

# **BOARD OF EDUCATION OF HARFORD COUNTY**

## **INFORMATIONAL REPORT**

### **PRESENTATION OF ORACLE CLOUD IMPLEMENTATION**

August 14, 2023

#### **Background Information**

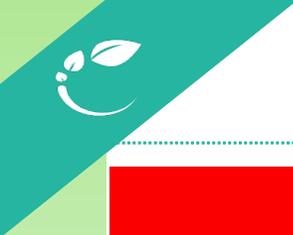
Harford County Public Schools has used Infor Lawson as its Enterprise Resource Planning (ERP) system for over 20 years. ERP systems manage day-to-day business activities such as accounting, procurement, human resources, payroll, on-boarding, and contract management.

#### **Discussion**

Due to increased reporting demands and requirements for information, the need for up-to-date technology and a desire for security enhancements and increased efficiency, Harford County Public Schools began to develop requirements to replace the current version of Infor Lawson. In December 2020, Procurement met with stakeholders to determine a scope of work for a Request for Qualifications (RFQu) for a new ERP system. The Request for Proposal (RFP) process began in December 2021 which included a list of “must have” requirements along with a list of “would like to have” requests. Award was made to Cherry Road (Oracle), which scored the highest by the consensus committee and the board approved the award on November 14, 2022. The project kicked off in January 2023. The Planning and Budgeting System will go live in October 2023. The Finance System will go live in July 2024. HR and payroll is scheduled for January 2025.

#### **Superintendent's Recommendation**

No action is required.



# INTRODUCING ORACLE<sup>®</sup>

## IMPLEMENTATION SCHEDULE

### Fall 2023

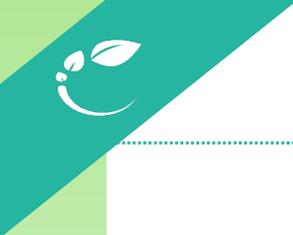
- *Budget Module*

### July 1, 2024

- *Accounts Payable*
- *Financial Reporting*
- *Procurement*

### January 1, 2025

- *Human Resources*
- *Payroll*



# Oracle Cloud Implementation

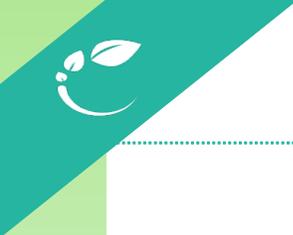
## ***Vision***

*“Develop a highly efficient and effective system of integrated processes that positively affects all stakeholders and ultimately the lifecycle of every employee from recruitment to retirement.”*

## **Agenda**

- What is an ERP
- Why did HCPS need a new ERP System
- How did HCPS select the ERP System
- Preparing for Change
- Project Status





ERP is an acronym that stands for **Enterprise Resource Planning**.

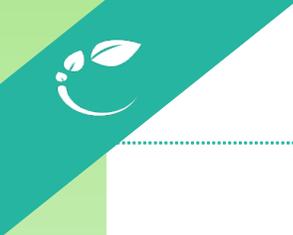
ERP systems manage day-to-day business activities such as accounting, procurement, human resources, payroll, on-boarding, and project management.

Core characteristics of an ERP system include:

- One application for each core function (General Ledger, Procurement, etc)
- Each application integrates with all other applications
- One common database, which means there is “one source of truth”

The current District ERP system is Infor/Lawson.





**Infor/Lawson was implemented approximately 20 years ago.**

- Technology has evolved beyond our current system
- Infor/Lawson no longer supports the budget module
- We've had to create paper-based, manual workarounds
- Workarounds make it difficult to gather and analyze District data





## **Implementing Oracle Cloud is expected to achieve...**

- Retire Infor/Lawson S3 System
- Eliminate manual paperwork and leverage automated workflow
- Integrate document scanning for efficiency
- Leverage delivered business processes to improve overall efficiency
- Reduce the reliance on multiple silo systems and shadow systems
- Anytime and anywhere access for staff
- Vendor maintains the system – hardware, software, patching and updates
- A security robustness beyond what HCPS could economically provide on-premise



In December 2020, Procurement met with stakeholders to determine a scope of work for a Request for Qualifications (RFQu) for a new ERP system.

- The evaluation committee consisted of 6 voting members, 3 alternates, and 2 advisors
  - The committee included members from Procurement, Finance, Budget, Human Resources, Operations, Technology, Legal and Risk Management
- An RFQu was issued March 16, 2021
- 8 firms responded to the RFQu
- After evaluations, the top 5 firms were invited to provide high level, one (1) day demonstrations
- Consensus committee determined that all 5 firms would move on to the Request for Proposal process



The Request for Proposal (RFP) process began in December 2021 which included a list of “must have” requirements along with a list of “would like to have” requests.

