

School District of Philadelphia Enterprise Resource Planning (ERP) System Project

March 15, 2018

What is an ERP?

- ▶ The acronym *ERP* stands for enterprise resource planning. It refers to the systems and software packages used by organizations to manage day-to-day business activities, such as accounting, procurement, human resources, payroll, on-boarding, and project management.
- ▶ ERP systems are designed around a common, defined data structure that usually has a common database.
- ▶ With a secure and centralized data repository, everyone in the organization can be confident that data is correct, up to date, and complete. Data integrity is assured for every task performed throughout the organization.

Why does SDP need a new ERP system?

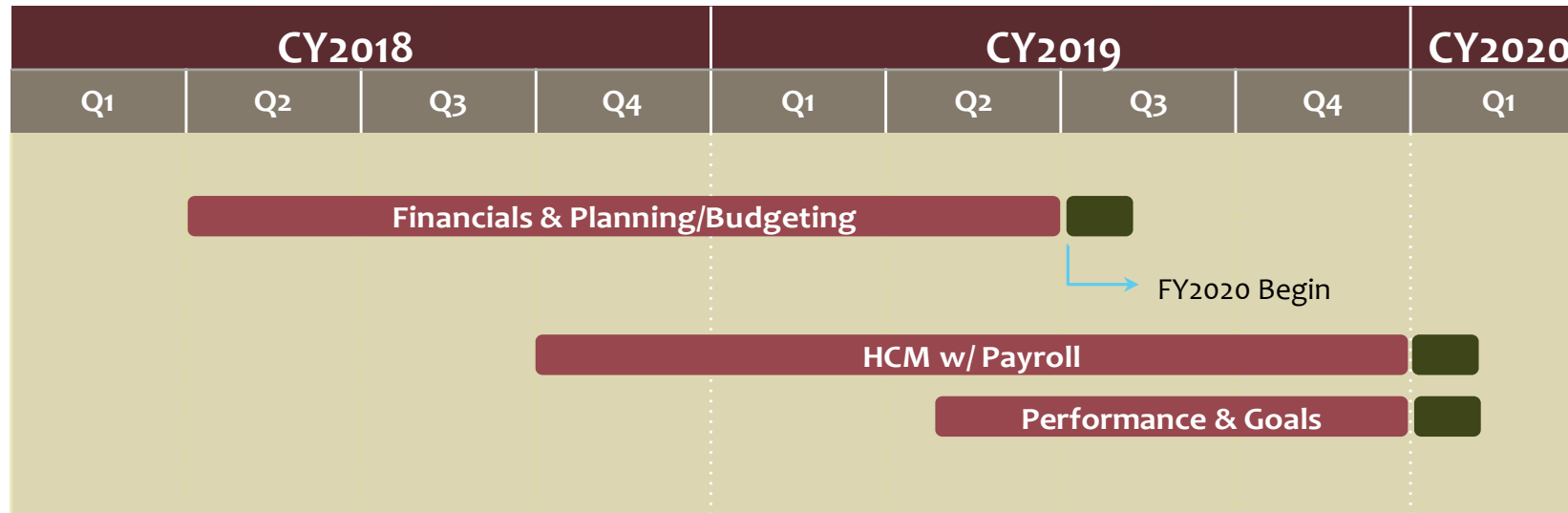
- ▶ The current District ERP system is more than 17 years old, and is increasingly more expensive to maintain.
- ▶ The current system predates user-friendly, intuitive technology, making thousands of basic processes such as payroll, purchasing, applicant tracking, accounts payable, etc., cumbersome and inefficient.
- ▶ The system requires supplemental systems to support its functionality, resulting in multiple points for data entry, increasing the likelihood of data errors.
- ▶ The system makes it difficult to gather and analyze data across the School District's core operations, and more difficult to make District operations more transparent to the public.

How did the SDP select a recommended ERP product?

