Business Process Analysis and the HR/Financial System Software Project

A Presentation to the SOCCCD Board of Trustees

January 27, 2014
This presentation will address the following questions:

1. What were the issues and challenges that drove us to conduct Business Process Analysis (BPA) Sessions and the need for a new HR/Financial Software System?
2. Why were the BPA’s done before the RFP process?
3. What BPA’s were conducted? What were the results?
4. How were the BPA findings used in the RFP and procurement process?
5. What was the RFP process? Who was included and had input?
6. What product is being recommended? Why?
7. What will it be able to do for us? What are the benefits that everyone will experience?
8. What will project implementation entail? What is the timeline?
What were the issues and challenges?

- District’s current software systems for HR and Finance are old and out of date (CHRMS 25 years old; ESCAPE 14 years old)
- No longer adequate for current and future needs
- Additional safe guards needed for compliance
- Systems not integrated or comprehensive, nor do they handle everything needed
- Tons of paper and manual processes
- Paper driven system does not work with the high volume, complexity, and size of our district
- Lots of complaints across the district at all levels - length of time it takes to do things, processes hard to understand, lots of confusion
- Need to improve services to colleges and to faculty, staff, and students
Why do BPA before the RFP for a new system?

- Understand our current business processes
- Understand our inefficiencies and issues
- Need to have shared Ideal Model for our business processes
- Ideal Model would be based on best practices:
  - Simple
  - User friendly
  - Compliant
  - Transparent
- Provide good data to be used for the RFP
  - Scope
  - Definitions
  - Criteria of our needs for a new system
- Costco effect
  - We want to avoid disappointment in selecting a system and then realizing our system selection alone does not fix everything
  - Avoid implementing inefficient and ineffective practices in the new system
“If we automate a mess, we have an automated mess.” anonymous
What BPA’s were conducted?

- Hiring process *for faculty, classified, and administrators/managers*
- Budget development
- Travel
- Payroll
- Accounts Receivable *(included cash management, cash controls, invoicing, foundations, etc.)*
- Employee On-Boarding
- Purchasing, Warehouse, Receiving, Accounts Payable
- Curriculum Development
- Capital/Facilities Planning *(part 1)*
- Student Financial Aid *(part 1)*
- Board agenda preparation process
- Benefits
- Contracts
What did we learn from the BPA’s?

(Item 4.2 – Exhibit B)
Our current processes are:

- Inefficient
- Workarounds
- Errors
- Inability to get info quickly
- Lots of duplication
- Delays
- Multiple layers
- Clunky
- Paper files
- Lots of handoffs
- Not strategic
- Reliance on memory
- Need for role clarification
- Lots of anxiety
- Lack of internal controls
- Shadow systems
- Information not in real time
- Wasted resources
- Confusion
- Chokepoints
- Silos
- Checking, rechecking, checking again

Walking around paperwork from office to office
Wasted resources
Hard to figure out what to do
Lots of anxiety
What did we learn from the BPA’s?

We want the new system to be:

• One integrated comprehensive single authoritative source of data
• Based on tried and true best practices and new technology
• Create solutions for issues we know are happening
• A robust information management foundation for the next two decades
• Fast, real time transactions and processes
• Electronic, online signatures and approvals with routing to appropriate approvers
• Auto/notify reminders
What did we learn from the BPA’s?

We want the new system to do:

• Reduce steps, streamlined
• Eliminate “side” systems and silos of information
• Reduce errors, reduce risk and liability, control access for security, better internal controls
• Data entered once into the system and extracted for easy and robust reporting
• Transparency
• Clearly define roles and responsibilities
• Require less time to do things
• Hopefully reduce operational costs
How did the BPA info get used in the RFP process?  (Item 4.2 exhibit A)

- Using the detailed findings and reports, common themes emerged
- Determined
  - overall scope of work
  - basic needs
  - additional requirements for a new HR/Financial Software system
- Based on the above, RFP was developed by the steering committee
- Process assures respondents had clear understanding of what we were looking for
- Rigorous competitive procurement process took place
- Evaluation was
  - objective
  - transparent
  - and fact based
Recommendation

• Refer to Item 6.1 Exhibit A
• Out of 7 vendor responses, 3 were invited for extensive weeklong interviews and demonstrations
• *Workday, Inc.* is recommended as the HR/Financial Software System
• *CedarCrestone, Inc.* is recommended to be the implementation partner for the project
Why Workday?

- Meets and exceeds the district and colleges’ needs - can do the functions we want and more
- Unique to the point of distinguishing it from all other products
- Takes advantage of the significant shift in the administrative software market towards:
  - Cloud Based
  - Multi tenant Software as a Service (SAAS) Computing
  - Object Oriented Technology
  - Big Data Analytics
  - Next Generation User Experience
  - Software has the longest possible life span
Technological Advantages

- Faster Performance
- Superior Data Modeling and Integration
- More Scalable
- More Elastic
- Easier Set Up and Maintenance

- Simplified Upgrades
- Superior Security
- Superior Configuration
- Native Mobile Access
- Native Advanced Analytics
- Better Deployed IT Resources
- Employee & Student Centered
Project Timeline

Implementation will take approximately 18 months, starting immediately.
Project Implementation

- Will be a lot of work but worth it in the end!
- Will be making the process changes along with implementing the software system
- Project Plan with milestones developed
- Steering Committee-Consultants-**Lots of college input in all phases**
THANK YOU!

• HR/Finance Software System RFP/Procurement Steering Committee:
  Brandye D’Lena, Carol Hilton, David Bugay, Davit Khachatryan, Debra Fitzsimons, Denise Aviles

• The **HUNDREDS** of College Faculty, Classified Staff, Administrators, Managers who participated in the BPA sessions and all of the vendor demonstrations

• Vice Chancellor Robert Bramucci and District Services IT staff

• Strata Information Group

• Gartner Group

• Legal Counsel-AALRR and OCDE
QUESTIONS?