

PeopleSoft Implementation Vendor Conference Minutes

Meeting Type:	<input checked="" type="checkbox"/> Overview, <input checked="" type="checkbox"/> Planning, Discussion <input checked="" type="checkbox"/> Q&A
Objectives:	<ul style="list-style-type: none"> • PeopleSoft Implementation Vendor Conference
Scribe:	Charlotty Wong
Facilitator:	Rane Johnson
Date:	Friday, May 16, 2003
Time:	10:00 AM -12:00 PM
Duration:	2 Hour
Materials Provided:	PeopleSoft Implementation Services Q&A PeopleSoft Implementation Services Vendor Conference Agenda
Location:	135 Van Ness Ave, Room 209

Invitees/Attendees * in attendance

Names			
*	Nasser Azimi, SFUSD	*	Howard Bishop, Bearing Point
*	Eric Bouwell, SFUSD	*	Rose Healy, Venturi
*	Rane Johnson, SFUSD	*	Dennis Lacar, STA
*	Raymond McDougal, SFUSD	*	Bob Krueger, Cherry Road
*	Charlotty Wong, SFUSD	*	Felix Kuckucky, STA
		*	Patrick Meade, Unisys/EpicEdge
		*	Gloria Su, Han Consulting
		*	Doug Wathor, Han Consulting

Meeting Minutes for 5/16/03

Main Points, Conclusions/Discussions, Decisions, Next Steps

Nasser Azimi presented vision of project. District brought in PS products about 4-5 years ago in an attempt to automate certain aspect of its accounting and human resources practice. The initial implementation engaged a third party integrator that attempted to integrate PeopleSoft 7.x. There have some problems associated with that, not necessarily the product itself but a combination of project management and the implementation approaches used with regards to trainings, transition, and organization transformation. As a result, the system currently in use has some problems associated with it with regards to configuration, the level of customization, the end user knowledge in order to properly use and populate the system, and as a result there has been data integrity issues that has to be resolved or reconciled. In addition, we have a somewhat of an island structure with relation with our current implementation. We have PeopleSoft in use for a line share of our accounting and HR, but when it comes to procurement and projects, the respective departments use third party software. For Projects component, the Revelations is being used as a front end project tracking; however backend accounting updated into PeopleSoft. Naturally for current phase and Phase II of 8.x implementation is to get our arms around the entirety. First and foremost is to achieve the highest level of integration within the overall software environment. This means is that all the peripheral and software used currently has to be completely integrated and restructure and brought into the PeopleSoft umbrella. The full range of 11 modules that PeopleSoft offers. First aspect is to integrate the wide range of software we currently use. The second vision is to achieve the highest level of data integrity. There is extensive data purification is involved and extensive conversion strategy has to be explored. Needs to make sure data moved to the final PeopleSoft environment is credible and meets the requirements of end users. Third aspect is to have fully trained and full organization transformation entities. District is focus on proper alignment with respective business organization. Fourth is the level of customization. Our current customization is estimated to have 35-40% customization, which makes it difficult for commercial off the shelf software. Our goal with this new implementation is to shrink down the customization by doing organizational transformation, redoing all of our procedural flows, and properly training our end-users, we believe we can achieve a level of customization to a level of around 5%. Lastly and most important, is the maintenance of the overall environment. So that clearly falls on IT from the standpoint of expanding but also making sure my folks have the proper knowledge transfer to configure, customize, reconfig and do whatever it takes to properly maintain the software environment. We do anticipate some external assistance by the supplier community in support and maintenance to a much smaller extent than what we are currently experiencing in the current project. District fully wants to take control and ownership of maintenance and operation. In a nutshell, integration, organizational transformation, training, lower level of customization, easy to maintain software environment are elements of vision of this new business system environment of Phase I. Phase I will bring live 6 of the 11 modules that PeopleSoft off the shelf package automates. The remaining 5, which will be part of the Phase II will be Projects, Time and Labor, Accounts Receivable, Asset Management, and Procurement. In addition to the functional module, we are planning to web enable the entire application suite, which involves e-apps that needs to be implemented plus the portal module. One of the elements has to do with organizational transformation because PeopleSoft offers a workflow component to streamline transaction flow from front end to back end. We are planning to fully exploit the power that the workflow brings to the table to properly reorganize our Human Resources and Fiscal shops for proper utilization in an electronic fashion.

