May 21, 2013

Commission Workshop – Building Success

www.broward.org/erp
ERP Defined

- Enterprise Resource Planning (ERP) is a set of business systems to manage and integrate best practices for
  - Business, financial, administrative and operational processes
  - Enterprise-wide across multiple divisions and organizational boundaries
  - These applications act as the backbone of the enterprise and are designed to support and automate the organization’s processes
Today’s Agenda

Building Success for a *Centralized, Integrated Software Solution: ERP*

- Business Case for ERP
- Current Project Scope
- Project Milestones
- Procurement Timeline
- Critical Project Success Factors
- Next Steps
- Questions
February 2010 – Business Case document for ERP prepared by County and transmitted to Board. Key weaknesses identified were:

**Lack of System Integration and Real-Time Data**

Many of the County’s business functions are supported by a series of independent systems, which results in inconsistent access to information and data lacks timeliness.

**Inefficiencies due to Redundant Data Entry and Manual Processes**

The existence of numerous, aging, standalone systems and reliance on shadow desktop applications like Excel and Access result in redundant data entry efforts resulting in higher processing time, errors and costs.

**Reporting Tools are Substandard for County needs**

The current systems lack sufficient querying tools, and the smaller number of standard reports in the systems do not meet the county’s needs resulting in increased staff time to develop reports resulting in less time spent on analyzing data.
Business Case for ERP

Business Case included data on Process and System Inefficiencies outlined by the 3rd Party Assurance Firm – EquaTerra

They identified:

- 670 business tasks in the Accounting, Human Resources, Purchasing and Revenue Collection areas
- 94% of these tasks were found to be manual
- ERP can reduce the 94% to 36%
- 27 systems currently supporting these tasks

Current financial system is at end-of-life & needs replacement
Current Project Scope
Current Project Scope

- **easyPay**: PayCard, Online epay Statements, Automated payroll/timekeeping system
- **Financials**: Accounting, Purchasing, Payroll, Grants Management, Cashiering, Project Accounting, Fixed Assets
- **Budgeting**: Budget Preparation, Budgetary Controls, Performance Measurement
- **Human Resources**: Recruiting, Learning Management, Personnel Administration, Benefits
- **Procurement**: Purchasing and Inventory
- **Self Service**: Employee, Manager and Vendor Self Service
- **Reporting**: Business Intelligence Reporting, Ad-Hoc Reporting, Analytics
Project Milestones
Project Milestones

- Identify County ERP system needs and requirements
- RLI issued, responses received and vendors shortlisted
- Prepare pre-implementation processes
  - Refine budget
  - Set aside funding
  - Identify implementation team
  - Refine estimated implementation schedule
  - Construct ERP workspace
- Prepare county staff to work on ERP
- Select software and vendor to perform implementation

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Project Milestones

- Phase I – easyPay
  - ✔ Phase I(a) – PayCard
  - ❏ Phase I(b) – Online epay statement
  - ❏ Phase I(c) – Automated payroll/timekeeping system

- Finalize Contracts for Phases II to IV
- Celebrate our Successes

5/21/2013
Milestone – Prepare County Staff to Work on ERP

- **Purpose**: To ensure consistency for all vendors to demonstrate their products equally. Results will be compiled for the Selection Committee.
  - Prepare staff for vendor demos - Conducted a Kick Off Meeting on February 4, 2013
  - Prepare Vendor Demonstration Scripts – February 2013 and sent to vendors on March 2, 2013
  - Conducted a meeting to set expectations with staff attending the software demonstrations – March 15, 2013
Milestone - Select Software and Vendor to Perform Implementation

- 4 vendors short-listed in August 2012
  - CedarCrestone for PeopleSoft
  - Ciber Inc. for PeopleSoft
  - Infor for Lawson Software
  - AST Corporation for Oracle e-business software

- Vendor Protest Filed and proceedings lasted 5 months
  During this time the following was accomplished:
  - Identified subject matter experts by name within county staff to work on ERP
  - Adjusted the estimated project timeline
  - Outlined facility needs for project team
  - Organized the vendor software demonstrations
  - Created an online tool for fact finding & data consolidation
Milestone - Select Software and Vendor to Perform Implementation

- Software Demonstrations held for five weeks – four days a week – in April and few days in May
  - On average 145 staff attended the software demonstrations each week
  - 28 different software demonstration sessions each week
  - Vendors expressed praise for high level of County staff engagement in the process
- Site Visits (June/July)
- Selection Committee Ranking (August)
- Board Workshop and Board Approval of Ranking (September)
Milestone – Phase I(a) easyPay

- easyPay is environmentally friendly and is part of Broward County’s Go-Green government effort to reduce our greenhouse gas emissions (electricity used to print documents), preserve natural resources (less paper), use taxpayers’ dollars more efficiently and reduce waste
  - Paper paychecks replaced with Pay Cards (May 2013)
  - Reduced number of employees not receiving direct deposit from 800 to 130

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Milestone – Phase I(b) easyPay

Blue Paystubs will be replaced with online ePay Statements (August 2013) thereby continuing with Broward’s Go Green effort

• Reduces agency travel time to pick up paystubs
• Employees can securely access statements from any computer
Milestone – Phase I(c) *easyPay*

Paper time cards and leave slips replaced by automated time & attendance system

- Conducted employee survey to ascertain awareness, identify organizational readiness gaps and establish baseline
- Promote awareness thru communications – eCounty Line, Sun-eNews, PACERS bulletins, agency newsletters, *easyPay* memos and *easyPay* website
- Created comprehensive change management plan
- In implementation phase where we are building the system, testing and developing training material
ERP Procurement Timeline
## ERP Procurement Timeline

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Critical Project Success Factors

- Organizational commitment
- Sufficient full-time staffing resources on project
- Select software solution and implementer that satisfies County needs
- Use of a third party assurance firm – “Trust but verify”
- Include high level of change management and training activities
Next Steps for ERP

▪ **Perform site visits.** Selected staff will travel to other sites where vendors have implemented their proposed software; staff will view the software and gain insight on those agencies’ experiences with the vendor implementation services.

▪ **Selection Committee Ranking.** Third party assurance firm and staff to compile data from vendor responses, software demonstrations fact-finding, and site visits for Selection Committee for their evaluation and ranking.

▪ **Board Workshop and Board Approval of Ranking.** Staff to prepare a presentation with ranking results.
Questions
Thank You