- ▶ The process began in March 2017, with the dual goal of mapping all of SDP's business processes and developing a robust RFP document.
- ▶ Seven Respondents; Six brought in for two-hour interviews attended by over 50 SDP staff
- ▶ Narrowed to three finalists
 - ▶ Week long demonstrations including in depth labs, attended by over 80 SDP central office and school-based staff
- ▶ Surveys were completed by more than two-thirds of the SDP staff who attended the vendor demonstrations
- ▶ A working group made up of a cross section of SDP staff (Finance, Talent, Procurement, Payroll, IT, etc) evaluated the various proposals, in sessions facilitated by GFOA.
- ▶ Based on all of the demonstrations, Q&A with vendors, and SDP staff feedback, the ERP Steering Committee ranked the proposals on the basis of:
 - ▶ Vendor experience and evidence of success at similar organizations
 - ▶ Technological specifications and ability to meet SDP needs
 - ▶ Installation and training support
 - ▶ Implementation strategy
 - ▶ Price

Vendor Recommendation and Timeline

- ▶ The Steering Committee for the RFP review unanimously recommended that SDP contract with Cherry Road Technologies to serve as the implementer of a new, Cloud based, Oracle ERP Solution.
- ▶ The project includes all software and hardware costs, implementation services, training and support services, hosting, management, and upgrade fees for a ten year period.



