes across: Time and Labor, Payroll, Accounts Payable, General Ledger, Human Resources, and Purchasing. These demonstrations were not scored. The BEST Core Team provided CAT members with general observations and feedback concerning the demonstrations.

IV. ORGANIZATIONAL CHANGE MANAGEMENT (OCM)

Mary Lang, BEST Project Change Management Coordinator, presented the BEST Core Team’s approach to capturing and analyzing baseline metrics at six pilot districts including: Alhambra USD, Downey USD, Glendale USD, LACOE, Lynwood USD, and Cerritos College. Time, cost and process complexity are the three core metrics being focused on across five key processes (Payroll, Hiring, Purchasing, Vendor Payments, and Assignment Changes). The first baseline metrics analysis has been completed for LACOE; the analysis on the remaining five districts are scheduled to be completed by December 2015. The goal of this analysis to co-develop an “As-Is”
process metrics report, and identify business process improvement opportunities with best practice tips. CAT members advised that they would like to know how the Baseline Metrics Analysis went at the Pilots once it is completed. They also informed the BEST Core Team that districts would like to be involved with the future state business processes; by co-developing these processes, we can optimize business practices.

V. STRATEGY VENDOR – KPMG DELIVERABLES

Bill Bangs, KPMG Project Director (Strategy Vendor), highlighted KPMG’s role in the BEST Project and identified their major deliverables: Change Management Strategy, Technical Landscape Analysis, Market Review, Implementation Roadmap, and Implementation Readiness. Bill also presented the timeline for their deliverables and how it ties into the overall project plan for the BEST Project.

VI. PROJECT TIMELINE – MAJOR ACTIVITIES
(October 2015 through January 2017)

Paul Landry presented the overall project timeline for October 2015 – January 2017, outlining major Project tasks including: remaining site visits, Request for Proposal (RFP) development, vendor selection, and contract negotiations.

INPUT

VII. ORGANIZATIONAL CHANGE MANAGEMENT (OCM) SURVEYS

Mary Lang presented a survey strategy for 2 upcoming surveys to be distributed in October 2015. Mary requested feedback on when was the best time to solicit information via survey. Mary also requested feedback on proposed survey questions to be distributed on the topics of Human Capital Management (HCM) systems, and Time and Labor/AB 1522. CAT members gave the following feedback that the BEST Core Team should:

- Ask if the districts are happy with their current system and how well their system meets their needs;
- Make sure to explain what a time and labor system is when asking questions about it; some might not know;
- Make sure to explain what AB1522 is;
- Make sure to explain what HCM is; and
- Ask who else might need to know about the BEST Project in their organization.
CAT members advised districts will welcome this survey, and are willing to support the delivery of the survey to the people that need to respond to the survey. Districts would like to know what other districts are using for Time and Labor.

VIII. INPUT FOR ARCHIVING AND DATA CONVERSION

Paul Landry led a discussion regarding potential archiving and data conversion standards. Paul asked for member input regarding the number of years of data that should be retained in the new system and how often they inquire on previous data (e.g., data 1 year old, 2 years old, 3 years old, or 4 or more years old). CAT members provided estimated percentages for each of these scenarios as follows:

- 75% - 80% - Current (Calendar or Fiscal) Year Data
- 10% - 15% - One to Two Year-Old Data
- 3% - 5% - Two to Four Year-Old Data
- 2% - 5% - Four or More Year-Old Data

Questions were brought up regarding data conversion for current interface districts that might wish to come on the new system; will they be able to bring over their existing data? If not, they will have challenges accessing their historical data from their current 3rd party software vendor. More discussions will need to be had regarding interface district strategy.

IX. NEXT MEETING – JANUARY 2016 – Date: TBD
## ATTESTANCE

<table>
<thead>
<tr>
<th>Name</th>
<th>District</th>
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<tbody>
<tr>
<td>Bill Bangs</td>
<td>LACOE</td>
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<td>Daniel Banh</td>
<td>LACOE</td>
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<td>Judy Chai</td>
<td>Torrance USD</td>
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<td>David Chiang</td>
<td>LACOE</td>
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<td>Gerardo Cruz</td>
<td>ABC USD</td>
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<td>Sandra Garcia</td>
<td>Pomona USD</td>
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<td>Lisa-Ann Hinkson</td>
<td>LACOE</td>
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<td>Andrea Iacovitti</td>
<td>Downey USD</td>
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<td>Mark Kithcart</td>
<td>LACOE</td>
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<td>Paul Landry</td>
<td>LACOE</td>
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<td>Mary Lang</td>
<td>LACOE</td>
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<td>Sean Lewis</td>
<td>LACOE</td>
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<td>Lisa Loop</td>
<td>Mountain View SD</td>
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<td>Dawnalyn Murakawa-Leopard</td>
<td>Manhattan Beach USD</td>
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<td>Phillip R Norris</td>
<td>LACOE</td>
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<td>Scott Pilch</td>
<td>Hacienda La Puente USD</td>
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<td>Yumeka Seabrooks</td>
<td>Lynwood USD</td>
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<td>Thomas Tan</td>
<td>Hacienda La Puente USD</td>
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<td>Joan Velasco</td>
<td>Bonita USD</td>
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<td>Diane Warner</td>
<td>Bonita USD</td>
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<td>Luz Zavalza</td>
<td>Mountain View SD</td>
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Core Advisory Team (CAT) Meeting Update - FINAL

