

Case #3: Business System Implementation The Madison Metropolitan School District (WI)

The Madison Metropolitan School District (MMSD) is located in Madison, WI and services approximately 25,000 students across 50 school buildings. With the assistance of Davidson Services during the business process review; business case development; and RFP selection process, the school district selected a full featured commercially available software solution to replace their 1970's vintage legacy business and payroll system.

The Integrator Selection Process

During the software selection process, MMSD evaluated several implementation methodologies for the management of the new business and payroll system installation. The options considered included:

- Managing the implementation process using internal resources
- Hiring the software vendor to take full responsibility for the implementation
- Hiring an independent professional services firm to manage the overall implementation

With the business case for the new system requiring tight cutover schedules and even tighter budgets, the district determined that internal resources did not have the training or experience to manage a project of this complexity. Freeing resources to assign one or two full time district employees to the project was also not feasible so the use of internal resources was eliminated from consideration.

When the district evaluated the software vendor's implementation strategy, one key component that was missing was knowledge of K-12 school applications outside of the basic business and human resource systems. MMSD was evaluating all their critical information systems and had scheduled replacement or implementation of a time clock system; a new web based substitute management system; a new back of the house and point of sale food service system; a new budgeting system; and a work order system in addition to the business and payroll system. Each of these applications required an interface with the new financial and human resource systems and a systems integrator's understanding of their operations was critical to a successful implementation. The lack of K-12 experience, unproven project management skills, and limited knowledge of critical software outside the

base financial and human resources systems led the district to publish a Client Advocate and Integration.

Within the bid, the district was searching for an organization that had a proven track record in implementing school based financial and human resource systems. They



wanted trained, seasoned resources that could successfully lead a complex implementation and meet budgets and timelines. After reviewing multiple companies, the district chose Davidson Services as the company that best met these requirements.

The Implementation Process

Davidson Services kicked off the overall implementation by working together with the multiple software vendors and departments to build a plan and schedule for implementation. Two implementation scenarios were discussed; cutover of all systems within a 12 month period or a staged implementation with financial and purchasing systems going live in 12 months and payroll following 6 months later. Evaluating risks, costs, district workload, and requirements for temporary interfaces to allow for a staged implementation, the benefits of a staged implementation out weighed the risks of an accelerated, condensed implementation.

With the time line now set, a communication plan for coordinating the efforts of all members of the implementation team and providing updates to district stakeholders was developed. Shared online access to the project plan, documentation, issues log, and other related information was established for both the implementation team and the district management team. Quarterly management team meetings were held where progress and issues were reviewed to keep all members of management informed. The same management meetings were used to escalate issues that were outside the control of the project team, resulting in faster resolution times.

During the implementation process, the business process flow documentation created prior to software selection was used to help tailor the software to meet the needs of the district. Since the new software suite

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was a tightly integrated set of modules, communication between departments became critical and implementation decisions in each area greatly impacting the operations of other departments. Davidson Services help facilitate inter-departmental discussions by taking part in training, department reviews, and configuration decisions. When decisions were required affected fundamental business processes Davidson Services prepared documentation, identified alternatives, and provided recommendations. This on-going involvement helped keep time lines on track while maintaining user confidence in the new system.

The Results

All finance and budgeting systems were successfully cut over on schedule beginning July 1, 2004. However, many software issues arose during implementation because MMSD was one of the first users of a new release of the software. Davidson Services developed a problem reporting log and managed the issue resolution process to help mitigate the impact on users. First daily and eventually weekly calls with the vendor's technical and development teams helped resolve major functional issues. No installation is without challenges and Davidson Services' full-time project management team helped resolve problems in a timely manner. After approximately 6 months of continuous improvement effort, the financial systems were functioning well and the district began to achieve the expected business results from the new system.

Davidson Services also took a leadership role in identifying and documenting areas where more customized programs or documented needed to be created. They assisted the district with:

- Identifying critical changes to software screens to display the financial accounting structure according to the standards typically seen in K-12 school districts.
- Documenting in detail the requirements for a complex approval process for purchase requisitions. This information was used to create a customized process flow fully automating the budget checking and management approval of all purchases based on published Board policy.
- Creating a unique integration between the new budgeting and financial applications for district

budget development. Strengths of each system were identified and integrated with the requirements of the district for budget development. The customized integration allowed the district to cut nearly 45 days off their budget cycle with a projected ability to further reduce that by an additional 30 days during the next budget cycle.

- Documenting integration "touch points" between the new business and payroll system and critical systems including Time Clock; Substitute Tracking; Food Service; Work Orders; p-Card processing; and other systems. These interfaces were established without creating complex customized programs, making use of tools that were integral to the new system.
- Developing a K-12 reporting suite for local and state reports that matched the needs of the users within the district. The district now has nearly 40 Crystal Reports that provide financial, human resources, payroll, and purchasing information in formats that meet their needs.

Besides the management of schedule and resources, Davidson Services also provided budget management services. Being involved in the RFP preparation and contract negotiations proved essential to helping resolve implementation issues after the sale. Travel expenses were tightly managed and met the audit requirements of the district. In addition, issues with software, hardware, and requirements were successfully negotiated to the district's benefit, resulting in reductions in expenditures and elimination of additional expenditures proposed by the software vendors and implementation team. Davidson Services identified nearly \$300,000 in savings during the implementation that did not impact the district's overall budget.

Today, MMSD has completed the replacement of nearly ever major information system affecting financial, human resource, and payroll processing within the district and accomplished all this within a 2 year period. Although the project extended past the initial 18 month schedule, scope increased to include additional requirements outside the original project in areas such as additional labor reporting; new online facilities and sports scheduling; and conversion to a district-wide centralized library system.