OAKLAND UNIFIED SCHOOL DISTRICT

Community Schools, Thriving Students

BUSINESS AND OPERATIONS PORTAL

(Finance and Talent System)

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AGENDA

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- **EXECUTIVE SUMMARY**
- **BACKGROUND**
- **BENEFITS OF ESCAPE SYSTEM**
- **PROJECT TIMELINE**
- **OUSD EXTERNAL SYSTEMS ROADMAP**
- **5 YEAR COST**
- **CONCLUSION AND RECOMMENDATION**

EXECUTIVE SUMMARY

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- The goal of this project is to design and implement a new Business and Operations System (Escape), which will be the operating system backbone to the District's Business Operations Portal. Escape is the system currently used by a majority of school districts in Alameda County and by the Alameda County Office of Education (ACOE).

- We are **requesting** the Board of Education's **approval** of the agreement for ACOE and Escape for the amounts of $2,500,272 (over two (2) years) and $3,464,222 (over three (3) years) for a projected total of $5,964,494 over five (5) years.

BACKGROUND

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- The Business Operations Portal has already launched with our updated intranet.

  The intranet gives all District employees one single place to go for their interactions with human resource and finance data via various tools with a single sign-on using District email.

  However, it is the Portal's underlying support system that must change.

- Auxiliary applications are currently available on the Business Operations Portal (e.g. Contracts Online; SmartFind Express; Financial Transparency Dashboard).

  However, the new Portal backbone will include all the applications necessary to effectively operate both the Talent and Finance Divisions, while providing meaningful data and tools to our staff at schools.

- OUSD has used Sungard's Integrated Finance and Accounting System (IFAS) as its primary operating system since January 2004. Sungard required OUSD to upgrade IFAS from version 7.7 to 7.9 in November, 2015.

BACKGROUND (continued)

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- The IFAS upgrade presented multiple challenges so severe that it was a practical downgrade. As a result:

  Staff in multiple operational departments are working extended hours as the system takes a longer time to enter and review data.

  Customers are experiencing delays and errors, which reduce their trust in the system.

- In light of the ongoing problems with IFAS, Talent moved forward with a switch to Workday's human capital management system.

  Talent worked with Sungard to create a program to interface IFAS with Workday so data could be communicated between Talent and Payroll.

  Just as the interface was to begin testing, Sungard informed OUSD that they would not support the data interface.

  The result is that OUSD will not be able to implement Workday.

BACKGROUND (continued)

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- The District conducted an evaluation process in our search for a replacement operating system.
- After the evaluation process, the district leadership determined that Escape was the best solution.
- Escape will meet the majority of the needs contemplated by Finance and Talent departments.

BENEFITS OF ESCAPE SYSTEM

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- The system is contracted and hosted by Alameda County Office of Education (ACOE) which will improve support and accountability.
- The vendor has recent, applicable implementation experience in Alameda County (e.g. Fremont Unified and Castro Valley Unified School Districts).
- The system has proven compatibility with California's K-12 education and financial reporting systems.
- The system is a wholly integrated solution, comprised of human resources, finance, budget, accounting, and payroll systems.

PROJECT TIMELINE

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Activity/Milestone*	16 Q2	16 Q3	16 Q4	17 Q1	17 Q2	17 Q3	17 Q4	18 Q1	18 Q2	18 Q3
Evaluation and selection; Approval to move forward with Escape and cancel Workday		7/27								
Contract Negotiations; BOE Contract Approval			10/26							
Develop/Approve Project Team, Resources, Budget			10/31							
System training for core team			12/31							
System Design				1/25						
System interface Setup					4/5					
Data Conversion					4/12					
System Setup					4/26					
HR Testing							12/18			
Payroll Testing									5/21	
Finance/Accounting Testing									5/30	
School Staff User Training										7/26
ESCAPE OFFICIAL LAUNCH										7/26
IFAS Shut Down										9/27

*** Milestone:** *an action or event marking a significant change or stage in a project*

OUSD EXTERNAL SYSTEMS ROADMAP (1)