Rane Johnson clarified the RFP. For all the questions that were submitted to us, answers are given to you and answered to the best of our knowledge. Some questions were very specific and we are unable to provide the answers since we have not implemented everything yet. A lot of the answers, you will see that it will be answered in the requirements analysis. For you to give your bid, you will just need to give us assumptions. There was request for clarification because a lot of the questions were repeated, do most of your detail in the work description and if it is already in your work description, refer the reader to review work description. We don't expect you to give two schedules and two detail cost analysis, etc. The due date is May 23, 2003 close of business day at 5:00p.m.PT. A lot of request for extension, however, can not extend that because this has to go to the board for the last board meeting on June 23 before summer begins. If you have any idea and comments, we are more then welcome to hear your ideas.

Questions and Answers

1.Q	What level of change management, reengineering assistance are you looking for? Scope can range from very limited to very extensive, can you expand on the level of change management.
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RFP Conference Meeting

1.A	Existing relationship model implemented is between us and PeopleSoft Corp for Phase I is a tightly knit joint team structure. What I mean by that is that PeopleSoft has a project manager, District has a Project Manager. PeopleSoft has a technical manager and District has a corresponding technical manager. PeopleSoft has developers to configure and assist with customization but we own the entire range of developing the customize components ourselves. PeopleSoft for example specs out the design of a particular customization and provide oversight on a quality assurance standpoint, but my folks actually do the programming and implementation. From the organization engineering standpoint, the current phase has 2 business manager supplied by SFUSD and a series of subject matter expert also supplied by SFUSD who are engaged in the full range of defining requirements, reviewing design, reviewing test scripts, and also becoming trainers for training sessions. In this regards, PeopleSoft has more of an oversight responsibility and training the trainers, the actual task of reconsidering procedures and organizational models and reorganizing the perspective departments belongs to the District.
2.Q	Does the District have a full-time change management person?
2.A	Yes, we created a project management office with a full-time project management staff, full-time technical staff and 2 business managers that represents HR and Fiscal. In addition to that, we built a training and transition management unit. The focus of training and transition management is strictly focus on training and organizational transformation. My department has 3 full-time staff associated with that unit and that is just from IT dept. The business organizations are bringing in a tremendous amount of subject matter expertise. So my department from a training and transition standpoint is just facilitating and making sure that a model is in place for proper development of procedures and organizational model but the task of making all of it happen. The duty of moving people around and developing procedures belongs to my peers for those respective departments HR or Fiscal with IT as oversight. We have a lot of emphasis placed on methodology and that's why the methodology has the highest percentage in the package.
3.Q.	Is the budget already approved?
3.A	Yes there is, but I can not tell you what it is because that would defeat the purpose of the RFP. Because of the Fiscal situation, the current phase is fully budgeted of course, and there is a chunk of money available for the next phase. The budget that is available for the next phase will not necessary cover all the entire set of components that I have mentioned. Give your bids for each of the modules independently then pick and choose to see what we want to bring live for the next fiscal year. When time comes to secure additional funds for the remaining modules then it simplifies the process.
4.Q	Are you releasing 8.4 when the latest PeopleSoft is 8.8 now.
4.A	We really rely on your expertise and recommendations in that regards. All of the RFP has been crafted in a fashion that meets our contract requirements. You are more than welcome to make recommendations and to solicit as much as information as you can provide us, better way of approaching certain component, please feel free to offer that up.
5.Q	On question number 2 on the Q&A handout about architecture: "Is the PeopleSoft PIA architecture (including database and all servers) sized and configured with the added modules and e-app in mind" had the answer no. Is this correct?
5.A	That is not an accurate answer. We brought a hardware supplier, Microsoft, and team with PeopleSoft to blueprint an architecture. We will correct this before posting the answer.
6.Q	Any addition will be beyond scope?
6.A	Yes, that is correct.
7.Q	Is this a combination of upgrade and implementation?
7.A	Yes, combination of upgrade and implementation. Also note, as you consider this opportunity you should think about the upgrade. Currently we use Revelation, a third party. Configuring the Projects component into PeopleSoft is the highest priority right now. So one of the things to consider it to configure the Projects module first, so we can put new projects on the PeopleSoft projects module rather than on Revelation. Once that is configured, and the entire scheme is well tested, then we move on to converting our existing projects on Revelation.
8.Q	Projects module may be missing the time and labor piece, due to the implementation. Are you aware of that?

