



Human Capital Data & Business Systems Board Presentation Memo

Over the last few years, technology for the Talent Division has been selected and implemented by the Talent Division with Technology Services and Finance in a support and advisory role. The purpose of this presentation is to give an update on the Human Capital Database System, but more importantly, introduce a new way to look at all our systems that are used by both the Talent Division and the Finance Division as well as end users at all our schools. Rather than reporting on core system needs separately by Talent and Finance, we will now report on them together as the **Business Operations Portal**. The portal will include all the applications necessary to effectively operate both the Talent and Finance divisions built core technology that meets the needs of both divisions while providing meaningful data and tools to our staff at schools.

Heretofore, each division had its own plan to move from the legacy iFAS system from Sungard that had not be updated in nearly a decade. This old system was a pain point operationally for not only staff at the central office but also for users at all our schools. It did not effectively or efficiently meet the needs of either division or the end users at the schools.

To remedy the some shortfalls with this system, each division selected auxiliary applications to implement and made longer term plans for its own anchor application. The Talent Division, for example, deployed Teach Boost for certificated staff talent management, SmartFind Express to manage substitutes, a new recruiting web application, and its own tracking system. For its anchor application, it chose Workday. Finance, likewise, rolled out auxiliary applications



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that include the Budget Development Tool, E-marketplace, Contracts Online, and the Financial Transparency Portal. For its anchor application, the Finance Division planned on deploying an updated version of iFAS called e-Business Plus from Sungard. This update was also needed as a prerequisite to Workday that the Talent Division was planning on.

The Business Operations Portal has actually already launched with our updated intranet. The Business Operations Portal gives all employees, central and at schools, one single place to go for their interactions with human resource and finance data using the the various tools with single sign on using district email. Many auxiliary applications are currently available, it is the anchor applications that need to change. Along with this change, the auxiliary applications will be updated and expanded.

The iFAS upgrade did not bring the feature and performance improvements anticipated. Talent and Finance staff and school site staff still do not have the features, performance, or reliability they needed. Also, the planned integration with Workday was no longer feasible with a change in direction from Sungard. These facts, along with the fact that the only other California district currently attempting to deploy Workday cancelled its project, our district too is cancelling the Workday project. The plan is not use Workday or the upgraded iFAS, but rather go with a proven application used widely in both the county and state. That application, Escape, is hosted and supported by our county office, the Alameda County Office of Education (ACOE).

It was a process to get to this decision that a look at recent history will be helpful.



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In 2013-2014, the Talent Division identified the key requirements it needed to address: recruitment & hiring, pre-employment process, onboarding, orientation, induction, growth and development, personnel actions, career pathways, and off boarding. The finance system, Sungard's iFAS, at the time did not meet all the needs of the division and it determined that new systems were needed to augment it. The concept of Human Capital Data Management System was introduced to meet some of the challenges that the division was facing. Other auxiliary systems were also identified.

Workday was introduced as the Human Capital Data Management System. However, in order to implement Workday, iFas needed a major upgrade because it had not been updated in nearly 10 years, was no longer going to be supported by Sungard, and a modern platform was needed to integrate. After a one-year implementation process, the iFAS upgrade was complete, but not only did it fail to meet performance and reliability expectations, the integration planned with Workday was no longer feasible.

During this upgrade, other Talent systems have been successfully implemented. TeachBoost was selected for teacher growth and development and TrackVia for tracking openings. An exciting new recruitment portal launched to actively reach out to prospective staff, <http://jobs.ousd.org/>. Also, the Finance Division did not wait for the existing finance system upgrade to pursue our goal of an accountable school district. It deployed the Financial Transparency Dashboard <http://www.ousd.org/fiscaltransparency> which used finance system data in an exciting interactive portal. Additionally, the District just launched a online professional development system, Knowledge Delivery Systems (KDS) Professional Learning Platform (PLP) that has great potential for onboarding,



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growth and development of all employees, and training and professional learning in all areas <http://plp.kdsi.org/ousd/>.

During the 15-16 school year, the Finance Division updated its goals. It pledged to improve the transparency, accessibility, and reliability of the budget development and financial management system and to align systems with Alameda County Office of Education (ACOE). The entire new Business Services Division decided to join visions to create a complete integrated best-of-breed suite of systems, integrated applications to manage the business and automate many back office functions related to budget and human resources. The goal is that business operations are easy to follow, user friendly, accountable, invisible, and provide high quality customer service to build an Effective Talent Program and Accountable School District.

To that end, the Business and Operations Leadership Team (BOLT) has decided to focus on one new system at the core. This system, Escape, is hosted and supported Alameda County Office of Education (ACOE) who is the single source provider for the system. Escape and ACOE have recent implementation experience with both Fremont Unified and Castro Valley Unified and it is the standard at virtually every district in the county. Escape is a proven California K-12 education financial system that will be well supported by the county as the core of the District's financial and human resources operations, reporting, and accountability.

With Escape at the core of the Business Operations Portal, Talent, Finance, and Technology plan to make sure we meet the goals for Effective Talent Programs and an Accountable School District. We plan to implement the move to Escape over the next two years. This timing is dictated by both ACOE and Escape to



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ensure a well-planned and smooth deployment that will be scheduled for July 2018. This does not mean, however, that Oakland Unified School District is going to remain stagnant of the next two years.

The District will be expanding the Budget Development Tool to add LCAP planning and we will improve Talent's position tracking system. The team will also work on applicant tracking, onboarding, and leaves management along with online timecards and talent management. Ultimately, when Escape launches in July of 2018, many of these capabilities will already be addressed. Whether the features are in Escape itself or part of the Business Operations Portal, the original needs of the Talent Division and the developing needs of Finance will be met.

The plan is to come back to the board with a detailed contract and cost outline to move to Escape. The board item will be scheduled for October 2016. The plan will include the full cost of Escape and anticipated related costs including personnel for the planning and roll out. Also, administration plans to present a five-year budget comparison that will compare the costs of the original plan with two core systems, Workday and iFAS, and the new plan of just Escape at the core of the Business Operation Portal.