

ATOM Update

Administrative Technologies of Marin

June 17, 2014

Sponsored By:

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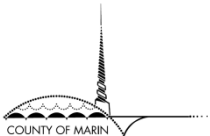
Charlie Haase – Director of IST

Joanne Peterson – Director of Human Resources

Roy Given- Director of Finance

Raul Rojas– Director of Public Works

Purpose of today: Provide an update on our vendor selection process



ATOM Guiding Principles

1. Phased deadlines based on readiness, not an arbitrary schedule
2. Simpler software solutions design for the public sector
3. Structured project management and oversight by IST throughout the life of the project
4. Meaningful input from our user community at key junctures
5. Timely, quality and targeted training
6. Early and ongoing change management

Why this project matters

Benefits to our Residents, our Employees, our BOS

- With 10% fewer staff, we need more effective and efficient administrative services
- Empower the County's most valuable assets – our employees – with enhanced tools and abilities to manage daily business
- Improve financial and HR reporting capabilities allow more transparent government and more tools to better inform use of County resources
- Achieve ongoing cost savings by simplifying County systems and business processes

Vendor Selection Criteria

- Vendor experience with emphasis on California municipalities
- Functional requirements (Finance, Budget, HR, Payroll)
- One-time and ongoing costs; Ongoing cost savings
- Implementation requirements and method
- Technical requirements
- Results of Vendor demonstrations – User Input
- Results of site visits and reference checks

Tyler Technologies & Selection Criteria

- Solution designed for Public Sector with hundreds of installations across the County and 2 Counties in CA (on in progress)
- Over 94% compliance with County functional needs
- Proposed costs within our estimated budget
- Tyler modified their implementation method to fit Marin
- Strong positive reviews at demonstrations from a broad user base
- Site visits and reference checks informing our contract negotiation strategy

Steering Committee Recommendation

CAO and Steering Committee requesting approval to enter a contract negotiation with Tyler Technologies

- Designing our contract negotiation plan to apply lessons learned from our past and other similar Tyler Technologies clients
- Infor and SunGard remain viable alternatives as a backup plan

Contract Negotiation Goals – Lessons Learned

The County will pursue a contract that builds a partnership with Tyler Technologies that merges our interests in success

- Secure qualified implementation staff from Tyler including requirements to maintain staffing consistency
- Building a deliverables based statement of work – not time elapsed based
- Building performance guarantees to achieve success at milestones

Schedule for Software Selection

March-June 2014

- On-site software demonstrations by finalist vendors
- Reference checking and due diligence

June 2014

- Steering Committee seeks approval from BOS to negotiate a contract with Tyler Technologies

July 2014

- Contract Negotiations begin – target 3 months or less

Fall 2014

- Target - return to your Board requesting approval of a contract with Tyler Technologies

What's Next?

- Define the contract negotiation milestones and timeline
- Refine the estimated project costs (current range is estimated between 12-16 Million)
- Secure County staff for the implementation team
- Plan out the specific timelines and milestones for the implementation (currently estimated at 30 months)
- Check in with our outside Ad Hoc working group to obtain feedback

Questions

