



# City of Greater Sudbury Time & Activity Tracking Assessment Final Report

December 20, 2019



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This report may include or make reference to future oriented financial information. Readers are cautioned that since these financial projections are based on assumptions regarding future events, actual results will vary from the information presented even if the hypotheses occur, and the variations may be material.

Comments in this report are not intended, nor should they be interpreted, to be legal advice or opinion.

KPMG has no present or contemplated interest in the City of Greater Sudbury nor are we an insider or associate of the City of Greater Sudbury. Accordingly, we believe we are independent of the City of Greater Sudbury and are acting objectively.



# Key Objectives: Core Services Review

## Project Objectives – *How will we define success?*

KPMG has been engaged by the City of Greater Sudbury to undertake an in-depth analysis of key service areas determined by City Council. The overall goal of this review is to create sub-service profiles for each of the key areas (seven services areas: Long Term Care, Parks, Recreation, Arenas, Facilities Management, Road Maintenance and Community Grants) and conduct a comprehensive, data-driven evaluation process to examine the strategic alignment, relevance, effectiveness, efficiency and sustainability of these programs and services. Our aim is to identify ways in which the services can be streamlined or altered in order to realign costs and improve efficiency across the City. We will also give consideration to other areas outside of these seven, should any opportunities present themselves throughout our work. A further key area of this review is to consider the City's enterprise systems, identifying opportunities to support and enhance routine time, attendance and activity reporting.

Specific project objectives include the following:

- 1. Facilitate review** – conduct a comprehensive review and detailed analysis of the relevance, efficiency and effectiveness of the City's services including a review of comparable municipalities (where data is available) and other insights from our global team as relevant. As part of this, consider all aspects of the City's services including delivery methods, service expenditure and revenue streams as well as the current systems in place to track time, attendance and activity reporting.
- 2. Identify opportunities** – Explore opportunities based on leading edge practices globally (public, private, not-for-profit) and define options for sustainable approaches to service delivery and levels, as well as systems to enhance improved data collection in relation to time attendance and activity reporting; and
- 3. Prioritize implementation** – Provide guidance to the City's Senior Management team on implementation and prioritization of new, innovative and/or leading service delivery models that may realign costs and/or improve service delivery methods. In addition, we will highlight how these can be supported by improved enterprise systems to collect time attendance and activity reporting, along with the risks associated with each proposed change/option to inform management of the key factors which should be considered during the decision making process.

# Key Objectives: Core Services Review

## **Project Drivers - *Why are we doing this, what problem do we want to solve?***

- As with all municipalities and other levels of government, the City of Greater Sudbury is balancing community/stakeholder expectations and financial constraints. The City is experiencing significant growth which requires it to consider how municipal services will be delivered sustainably in the long term. The City is reviewing how it leverages capital, technology, specialized skills and expertise in order to address complex social, environmental and operational considerations/challenges/opportunities; achieve superior outcomes and value for money for its residents, and increase its revenue streams.

## **Project Principles – What is Important to Us?**

- Due to the tight project schedule, we will leverage existing sources of consultation from Council and City staff to inform the work of the Service Review. We will use the City's service profiles as a basis for our work and develop sub-service profiles for each of the areas in scope. We will meet with City staff to identify efficiencies and opportunities for improving the overall delivery of these services.
- The framework and approach will be based on leading practice from municipal or other levels of government experience and/or private sector.
- While these reviews often go by many different names – including service efficiency reviews, value for money audits and cost realignment studies – they all share the same goal: to determine if a city is delivering its services to its customers in the best possible manner and further, to determine if there are more efficient, effective or economical means to delivering municipal services. For simplicity, this will be called a 'Core Service Review'.

## **Project Timing**

- The project will commence on October 21, 2019, and all engagement activities and deliverables will be completed and submitted to the City of Greater Sudbury on or before December 20, 2019, except for the final report presentation. Timing of the final report presentation will be subsequently determined by the City of Greater Sudbury.

# Objectives and Scope of the Final Report

## **Final Report Objectives – *Time & Activity Tracking***

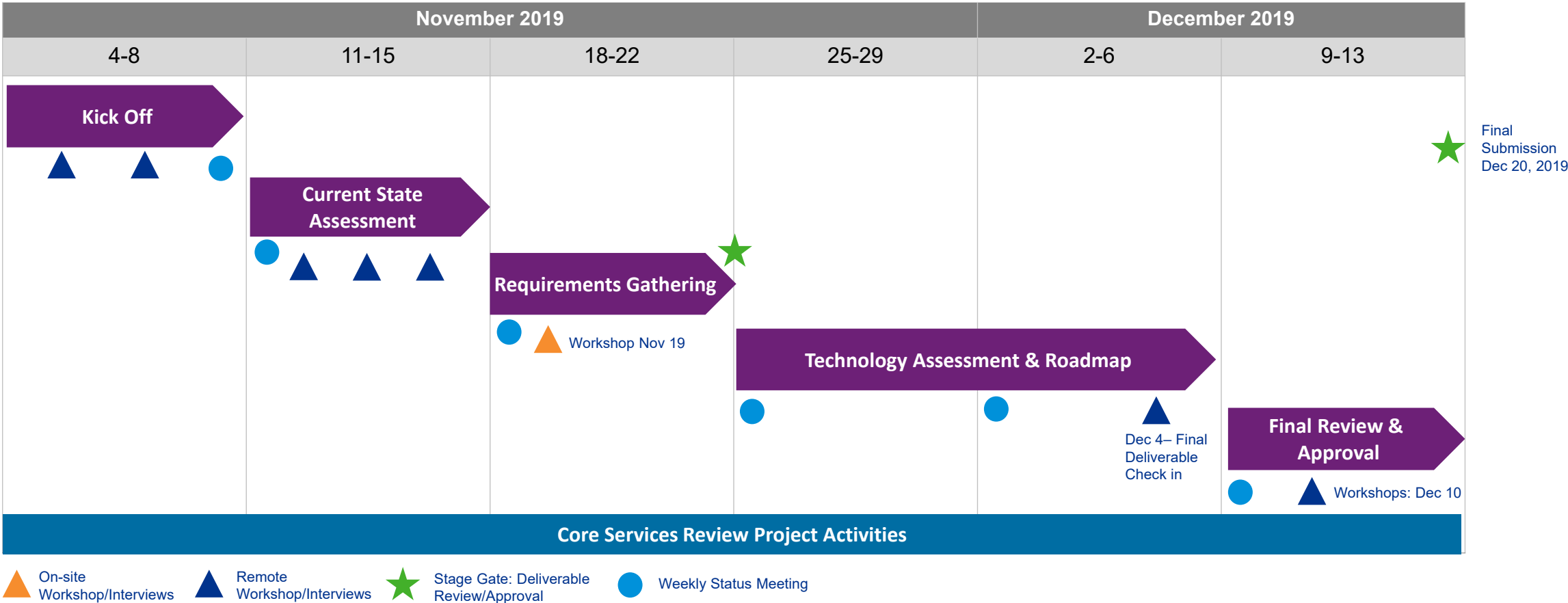
KPMG performed an assessment of the City of Greater Sudbury's enterprise systems with recommendations for change that facilitate data collection and processing to support routine, real-time performance reporting. The objectives and scope of the final report is to provide an evaluation of staff time, activity and attendance reporting.

Deliverables include an implementation roadmap for time and attendance and will include recommendations regarding changes to enterprise systems that took the following into consideration:

- Recommendations on implementing an activity based time tracking system minimizing the impact of time entry on Front Line workers, and managers
- Help staff and managers compare actual workloads with planned workloads
- Automate staff time and attendance reporting, with appropriate integrations between time/attendance reporting and work order processing to support both job costing and efficient payroll administrations.
- Enable real-time, performance dashboards for internal and public use that communicate service efforts, accomplishments and other related information

# KPMG's Time & Attendance Assessment Approach

The below outlines our proposed timeline and workshop schedule for the Time and Attendance Assessment work.



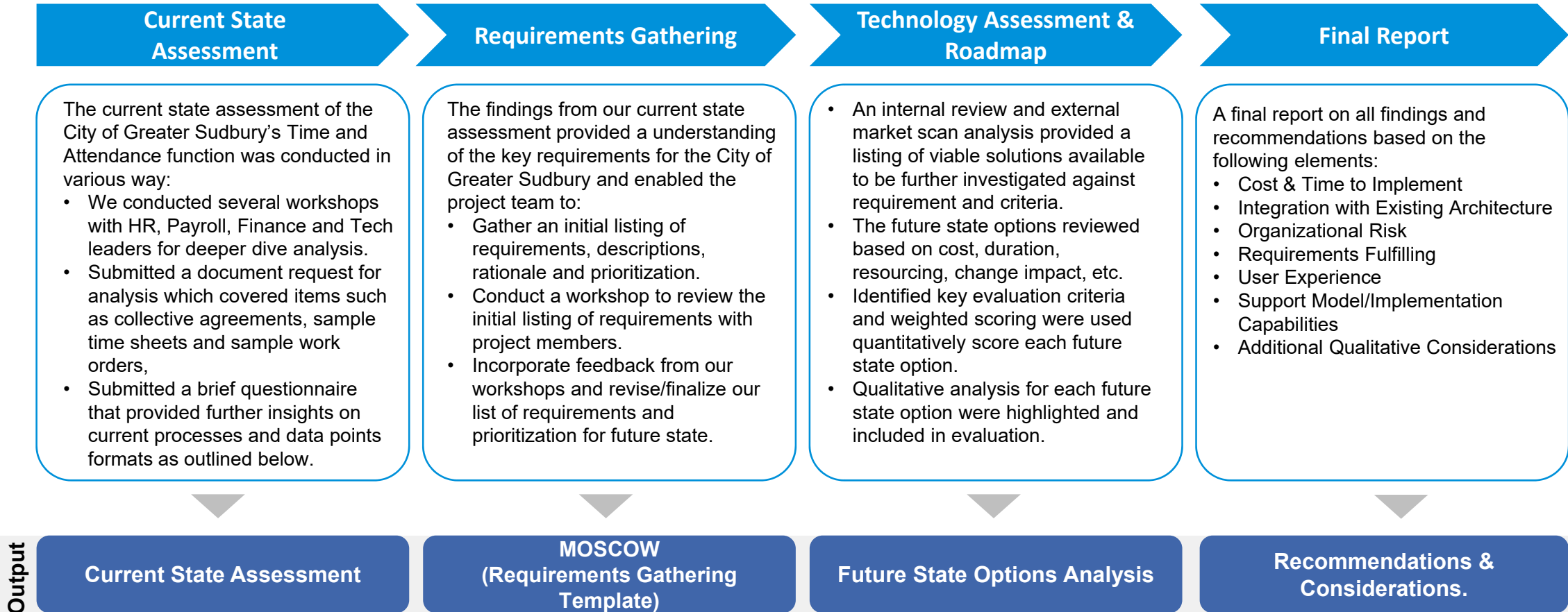


# Future State Methodology and Evaluation Approach



# Evaluation Approach

The below outlines our approach used to validate our future state options against all requirements gathered during our assessment.





