

Report To: Finance + Facilities Committee, Board of Health
Submitted by: Dr. Nicola Mercer, Medical Officer of Health & CEO
Subject: Enterprise Resource Planning (ERP) Project Update

RECOMMENDATION(S):

- (a) That the Finance + Facilities Committee makes recommendation to the Board of Health to receive this Report for information.

BACKGROUND:

Enterprise Resource Planning (ERP) software is a shared database that supports multiple business functions throughout an organization. In 2018, the Board of Health (BOH) directed WDG to source out and purchase an ERP system that would address concerns about existing legacy system reliability, and the Agency’s ongoing ability to meet Ministry reporting requirements.

Following a comprehensive procurement effort, WDG selected “Sparkrock” as its ERP vendor of choice. Sparkrock is an all-in-one ERP solution that is able to house and address all of the Agency’s HR, Finance, Scheduling and Inventory needs in one place.

October 15, 2019 marked the formal kick-off of the project. What follows is a general summary of the product and project highlights to-date.

PUBLIC HEALTH AND/OR FINANCIAL IMPLICATIONS:

ABOUT THE VENDOR

Sparkrock is a Human Services software company that provides Finance & Accounting, Workforce Management, Case Management, Donor Management and Customer Relations Management. The Sparkrock software solution is built on the robust Microsoft platform and allows organizations to manage their financial, workforce and client data in one integrated system. The overriding system goal is to have information pass from one department to another without employees having to sign into multiple applications or work from paper reports or excel worksheets.

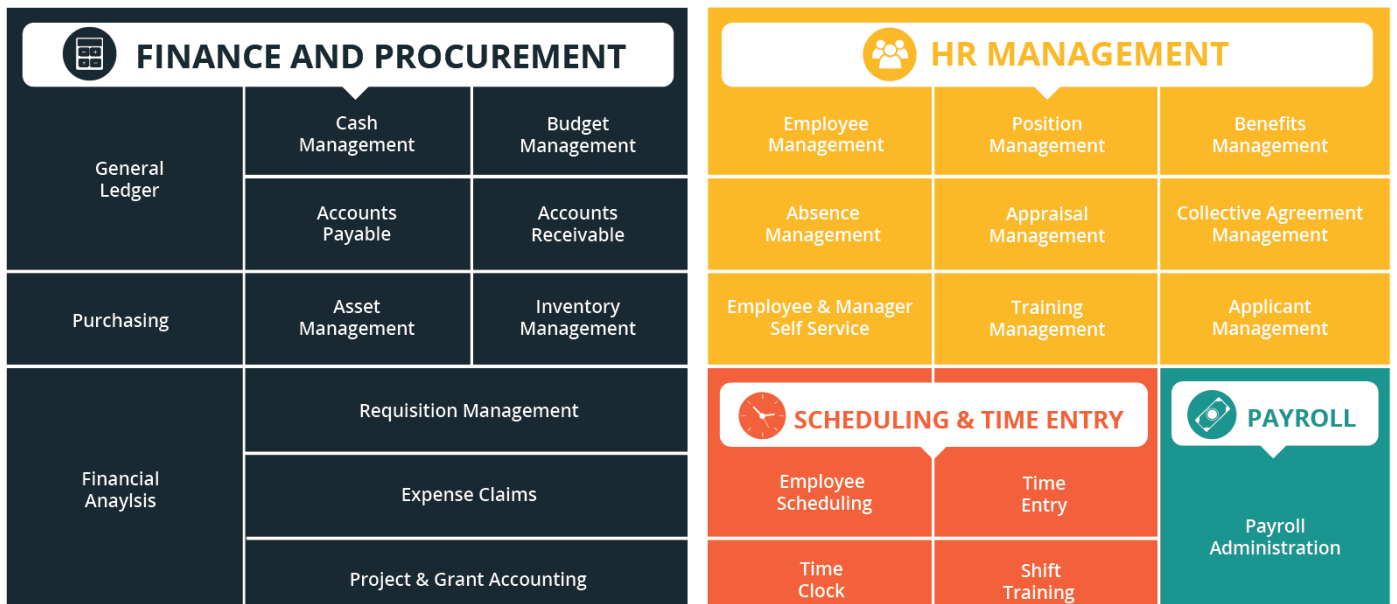
With 16 years of experience and over 44,000 Users, Sparkrock has been implemented successfully in a number of public sector organizations with high concentration in school boards and public health - including health units in North Bay Parry Sound, Simcoe Muskoka and Grey Bruce.

