Enterprise Resource Planning (ERP) Update

City Council Work session

March 22, 2022

- Project History
- Project Update
- Lessons Learned
- Next Steps: 2022 and Beyond

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What is ERP?

System (Oracle) used by the organization to centralize, integrate, and manage core business processes such as:

- Human Resources
- Finance
- Budgeting

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Benefits of Updating ERP System

- 1992 - Last ERP system conversion by City – prior system out of date and not on common platform.

Community

- Dependable delivery of community services through support of technology.
- Enhanced customer service.
- Commitment to transparency and achieving community excellence.

Organization

- Drives operational excellence.
- Improved collaboration and workflows.
- Improved planning and reporting.
- Increase operational efficiency.

ERP Conversion – Pre-Go Live

Prior ERP City Staff Team Actions:*

GFOA Action Report:

April 2018

RFP Issued: August 2018

Oracle selected

Contract Signed May 2019
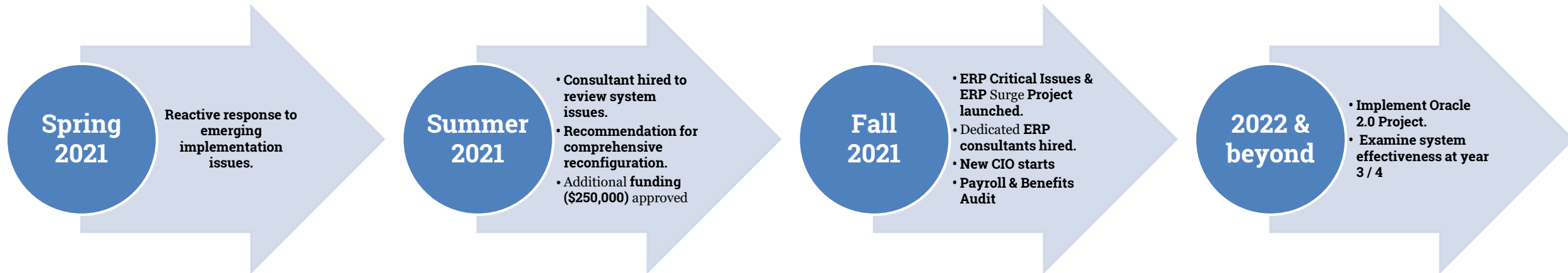
Third Party Implementer SCI

Readiness Report (SCI): September 2019

Scheduled Launch:

April 2020

- Actual Launch: December 2020

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* All original members of ERP Staff Team left City employment between February 2019 and August 2021

ERP Conversion – Post Go-Live

Spring 2021

Reactive response to emerging implementation issues.

Summer 2021

- Consultant hired to review system issues.
- **Recommendation for comprehensive reconfiguration.**
- Additional **funding ($250,000)** approved

Fall 2021

- **ERP Critical Issues & ERP** Surge **Project** launched.
- Dedicated **ERP** consultants hired.
- **New CIO starts**
- **Payroll & Benefits Audit**

2022 & beyond

- Implement Oracle 2.0 Project.
- Examine system effectiveness at year 3 / 4

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Key Lessons Learned

1. 'Big Bang' Project Implementation Approach
2. Project Timeline
   - Signed contract in May 2019, anticipated 'Go-Live' in April 2020
3. Resources
   - Dedicate needed resources to project / back fill of staff
4. Establish and understand roles & responsibilities at contract time
   - Do not over rely on third party implementer
5. Communications, Change Management and Training Plan
6. Systems, structure, strategies, policies and process

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Lessons Learned - Moving Forward