# Implementation Approach

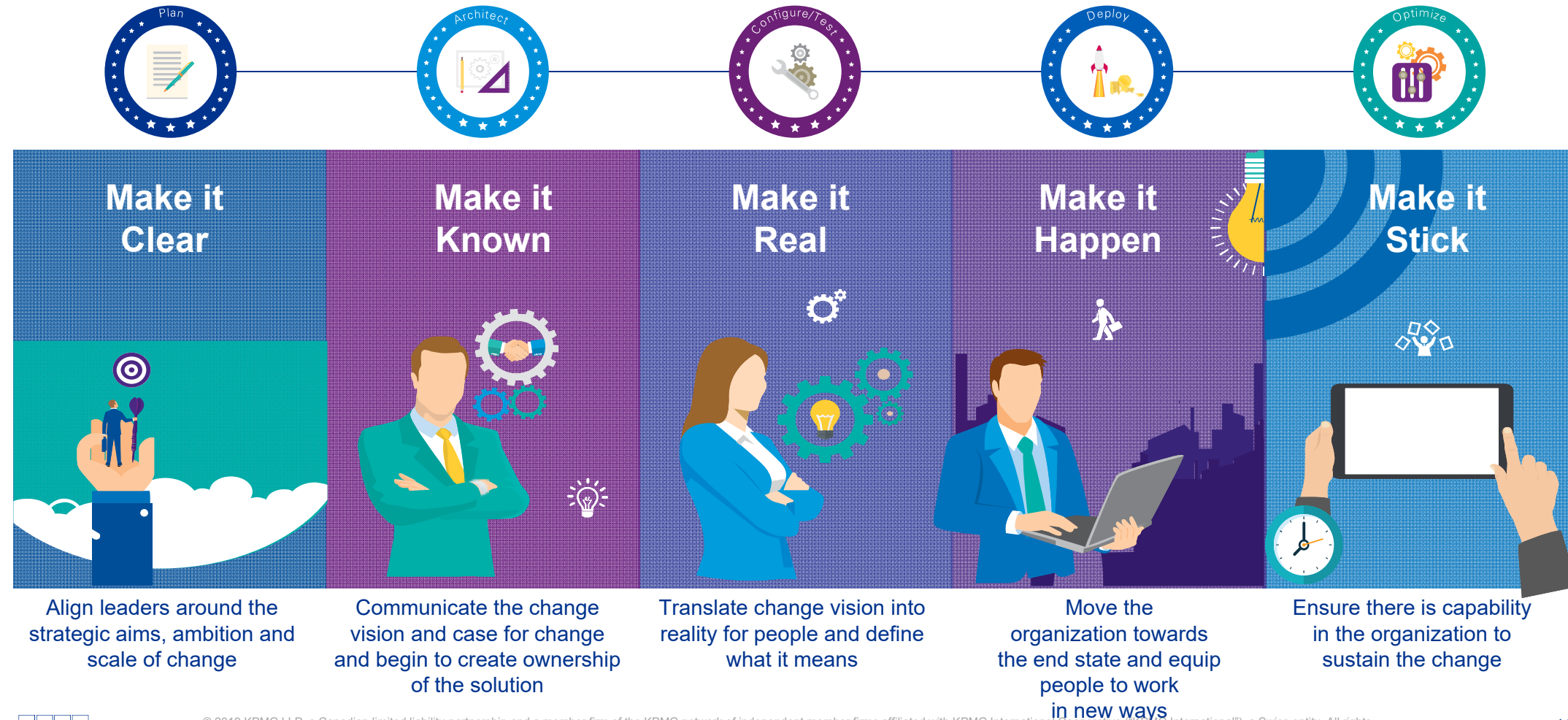
# What we achieve in each Phase

A detailed implementation approach should be considered for any technology implementation project in order to deliver on time and budget. Below outlines a sample approach which includes integrated functional activities by phase and sequencing in order to prepare internal and external resourcing appropriately. The below approach is modular and can be modified depending on your project context, scope and deliverables.










# Change Management Approach

A change management approach should not be developed in a silo but integrated with your overall implementation approach as outlined in the previous slide. The key change management activities should be present within all phases driving towards the strategic priorities established from the onset. Key areas such as training and communications can be tailored depending your project goals, scope and organizational context.








# Persona Sample – Exception Time Entry Staff

Identifying your organizational personas is a key upfront activity that will provide advantages to your change management outcomes and ensure you are providing a more tailored and thoughtful approach to change. Understanding how change impacts your staff and end users will crystalize the right communication and training approaches to promote improved adoption.

Exception Time Entry Staff		Communication & Training Needs	Engagement Strategies	
 <div><b>Exception Time Entry Staff</b> <b>Ideal Experience:</b> Entering Time through Self-Service Timesheets</div>	<b>Group Overview</b> Exception Time Entry Staff currently enter time through a timesheet recording activity time against scheduled and exception hours.	<b>Level of Frequency:</b> <div><div>L</div><div>M</div><div>H</div></div>	 In-Person Meetings & Workshops	 Intranet/Portal updates
		<b>Level of Depth:</b> <div><div>L</div><div>M</div><div>H</div></div>	 Time Attendance exposure	 Change Frame engagement
		<ul style="list-style-type: none"><li>Exception Time Entry Staff require training on entering time through self-service online or mobile timesheet.</li><li>Easier process only be able to enter against time codes eligible for specific group.</li><li>Union staff may require additional time entry methods, i.e. computer kiosks</li></ul>	 Demos	 Written Communications
			<b>Key Themes</b>	
<ul style="list-style-type: none"><li>Activity tracking determines cost driving service</li><li>Self-service timesheets are more efficient reduce the number of time code entry code selections</li><li>Improved experience from entering time on paper</li></ul>				
<b>Future Experience in Time Administration</b> <ul style="list-style-type: none"><li>Dual Entry system removed improving efficiency</li><li>Ownership of time entry placed on worker; fewer entry errors.</li><li>Access to time history for worker</li></ul>		<b>Change Activities</b> <ul style="list-style-type: none"><li>Job Aids/SOP's</li><li>Instructure Led Training opportunities</li><li>Demonstrate self service time entry</li><li>Identify change agent network to address questions/how to</li></ul>		

# Persona Sample – Timekeeper



Identifying your organizational personas is a key upfront activity that will provide advantages to your change management outcomes and ensure you are providing a more tailored and thoughtful approach to change. Understanding how change impacts your staff and end users will crystalize the right communication and training approaches to promote improved adoption.

Timekeeper		Communication & Training Needs		Engagement Strategies	
 <b>Timekeeper</b> <b>Ideal Experience:</b> Keying of timesheets reduced. Move towards a strategic auditing role.	<b>Group Overview</b> Shift from keying paper timesheets to supporting the new optimized activity based time and attendance system.	<b>Level of Frequency:</b> <div><div>L</div><div>M</div><div>H</div></div>		 In-Person Meetings & Workshops	
		<b>Level of Depth:</b> <div><div>L</div><div>M</div><div>H</div></div>		 Time Attendance Exposure	
		<ul style="list-style-type: none"><li>Timekeeper role becomes a time expert role.</li><li>Move away from entering data to analyzing and approving time entry</li><li>Leveraging knowledge and experience of collective agreements, and activity tracking to ensure accuracy and compliance</li><li>Investigating possible discrepancies</li></ul>		 Change Frame engagement	
		<b>Key Themes</b> <ul style="list-style-type: none"><li>Knowledge of collective agreements can be utilized in time approval, and correcting worker entries</li><li>There will be a bridge phase with some unionized employee continuing to enter paper timesheets</li><li>Analytics Reporting provide numbers; people provide the story behind the numbers</li><li>Shift towards a 'value added' strategic role of analyzing and investigating activity and time reporting</li></ul>		 Written Communications	
<b>Objectives</b> Self-Service time entry change timekeeper role. <ol style="list-style-type: none"><li>Provide support for worker's entering time.</li><li>Utilized in providing support for activity based reporting and testing.</li><li>Investigate discrepancies in activity reporting.</li></ol>		<b>Change Activities</b> <ul style="list-style-type: none"><li>Need to be involved in testing of new time scenarios</li><li>Documentation on how to enter time as workers; how to correct entries</li><li>More training on soft skills dealing with customers</li><li>Workshops on new methods and approach</li></ul>			
<b>Future Experience in Time Administration</b> <ul style="list-style-type: none"><li>Rules will change, and Timekeepers need to test configuration changes</li><li>Time Activity reports will need to run, and trends need to be analyzed</li><li>Adjustments and keying of entries required, entries dramatically reduced</li></ul>					