Phase I – Financial, Budget, and Procurement Applications by July 2019

Phase II – HR/Payroll and Related HCM Applications by January 2020

Existing vs. New: School Budgets

Current System

Proposed System

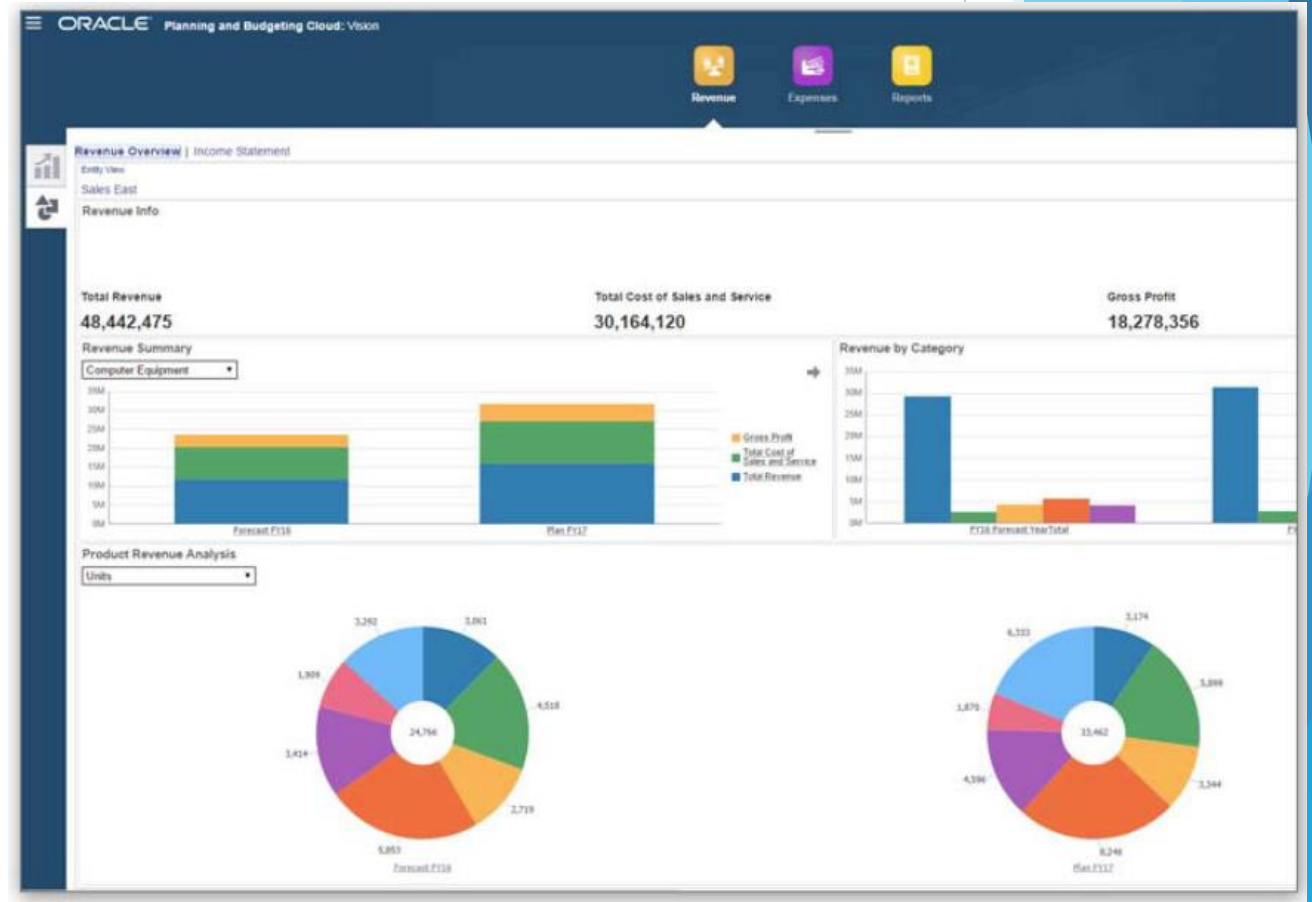
1 - IBM (ibm.cdp) 02/16/18 02:27:49 PM

ACTION: R SCREEN: FAVS

FUNDS AVAILABLE BY ORGANIZATION AND APPROPRIATION UNIT SUMMARY INQUIRY

ORG: 1010 NAME: BARTRAM, JOHN HIGH SCHOOL FISCAL YEAR:

ORG	APPR UNIT	FY	NAME	UNOBLIGATED
1010	AAC101030	18	OPER BUD - PROF/TECH CNTR	127.00
1010	AAC101049	18	OPER BUD - MATERIAL/SVCS	37,368.66
1010	ABA1010SR	18	OPER BUD - SUMMER REORG	-923.50
1010	ABA101010	18	OPER BUD - PT SAL	9,899.13
1010	ABB101010	18	TEACHER EC - FT SAL/BEN	5,923.18
1010	AC0101010	18	MAINTENANCE OT - PT SAL	0.00
1010	AFD950000	18	VOC TRAIN DISABLE - FT SAL/BEN	0.00
1010	AFN101000	18	ESOL-FT SAL/BEN	-1,017.94
1010	AFN101056	18	ESOL-\$100 TCH ALLOT	0.00
1010	AFZ000456	18	OPER BUD - \$100 TEACHER ALLOT	11,710.84
1010	AHC950000	18	LOW INC PREP - FT SAL/BEN	-838.70
1010	AHQ000500	18	SPECIAL ED - FT SAL/BEN	240,181,686.41



Existing vs. New: Purchasing

Proposed System

Current System

FUNCTION: DOCID: RX1 113 29387 02/16/18 03:01:51 PM
 STATUS: PEND3 BATID: ORG: 001-002 OF 002

LN	COMMODITY CODE	QUANTITY	UNIT	UNIT COST	TOTAL COST
001	60015	49.000	EA	94.630000	4,636.87
DESCRIPTION: CALCULATORS TEXT: ITEM 0010409012 TEXAS INSTRUMENTS - TI-83 NO SHIPPING AS PER QUOTE# 234424898					
LN	COMMODITY CODE	QUANTITY	UNIT	UNIT COST	TOTAL COST
002	60015	1.000	EA	12.130000	12.13
DESCRIPTION: CALCULATORS TEXT: ITEM 0010570041 MANUFACTURER TI-30X-IIS					
LN	COMMODITY CODE	QUANTITY	UNIT	UNIT COST	TOTAL COST
DESCRIPTION: TEXT:					

ORACLE PROCUREMENT MANAGER

What do you need to do or find?