BEST PROJECT

BUSINESS  ENHANCEMENT — SYSTEM  TRANSFORMATION

October 2, 2015
Agenda - Topics

- Welcome and Introductions  
  Paul Landry
- Site Visits – Lessons Learned  
  BEST Team
- Market Analysis  
  BEST Team
- OCM Baseline Metrics with Pilots  
  Mary Lang
- Strategy Vendor – KPMG Deliverables  
  Bill Bangs
- Project Timeline – Major Activities  
  Mark Kithcart

Break

- Organization Change Management  
  Mary Lang
  - Survey – Time and Labor
  - Reports
- Input for Archiving and Data Conversion  
  Paul Landry
- Next Meeting – January – Date: TBD  
  All
Site Visits Lessons Learned

- San Diego County Office of Education (MITI Project) Site Visit - August 14:
  - The MITI Project is a 6 year Business and Systems Transformation Initiative to be completed January 2017
  - Site Visit Purpose:
    - To learn from the MITI Project’s experience, success, and challenges
    - In the spirit of collaboration, professionalism, and for the benefit of The BEST Project
Site Visits Lessons Learned

Topics Covered:

- Pre Implementation – Sales Cycle
- Project Management
- Project Strategy (Various Topics)
- Organization Change Management
- Systems Applications (GL, HR, Payroll, etc.)
- Technical – Customizations, Interfaces, data conversion
- Training
- Help Desk - Support
- Output Management - Reporting
Site Visits Lessons Learned

- Payroll
  - Don’t underestimate the complexity of PERS and STRS reporting
  - Test, Test, and Test Some More
- Readiness Assessment
  - Take ownership and support of new system early (“Own It”) in Project
  - Knowledge transfer from System Implementer to COE staff...early and often is critical
  - Plan for Tiers of Support...to support initial and subsequent Wave(s)
  - Build a deep bench
  - Full-time dedicated staffing is critical
Site Visits Lessons Learned

Technical Considerations

Environments (e.g., Pristine, Production, Development, Testing, Training, Sandbox, Staging):

- What...clearly define all environments needed throughout Project and Post Go Live
- When environments are needed and when they will be updated/refreshed
- Who will use them and related security access for each environment
- How they will be used and frequency of updates
- What data will be in each environment & what migration path (and timing) is for these environments
Site Visits Lessons Learned

Technical Considerations (continued)

Hosted Solution

- Contract considerations...there are many
- Managed Services (e.g., response time troubleshooting, COE visibility)
- Multi-Tenancy...need to really understand pros and cons
- Single Sign On (SSO)...have to plan and really test this infrastructure
- Impact on COE internal IT staff
- Clear Role Definitions for Supporting New System (COE) vs. Host Vendor is critical
Site Visits Lessons Learned

Other Lessons Learned??

- Financials
- Organizational Change Management (OCM)
- Human Resources

Round Table Discussion
Market Analysis – Software Demonstrations

- 7 Software Vendor companies completed software demonstrations: July – August 2015
- They were not scored
- The demonstration’s scope included key processes across:
  - Time and Labor
  - Payroll
  - Accounts Payable
  - General Ledger
  - Human Resources
  - Purchasing
Market Analysis – Software Demonstrations

- Other factors considered/noted:
  - Ease of use
  - Process or Real Time data availability
  - Data Extraction
  - Functional and Technical considerations
Market Analysis – Software Demonstrations

Round Table Discussion
OCM METRICS: CONTEXT

Inside the Box: What We Can Do To Help

Outside of the Box: What Are Our Challenges?