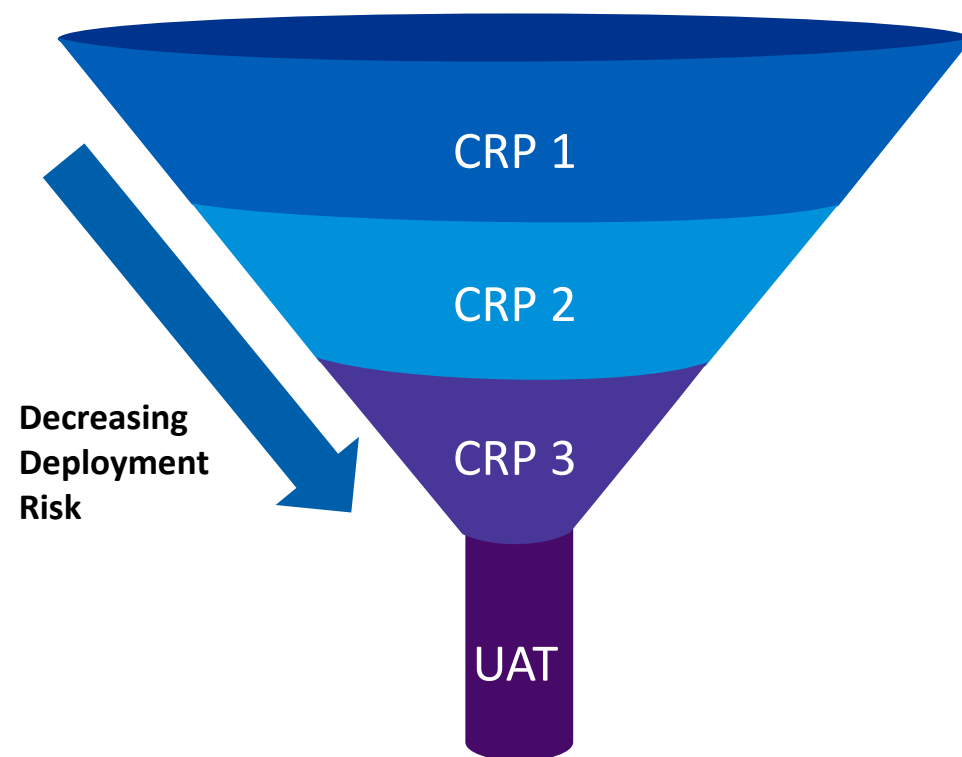
# Persona Sample – Manager

Identifying your organizational personas is a key upfront activity that will provide advantages to your change management outcomes and ensure you are providing a more tailored and thoughtful approach to change. Understanding how change impacts your staff and end users will crystalize the right communication and training approaches to promote improved adoption.

 <b>Manager</b> <b>Ideal Experience:</b> Approving time and ensuring accurate activity reporting	<b>Communication &amp; Training Needs</b>	<b>Engagement Strategies</b>
<b>Group Overview</b> Manager review and approve time entered. Need to be key change agents in accurate and effective activity tracking.	<p><b>Level of Frequency:</b> L M <b>H</b></p> <p><b>Level of Depth:</b> L M <b>H</b></p> <ul style="list-style-type: none"> <li>Managers are the key change agents in the transition to activity tracking</li> <li>Ensure compliance, and assist with creating a culture shift towards activity tracking</li> <li>Understand how to delegate approvals when away</li> <li>Work closely with timekeepers, when discrepancies arise</li> </ul>	<div>  <p>In-Person Meetings &amp; Workshops</p>  <p>Intranet/Portal updates</p>  <p>Time Attendance exposure</p>  <p>Change Frame engagement</p>  <p>Demos</p>  <p>Written Communications</p> </div>
<b>Objectives</b> Approving time, and ensuring activity properly tracked: <ol style="list-style-type: none"> <li>1) Approve time hours prior to submission to payroll.</li> <li>2) First level approval of activity based reporting.</li> <li>3) Key in creating the activity reporting culture.</li> </ol>	<b>Key Themes</b> <ul style="list-style-type: none"> <li>Benefits from activity report, i.e. How long specific tasks actually take?</li> <li>Increase effort to review and approve time</li> <li>Need support from timekeeper for investigating and reviewing data</li> <li>Input required when designing how activities are tracked and identify the level of granularity</li> <li>Agents of change who need to comply with their own time entry</li> </ul>	<b>Change Activities</b> <ul style="list-style-type: none"> <li>Job Aids/SOP's</li> <li>Instructure Led Training opportunities</li> <li>Perspective on granularity of activity tracking</li> <li>Support from executives, and time keepers</li> </ul>
<b>Future Experience for Managers</b> <ul style="list-style-type: none"> <li>Review of activity time will increase review of employee timesheet</li> <li>More long term benefits around analytics &amp; improved reporting</li> </ul>		

# Solution Validation Approach

The solution validation approach should be a highly structured, rigorous, and repeatable testing and data validation process to minimize deployment risk and increase the quality of the solution for the City of Greater Sudbury. The below approach would only be applied if Option A is selected – options to be outlined shortly. If Option B is selected, an approach similar to what is outlined on Slide 11 will be leveraged and may vary slightly by selected technology.



**\*Conference room pilot (CRP)** is a key project implementation strategy that tests normal business case scenarios in a proposed new system to uncover people, process and system issues, generate resolutions, and design decisions needed to complete the implementation.

## CRP 1: Process and Design Validation

Proof of concept based on future process designs in each functional stream

## CRP 2: Build Validation

Encompasses must-haves, static data conversions, and discussions around integrations

## CRP 3: Final Implementation Validation

More integration and data conversion validation. “A day in the life”.

## UAT Final Acceptance/Production Certification

Users verify process systems and ensure data is correct and ready for production





# Future State Options Analysis



# Option A: Enhance PeopleSoft Time & Labor

# Option A: Enhance PeopleSoft Time & Labor

The below is an overview one of two options being presented for future state consideration:

Description	<ul style="list-style-type: none"><li>• PeopleSoft 9.2 to be used for core HCM and Time &amp; Labor</li><li>• Enhancements made to PeopleSoft Time &amp; Labor adding self service, activity tracking and more automated time rules</li><li>• Leverage Project Costing module for project tracking</li><li>• Continue with Kronos for EMS and Pioneer Manor (scheduling)</li></ul>	Duration	<ul style="list-style-type: none"><li>• Implementation: 16 Months</li></ul>
Strengths	<ul style="list-style-type: none"><li>• Internal knowledge may reduce the impact of upgrade to time and attendance. Minimal knowledge transfer required.</li><li>• No AIP or Integrations required; completely unified solution</li><li>• Consolidating enterprise applications and leveraging internal investment</li><li>• Faster time to value for time activity tracking</li></ul>	Estimated Cost*	<ul style="list-style-type: none"><li>• \$1,774,245 - \$2,168,522</li></ul>
Cautions	<ul style="list-style-type: none"><li>• Oracle has stated that PeopleSoft 9.2 support is guaranteed until 2030 but is subject to change.</li><li>• Market trending toward Cloud Based ERP solutions</li><li>• Best of Breed platforms offer more functionality (i.e. scheduling)</li><li>• The removal of Kronos would provide added complexity due to scheduling needs</li><li>• Determining what to do with Kronos from a design perspective must be identified</li></ul>	Assumptions	
Change Management Considerations	<ul style="list-style-type: none"><li>• Self-Service Timesheet requires additional employee training</li><li>• Union employee may require additional time entry options including computer kiosks</li></ul>	<ul style="list-style-type: none"><li>• Activity based costing can occur within the current time entry framework</li><li>• Continued manual workarounds for scheduling</li><li>• If absence module is upgraded the timeline and resourcing will need to be revised</li><li>• HCM Enhancements work will be completed as a prerequisite or in parallel</li><li>• The 3 month plan phase includes an RFP for external consultants and internal resourcing preparations/backfilling</li></ul>	

\* +/- 15% contingency due to resource availability, time constraints, detailed scope etc.



