



**SHARON R. BOCK**  
Clerk & Comptroller  
Palm Beach County

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**ENTERPRISE RESOURCE PLANNING  
SOLUTION FOR CLERK & COUNTY FUNCTIONS**

**EXECUTIVE SUMMARY**

*Revised*

**August 18, 2009**



SHARON R. BOCK  
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Palm Beach County

## ENTERPRISE RESOURCE PLANNING SOLUTION FOR CLERK & COUNTY FUNCTIONS

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# EXECUTIVE SUMMARY

## INTRODUCTION

The Enterprise Resource Planning (ERP) project has modernized the payroll functions of the Clerk & Comptroller (Clerk) and Palm Beach County (County) government. In October 2008, the new system replaced the Clerk's outdated ACS Banner payroll, human resources and accounting system. In August 2009, the system replaced the County's outdated mainframe Integral Payroll System.

A team of payroll, accounting, human resources and information technology experts from the County and Clerk's office searched extensively for the most effective and efficient software available. All parties agreed that Oracle's PeopleSoft 9.0 was the best product on the market, exceeding the competition in many areas including functionality, cost and on-site support.

In 2007, Oracle became the first Enterprise Software Company to receive J.D. Power and Associates Certification for Outstanding Service and Support. Oracle was also the recipient of five Intelligent Enterprise 2007 Readers' Choice Awards, including "Best ERP Software," outperforming Microsoft and SAP.

Funded entirely by the revenue and technology fees collected through charges for document recordings, the project is now fully implemented and operational. In this report, you will learn how strategic product selection, expert support resources and effective project management facilitated a successful implementation of the award-winning system.

## BACKGROUND

In February 2006, County ISS Director Steve Bordelon advised that the mainframe computer system that hosts software used by the Clerk's office to administer payroll for County employees was outdated and not performing optimally. Bordelon suggested that moving away from the mainframe (and the 12-year-old Integral Payroll software) to a modern system would result in significant taxpayer savings in the long run.

Around the same time, it was determined that the Clerk's 10-year-old Banner software system, used for accounting, employee benefits management and in-house payroll was also out of date and operating inefficiently.

This being the case, in September 2006 the Clerk's office launched an official search for a comprehensive ERP software system that would replace, upgrade and integrate all of the above-mentioned systems.

Leadership, Steering and Evaluation Committees (see attachment) were established to guide the ERP project from product selection through successful program implementation and functioning. Each committee included representatives from the Clerk's office and County departments.



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### SOFTWARE VENDOR SELECTION

The Evaluation Committee for ERP System Selection, which consists of individuals with prior software systems implementation experience and representing many functional departments, was tasked with accepting and critiquing vendors' product proposals and narrowing the list of vendors.

The committee evaluated submissions based upon a wide range of technical, functional and experience-based criteria, and identified three products that met a minimum standard of performance. Of these three vendors, Oracle and SAP were recommended for contract negotiations. After extensive negotiations with Oracle and SAP, Oracle's PeopleSoft 9.0 software was recommended to the Leadership Committee for purchase. The Leadership Committee selected Oracle's PeopleSoft 9.0 by a unanimous vote.

The Leadership Committee's vote was based on, but not limited to, the following facts and rationale:

- **Depth of System Functionality:** Oracle met and exceeded overall Clerk/County functional, technical and audit requirements;
- **Cost:** Oracle's five-year estimated cost total was almost \$400,000 less than the competitor's;
- **On-Site Support:** 70 days/14 weeks of personal program management support was included in proposal cost (not offered by competitor);
- **Vendor's Customer Advisory Board:** A member of the Clerk's office could sit on the Advisory Board (not offered by competitor).

### IMPLEMENTATION VENDOR SELECTION

The successful installation and implementation of a large-scale, technologically-complex and multi-faceted software system requires the guidance and support of a technology firm with proven experience and expertise in such matters. After final selection of Oracle's PeopleSoft ERP software, the selection of an implementation vendor was necessary to oversee the project and train permanent Clerk and County end users.

The Evaluation Committee for ERP Implementation Vendor Selection examined submissions from various technology firms and narrowed the field of candidates to two. After extensive negotiations with CIBER and Oracle Consulting, the committee recommended Oracle Consulting to the Leadership Committee as the Payroll/ERP software implementation vendor. The recommendation for the implementation vendor was affirmed by a unanimous vote from the Leadership Committee.

The Leadership Committee's vote was based on, but not limited to, the following facts and rationale:

- **Single Source of Accountability:** A single corporate entity is the sole source for software, implementation, training, and support;
- **Company Reputation:** Oracle Consulting is a recognized leader in ERP implementation world-wide;
- **Special Commitment to Project Success:** Oracle Consulting has a vested interest in strengthening the reputation of the PeopleSoft product in South Florida with a successful implementation; and
- **Multi-Staged Implementation Contract:** The implementation contract included an initial Fit/Gap analysis to provide a thorough understanding of requirements, thus eliminating change orders to the contract and minimizing additional future costs



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### RESEARCH

#### RISK ANALYSIS AND CHALLENGES

High-profile struggles with the PeopleSoft software platform have occurred at other institutions, such as Arizona State University, the Department of Defense and at the Palm Beach County School District (PBCSD). Given the costly, time-consuming and public nature of the errors involved in PBCSD's implementation of PeopleSoft, the Clerk & Comptroller's office may face intense scrutiny should any imperfection arise in the ERP implementation process.