RFP Conference Meeting

8.A	Yes, we recognize that. That is some of the dilemma we have now. In fact, the way we structure our relationship with PeopleSoft Corporation really involves a holistic approach. We have them on the hook for third party integration interphase. They have committed to making sure the full stream of Human Resources and Fiscal works, even though they are only implementing 5 modules. We have third party manual interphases that we require them to be attentive to.
9.Q	We are not at a state where we have a state template, though that is where we like to hit so that no matter where a child goes, there is an IAP document similar form district to district.
9.A	For Special Ed, do you want the application to include intervention strategies?
10.Q	Currently, are you finishing upgrade in July? For HR or for Financial?
10.A	Yes, stagger rollout. Both to go-live in July, just stagger 2 weeks apart.
11.Q	Has that been done in the lab environment or on-site?
11.A	It is combination of lab and on-site.
12.Q	I notice there is a short emphasis on the request for fixed bid proposal, as you know that the conversion can be multi-year type of effort, to be accurate in our response, what might be some information that you can provide us so that we can get the extent of data migration, etc.
12.A	We can provide you with whatever you would like to see with the exception of confidential data. However when it is all said and done, there is still an element of risk, that you may never know about until you actually come on board and see the data. We are ok with you defining a fix set of assumptions and associated risk and giving us a fix bid with that regard. I know the dilemmas associated with fix bid contracts but it has to be deliverable base so we can make sure enough budget. We can not have open engagement in time and material.
13.Q	If there are a list of items or questions that we are interested to see, who is our contact?
13.A	Charlotty Wong is your single point of contact at this point.
14.Q	Are there any requirements done and if so is it available?
14.A	The only requirements done is what we have done for HR and Financials right now. We do have workflows that we have done. We are getting the detail level put together, but that the only requirements analysis that has been done.
15.Q	I worked with the City and County of San Francisco before and I know that there has been incentives or benefits for local businesses that is small, is there any incentive for school district to contract either as prime or subcontract to small
15.A	Pretty much the one who gives the best proposal is the one we select. If you a small business, I may suggest and you are more than welcome to partner with another organization or if we see in your proposal that you have some good strengths and see in another organization with other good strengths and we like you both, then we may come back to both of you and recommend you partnering up. However, we will not say we will favor one over the other, pretty much we are looking to get the best product at the lowest price.
16.Q	When do you want to complete it?
16.A	As quickly as possible. The priority right now is the Projects Module. Make that bid a very aggressive schedule. The other modules may be a more realistic schedule to get the price down. You may consider having a recommended schedule, i.e. with x# of months will cost x dollars, for accelerated n# of months, it will cost n dollars.
17.Q	Can you provide more detail as to beside having a project manager from the District, what other support are present?
17.A	Depending on the module, there will be financial business manager, a human resources business manager, there will be a facilities business manager, a business analyst for each one of those and depending on the complexity the number subject matter expertise, technical team, 2 DBAs and people from Transition Team.
18.Q	Please clarify question #99, RFP p.12 section 5 and 6 on the guarantee.
18.A	Goal of the District is to have it up and running. As an implementator, we just need suggestion, not having to guarantee what we do does it. Need recommendation, ie. if the run time takes 10 seconds, a performance tuning recommendation to bring this down to perhaps 5 seconds.