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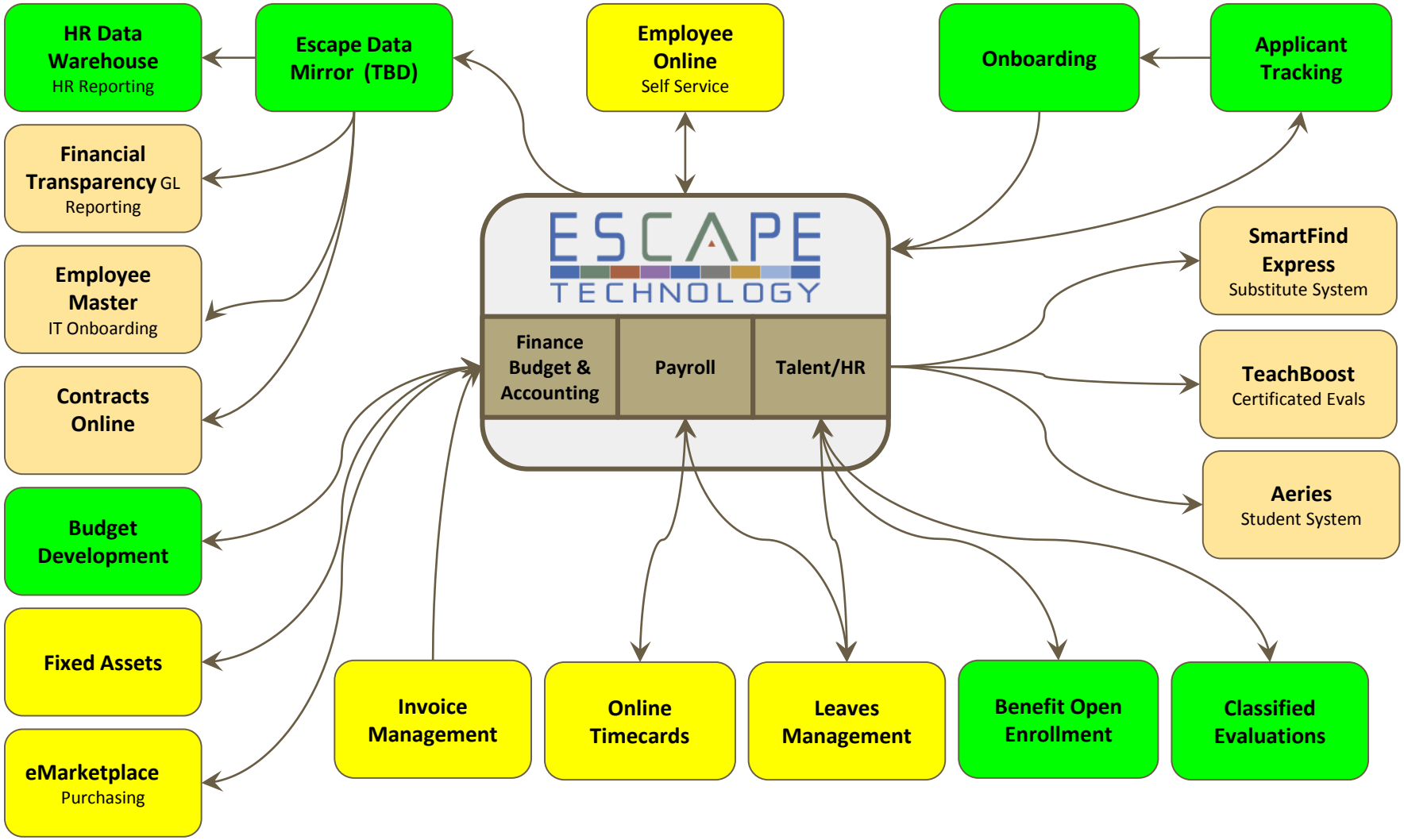

Escape | 3rd Party | Keep Existing

(1): Roadmap items pending deeper evaluation of 3rd parties and Escape

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5 YEAR COST

Fiscal Year (Jul-Jun)	2016-17 (Prorated)	2017-18	2018-19	2019-20	2020-21	5 year Total
One-Time Implementation Costs (Estimated) (A)	$264,760	$353,013				**$617,773**
ACOE Hosting	$243,333	$365,000	$365,000	$372,300	$379,746	**$1,725,379**
Escape Licensing	$509,666	$764,500	$764,500	$779,790	$795,386	**$3,553,842**
Staff Training			$2,500	$2,500	$2,500	**$7,500**
GRAND TOTAL	**$1,017,759**	**$1,482,513**	**$1,132,000**	**$1,154,590**	**$1,177,632**	**$5,964,494**

(A): Our one time external implementation costs are estimated to be $617,773 and includes vendor project management, data conversion, custom interface development, staff training; and vendor travel.

CONCLUSION AND RECOMMENDATION

- The move to Escape will happen over the next two years. This timing is dictated by both ACOE and Escape to ensure a well-planned and smooth deployment that will be scheduled for July 2018.

    - With Escape at the core of the Business Operations Portal, the Talent, Finance, and Technology Divisions will be well positioned to ensure OUSD meets its goals having **Effective Talent Programs** and becoming an **Accountable School District**.

- We **recommend** the Board of Education **approve** the agreement for ACOE and Escape for the amounts of $2,500,272 (over the next two (2) years) and $3,464,222 (over the following three (3) years) for a projected total of $5,964,494 over five (5) years.

EVERY STUDENT THRIVES!

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