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# Option A: Enhance PeopleSoft Time & Labor

Legend:

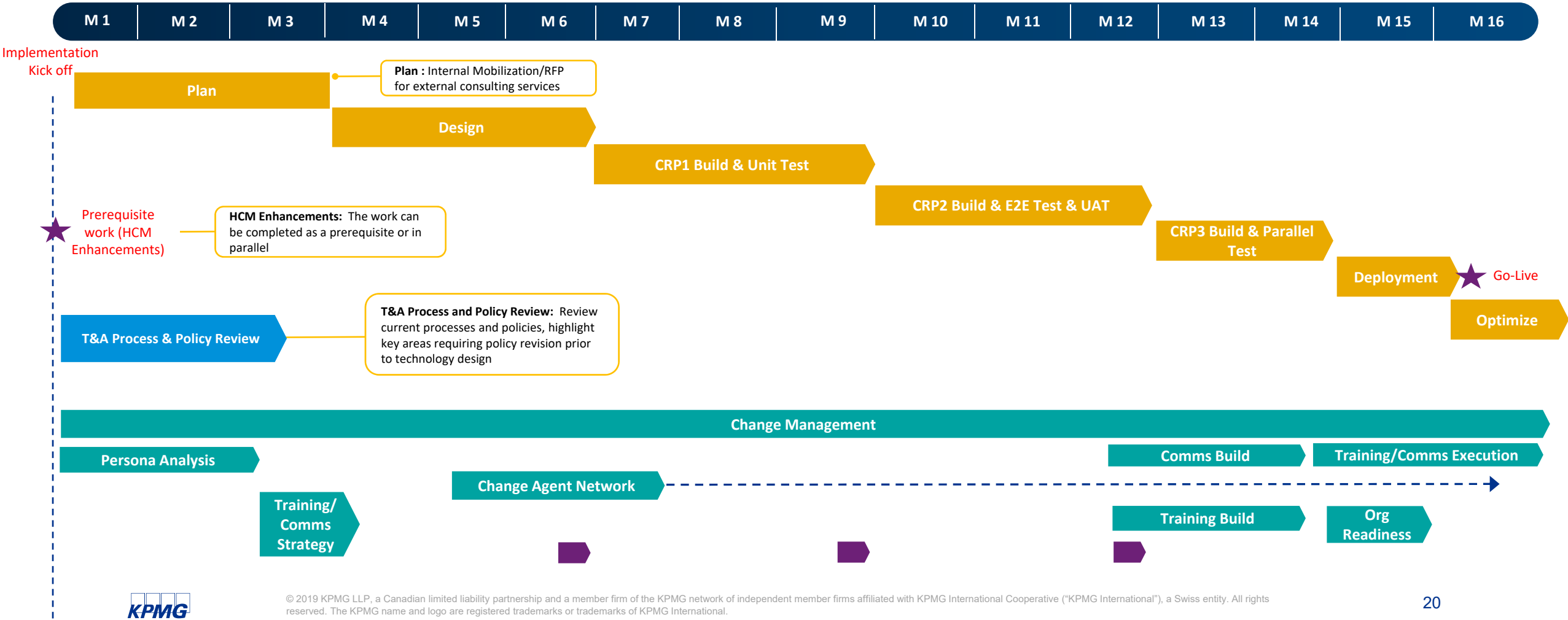
T&A Process Review & Prep work

Implementation

Change Management Activities

Impact Assessment

The below is an overview of a recommended timeline, key activities, sequence required to deliver Option A:



# Option A: Enhance PeopleSoft Time & Labor

The below resourcing model represents the appropriate client and external consultant roles and effort required to deliver Option A:

Phase	Implementation Months															
	Plan			Design			CRP1 & Unit Test			CRP2 & E2E Test			CRP3 / Parallel		Deploy	Test
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Duration	Effort Estimates															
Client Roles	Effort Estimates															
Project Executive	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
Project Manager	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
HCM SME	50%	50%	50%	50%	50%	50%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Time & Labor Lead	50%	50%	50%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Payroll SME	50%	50%	50%	50%	50%	50%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Change Management SME	50%	50%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Procurement	50%	50%														
Senior Application Analyst	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
Database Administrators/System Admins	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
External Consultant Roles	Effort Estimates															
Engagement Manager			50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
Time & Labor Lead			50%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Support			50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
Change Management SME			50%	50%	50%	50%	50%	50%	50%	25%	25%	25%	25%	25%	25%	25%

## Assumptions:

- Month 1 & 2 of Plan will be dedicated to “internal mobilization”, backfilling current roles and contracting for implementation services/external consultants
- Database Administrator hours can be spread across 1-2 roles
- Client Change Management SME will be developing documentation and training materials and execution
- External Support role will be a shared resources across various streams such as functional, project management and change management
- HCM Tech SME and Payroll SME will be involved in upfront design discussions and during testing to assist in text case scenarios and priority defects
- External Change Management SME will be in an advisory capacity only during strategy/design sessions.



# Costing Estimates

The below resourcing model represents the appropriate client and external consultant roles and effort required to deliver Option A:

Costing Element (One-time)	Estimates*			Notes
	High	Medium	Low	
Internal Project Resourcing	\$904,754	\$822,504	\$740,253	• Based on rates provided by the City of Greater Sudbury which include fringe benefits and the utilization estimates.
External Project Resourcing	\$1,263,768	\$1,148,880	\$1,033,992	• Based on external consulting roles and utilization estimates
<b>Total</b>	<b>\$2,168,522</b>	<b>\$1,971,384</b>	<b>\$1,774,245</b>	

Costing Element (On-going)	Estimates			Notes
	High	Medium	Low	
On-Going HR Technology (i.e. Licensing and Support)	\$0	\$0	\$0	• Current PeopleSoft modules are owned
<b>Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	

<b>Grand Total</b>	<b>\$2,168,522</b>	<b>\$1,971,384</b>	<b>\$1,774,245</b>
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\* +/- 10% contingency used to estimate both high and low estimates from the mid-point..



# Evaluation Results for Option A

#1	Cost & Time to Implement	Score	Justification
1a	Technology Fees	8/8	<ul style="list-style-type: none"> <li>The City of Greater Sudbury currently owns all PeopleSoft modules (i.e. T&amp;L, Project Costing)</li> <li>No additional cost per employee for on-going licensing</li> </ul>
1b	Duration	3/4	<ul style="list-style-type: none"> <li>In Option A, there is no requirement to initiate a request for proposal (RFP) as no net new systems will be acquired. Time will be required for internal mobilization and contracting of external consulting services.</li> <li>Strong Internal PeopleSoft resources provide greater timeline certainty</li> </ul>
1c	Implementation Fees	3/4	<ul style="list-style-type: none"> <li>Overall cost is reduced since no RFP process is required. Time will be required for internal mobilization and contracting of external consulting services.</li> <li>All implementation fees will be focused on the enhancement of PeopleSoft 9.2</li> </ul>
<b>Total Score</b>		<b>14/16</b>	
#2	Integration with Existing Architecture	Score	Justification
2a	Integration	10/10	<ul style="list-style-type: none"> <li>There will be no net new integrations to manage; only enhancing the current architecture.</li> <li>The enhancements will unify the solution with payroll/time and absence</li> </ul>
2b	Maintenance	7/10	<ul style="list-style-type: none"> <li>Patches may take longer to upgrade compared to a Cloud system with automatic updates</li> <li>Testing requirements will be relatively the same for cloud or on premise systems</li> </ul>
<b>Total Score</b>		<b>17/20</b>	

# Evaluation Results for Option A

#3	Organizational Risk	Score	Justification
3a	Internal Capabilities and Capacity	3/6	<ul style="list-style-type: none"> <li>The City of Greater Sudbury's PeopleSoft application support team has strong PeopleSoft knowledge minimizing the requirement for knowledge transfer/training.</li> <li>The application support team and HR are currently operating efficiently with limited capacity to support an implementation.</li> </ul>
3b	Vendor Viability	1/4	<ul style="list-style-type: none"> <li>Oracle has stated that PeopleSoft 9.2 support is guaranteed until 2030 but is subject to change.</li> <li>Market research indicates that current HR Technology is moving to cloud</li> <li>Oracle is making minimal investment in enhancing PeopleSoft</li> </ul>
3c	Change Impact	7/8	<ul style="list-style-type: none"> <li>Low impact due to further enhancing current system versus investing in net new technology.</li> <li>There will be minimal training for Timekeepers</li> <li>Worker population requires instruction on time entry</li> </ul>
Total Score		11/18	



# Evaluation Results for Option A

#4	Requirements Fulfilling*	Score	Justification
4a	Activity Tracking	7/10	<ul style="list-style-type: none"><li>• All time entry software has the ability to track time against projects</li><li>• PeopleSoft does not have more advanced capabilities than other alternatives</li><li>• All time entry software provide standard and custom report capabilities</li></ul>
4b	Time & Attendance	2/4	<ul style="list-style-type: none"><li>• All rule validations need to be configured during deployment because Time &amp; Attendance has limited basic functionality</li></ul>
4c	Scheduling	0/2	<ul style="list-style-type: none"><li>• Market research indicated that PeopleSoft does not have the functionality to support complex scheduling (i.e. 24/7 schedules)</li><li>• PeopleSoft does not have the ability to track employee availability or schedule employees</li><li>• PeopleSoft can only configure basic scheduling patterns</li><li>• Due to the lack of complex scheduling in PeopleSoft other technologies should be leveraged to meet the needs of departments (i.e. EMS and Pioneer Manor)</li></ul>
Total Score		9/16	

\* Please reference detailed requirements gathering template (MOSCOW) which was included in the current state and final deliverable submission.



# Evaluation Results for Option A

#5	User Experience	Score	Justification
5a	Usability/Ease of Use	6/10	<ul style="list-style-type: none"> <li>PeopleSoft fluid pages are not “best of breed” for user experience and enhanced navigation compared to cloud solutions.</li> <li>Dashboard and utilization tiles provide some ease of use for workers</li> </ul>
5b	Mobile	2/6	<ul style="list-style-type: none"> <li>Mobile time entry needs to be configured in PeopleSoft</li> <li>No additional configuration in modern time and labor systems</li> <li>PeopleSoft Mobile was not developed in parallel with the desktop product and the solutions are less integrated than cloud based alternatives</li> </ul>
Total Score		8/16	
#6	Support Model/Implementation Capabilities	Score	Justification
6a	Customer Experience and Support	6/8	<ul style="list-style-type: none"> <li>During the current state assessment, the project team outlined their positive experience with Oracle support</li> <li>Oracle is making minimal investment in enhancing PeopleSoft which could impact future support as well</li> </ul>
6b	Implementation Methodology & Approach	5/6	<ul style="list-style-type: none"> <li>PeopleSoft is a proven and mature product with many successful implementations across various sectors.</li> <li>Due to the competitive HCM Technology market there is now a smaller pool of external PeopleSoft consultants available</li> </ul>
Total Score		11/14	

# Option A Evaluation Results

			Option A: Enhance PeopleSoft Time & Labor
#	Criteria	Weight	
1	Cost & Time to Implement	16%	14
2	Integration with Existing Architecture	20%	17
3	Organizational Risk	18%	11
4	Requirements Fulfilling	16%	9
5	User Experience	16%	8
6	Support Model/Implementation Capabilities	14%	11
Vendor Score			70/100

**Justification Summary**

- A quicker, and more cost effective route to achieving the objective of activity tracking
- Strong internal knowledge and capability on PeopleSoft platform
- Oracle has stated that PeopleSoft 9.2 support is guaranteed until 2030 but is subject to change.
- No PeopleSoft scheduling module, Kronos needs to remain in place for EMS and Pioneer Manor
- PeopleSoft is making limited investments in new technologies, i.e. analytics, chat bots, user experience
- Mobile requires additional configuration and has more limited capabilities than cloud based alternatives
- Based on market research, PeopleSoft can handle the complexity of 11 unions.