In preparation for the software transition, the Clerk's office conducted thorough research to discover why errors had occurred with previous institutions. **Almost all problems faced by PeopleSoft clientele, specifically PBCSD, were the result of poor software *implementation* and not software design or functionality.**

Extensive research revealed costly and time-consuming difficulties at PBCSD were the result of:

- **Inadequate Staff Resources:** No dedicated implementation staff, no dedicated training team, lack of manpower across the board;
- **Inadequate Timeframe:** Unreasonable expectations were set with regard to product installation time, staff training time, and system testing time;
- **Inadequate Professional Support:** The implementation vendor performed a cursory installation, failing to properly convey knowledge and trouble-shooting information to permanent staff;
- **Inadequate Level of Procedural Flexibility:** An unwillingness (or unawareness of the need) to modify existing departmental procedures to better fit the functionality of the software package

**NOTE:** The above information was obtained through, among other sources, a site visit to PBCSD on December 21, 2006 by members of the Clerk's ERP Implementation Team. The contingent met with the district's implementation project manager and individuals representing each affected department, and determined that the PeopleSoft software platform had no apparent fatal flaws.

The Clerk's project staffing, project scheduling, implementation vendor selection process and initial implementation procedures have been instituted to avoid these pitfalls. In each case, the ERP Implementation team has sought to match implementation procedures with proven industry and product best practices procedures, which include:

- Dedicating technical and cross-functional resources to work on the ERP implementation team;
- Dedicating project facilities;
- Employing experienced personnel that have successfully implemented PeopleSoft applications and other large enterprise systems;
- As remedied by our "Fit/Gap" in September 2007, modifying existing departmental procedures to better fit the functionality of the software package; and
- Utilizing proven project management techniques.



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The decision to undertake an ERP implementation to replace the Clerk's payroll, human resources, and accounting system as well as replace the County's payroll system, was based upon technological need. It was a decision driven by fiscal necessity that will save taxpayer funds in the long run by making critical administrative tasks of the Clerk's office more efficient and less time-consuming.

Each phase of the Payroll/ERP implementation process was guided by Leadership, Steering, and Evaluation Committees, each of which included representation from both the Clerk's office and County departments. Recommendations made to the Clerk by the Leadership Committee regarding the purchase of software and the hiring of outside professional support for the implementation process were based on unanimous votes.

Despite well-publicized difficulties involving the implementation of PeopleSoft software by businesses and institutions in Palm Beach County and elsewhere, experts agree world-wide that the PeopleSoft software platform is free of inherent flaws, ideal for its wide-ranging needs and an excellent value.

To avoid problems during software implementation, which is a critical project management phase, the Clerk's office committed the proper timeframe, financial resources and training personnel to maximize implementation success.



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**EXECUTIVE SUMMARY**

**LEADERSHIP COMMITTEE**

<b>Agency/Department</b>	<b>Resource Title</b>
Clerk & Comptroller, Administration	Chief Administration Officer
Clerk & Comptroller, Finance	Chief Operating Officer of Finance
Palm Beach County, Information Systems Services	Director of ISS
Palm Beach County, Financial Management & Budget	Director of OFMB

**STEERING COMMITTEE**

Clerk & Comptroller, Information Technology	Financial Systems Manager, Steering Committee Chairperson
Clerk & Comptroller, Human Resources Operations	Human Resources Analyst Benefits Specialist
Clerk & Comptroller, Finance	Director of Budget & Financial Analysis Director of Accounting Services Accounting Manager
Clerk & Comptroller, Payroll	Payroll Manager Payroll Administrator
Palm Beach County Community Services (Grants)	Fiscal Manager II
Palm Beach County Facilities Development & Operations	Director of Facilities & Operations
Palm Beach County Fire/Rescue	Deputy Chief Director of Finance & Planning Payroll Supervisor & LTD Coordinator
Palm Beach County Human Resources	Compensation and Records Manager Fiscal Specialist II
Palm Beach County Information Systems Services	Applications Services Manager Agency Consultant
Palm Beach County Financial Management & Budget	Budget Director
Palm Beach County Palm Tran	Finance/Payroll Manager Financial Analyst I
Palm Beach County Parks & Recreation	Director of Parks Financial & Support Services
Palm Beach County Planning Zoning Building	Director of Administration Fiscal Specialist II

**EVALUATION COMMITTEE for ERP Software Vendor Selection (ITN NO 06-06)**

Clerk & Comptroller, Employee Relations	Employee Services & Systems Manager
Clerk & Comptroller, Information Technology	Financial Systems Manager
Clerk & Comptroller, Payroll	Payroll Administrator
Palm Beach County, Human Resources	Assistant Director
Palm Beach County, Information Systems Services	Senior Coordinator

**EVALUATION COMMITTEE for ERP Implementation Vendor Selection (ITN No 06-11)**

Clerk & Comptroller, Employee Relations	Human Resources Generalist
Clerk & Comptroller, Information Technology	Financial Systems Manager
Clerk & Comptroller, Payroll	Payroll Administrator
Clerk & Comptroller, Accounting	Accounting Manager
Palm Beach County, Information Systems Services	Agency Consultant

**NEGOTIATION TEAM for Vendor Selection**

Clerk & Comptroller, Finance	Chief Operating Officer of Finance
Clerk & Comptroller, Information Technology	Chief Information Technology Officer
Palm Beach County, Information Systems Services	Deputy Director of ISS
Palm Beach County, Financial Management & Budget	Contract Analyst ( <i>Implementation only</i> )