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

• Focus
• Transparency
• Communication

CONSTRANTS
• Inclusion
• Candor
• Relationships

ENGAGEMENT
• Rigor
• Readiness

COMPLEXITY

UNDERSTANDING

CURRENCY
• Value
• Simplicity

ENDORSEMENT

ADOPTION CULTURE
OCM IN ACTION: ASK THE RIGHT QUESTION
Where are we and what needs to happen next?

- Understanding
- Adoption
- Engagement
- Endorsement

• Metrics
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? LACOE
When? July – August, 2015
Where? Select Pilots
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
- Change Agent Network
- Baseline Metrics Analysis
- Workforce Development Plan
- Change Management Strategy

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

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

Market Review
- Vendor Demonstrations
- Post-Mortem

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

RFP
# KPMG’s Deliverables Timeline

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<th>Task Name</th>
<th>May '15</th>
<th>June</th>
<th>July</th>
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<td>Deliverable 1: Change Management Strategy Approach with Recommendations</td>
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<td>Deliverable 5: RFP Development and Implementation Roadmap</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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SECTION II
OCM Survey Progress
Since July CAT Meeting

✓ Developed 1st 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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## Topics

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<th>Key</th>
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<th>2016</th>
<th>2017</th>
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- **2014**
  - HR Availability
    - Planned
    - Executed
  - Business Availability
    - Planned
    - Executed

- **2015**
  - HR Availability
    - Planned
    - Executed
  - Business Availability
    - Planned
    - Executed

- **2016**
  - HR Availability
    - Planned
    - Executed
  - Business Availability
    - Planned
    - Executed

- **2017**
  - HR Availability
    - Planned
    - Executed
  - Business Availability
    - Planned
    - Executed

### Notes:

- HR Availability
  - Planned
  - Executed

- Business Availability
  - Planned
  - Executed
SURVEY #2

TOPIC: HUMAN CAPITAL MANAGEMENT MODULES

“HR” vs. “HCM”? 

BEST Project - Human Resources

3. What are your biggest Human Resources (HR) issues (i.e., recruitment, hiring, professional development and retention)?

4. What HR system are you using for recruitment, hiring and professional development?

- NEOGov
- PeopleSoft
- None, we don’t have a true human resources (HR) technology system
- We don’t have an HR technology system, but we use the Edison Job Board

Other (please specify):

5. If you know the modules you use, please list:

6. Other information you would like us to know about your HR system or HR system needs.

Prev  Next

Prev  Done
SURVEY #2 B

TOPIC: TIME & LABOR & AB-1522

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?

* 4. Which Time and Labor System have you purchased?
   - Executime
   - Kronos
   - Novatime
   - Workforce
   - Other (please specify)

* 5. Is it meeting your expectations?
   - Yes
   - No

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?