Business Process Re-Engineering Project Completion
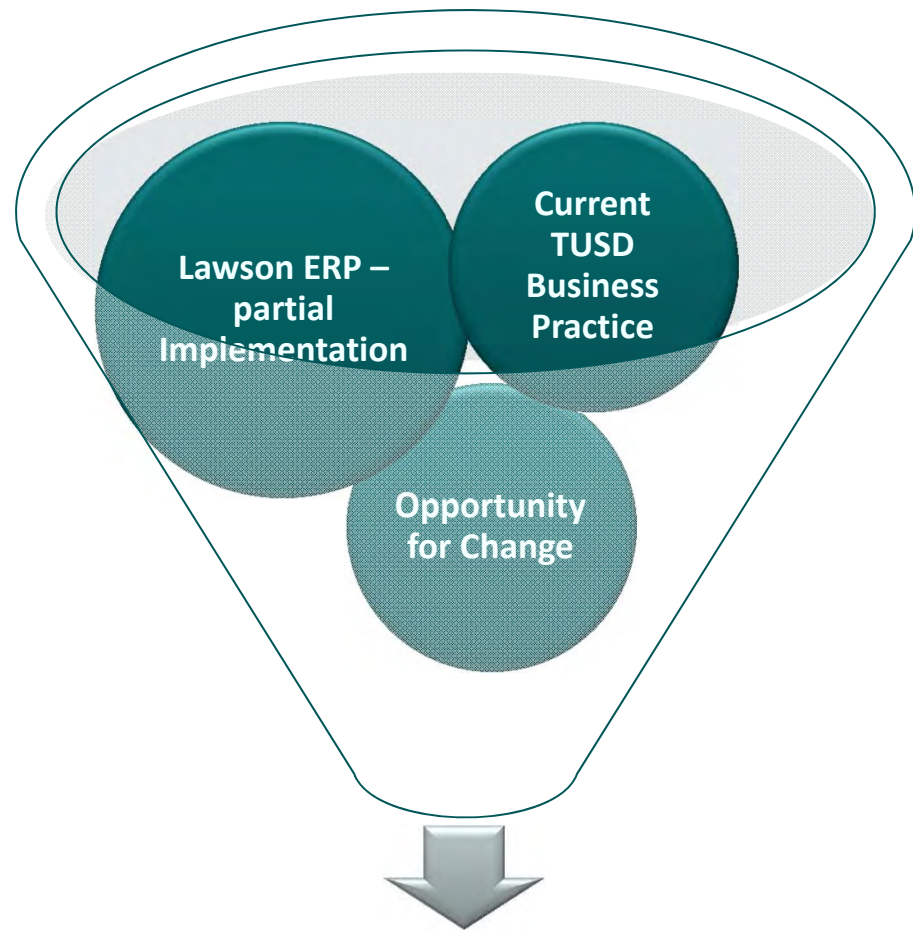
By:

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Chief Financial Officer

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Why BPR?

Lawson ERP – partial Implementation

Current TUSD Business Practice

Opportunity for Change

Business Process Re-Engineering

BPR Scope

- 6 month timeline, meeting 16 hours a week

- Participating Departments: HR, Payroll, Finance, TS and Benefits. Other experts as needed.

- 47 Business Processes prioritized by degree of inefficiency and complexity.

- Re-engineered Processes *to be implemented* when ERP Implementation is resumed.

- Addresses 70 % of business requirements for ERP implementation

Methodology

1. As-Is (Current State)
   - Identify Current Process Steps
   - Identify Issues and Challenges
   - Estimate Costs

2. Business Process Reengineering
   - Clarify Process Objective
   - Identify Best Practice
   - Fit/Gap Between As-Is and Best Practice

3. To-Be Process (Future State)

Execution Plan

Hired Consultant (Apriant, Denver)

Strategically chosen from each Department

Process Champions for Continuous Improvement

Identified 102 Business Processes

Kick-started 24th October, 2011

Traceability Matrix

- Traceability Matrix – Spreadsheet that helps tie Process to specific requirements (e.g.(reports, interfaces, etc.)