# Option B: RFP for Time & Attendance

# Option B: RFP for Time & Attendance

The below is an overview of the first future state option for consideration:

Description	<ul style="list-style-type: none"><li>• PeopleSoft 9.2 to be used for core HCM only</li><li>• Use Project Costing Module in PeopleSoft</li><li>• RFP for Time &amp; Attendance with Advanced Scheduling to integrate with PeopleSoft</li><li>• Systems to be considered: Kronos Dimensions and Workforce Software</li></ul>	Duration	<ul style="list-style-type: none"><li>• RFP: 7 Months</li><li>• Implementation: 14 months</li></ul>
Strengths	<ul style="list-style-type: none"><li>• Best of Breed, enhanced mobile functionality, user experience</li><li>• Cloud solutions offer continuous improvement</li><li>• Patches Updates applied automatically</li><li>• Alternatives fulfill complex scheduling requirements</li></ul>	Estimated Cost*	\$2,749,971 - \$3,413,853
Cautions	<ul style="list-style-type: none"><li>• Robust training required for administrators and support staff</li><li>• AIP and Integrations between PeopleSoft need to be updated for future releases – net new integrations would be required</li><li>• Longer roadmap for implementation due to RFP process</li><li>• Higher cost due to extended timeline and integration cost</li></ul>	Assumptions	
Change Management Considerations	<ul style="list-style-type: none"><li>• Training for all administrators, and staff on new time attendance system</li><li>• Existing PeopleSoft training materials cannot be leveraged</li><li>• Leveraging mobile technology could be a challenge for certain employee populations</li><li>• Cloud based technology introduces improved user experience</li></ul>	<ul style="list-style-type: none"><li>• The priority is the advancement of activity tracking</li><li>• Enhancing overall scheduling process is a secondary consideration</li><li>• Leverage advance cloud based time and attendance system for improved user experience; on premise Kronos replaced</li><li>• HCM Enhancements work can be completed as a prerequisite or in parallel</li><li>• Complex Scheduling can be added to the RFP if there is a business requirement</li></ul>	



\* +/- 15% contingency due to resource availability, time constraints, detailed scope, etc.

# Workforce Software Snapshot



Functionality	Company stability	Global Functionality
<ul style="list-style-type: none"><li>▪ Forecasting and Scheduling</li><li>▪ Time and Attendance</li><li>▪ Crew Management</li><li>▪ Advanced Scheduler</li><li>▪ Absence Compliance Tracker</li><li>▪ Analytics</li><li>▪ Fatigue Management</li><li>▪ Data Capture</li></ul>	<ul style="list-style-type: none"><li>▪ Workforce is headquarters is in Livonia, Michigan.</li><li>▪ Workforce has a revenue of \$100.9M, and 550 employees.</li><li>▪ It has become a leader in cloud-based workforce management.</li></ul>	<ul style="list-style-type: none"><li>▪ Collaborative Approach working jointly with global and regional partners throughout the globe.</li></ul>
	Integration capability	Credentials
	<ul style="list-style-type: none"><li>▪ 100 APIs 35 file, ability to integrate with 100 leading HR payroll and business systems</li></ul>	<ul style="list-style-type: none"><li>▪ Workforce Software serves energy, healthcare, education, manufacturing, and retail sectors in the United States, Australia, and the United Kingdom.</li></ul>
	Implementation capability	<ul style="list-style-type: none"><li>▪ Representative Canadian Clients:<ul style="list-style-type: none"><li>▪ City of Windsor</li><li>▪ CAE</li><li>▪ Canadian Automobile Association (CAA)</li></ul></li></ul>

# Kronos Snapshot



## Functionality

### Workforce Management

- Time and Attendance
- Employee Scheduling
- Absence Management
- Labor Activities
- Analytics

### Human Capital Management

- Benefits Administration
- Talent Acquisition
- Onboarding
- Human Resources
- Talent Management
- Payroll

## Company stability

- Due to continued growth and expansion, Kronos announced its world headquarters move to Lowell, Mass. to a building with state-of-the art technology and amenities aimed to inspire employees. They employ approx 6,000 “Kronites” in 70 offices & 16 countries around the world.
- 2018 - Surpassed 35,000 customers worldwide
- 2019 - Unveiled the Kronos InTouch® DX time clock

## Integration capability

- Robust API and integration framework, all product functionality is accessible through a set of restful APIs; additional APIs are available via a developer portal.

## Implementation capability

- Kronos Paragon implementation methodology is configured for your industry profile to provide fast deployment and rapid time to value on your workforce solution. Kronos Paragon implementation methodology is now supported in more than 50 countries

## Global Functionality

- Global leader in workforce management and human capital management.

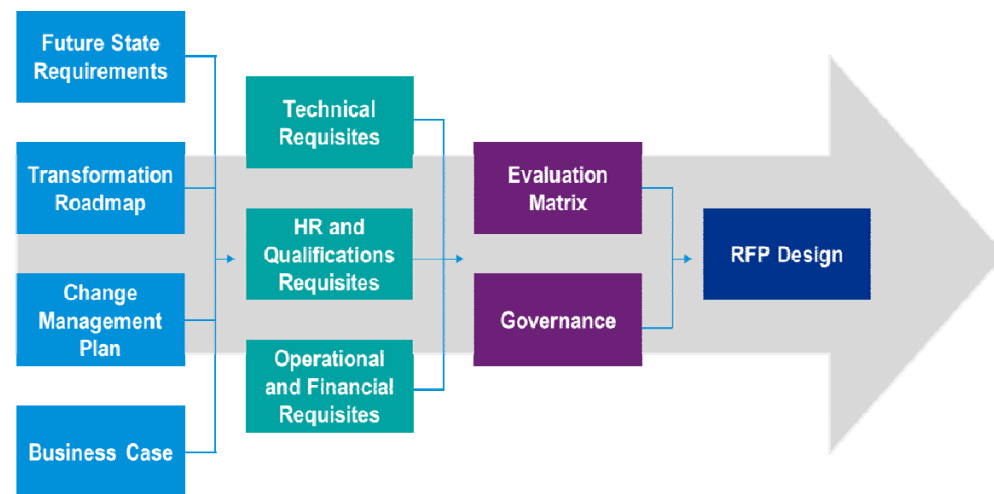
## Credentials

- Top industries served:
- Health Systems, Manufacturing, Retail, Sate and Local Government, Distribution, Police and Corrections, Higher Education
- Representative Canadian Customers:
  - Staples
  - Vancouver Airport Authority
  - University of Toronto
  - Canadian Federal Government



# Vendor Selection Approach

We appreciate that vendor selection is a key activity when evaluating Option 2. The Request for Proposal (RFP) process the first step in framing future transformation requirements. The key is to take and convert all future state requirements, transformational roadmap, change plan and the expected outcomes into a set of requisites (i.e. functional/technical) that will further evolve into an RFP, governed by specific evaluation criteria that will help the City of Greater Sudbury analyze the best contenders in a structured way. Our recommended approach to developing RFPs is based on clear framework that provides guidelines that enforce the alignment to the desired outcome and requisites.

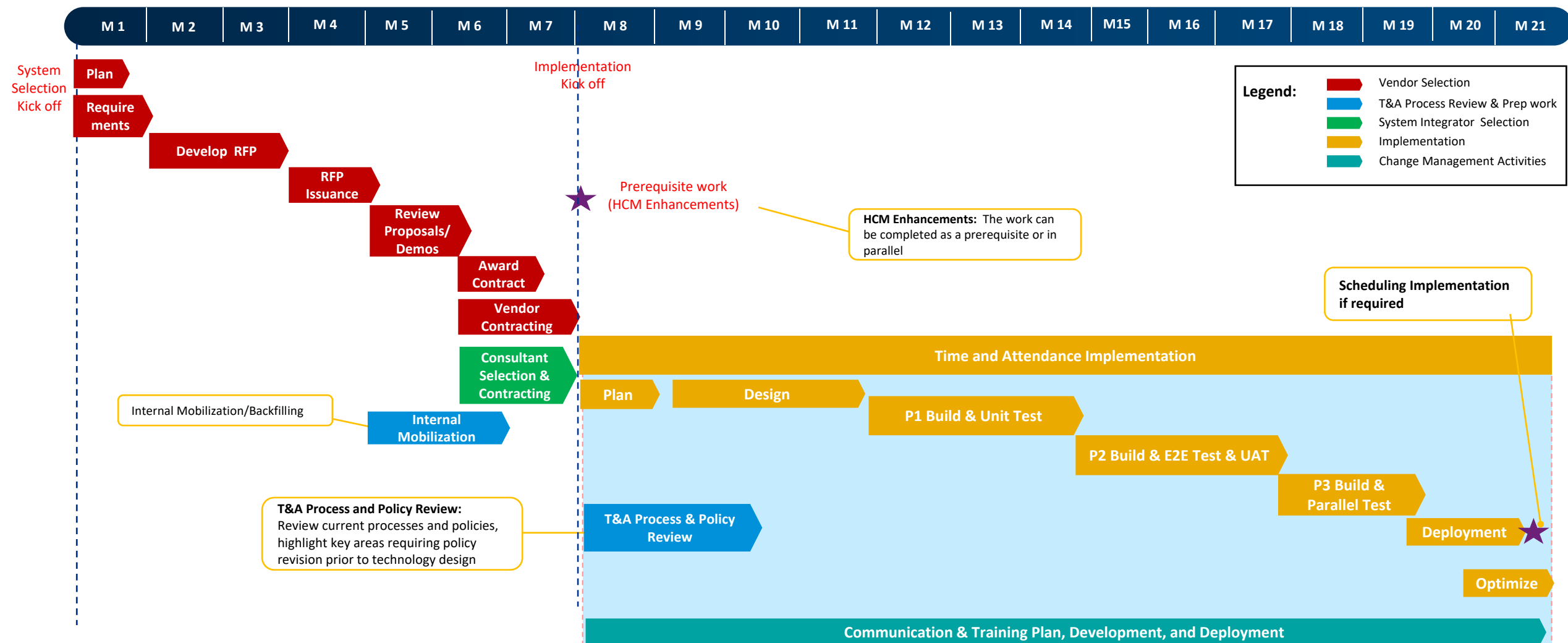


The development of a RFP can be complex and should include the following principles:

- 1. Straightforward approach:** The approach to RFP development should be purposely simple so as not to distract from the complexity of the requirements definition work to be undertaken.
- 2. Built on requirements:** With a high level of complexity and different levels of IT sophistication and readiness for change, technical, financial and legal requirements our team will require immense engagement from the respective stakeholders to align the scope and methodology of the RFP.
- 3. Art and science:** Writing an RFP is a bit of art and science to get the right proposal responses from the vendor community and we will bring our lived perspective this matter, through our HRT, Change and IT advisory teams, to strike the right balance of specificity in requirements but also flexibility that can allow the vendors to show where they are best in class.



# Option B: RFP for Time & Attendance



# Resourcing Estimates

The below resourcing model represents the appropriate client and external consultant roles and effort required to deliver Option B. A more detailed breakdown has been attached to the appendix.

Phase	RFP Process							Plan	Design			CRP1 & Unit Test			CRP2 & E2E Test			CRP3 / Parallel		Deploy	Post
Duration (Month)	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
<b>Client Roles</b>	<b>Effort Estimates</b>																				
Project Executive	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
Project Manager	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
HCM Technology SME	25%	25%	25%		50%	50%		50%	50%	50%	50%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Time & Attendance Lead	50%	50%	50%	25%	50%	50%	25%	50%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Payroll SME	25%	25%	25%		50%	50%	50%	50%	50%	50%	50%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Change Management SME					50%	50%		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Procurement	50%	50%	50%	50%	50%	50%	50%														
Senior Application Analyst	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
Database/System Admins					50%	50%	50%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>External Consultant Roles</b>	<b>Effort Estimates</b>																				
Engagement Manager								50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
RFP Lead Developer	50%	50%	50%	50%	50%	50%	50%														
Integration Lead								50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
Integration Developer								100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Time & Attendance Lead								50%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Support	50%	100%	100%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
Change Management SME								50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%

## Assumptions:

- Month 5 and 6 will be dedicated to “internal mobilization”, backfilling current roles
- Client Change Management SME will be developing documentation and training materials and execution
- External Support role will be a shared resources across various streams such as functional, project management, RFP process and change management
- HCM Tech SME and Payroll SME will be involved in upfront design discussions and during testing to assist in test case scenarios and priority defects
- External Change Management SME will be in an advisory capacity only during strategy/design sessions.



# Costing Estimates

The below resourcing model represents the appropriate client and external consultant roles and effort required to deliver Option B:

Costing Element (One-time)	Estimates*			Notes
	High	Medium	Low	
Internal Project Resourcing	\$1,101,729	\$1,001,572	\$901,415	<ul style="list-style-type: none"> <li>Based on rates provided by the City of Greater Sudbury which include fringe benefits and the utilization estimates.</li> </ul>
External Project Resourcing	\$2,137,124	\$1,942,840	\$1,748,556	<ul style="list-style-type: none"> <li>Extended timeline and resourcing</li> <li>Additional integration development cost</li> </ul>
<b>Total</b>	<b>\$3,238,853</b>	<b>\$2,944,412</b>	<b>\$2,649,971</b>	

Costing Element (On-going)	Estimates			Notes
	High	Medium	Low	
On-Going HR Technology (i.e. Licensing and Support)	\$175,000	\$150,000	\$100,000	<ul style="list-style-type: none"> <li>Estimated employee count of 2,500</li> <li>Cost per employee \$70 (high), \$60 (med) and \$40 (low)</li> </ul>
<b>Total</b>	<b>\$175,000</b>	<b>\$150,000</b>	<b>\$100,000</b>	
<b>Grand Total</b>	<b>\$3,413,853</b>	<b>\$3,094,412</b>	<b>\$2,749,971</b>	

\* +/- 10% contingency used to estimate both high and low estimates from the mid-point..



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# Evaluation Results for Option B

		Workforce	Kronos	
#1	Cost & Time to Implement	Score	Score	Justification
1a	Technology Fees	2/8	1/8	<ul style="list-style-type: none"> <li>There will be an impact as any net new cloud technology would require an investment</li> <li>Kronos Dimension would replace Workforce Central EMS Pioneer Manor</li> <li>Estimated cost of \$100,000 – \$170,000 per year to license either Kronos or Workforce Software.</li> <li>Market data suggests that Workforce Software will be a more cost effective option between the two.</li> </ul>
1b	Duration	2/4	2/4	<ul style="list-style-type: none"> <li>The RFP process will increase the duration of the timeline by approximately 5 months.</li> <li>Time dedicated to configuration will be less as Workforce Software and Kronos offer more delivered functionality with Time and Labor</li> </ul>
1c	Implementation Fees	2/4	2/4	<ul style="list-style-type: none"> <li>An additional estimated 5 months effort will impact the overall implementation fees compared to Option A.</li> <li>Higher implementation cost required to develop net new integrations</li> </ul>
Total Score		6/16	5/16	
#2	Integration with Existing Architecture	Score	Score	Justification
2a	Integration	6/10	6/10	<ul style="list-style-type: none"> <li>Prior project qualifications confirms that Kronos and Workforce Software have been integrated with Workday, ADP, Oracle, SAP, and other best of breed ERP solutions.</li> <li>Workforce Software: 100 APIs 35 file, ability to integrate with 100 leading HR payroll and business systems. Integrate with major project tracking systems for lookup lists.</li> </ul>
2b	Maintenance	8/10	8/10	<ul style="list-style-type: none"> <li>Cloud software provide frequent enhancements and new features</li> <li>Training and strategic rollout development opposed to applying patches</li> </ul>
Total Score		14/20	14/20	

# Evaluation Results for Option B

		Workforce	Kronos	
#3	Organizational Risk	Score	Score	Justification
3a	Internal Capabilities and Capacity	1/6	2/6	<ul style="list-style-type: none"> <li>Internal Workforce Software capability is limited as the application is not being used. Hiring for the skill and capability will need to be considered (if selected).</li> <li>Kronos knowledge and capability exist within some departments and can be leveraged for knowledge transfer.</li> </ul>
3b	Vendor Viability	4/4	4/4	<ul style="list-style-type: none"> <li>Kronos and Workforce Software are considered best of breed as outlined in the company overview sections with investments being made in enhancing functionality.</li> <li>Workforce Software: clients include complex scheduling organizations such as City of Windsor, CAE, and the Canadian automobile association (CAA)</li> <li>Kronos Dimension: platform partnership with Google</li> <li>Kronos quadrant leader for Time and Attendance, long track record of successful implementations</li> </ul>
3c	Change Impact	3/8	4/8	<ul style="list-style-type: none"> <li>Organizational transformation impacting IT, HR, and workers</li> <li>No internal capability on Workforce, minimal Kronos capabilities</li> <li>Both solutions offer an advanced user experience that will help mitigate change impact on Managers and employees</li> </ul>
Total Score		8/18	10/18	

# Evaluation Results for Option B

		Workforce	Kronos	
#4	Requirements Fulfilling	Score	Score	Notes
4a	Activity Tracking	7/10	7/10	<ul style="list-style-type: none"> <li>All time entry software have ability to track time against projects</li> <li>All time entry software provide standard and custom report capabilities</li> <li>No discernable requirement gaps in the three technologies evaluated</li> </ul>
4b	Time and Attendance	3/4	3/4	<ul style="list-style-type: none"> <li>Both system time rules/calculations can deal with 24/7 employees and complex union requirements</li> <li>Workforce Software offers a specific field worker time module; IVR for call in time entry</li> <li>Kronos uses AI and analytics to predict future exceptions</li> </ul>
4c	Scheduling	2/2	2/2	<ul style="list-style-type: none"> <li>Kronos: using AI and analytics for scheduling employees</li> <li>Workforce Software has the ability to test millions of schedule combinations in one click</li> <li>Both vendors have a track record of customers with complex scheduling requirements</li> </ul>
Total Score		12/16	12/16	
#5	User Experience	Score	Score	Notes
5a	Usability/Ease of Use	8/10	8/10	<ul style="list-style-type: none"> <li>Workforce Software offers solutions that improve usability such as clock punches being visible to managers displayed in application, manager &amp; HR notifications about warning thresholds, granular labor reports, etc.</li> <li>Kronos Dimension offers chat bots time and approval and has taken the time clock design and power to the next level providing a super-responsive touch screen and intuitive, consumer-grade experience.</li> <li>Both offer automated approval of high volume tasks approval of time</li> </ul>
5b	Mobile	5/6	5/6	<ul style="list-style-type: none"> <li>Strong mobile functionality by taking advantage of HTML 5 screens rendering perfectly on tablet laptop or mobile</li> <li>Mobile solutions developed and enhanced in parallel with desktop solutions</li> </ul>
Total Score		13/16	13/16	

