



BOARD RETREAT ERP Project Update

Wednesday, August 23, 2023

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Scope, Milestones, and Status

Transition financial, human capital management, and selected facilities and operations functions from legacy ERP applications to Munis ERP application.

Current ERP Project Scope



Phase	Module	Status
Phase 1 - Finance	General Ledger	Live
Phase 1 - Finance	Budget	Live
Phase 1 - Finance	Accounts Payable	Live
Phase 1 - Finance	Bid Management	Evaluation
Phase 1 - Finance	BMI Asset Track Interface	Evaluation
Phase 1 - Finance	BMI Collect IT Interface	Evaluation
Phase 1 - Finance	ACFR Statement Builder	Evaluation
Phase 1 - Finance	Cash Management	Live
Phase 1 - Finance	Fixed Assets	Live
Phase 1 - Finance	Inventory	Evaluation
Phase 1 - Finance	Project Accounting	Live
Phase 1 - Finance	Grant Accounting	Evaluation
Phase 1 - Finance	Purchasing	Live
Phase 1 - Finance	eProcurement	Live
Phase 1 - Finance	SSRS Reporting	Evaluation
Phase 1 - Finance	Contract Management	Live
Phase 1 - Finance	Accounts Receivable	Live
Phase 1 - Finance	General Billing	In Progress
Phase 1 - Finance	Student Activity	In Progress
Phase 1 - Finance	Performance Based Budgeting	Evaluation

Phase	Module	Status
Phase 2 - HR/PR	Applicant Tracking	Deferred
Phase 2 - HR/PR	Employee Expense Reimbursement	Live
Phase 2 - HR/PR	HR Management	In Progress
Phase 2 - HR/PR	Payroll	In Progress
Phase 2 - HR/PR	Employee Self Service	Live
Phase 2 - HR/PR	Professional Development	Evaluation
Phase 2 - HR/PR	Time and Attendance	In Progress
Phase 2 - HR/PR	Time and Attendance Mobile	In Progress
Phase 2 - HR/PR	Time and Attendance Import	In Progress
Phase 3 - Fleet/FM	Work Orders	Live
Phase 3 - Fleet/FM	Fleet & Facilities Management	Evaluation
Phase 3 - Fleet/FM	Tyler GIS	Evaluation
Phase 3 - Fleet/FM	Standard Fuel Interface	Evaluation

Live	<i>These modules are live with function only occurring in MUNIS.</i>
In Progress	<i>Implementation for these modules are in progress. Function is occurring in CrossPointe. Critical to project GO LIVE.</i>
Deferred	<i>Functions are currently live in other systems. Decision to transition to Munis is temporarily paused. No impact to project GO LIVE.</i>
Evaluation	<i>Functions are currently live in other systems. Need to determine if they are still needed 7 years later. No impact to project GO LIVE.</i>

Current Milestones



Phased Payroll Go-Live

- October 15, 2023: 12 Month Employees
- January 15, 2024: 10- and 11-Month Employees
- April 15, 2024: Part-time Employees and Retirees

HR Management Go-Live

- October 15, 2023: 12 Month Employees
- January 15, 2024: 10- and 11-Month Employees
- April 15, 2024: Part-time Employees and Retirees

Time and Attendance Go-Live

June 30, 2024

General Billing Go-Live

December 31, 2023

Student Activity Go-Live

December 31, 2023



Strategies for Success



Strengthen Project Governance

- Executive Committee consists of:
 - Chief Financial Officer
 - Chief Human Resources Officer
 - Chief Information Officer
 - Chief Operations Officer
 - Chief of Staff
- The district will agree to adhere to revised scope regardless of leadership changes.
- All decisions must be discussed and agreed upon by the Executive Committee, with superintendent oversight/approval.
- Committee debriefs weekly.
- Committee works closely with Project Team – keep finger on pulse of project.
- The responsibility of completing the project rests with the entire executive committee with oversight from superintendent.



Address Project Management

- Select two new project managers (Tyler/DCSD) with experience and fresh perspectives.
- Develop DCSD-focused comprehensive project charter and plan.
- ***Shift to a phased approach.***
- Ensure effective and transparent project progress reporting





Monitoring & Managing Resources

- Ensure staff receives training and support necessary for job position.
- Augment staff to assist where possible and strategic.
- Address change management for permanent position duties and responsibilities.

Thank You

