Challenges, Opportunities and Lessons Learned

Wednesday, December 12, 2018
2:30 – 3:45 pm

- **CPE Units**
  - You may meet the qualifications to earn CPE
  - In order to qualify you must sign in/out
    - Sign in sheets are in the back of the room

- **Questions**
  - We will take questions throughout...

- **Today’s Presenters:**
  - Michael Solorza
  - Jack Wood

Announcements – Housekeeping
Today’s Session

- Our Stories / Introductions
- Challenges
- Must-Haves
- Critical Success Factors
- Measuring Success
- Ensuring Continued Success

Michael Solorza
Director of Administrative Services
City of Pico Rivera

- 20+ year career in public sector
  - State, County and City
  - Budget, treasury, accounting, information technology, human resources
- Cities of Huntington Beach, Mission Viejo, La Palma, Westminster
- CMTA Board Member, Southern Division
- League Environmental Policy Committee
Jack Wood
Chief Systems Officer, Controller’s Office
City and County of San Francisco (CCSF)

- 11 years leading PeopleSoft projects for CCSF
- Oversees 80 person IT team supporting:
  - PeopleSoft Financials & Supply Chain (17 modules)
  - PeopleSoft Human Capital Management (5 modules)
  - PeopleSoft Enterprise Learning Management
  - Oracle Business Intelligence Enterprise Edition
  - Other legacy systems
- Before CCSF, worked with Accenture consulting

ERP Implementation:
Pico Rivera’s Story

- Pico Rivera
  - $100M annual budget
  - 140 FT employees; 5 departments; contract public safety; 4 bargaining groups
- Tyler New World Systems
  - 3 year process (begun 2015)
- 4 modules:
  - Finance, Human Resources/Payroll, Community Development, Water Billing
- Personnel changes – lack of stability
  - City and Tyler
ERP Implementation: San Francisco’s Story

- City & County of San Francisco
  - $11B annual budget
  - 37K employees; 55 departments; 35 unions

- PSoft Financials & Supply Chain Project
  - Replaced FAMIS (mainframe financial system)
  - 6,000 department users; ~15K vendor users
  - 17 FSCM modules, most brand new to CCSF

Challenges

Project Implementation Challenges
- Lots of Scope/Modules for 2-Year Timeline
- Retirement/Replacement of 90+ Dept Systems
- Readiness
  - Business Process (Citywide & Departmental)
  - People (City Staff, Bidders, Suppliers, Subcontractors…)
- Training Approach
  - Fixed 2-Year Timeline
**Challenges**

**Post Go-Live Challenges**
- Complexity of Roles/Permissions, OverMapping
- Data Conversion
- Supplier Experience
- End User Accounting Knowledge
- Batch Schedule (During Business Hours)
- Limited Ability to Apply Oracle Bug Fixes
- Operations vs Systems/IT Tasks
- Entire Year of “First” Transactions/Processes

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**Must-Haves**

- Top Down Buy-In
  - City Council down…

- Executive Level Sponsorship and Support
  - Active support from City Manager / Directors

- Organization-wide Awareness and Support
  - Why are we doing this?
Must-Haves

- Effective Project Management
  - In-house or Third party?
  - Pros and Cons of each

Critical Success Factors

- Clear Definition of Goals for New System
  - What works now?
  - What needs to be fixed?
  - What does the organization need/want?

  - Better, Easier and Faster Data Extraction
  - User Friendly Interfaces
  - Improved Fiscal Literacy
Critical Success Factors

- Update Chart of Accounts
  - When was the last time?
  - When will the opportunity present itself again?

- Improve Processes / Increase Efficiencies
  - Processes usually tied to current (out of date) technology
  - Take opportunity to review ALL processes/procedures

- Training Plan / Roll-out
  - Critical decision – who gets access and when?
  - How/when to provide training?

Measuring Success

- Surveying Staff and Management About Go Live Process

- Module “Clean-Up” Post Go-Live

- Additional training?

- “Discovery:” other processes needing adjusting?
Ensuring Continued Success

- Re-Visit Modules Not Fully Utilized
- Actively Participate in Software User Group Meetings and Conferences
- Collaboration with Peer Organizations
- Effective Governance Approach
  - Advisory Boards, Working Groups, Local Experts

Ensuring Continued Success

- Data Analytics (Dashboards) – Reporting Transparency and Easy of Use
- Staying Current on Application Versions
- Partnership/Expectations with Key Stakeholders
- Effective IT Service Delivery Methodology
Summing it up...

- Lessons Learned – Take Aways
- Questions?