**OBJECTIVES**
What We Want to Achieve

**CONSTRAINTS**
- Focus
- Transparency
- Communication
- Inclusion
- Candor
- Relationships

**UNDERSTANDING**
- Complexity

**ENGAGEMENT**
- Rigor
- Readiness

**ADOPTION**
- Culture

**CURRENCY**
- Value
- Simplicity
OCM IN ACTION: ASK THE RIGHT QUESTION
Where are we and what needs to happen next?

- Understanding
- Adoption
- Engagement
- Endorsement

- Metrics

Understanding
Adoption
Engagement
Endorsement
OCM Metrics Progress Since July CAT Meeting

1. Executed 1st Baseline Metrics Analysis (BMA)
2. Conducted Pilot BMA Kickoff Meetings
   Alhambra, Glendale, Lynwood, Cerritos College (DUSD pending)

Why? Improve & Measure
What? 3 Core Metrics Time, Cost, Process Complexity
How? 5 Key Processes measured
   Payroll, Hiring, Purchasing, Vendor Payments, Assignment Changes

Where? When?
LACOE       July – August, 2015
Select Pilots Oct. – Dec, 2015
BENEFITS

• Co-Developed “As-Is” Process Metrics Report
• Business Process Improvement Opportunities
• Best Practices Tips

Example: Summary Observations | LACOE
KPMG’S DELIVERABLES SCOPE

- Change Management Strategy
- Implementation Roadmap
- Technical Landscape Analysis
- Implementation Readiness
- Market Review

KPMG’S DELIVERABLES SCOPE

- Change Agent Network
- Baseline Metrics Analysis
- Workforce Development Plan
- Change Management Strategy

- ERP Strategy
- Implementation Approach Options and Budget
- Implementation Approach Recommendation

- Validate existing LACOE Cost Analysis
- Risks Analysis and Mitigation
- Alternatives Analysis
- 10 Total Cost of Ownership Analysis

- Business Skills Assessment
- Organization Impact Assessment
- Staffing Model
- Readiness Risk Analysis

- Vendor Demonstrations
- Post-Mortem
KPMG’S DELIVERABLES TIMELINE

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<th>#</th>
<th>Task Name</th>
<th>May '15</th>
<th>June</th>
<th>July</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
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<td>1</td>
<td>Deliverable 1: Change Management Strategy Approach with Recommendations</td>
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<td>Deliverable 2: Technical Landscape Analysis</td>
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<td>Deliverable 3: Market Review/Analysis of Potential Software Vendors</td>
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<td>Deliverable 4: Implementation Readiness</td>
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<td>Deliverable 5: RFP Development and Implementation Roadmap</td>
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<td>6</td>
<td>Deliverable 6: Scoring of Responses/Proposals to RFP</td>
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# BEST Project Timeline

**October 2015 – January 2017**

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<th>Months</th>
<th>Major Activities</th>
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<tr>
<td>August – October 2015</td>
<td>Site Visits to OCDE, LAUSD, SDCOE, Others… Lessons Learned</td>
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<td>September 2015</td>
<td>Community Colleges Workshops</td>
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<td>October 2015 – February 2016</td>
<td>Finalize and Issue Request for Proposal (RFP) - New System &amp; Implementation Services</td>
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OCM Survey Progress
Since July CAT Meeting

✓ Developed 1\textsuperscript{st} integrated survey calendar
✓ Collaborated on unified survey strategy
✓ Developed proposed next topics

➢ CAT support needed; Survey 2
  ➢ Topic vetting
  ➢ Delivery support
## SURVEY STRATEGY
**PURPOSEFUL & ALIGNED WITH CUSTOMER’S REALITIES**

### HR Availability

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### Business Availability

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<td>2016</td>
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<td>2017</td>
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**Key**
- [ ] Planned
- [ ] Executed

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*Los Angeles County Office of Education*
“HR” vs. “HCM”? 
**SURVEY #2**

**TOPIC: TIME & LABOR & AB-1522**

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<tr>
<td><strong>4. Which Time and Labor System have you purchased?</strong></td>
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<tr>
<td>☐ Executime</td>
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<td>☐ Kronos</td>
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<td>☐ Novatime</td>
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<td>☐ Workforce</td>
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<td>☐ Other (please specify)</td>
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<td><strong>5. Is it meeting your expectations?</strong></td>
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<td>☐ Yes</td>
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<tr>
<td>☐ No</td>
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1. Have you purchased a Time and Labor system?
2. Do you plan to purchase a Time and Labor System in the next two years?
3. How are you complying with AB-1522?
4. If you have a T&L system, what do you feel is lacking?

**A) Open to this topic? B) Leveraging the CAT members**
ARCHIVING

% of Time Looking Up Data in PSFS or HRS:

➢ Current Year or Fiscal Year Data?
➢ Last Year or Last Fiscal Year Data?
➢ Two to Four Years Old Data?
➢ 5 Years or Older?
ARCHIVING

Archiving vs. Disposal Considerations:

Class 1 – Permanent Records

Class 2 – Optional Records

Class 3 – Disposable Records
DATA CONVERSION

HRS Information – How Many Years to Convert?

PeopleSoft Financial System – How Many Years and What Data to Convert?