# Evaluation Results for Option B

		Workforce	Kronos	
#6	Support Model/Implementation Capabilities	Score	Score	Notes
6a	Customer Service and Support	6/8	4/8	<ul style="list-style-type: none"> <li>• Workforce Software offers Managed service offering and 24/7 support</li> <li>• Kronos Dimensions offers typical support packages.</li> <li>• Current state assessment outcomes indicated that the City of Greater Sudbury has not had a positive experience with Kronos support.</li> </ul>
6b	Implementation Methodology & Approach	5/6	4/6	<ul style="list-style-type: none"> <li>• Kronos Dimensions offer the “Kronos Paragon” modern implementation approach which takes into account various lessons learned from previous clients and accelerators such as automated testing datasets, project governance and system documentation.</li> <li>• Workforce Software has a partnership with system implementers and developing a pool of talent</li> <li>• Workforce Software has established newer partnerships with Oracle, Workday and SAP in the market</li> <li>• Kronos quadrant leader for Time and Attendance, long track record of successful implementations</li> <li>• Current state assessment outcomes indicated that the City of Greater Sudbury did not have a positive experience with Kronos support during prior implementation</li> </ul>
Total Score		11/18	8/18	

# Options B Evaluation Results

Below are the results of the evaluation activity rolled up into the 6 categories

			Option 2: RFP for T&A	
#	Criteria	Weight	Workforce	Kronos
1	Cost & Time to Implement	16%	6	5
2	Integration with Existing Architecture	20%	14	14
3	Organizational Risk	18%	8	10
4	Requirements Fulfilling	16%	12	12
5	User Experience	16%	13	13
6	Support Model/Implementation Capabilities	14%	11	8
Vendor Score			64/100	62/100

Justification Summary

- More expensive alternative due to extended timeline and higher integration cost
- Longer time to value for urgent activity tracking needs
- Requires IT resources to develop new technical capabilities
- Solutions offer modern and future based solutions, such as Chat Bots, AI, dashboards, etc.
- Platforms designed specifically for cloud self service, and mobile entry, all screens on all platforms look the same
- Kronos Dimension platform offers strong integration capability with Oracle. Workforce Software partnering with Oracle and SAP for the Time and Attendance-HCM integration offering
- Strong scheduling options using analytics, and AI to predict schedule patterns
- Both systems have the ability to track project and activity time





# Future State Options Evaluation Results

# Evaluation Results

Below are the results of the evaluation activity rolled up into the 6 categories for both options

#	Criteria	Weight	Option 1: Enhance PeopleSoft Time & Labor	Option 2: RFP for T&A	
				Workforce	Kronos
1	Cost & Time to Implement	16%	14	6	5
2	Integration with Existing Architecture	20%	17	14	14
3	Organizational Risk	18%	11	8	10
4	Requirements Fulfilling	16%	9	12	12
5	User Experience	16%	8	13	13
6	Support Model/Implementation Capabilities	14%	11	11	8
Total Score			70	64	62

**Top 2 Categories:**

1. Integration with Existing Architecture
2. Cost & Time to Implement

**Lowest Scored Category:** User Experience

# Qualitative Analysis

Below are the qualitative considerations of our future state options

## Qualitative Analysis

- Within the scope of the broader service review of service review and activity tracking both options provide the basic ability to track time against activity
- In terms of reporting, both options provide report capabilities necessary for providing decisions makers with key metrics
- Option A enhancing PeopleSoft is quicker, and more cost effective route to achieving the objective of activity tracking
- Option B RFP for new time attendance provides greater functionality in addressing other pain points such as scheduling 24hr workers, enhanced user experience, better collection of time
- Reviewing the Requirements lists all must have items are related to activity tracking, any other enhancement or improvements are listed as could have
- Enabling self-service enforces compliance through a validation; activity tracking could still be enforced through paper methods
- What are the costs of the current dual entry? Metric: Employees keying time, then entered by timekeeper
- What are the costs associated with incorrect timekeeper entry? How many additional runs processed? Metric: How much time is spent on corrections?
- How much time is a front line manager spending scheduling and tracking workers? Metric: What percentage of managers time spent on administration activities?
- Reviewing the actual costs of time entry may change the actual weighting of our current requirements, and enhance the position of Option B



# Final Recommendations

# Recommendation

Our recommendation is **Option A - Enhancing PeopleSoft Time & Labor** based on our assessment and findings as outlined below:

- A quicker, and more cost effective route to achieving the objective of activity tracking
- Strong internal knowledge and capability on PeopleSoft platform
- Meets key requirements identified during the current state assessment
- Kronos should remain in place for complex scheduling requirements for EMS and Pioneer Manor

## Key Consideration:

- The Time and Activity market scan identified various viable solutions with stronger user interface, mobile capabilities and improved employee/manager experience. While these alternatives were not selected for this review due to higher cost and duration; at the time the City of Greater Sudbury is ready to complete a broader HR ERP assessment; more modern cloud based solutions should be considered.



# Appendices



# Role Definitions

# Roles and Responsibilities

Client Roles	Responsibilities	Staffing Considerations
<b>Project Executive</b>	<ul style="list-style-type: none"> <li>– Serve as champion of the project, demonstrating support for the project to the organization</li> <li>– Set overall strategic direction and objectives for the project</li> <li>– Ensure key project decisions adhere to strategic direction and objectives</li> <li>– Ensure project has sufficient skilled resources</li> </ul>	<ul style="list-style-type: none"> <li>– Senior leader(s) in HR and IT</li> </ul>
<b>Project Manager</b>	<ul style="list-style-type: none"> <li>– Manages the project to scope, timeline and budget</li> <li>– Provides executive leadership to the team and supports escalations and issue resolution</li> <li>– Performs risk assessment, identifies prevention strategies/owners and maintains risk log Tracks and maintains issues and key decisions</li> <li>– Facilitates key project meetings (e.g., kickoff)</li> </ul>	<ul style="list-style-type: none"> <li>– Proven senior project manager with extensive experience managing large scale transformation projects</li> <li>– Working knowledge of functional and technical concepts to navigate cross-work stream dependencies</li> <li>– Strong communication skills</li> </ul>
<b>HCM SME/ HCM Technology SME</b>	<ul style="list-style-type: none"> <li>– Provides functional knowledge and expertise on local requirements such as HCM business processes, data, jobs, organization, absences management and legal/statutory requirements</li> <li>– Participates in design sessions if required</li> <li>– Supports the development of test scenarios for functionality in their scope</li> </ul>	<ul style="list-style-type: none"> <li>– Deep expertise and knowledge of local functional requirements</li> <li>– Often times participates on a limited or part time basis during certain phases of work</li> </ul>
<b>Time &amp; Labor Lead/ Time &amp; Attendance Lead</b>	<ul style="list-style-type: none"> <li>– Accountable for the design completeness of time tracking functional area</li> <li>– Participates in design workshops to shared system capabilities and the configuration options</li> <li>– Responsible for providing timely and accurate input during discovery period</li> </ul>	<ul style="list-style-type: none"> <li>– Deep expertise in time tracking</li> <li>– Strong understanding of functional requirements</li> </ul>



# Roles and Responsibilities

Client Roles	Responsibilities	Staffing Considerations
<b>Payroll SME</b>	<ul style="list-style-type: none"> <li>– Provides functional knowledge and expertise on local Payroll requirements</li> <li>– Participates in design sessions if required</li> <li>– Participates in the development of test scenarios for functionality in their scope</li> </ul>	<ul style="list-style-type: none"> <li>– Deep expertise and knowledge of local Payroll requirements</li> <li>– Often times participates on a limited or part time basis during certain phases of work</li> </ul>
<b>Change Management SME</b>	<ul style="list-style-type: none"> <li>– Support the design, development, delivery and management of communications.</li> <li>– Conduct impact analyses, assess change readiness and identify key stakeholders</li> <li>– Provide input, document requirements and support the design and delivery of training programs.</li> </ul> <p><b>Skills and Qualifications:</b></p> <ul style="list-style-type: none"> <li>– Experience and knowledge of change management principles, methodologies and tools</li> <li>– Strong communication skills, both written and verbal; strong active listening skills</li> <li>– Ability to clearly articulate messages to a variety of audiences</li> <li>– Ability to establish and maintain strong relationships</li> <li>– Ability to influence others and move toward a common vision or goal</li> <li>– Flexible and adaptable; able to work in ambiguous situations</li> <li>– Acute business acumen and understanding of organizational issues and challenges</li> <li>– Experience with large-scale organizational change efforts</li> <li>– Change management certification or designation desired</li> </ul>	<ul style="list-style-type: none"> <li>– Working knowledge of functional and technical concepts to navigate cross-work stream dependencies</li> <li>– Strong communication skills</li> <li>– Experience managing change management activities in relations to large transformations</li> </ul>