PRC Dashboard Purchase Requisitions Purchasing My Receipts Negotiations Catalogs Suppliers Supplier Qualification

Overview

Overview Refresh

Requisitions

All Negotiation Required Failed Automation

Actions View Format Freeze Detach Wrap Return Reassign

Requisition	Line	Line Description	Amount	Currency	Deliver-to Location	Requested Delivery Date
		Paper Towel Extra Strength 12P			Seattle	12/9/16
		Paper Towel Extra Strength Big Roll. 70 two ply sheets per roll 11" x 11" 12 big rolls equals 18 regular rolls White			Seattle	12/9/16
					Seattle	1/21/14
					Seattle	1/21/14
					Seattle	1/21/14

Item Details

Paper Towel Extra Strength 12P

Category Name Paper Towels
 Supplier Lee Supplies
 Supplier Site Lee US1
 Supplier Item B1822
 Supplier Item Auxiliary Identifier
 Item
 Revision

Existing vs. New: Employee Self-Service

Current System

N/A

Proposed System

The screenshot shows the 'Employment Information' page for Robert Jackman. It includes a navigation sidebar on the left and a main content area with the following sections:

- Employee Profile:** Robert Jackman : Employment Information
- Key Metrics:**
 - Hire Date: 02/28/02
 - Years Worked in the Company: 15.78
 - Years Since Last Salary Change: 0.43
 - Years Since Last Promotion: 7.19
- Job Details:**

Legal Employer	US1 Legal Entity	Job	Vice President of HR
Worker Type	Employee	Grade	Mgmt06
Assignment Name	Director	Business Unit	US1 Business Unit
Assignment Category	Full-time regular	Department	Human Resources US
Assignment Status	Active - Payroll Eligible	Work Location	Redwood City
- Employment History:** A timeline chart showing 'Hire 02/28/02' and 'Promotion 01/01/05' across quarters from '02 to '05.

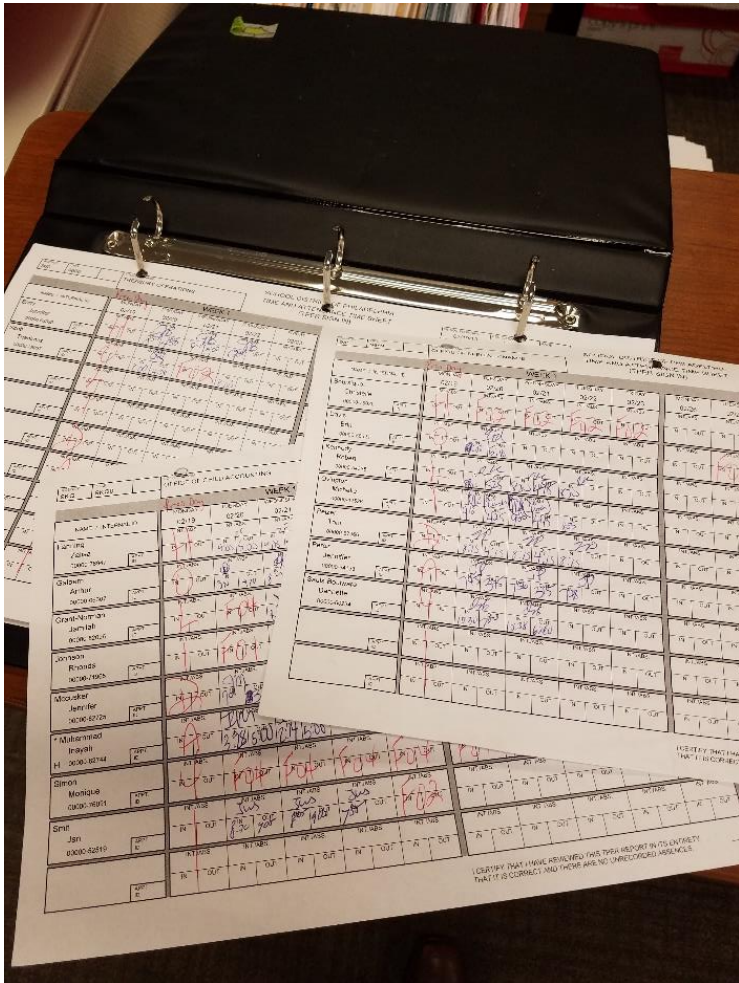
The screenshot shows the 'Benefits' page for Robert Jackman. It includes a navigation sidebar on the left and a main content area with the following sections:

- Benefit Plan:** Enrollments: Choice Program
- Benefits Details Table:**

Benefits	Details
Medical PPO-Participant Plus One Enrolled	Coverage Start Date: 01/01/17 Annual Amount: 4,296.00 USD
Medical PPO-Participant Plus One Enrolled	Coverage Start Date: 01/01/18 Annual Amount: 4,296.00 USD
Comprehensive Dental-Waive Coverage Enrolled	Coverage Start Date: 01/01/18
- Your Benefits Cost:** A horizontal bar chart showing costs for Medical, Life and Disability, Other, and Dental and Vision. Medical is the highest cost at approximately 1,100 USD.
- Dependents and Beneficiaries:**
 - Stephanie Jackman, Spouse, Dependent, Beneficiary
 - Jim Jackman, Parent, Beneficiary
 - Laura Jackman, Parent, Beneficiary

Existing vs. New: Time Entry and Leave Management

Current System



Proposed System

ORACLE

What do you need to do or find?

Reputation Competitions Web Clock My Account Expenses Time

Today Mar 14, 2016 - Mar 20, 2016

Edit Review and Submit Schedule Absence

Drag to Report Time Vacation Sick

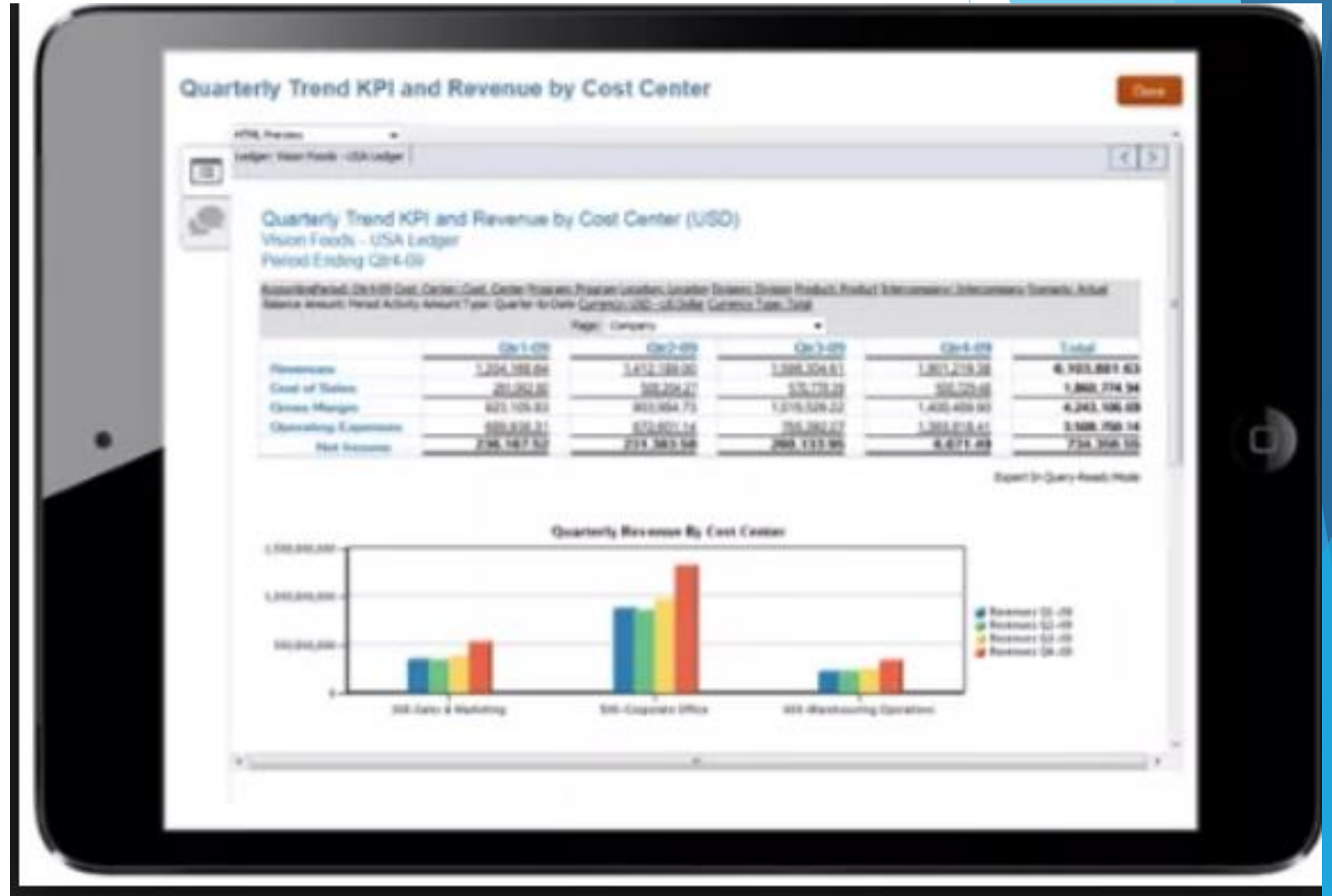
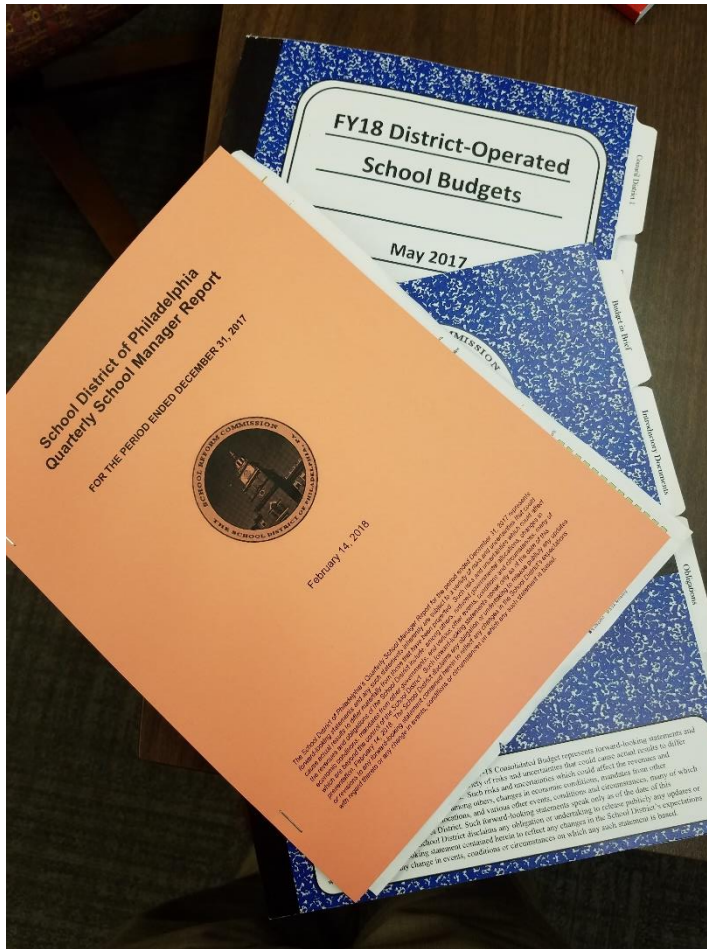
Entered	Time Card	Mar 14 - 20, 2016	Total Hours	Absence Hours	Scheduled Hours	
0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	40	
Mon 3/14	Tue 3/15	Wed 3/16	Thu 3/17	Fri 3/18	Sat 3/19	Sun 3/20
0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
8 hrs Work	8 hrs Work	8 hrs Work	8 hrs Work	8 hrs Work		