- Fills the gap we found in the ERP implementation
  - Every requirement from BRP is tied back to the Business Process
  - Helps us better scope the effort we will need for BPR ahead of time.

Traceability Matrix

Human Resources

Process #	Process Name	Priority
REC010	Job Requisition Process (RAF)	1
HR046	Personnel Action Form (PAF)	1
REC002	Certificated Employee Hiring	1
REC006	Classified Employee Hiring	1
REC014	Management Hiring	1
REC019	OnBoarding Process	1
HR063	Substitute Processing - Subfinder	1
HR052	Processing Voluntary Transfers	1
HR036	Leave of Absence without Pay and Benefits	2
HR087	Salary Schedule	2
HR080	Stipends	2
HR017	Employee Evaluations	2
REC018	Prepare Job Postings	3
HR028	Generate and Maintain Contracts	3
HR088	Highly Qualified	3
HR057	Rehire/Reinstate	3
HR058	Retiree Processing	3
HR084	Seniority Tracking	3
HR033	RIF (Bumping and Layoff)	3
HR034	Recall	3
HR090	Worker's Comp	4

Benefits

Process #	Process Name	Priority
BEN019	FMLA	1
PAY001	TSA Processing	2
BEN070	Benefits Reconcillation Process	2
PAY024	Leave Accrual Processing	2
BEN002	Benefits Open Enrollment	3
BEN001	ADA Case Management	3

Payroll

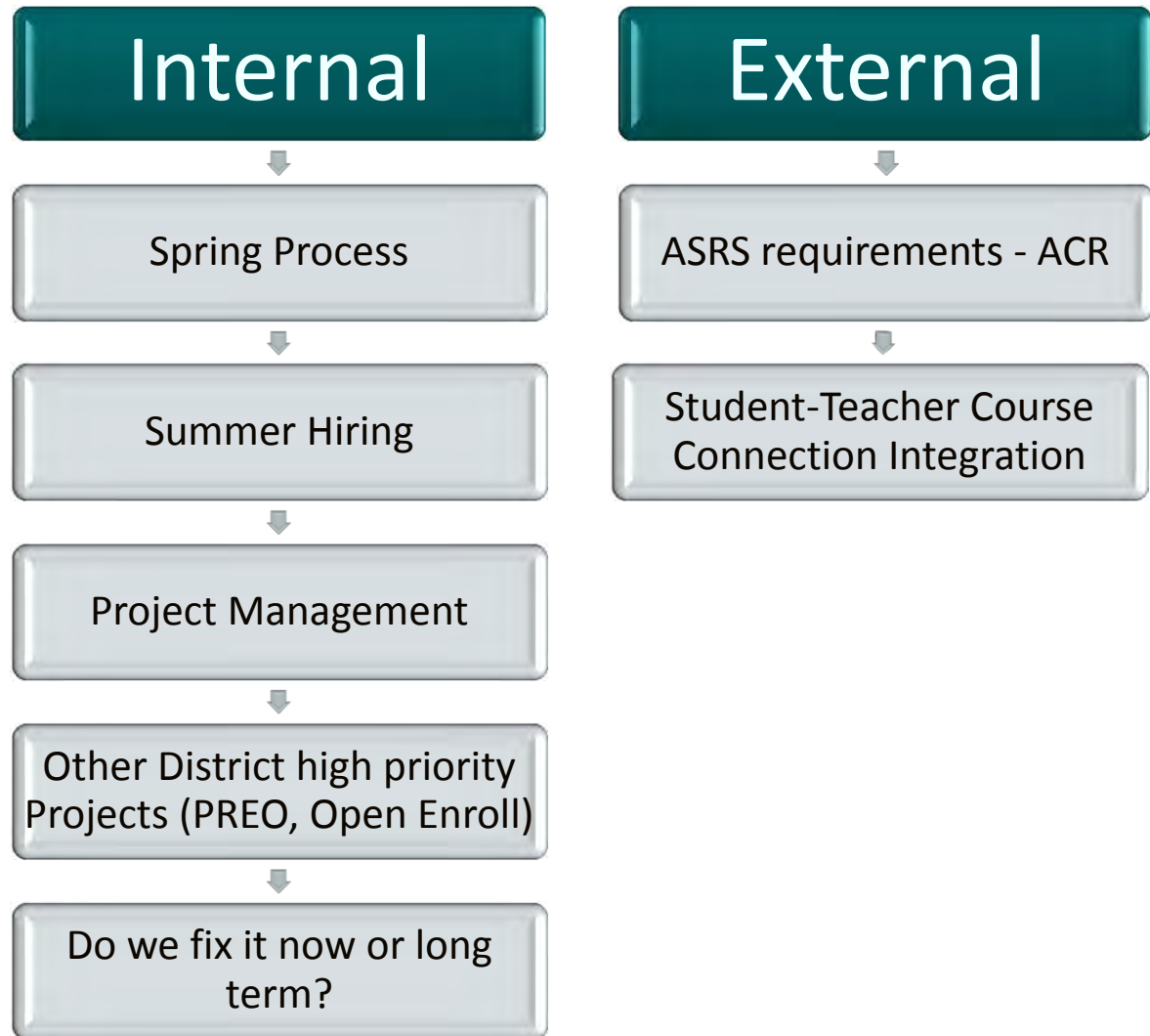| Process #	Process Name	Priority
PAY032	Payroll Cycles/Processing Interim	1
PAY014	Teacher Contract Pay	1
PAY015	Classified Pay-to-thePunch vs. Exception	2
PAY025	Leave Request (short-term)	2
PAY019	Termination Process	2
PAY028	Mid-Pay Period Payments for New Hires	2
PAY055	Workshops and After-School Programs	2
TIM001	Time Reporting - All	3
PAY034	Retirement Reporting (ASRS)	3
BEN027	Overpayments	3
PAY040	ASRS Service Purchase	3
HR047	Position Management	1
PAY022	GL Interface/Encumbrance Process	3