- Robust Project Management Structure
  - Identify dedicated staff, resources, & governance strategies for project.
- Execute best practices for project management:
  - Project chartering
  - Roles & responsibilities
  - Change management plans
  - Communications plan
  - Training plan
- Complete a third-party payroll and benefits audit of all City employees - April 2022 completion
- Conduct organizational cultural efforts – Spring 2022 start
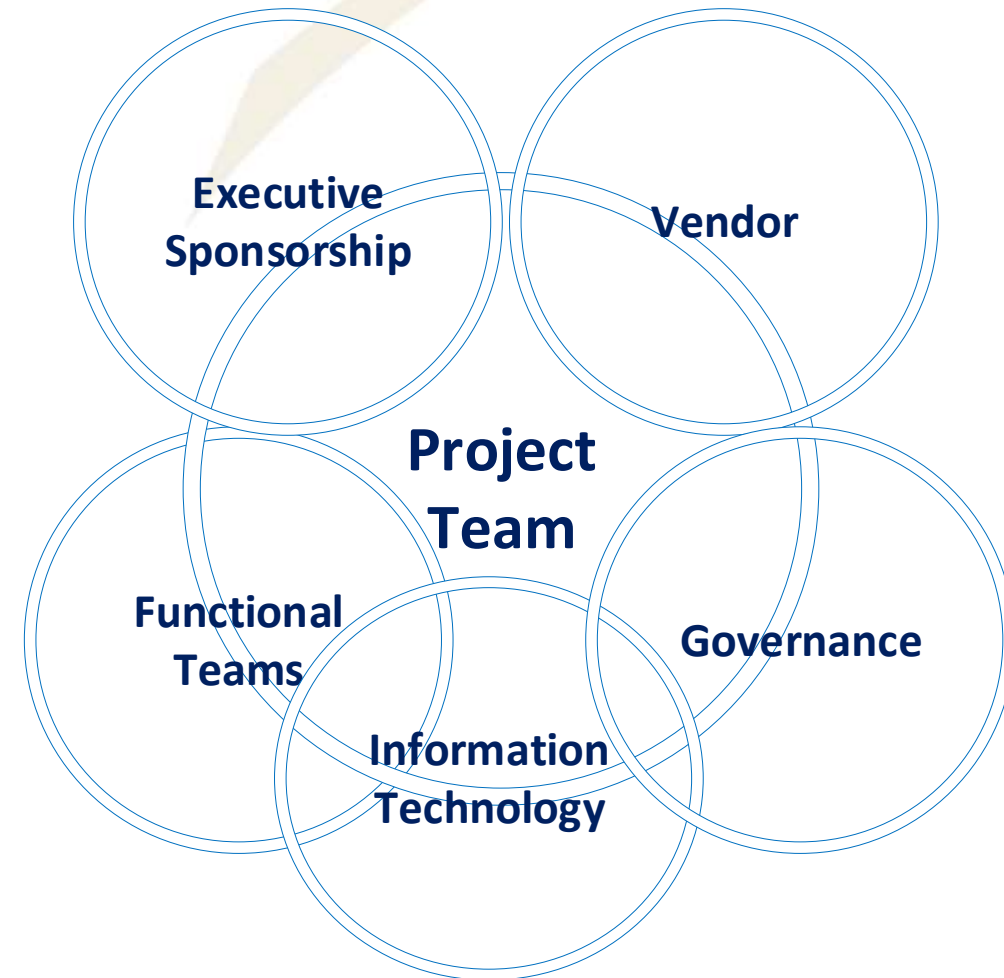
ERP Project Status

Surge Effort (Complete)

- Benefits Calculation Corrections (pension/401k/ 457b)
- Open Enrollment Configuration
- Financial Configuration Corrections
  - Removal of duplicate expense entries
  - Cost Accounting

Surge Effort (Pending)

- W-2 Configuration
- Overtime Calculations
- New User Time-Card Interface

Oracle 2.0 Project Overview

Objective: Configuration changes and enhancements to meet the long-term human resource, budget, and finance needs of the City of Greeley organization.
Duration: Through Spring 2023

Overview	Early Steps

• Continue to address:
    • configuration and system errors
    • reconciliation activities
	☑

• Establish support structure for long-term maintenance	
• Reporting and dashboard functionality	
• Alignment of security and roles for end users across departments	
• Departmental engagement on operational needs	☑
• Identify where the current processes are not meeting the needs of departments and individuals	☑
• Conduct interviews regarding surge effort, issues, etc.	☑

Oracle 2.0 Timeline and Next Steps

| RFP Issued - January | Vendors Submitted Proposals - Febuary | Interview Top Vendors – March | Select Vendor (In-Progress) | Finalize Project Schedule with Selected Vendor – Late March | Project Kickoff - April |

Questions?