() Scheduled hours My schedule Absence Public holiday

Existing vs. New: Financial Data

Proposed System

Current System



Project Cost

- ▶ The total estimated ten year project cost is **\$49.4 million**, broken down as follows:
 - ▶ **\$20.8** million for initial software and hardware purchase and project implementation services.
 - ▶ **\$28.6** million in annual hosting and support costs (approximately **\$3.2** million annually after implementation)
- ▶ SDP currently has annual contract costs related to its existing ERP and related systems (6 different systems)
 - ▶ Current total annual spend = **\$1.8** million
- ▶ The resulting net annual cost to SDP is **\$1.4 million**
- ▶ The net total ten year cost of the new ERP system for the SDP is **\$33.4** million.
- ▶ The **\$33.4** million of additional spend, represents less than 1/10th of one percent of the SDP's **\$34** billion in total spending over the ten year period.



THE SCHOOL DISTRICT OF
PHILADELPHIA

The New Parent & Family Portal

The Office of Family & Community Engagement
The Office of Information Technology

The Former Parent & Family Portal



The former *Parent & Family Portal*:

1. Launched over a decade ago!
2. The vendor is not growing this product
3. Included daily attendance information, but only limited details
4. Only showed the final report card marks after each cycle
5. Listed student courses, but not their schedule

The New Parent & Family Portal

Campus Portal

SELECT A STUDENT

Welcome

Sign Out

Infinite Campus

Family

Messages **1**

Discussions >

Household Information >

Family Members >

Calendar >

To Do List >

User Account

Contact Preferences >

















Access Log >

Notification Settings >





Digital Language Lab

▼ District Announcements - 1 message

[08/31/2017] **NEW**
Student Launchpad – Click on any icon to open an application that is used at your school (STUDENTS ONLY)

 My Account	 Surveys	 School Selection	 StudentNet	 Achieve3000	 Edgenuity	 First In Math	 HMH Ed
 My HRW	 Imagine Language	 Imagine Math	 iReady	 McGraw-Hill	 Naviance	 ST Math	 ThinkCentral

[08/30/2017] **NEW**
Parent & Family Launchpad – Click on any icon to open an application (PARENTS & GUARDIANS ONLY)

 My Account	 Surveys	 School Selection	 FamilyNet
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The New Parent & Family Portal

SELECT A STUDENT ▾



Sign Out














Edward

Calendar

- Schedule >
- Responsive Schedule >
- Attendance >
- Grades >
- Health >
- Academic Progress >
- To Do List >
- Reports >
- Demographics >
- Family**
- Messages 1 >
- Discussions >
- Household Information >
- Family Members >
- Calendar >
- To Do List >
- User Account**
- Contact Preferences >
- Access Log >
- Notification Settings >

◉ March 2018 ◉

 Assignment(s) Due
  Attendance Event(s)

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				01 Edward 	02	03
04	05 Edward 	06	07 Edward  	08 Edward 	09	10
11	12 Edward 	13	14	15	16	17
18	19	20 Edward 	21	22 Edward  	23	24
25	26	27	28 Edward 	29 Edward 	30	31

Features of the New Parent & Family Portal

The New Parent & Family Portal provides parents and guardians access to:

- A calendar for each child's assignments and attendance events
- Their child's daily schedule
- Their child's immunization information
- Daily attendance by period for High Schools and AM/PM attendance for Elementary and Middle Schools
- A view into the teacher's gradebook which includes quizzes, tests, assignments, etc.
- A "To Do List" of outstanding student assignments
- Access to see what online materials are available for their child through the *Student Portal*
- The ability for parents and guardians to update contact and language preferences