- RFP was issued December 1, 2021
- 5 firms that qualified in the RFQu process responded to RFP
- 2 highest scoring proposals moved forward to the in-depth demonstration portion of the process
  - RPI (Infor/Lawson)
  - Cherry Road (Oracle)
- After multiple demonstration days with each vendor, Cost Proposals were opened
- Award was made to Cherry Road (Oracle), which scored the highest by the consensus committee
- Board Approval was on November 14, 2022
- Project kicked off in January 2023 with Chart of Accounts Design



- A working group made up of stakeholders (Finance, Budget, Human Resources, Procurement, Technology, Operations, Food & Nutrition and Principals) evaluated the various proposals.
- Demonstrations were open to all HCPS Staff, which included the stakeholder departments mentioned above.
- Based on all the demonstrations, Q&A with vendors, reference interviews, and staff feedback, the ERP Evaluation Committee ranked the proposals with the following criteria:
  - Methodology – Detailed plan which included approach and methodology for providing all requirements.
  - Project Team Qualifications & Experience – Identified and provided resumes of key personnel on who would be assigned the project
  - Timeline – Provided a detailed timeline that included planning, configuration, data conversion/migration, implementation, training and documentation, test environment, and transitioning to fully functioning system
  - References
  - Exceptions
  - Demonstrations
  - Cost Proposal



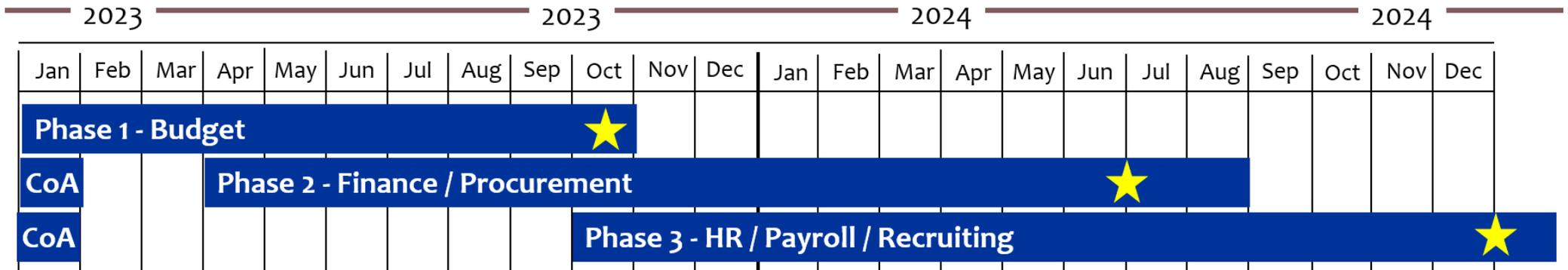
- **Oracle K12 Customers Include:**

- Baltimore City Schools
- Charles County Public Schools
- Frederick County Public Schools
- Montgomery County Public Schools
- Prince Georges County Public Schools
- Arlington County Schools (VA)
- Syracuse City School District
- Olathe School District (KS)
- Rochester City School District

- **Access to Oracle communities – user groups, including dedicated public sector user group and Cloud World**
- **Access to continuous product improvement - \$64 billion in R&D investment last 11 years**
- **430,000 customers in 175 countries and support thousands of educational institutions globally**

# Vendor Recommended Timeline

- The Selection Committee for the RFP review unanimously recommended that HCPS contract with Cherry Road Technologies to serve as the implementer of a new, Cloud based, Oracle ERP Solution.
- The project includes all software license, cloud services, implementation services, training and support services.



- **Phase I – Chart of Accounts Design & Planning and Budgeting by October 2023**
- **Phase II – Finance (General ledger, accounts payable and receivable, fixed assets, inventory, contract management, expenses and procurement) by July 2024**
- **Phase III – HR/Payroll and related applications by January 2025**



# Project Status

## Planning and Budgeting System



## Finance System Status



## Human Resource and Payroll





This project is more than a technical exercise. It is a **business process transformation.**

Transformational change require a leadership inspired, stakeholder driven change management approach.

### **Organizational Change Management (OCM)**

Helping a group of people change their behavior in order to achieve desired results.

Our OCM approach features the following components to help us lead and facilitate change.

- Engagement: Leaders and stakeholders speaking with and listening to stakeholders
- Communications: Creating awareness and inspiring a drive for change
- Readiness: Preparing departments and teams for Go Live
- Training: Hands on experiences to learn how to use Oracle
- Adoption Support: Helping users master their new skills, reinforcing new practices



## What we've done so far

- Completed OCM workshops
- Conducted stakeholder interviews (Support is high!)
- Created our OCM strategy
- Launched our communications plan and readiness plan

## What's next

- Set up and kick off our readiness network
- Identify and document change impacts
- Create training plan and learning curriculum
- Kicking off the HR/Payroll phase

## Your support

Everyone has a role to play in the change process to include The Board. Showing your support for the project will instill confidence amongst District employees, which will enhance change adoption.