# Roles and Responsibilities

Client Roles	Responsibilities	Staffing Considerations
Procurement	<ul style="list-style-type: none"> <li>– Drive the RFP process and provide expertise in organizational expectations and behaviours</li> </ul>	<ul style="list-style-type: none"> <li>– Resource with a strong understanding of City of Greater Sudbury’s standard operating procedures for procurement</li> </ul>
Senior Application Analyst	<ul style="list-style-type: none"> <li>– Provides architecture, engineering services and technical support for all technologies</li> <li>– Assists in defining high level migration plans to move from current to future states, detect critical deficiencies and advanced solutions and when needed</li> </ul>	<ul style="list-style-type: none"> <li>– Deep expertise and knowledge of all technologies</li> <li>– Deep expertise and knowledge of local functional requirements</li> </ul>
Database Administrators/System Admins	<ul style="list-style-type: none"> <li>– Provide an understanding of impact of changes on the current configuration of time rules</li> <li>– Knowledge transfer</li> </ul>	<ul style="list-style-type: none"> <li>– Deep expertise in time tracking</li> <li>– Strong understanding of functional requirements</li> </ul>

# Roles and Responsibilities

External Consultant Roles	Responsibilities	Staffing Considerations
<b>Engagement Manager</b>	<ul style="list-style-type: none"> <li>– Provides input and approval to key strategic deliverables including the deployment strategy, project charter, target operating model, and process design documents.</li> <li>– Participate in key workshops and steering committee meetings</li> <li>– Oversee deployment activities and approve the overall deployment and cutover strategy</li> </ul>	<ul style="list-style-type: none"> <li>– Experience on past PeopleSoft and/or time and attendance technology implementations</li> <li>– Proven senior project manager with extensive experience managing large scale transformation projects</li> </ul>
<b>Time &amp; Labor Lead /Time &amp; Attendance Lead</b>	<ul style="list-style-type: none"> <li>– Accountable for the design and configuration of time tracking functional area</li> <li>– Participates in design workshops to shared system capabilities and the configuration options</li> <li>– Responsible for providing timely and accurate input during discovery period</li> </ul>	<ul style="list-style-type: none"> <li>– Deep expertise in time tracking bring lessons learned from previous projects</li> <li>– Strong understanding of functional requirements</li> </ul>
<b>Change Management SME</b>	<ul style="list-style-type: none"> <li>– Provides leading practice materials, approach and design to change management, communications and training plans</li> <li>– Provide support and council to client Change Management resource</li> <li>– Oversees development of change management materials</li> </ul>	<ul style="list-style-type: none"> <li>– Experience delivering change for ERP implementations</li> <li>– Strong communication skills</li> </ul>
<b>Integration Developer</b>	<ul style="list-style-type: none"> <li>– Accountable for overall technical architecture and integration of the system (hardware, database, network) within the organization including design, testing, implementation and support</li> <li>– Signs off on integration scope, design, build, and readiness to go-live</li> </ul>	<ul style="list-style-type: none"> <li>– Project manager in IT responsible for managing HR and payroll interfaces</li> <li>– Understands functional context and business case for each interface</li> </ul>
<b>Integrations Lead</b>	<ul style="list-style-type: none"> <li>– Responsible to document requirements, develop and unit test integrations to systems (internal or external)</li> <li>– Responsible to provide regular updates on integration design and development (including issues, risks) to Integrations Lead</li> <li>– Adheres to the work stream knowledge management and documentation standards</li> </ul>	<ul style="list-style-type: none"> <li>– Strong development background in PeopleSoft</li> <li>– Near/offshore model to be considered</li> </ul>

# Roles and Responsibilities

External Consultant Roles	Responsibilities		Staffing Considerations
<b>RFP Lead Developer</b>	<ul style="list-style-type: none"> <li>Coordinates and assists with gathering and reviewing on-going service needs, reviews needs against existing service capacity and identifies new services or program modifications needed</li> <li>Recruits and orients prospective service providers through the Request for Proposal (RFP)</li> </ul>	<ul style="list-style-type: none"> <li>Experience with end-to-end RFP cycles, preferably technology related.</li> </ul>	
<b>Support</b>	<ul style="list-style-type: none"> <li>Supports activities through all phases of the implementation, specifically with the creation of preliminary deliverables, workshops materials, requirements gathering, etc.</li> <li>Helps support design and planning sessions</li> <li>Support the RFP process for Option B</li> <li>Develops/reviews change management materials, including communications and training materials</li> </ul>	<ul style="list-style-type: none"> <li>Junior Analyst/Analyst Role</li> </ul>	



# Evaluation Criteria, Scoring and Definitions

# 1. Cost & Time to Implement

During our November 19, 2019 workshop, participants agreed on 6 macro evaluation criteria and weighted score. The project team reviewed sub-criteria for each macro evaluation criteria to ensure we have a comprehensive listing and scoring breakdown.

#1	Evaluation Criteria	Score	Definition
1a	Technology Fees	8	➤ Initial and on-going investments related to technology/applications and on-going costs post deployment
1b	Duration	4	➤ The time investment required to deploy the technology/applications.
1c	Implementation Fees	4	➤ Internal and External resourcing costs to implement.
Total Score		16	

## 2. Integration with Existing Architecture

During our November 19, 2019 workshop, participants agreed on 6 macro evaluation criteria and weighted score. The project team reviewed sub-criteria for each macro evaluation criteria to ensure we have a comprehensive listing and scoring breakdown.

#2	Evaluation Criteria	Score	Definition
2a	Integration	10	➤ How easily can the system integrate with the current architecture.
2b	Maintenance	10	➤ How difficult is it to install, maintain and apply patches and fixes to the application.
Total Score		20	

# 3. Organizational Risk

During our November 19, 2019 workshop, participants agreed on 6 macro evaluation criteria and weighted score. The project team reviewed sub-criteria for each macro evaluation criteria to ensure we have a comprehensive listing and scoring breakdown.

#	Evaluation Criteria	Score	Definition
3a	Internal Capabilities and Capacity	6	➤ Level of knowledge within the organization to support the application independently
3b	Vendor Viability	4	➤ Assessment of vendors product, corporate and marketplace direction
3c	Change Impact	8	➤ Organizational perceptions of introducing new technology and impact to current business processes/way of work
Total Score		18	



# 4. Requirements Fulfilling

During our November 19, 2019 workshop, participants agreed on 6 macro evaluation criteria and weighted score. The project team reviewed sub-criteria for each macro evaluation criteria to ensure we have a comprehensive listing and scoring breakdown.

#	Evaluation Criteria	Score	Definition
4a	Activity Tracking	10	➤ How does the system meet the activity tracking requirements of the business
4b	Time & Attendance	4	➤ How does the system meet the time and attendance requirements of the business
4c	Scheduling	2	➤ How does the system meet the scheduling requirements of the business
Total Score		16	

# 5. User Experience

During our November 19, 2019 workshop, participants agreed on 6 macro evaluation criteria and weighted score. The project team reviewed sub-criteria for each macro evaluation criteria to ensure we have a comprehensive listing and scoring breakdown.

#	Evaluation Criteria	Score	Definition
5a	Usability/Ease of Use	10	➤ End users are able to easy get to pages, system word/phrases allow end users to find what they need with minimal mouse clicks
5b	Mobile	6	➤ Enabled mobile capability
Total Score		16	

# 6. Support Model/Implementation Capabilities

During our November 19, 2019 workshop, participants agreed on 6 macro evaluation criteria and weighted score. The project team reviewed sub-criteria for each macro evaluation criteria to ensure we have a comprehensive listing and scoring breakdown.

#	Evaluation Criteria	Score	Definition
6a	Customer Experience and Support	8	➤ Software providers ability to provide professional service, account representation and support, Quality of service, SLA's, responsiveness of support team
6b	Implementation Methodology & Approach	6	➤ Proven methodology and approach to implementing their solution in the marketplace successfully. Experience implementing their solution in the marketplace successfully
Total Score		14	



# Pricing Details

# Pricing Details – Option A

The below outlines the rate, hours and fees for both Client and External Consultant role estimates.

Role	Role Type	Rate	Hours	Fees
Project Executive	Client Roles	162.5	222	\$ 36,075
Program Manager	Client Roles	78	1101	\$ 85,878
HCM SME	Client Roles	58.5	746	\$ 43,641
Change Management SME	Client Roles	78	2202	\$ 171,756
Procurement	Client Roles	65	162	\$ 10,530
Time & Labor Lead	Client Roles	52	2123	\$ 110,396
Payroll SME	Client Roles	65	709	\$ 46,085
Database Administrator	Client Roles	84.5	2510	\$ 212,095
Senior Application Analyst	Client Roles	84.5	1255	\$ 106,048
Engagement Manager	External Consultant Roles	240	1101	\$ 264,240
Time & Labor Lead	External Consultant Roles	240	2123	\$ 509,520
Support	External Consultant Roles	160	1101	\$ 176,160
Change Management SME	External Consultant Roles	240	829	\$ 198,960



# Pricing Details – Option B

The below outlines the rate, hours and fees for both Client and External Consultant role estimates.

Role	Role Type	Rate	Hours	Fees
Project Executive	Client Role	162.5	317	\$ 51,513
Program Manager	Client Role	78	1571	\$ 122,538
HCM Technology SME	Client Role	58.5	1016	\$ 59,436
Change Management SME	Client Role	78	2356	\$ 183,768
Procurement	Client Role	65	549	\$ 35,685
Time & Attendance Lead	Client Role	52	2590	\$ 134,680
Payroll SME	Client Role	65	1058	\$ 68,770
Database/Systems Admin	Client Role	84.5	2435	\$ 205,758
Senior Application Analyst	Client Role	84.5	1650	\$ 139,425
Engagement Manager	External Consultant Role	240	1101	\$ 264,240
RFP Lead Developer	External Consultant Role	240	549	\$ 131,760
Time & Attendance Lead	External Consultant Role	240	2123	\$ 509,520
Support	External Consultant Role	160	1804	\$ 288,640
Change Management Lead	External Consultant Role	240	1101	\$ 264,240
Integration Lead	External Consultant Role	240	1101	\$ 264,240
Integration Developer	External Consultant Role	100	2202	\$ 220,200





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