

## Case #4:

### Wisconsin Schools Consortium – Business and Human Resource Software Selection

In May of 2004, representatives from the Middleton-Cross Plains Area School District (MCPASD), Verona Area School District (VASD) and Oregon School District (OSD) contacted Madison Metropolitan School District (MMSD) to study the feasibility of sharing resources to operate a joint Financial, Payroll and Human Resource System. All districts were using the same legacy system and operationally had similar requirements. MMSD had gone through a complete software selection in 2003 and was in the process of converting to its new Business and Human Resource system. MCPASD, VASD and OSD decided to hire Davidson Services to:

- Identify and document critical business processes
- Make an initial determination if business processes were similar enough to allow for all districts to share a common business and human resource system
- Create a Request for Proposal (RFP) that included options for systems installed in each district; a shared system; and a commercially hosted option
- Manage the overall proposal preparation, publication, and selection process

Davidson Services consultants met with each district's key staff and identified "must have" features in a new Business and Human Resource system. They also documented critical business processes and identified unique requirements that were important to maintain and enhance. From this initial data collection process, a list of prioritize functional requirements was developed to be included within the RFP. Davidson Services determined that there was a very high degree of common processes shared by the districts and a consolidated Business and Human Resource system was definitely possible. Each district wanted to analyze responses to the functional specifications based on their individual as well as group needs, so Davidson Services developed reporting tools to analyze the results of the RFP.

The major software vendors representing K-12 solutions installed in the State of Wisconsin responded to the bid request. Davidson Services compiled quantitative results of the functional specifications while each district reviewed the responses and prepared a qualitative analysis scoring sheet. By building individual district priorities within the functional specifications and qualitative scoring sheets,

individual as well as group comparisons of each bid were possible. Although priorities for each district were different, the individual districts' as well as the combined scoring sheets results were in agreement on the selection of the top three vendors.

Each of the three finalists was given a demonstration script to guide their two day demonstrations. The demonstration scripts were developed directly from the process work done early in the RFP development cycle. Since time was limited, the vendors were able to focus on critical work flows that each district identified as crucial to their success with a future Business and Human Resource system. Participants from each district focused on the critical processes and evaluated each vendor. A Davidson Services consultant managed each demonstration; collected completed scoring sheets; and compiled final results. All the districts were



unanimous on the selection of the software which would best meet their needs.

Completing the software selection process, a cost analysis was done

that reviewed the individual costs of installing and maintaining individual systems versus a shared environment. Reviewing a 5 year cost analysis prepared by Davidson Services, it was clear that a group buying decision provided each district with significantly enhanced software at an affordable price. The districts contacted MMSD and together they evaluated several processing models, including a shared system hosted by MMSD; individual systems installed within each district; and a commercial hosting company providing services to all districts. Reviewing installation services, initial costs, and on-going support costs from the RFP, the districts selected a commercial Application Service Provider (ASP) to provide hardware, installation, and operational support for their combined installation. The selected ASP provided the districts with the lowest total cost of ownership with the following distinct advantages:

- Flexible architecture and hardware supporting nearly round the clock

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- availability of systems with a fixed cost over a 5 year period
- The ability to add additional school districts to the proposed Consortium which would reduce the yearly hosting costs for all members
- Accommodation of future growth and application upgrades without investing in additional information technology hardware, software, and personnel within the districts
- Ability to meet the unique K-12 processing requirements of the districts, including supporting extensions for the State of Wisconsin Accounting System (WUFAR) as well as required state reports
- Availability of information at any time from any place within or outside the school district
- Integrated Business Continuity Services which guaranteed 72 hour return to full service if a catastrophic event would occur.

- Process flow and unique time entry screens prepared for a K-12 school setting will be available to the Consortium members
- Total Cost of Computing will be reduced by the formation of a larger buying cooperative to share operational, training, and future enhancement expenses

The Consortium was approved by each district's Boards of Education and the implementation phase is now in process. The Consortium selected Davidson Services to continue to represent their interests during the conversion process. All districts are projected to be operational with the new environment within a 6 month period.

With the selection of software and an Application Service Provider, the districts agreed to collaborate and proposed signing an Intergovernmental Cooperation Agreement creating the Wisconsin Schools Consortium. Davidson Services provided guidance on creating the operational environment and helped craft the overall agreement that would guide the decision making and management of the combined Business and Human Resource System over the next 5 years.

With the formation of the Wisconsin Schools Consortium, member districts will experience the following benefits:

- Software will run on an open UNIX platform in a clustered environment, providing complete hardware redundancy while allowing non-disruptive growth in processor and disk space
- Costs include the installation of all new releases and patches of the software providing new functionality without impacting the current Information Technology staff or incurring any additional expense or processing outages
- System availability will increase to meet the demands of any where, any time processing requirements
- Members will receive a proven implementation template for an advanced Business and Human Resource system in a K-12 school setting