Community College Advisory Team (CCAT) Meeting Update - BEST PROJECT

BUSINESS
ENHANCEMENT —
SYSTEM
TRANSFORMATION

October 1, 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

- Community College Workshop Review  
  TBD

  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

UNDERSTANDING
• Focus
• Transparency
• Communication

CONSTRAINTS
• Inclusion
• Candor
• Relationships

ENGAGEMENT
• Rigor
• Readiness

ADOPPTION
• Value
• Simplicity

CURRENCY

COMPLEXITY

Los Angeles County
Office of Education
OCM IN ACTION: ASK THE RIGHT QUESTION
Where are we and what needs to happen next?

- Understanding
- Engagement
- Endorsement

• Metrics
OCM Metrics Progress Since July CAT Meeting

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

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

- The “As-Is” Process Metrics Report
- BPI Opportunities
- Best Practices Tips
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

Market Review
- Vendor Demonstrations
- Post-Mortem

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

Implementation Readiness
- Business Skills Assessment
- Organization Impact Assessment
- Staffing Model
- Readiness Risk Analysis
KPMG’S DELIVERABLES TIMELINE

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<thead>
<tr>
<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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<tbody>
<tr>
<td>1</td>
<td>Deliverable 1: Change Management Strategy Approach with Recommendations</td>
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<td>2</td>
<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>5</td>
<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**

<table>
<thead>
<tr>
<th>Months</th>
<th>Major Activities</th>
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<tbody>
<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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<tr>
<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

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

<table>
<thead>
<tr>
<th>Topics</th>
<th>Purpose</th>
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<tr>
<td>HR Availability</td>
<td>Business Availability</td>
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<tr>
<td>July</td>
<td>Aug</td>
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<tr>
<td>HR Availability: Planned</td>
<td>Business Availability: Planned</td>
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<tr>
<td>HR Availability: Executed</td>
<td>Business Availability: Executed</td>
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</table>

### Key Notes:
- Planned: Initiatives planned for the coming months.
- Executed: Initiatives completed or ongoing.
- Key: Indicates the status of the initiative.

### Notes on the Table:
- The table outlines the planned and executed initiatives across different topics and months.
- The months span from July to June, with each month having a corresponding color-coded status indicator.
- The right column contains notes for each initiative, including start and end dates, and status updates.

### Additional Information:
- The table includes specific initiatives such as HR and Business Availability, with planned and executed statuses.
- The table also highlights key dates such as July 21, which may indicate the start or end of a specific initiative.

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*Los Angeles County Office of Education*
SURVEY #2

TOPIC: HUMAN CAPITAL MANAGEMENT MODULES

“HR” vs. “HCM”?
SURVEY #2

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?

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?