PROJECT OBJECTIVES

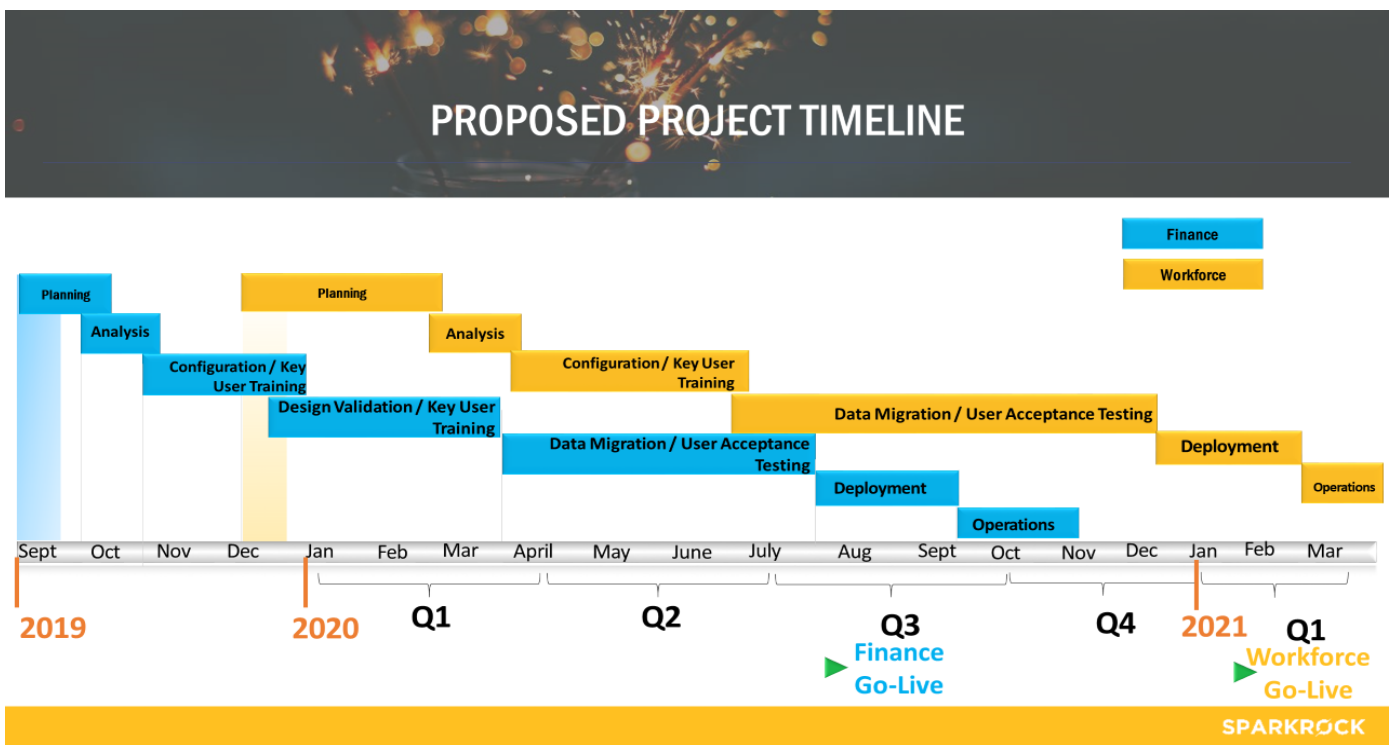
The key objectives of this project are as follows:

- Implement and maintain a comprehensive and reliable information technology infrastructure
- Improve internal communication, reduce silos, and enhance collaboration.
- Increase evidence-based accountability and reporting to WDGPH’s funders: including tracking staff work by program/cost center, and anticipated reporting down to the “intervention” level.
- Streamline current environment, which contains multiple disparate and dated systems that cause high manual effort and delays, to an integrated platform to help meet the above goals.