Other Processes

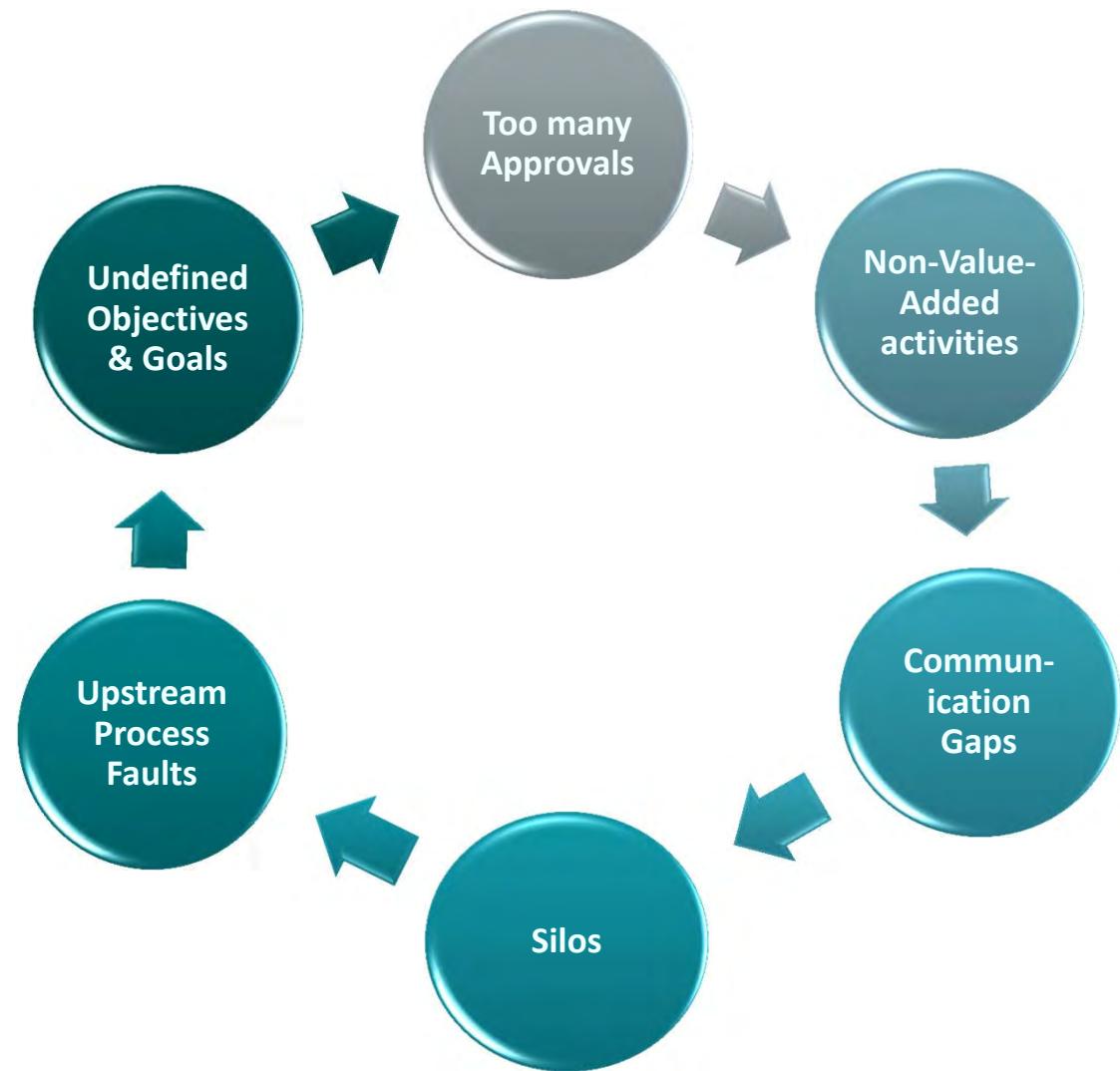| Process #	Process Name	Priority	Addressed in Process #
BEN032	Sick Leave Bank	5	PAY024
HR041	New Hire Physicals	5	REC019
HR021	I9 Process (Employment Verification)	4	REC019
PAY041	Sick Leave Donation	5	PAY024
HR062	Substitutes for workshops	5	HR063
PAY050	Update Sick/Vacation Balances	5	PAY024
BEN014	Blood borne Pathogens Standard (OSHA)	4	REC019

Current Status

Task	Quantity	Status	Percentage
Business Processes Evaluation	102	Complete	100%
Business Process Review and Optimization	47	Complete	100%

- Projected Completion is Jun 30th, 2012
- Actual Completion was Nov 21st, 2012
- Apriant responsible for re-engineered Process Documentation & Traceability Matrix
- BPR Team reviewed and signed-off on Process Documentations

Project Challenges

Internal

↓

Spring Process

↓

Summer Hiring

↓

Project Management

↓

Other District high priority Projects (PREO, Open Enroll)

↓

Do we fix it now or long term?

External

↓

ASRS requirements - ACR

↓

Student-Teacher Course Connection Integration

Common Process Findings

Too many Approvals

Non-Value-Added activities

Communication Gaps

Silos

Upstream Process Faults

Undefined Objectives & Goals

Organization Constraints

Employee Agreements

Laws & Regulations

IT Infrastructure

Limited Resources

Skill Mismatch

Accountability

Human Capital Intensive

- (Manual Vs. Automation)

Organization Culture

Anticipated Successes

- Onboarding Conclusions
  - Focus on employee effectiveness
  - District culture and Brand building
  - Improved Retention

- Analyzed Leave Plans to reduce from 75 to fewer than 12 thereby realizing:
  - Saving in back office processing
  - Reduced system complexity
  - Eliminated plan redundancy

Next Steps

Project: Strategic Evaluation of Enterprise Resource Planning System (ERP)

- Initiating on 22nd January, 2013
- Projected completion – May 2013

Questions