PROJECT SCOPE



PROJECT TIMELINES



PROJECT TEAM

Name	Title	Project Role
Finance Team		
Heather Young	Senior Financial Analyst	Accounting Lead / Test Lead
Alison Zinger	Senior Accountant	Accounting Lead / Test Lead
Sandy Dack	Procurement & Projects Analyst	Purchasing Lead / Test Lead
Kyle Davies	Finance & Administrative Services Administrator	Finance Subject Matter Expert / Tester
Grace Snider	Accounts Payable Specialist	Finance Subject Matter Expert / Tester
Workforce Team		
Shanta Persad	Senior HR Generalist	HR Lead / Test Lead
Pat Yantha	Payroll & Benefits Specialist	Payroll Lead / Test Lead
Lucy Kerrigan	HR Coordinator	HR Subject Matter Expert / Tester

INFORMATION TECHNOLOGY PERSPECTIVE

The foundation of a new cloud-based ERP solution for WDGPH has been successfully prepared with the existing implementation of the Microsoft Office 365 initiative. The integration of both the ERP and Microsoft Office 365 solutions offer a rich user experience by accessing key business applications via a single portal. This single portal allows users to access all resources with a single username and password from a singular location. Furthermore, mobility and flexibility provides the organization with an additional advantage to further improve productivity and to manage disruptive events.

In addition to offering a frictionless user experience, the ERP solution offers additional benefits for the organization from a strategic IT standpoint. IT security and compliance can be further improved with the new ERP system with the introduction of automated rule-based processes. Digitally transforming key business processes with an adaptable and sustainable solution also offers advantages such as reduced IT risk, increased scalability, and improved efficiency. The new ERP system will offer WDGPH a secure, easy to use and expandable solution designed to support both the traditional and mobile worker.

SUCCESS FACTORS

An ERP is a large investment for any organization both from a financial and human resources perspective. The potential gains in efficiency, security, dependability, functionality and reporting are significant. However, to realize these benefits it is critical that a number of organizational steps are taken to most effectively position the Agency for success. To that end, WDG has initiated the following as part of this project:

Process Mapping: prior to the project kick-off a thorough review of all HR and finance-related processes was conducted. Processes were evaluated for their effectiveness and where necessary, adapted for greater efficiency. These processes were then mapped using a specialized software so that the Vendor would be able to quickly assess and build upon the Agency's administrative operations.

Dedicated Resources: One the most common factors associated with failed ERP projects is undefined and / or uncommitted resources. To avoid this, WDG has seconded an existing employee to serve as full-time project manager for a 2-year period. Additionally, a project team has been assembled that meets weekly, and a number of employees considered subject matter experts have committed their expertise and time appropriately to the project as shown above.

Administration and IT: Another key success factor in an ERP project is ensuring that the organization's administration and IT teams are working in genuine partnership together. In this case, the Director of Information Systems and the Director of Administrative Services are serving as Project Co-Sponsors to ensure that the transition from project implementation, to technical support is executed as seamlessly as possible

Communication: To support the project's communication efforts, a Communications Specialist has also been added to the team. This will help in maintaining consistent and positive messaging about the project with WDG staff, and ensure that effective communication mediums are used. This position will also support the development and review of training materials.

Senior Leadership Team Support: The Agency's Senior Leadership Team is also committed to the success of the project and are providing regular updates to their respective teams. Having senior Staff communicate the value, applicability and necessity of the project will help ensure that each division is aware and ready for implementation. The Senior Leadership Team is working closely with the Project Team to ensure that timely change-management activities are initiated throughout the project duration.

FUTURE STATE

Another benefit of the ERP implementation is way it can help positively position the Agency in advance of the Public Health amalgamation set to occur in the near future. Not only does implementation ensure that WDG has its account structures, financial reporting processes and HR activities in good order, it also provides the new amalgamated entity with an optimal ERP option. To this end, the project team is structuring the new system in a manner that will easily allow for additional Agency data to be added, should a decision to use this resource more broadly occur in the future. Like all of WDG's preparatory efforts, this project is being approached with the objective of strengthening the Agency's position going into amalgamation.

REFERENCES:

NONE.

APPENDICES:

NONE

Prepared by:
David Kingma,
Director, Administrative
Services

Reviewed by:
David Kingma
Director, Administrative
Services

Approved by:
Dr. Nicola Mercer,
Medical Officer of Health &
CEO