

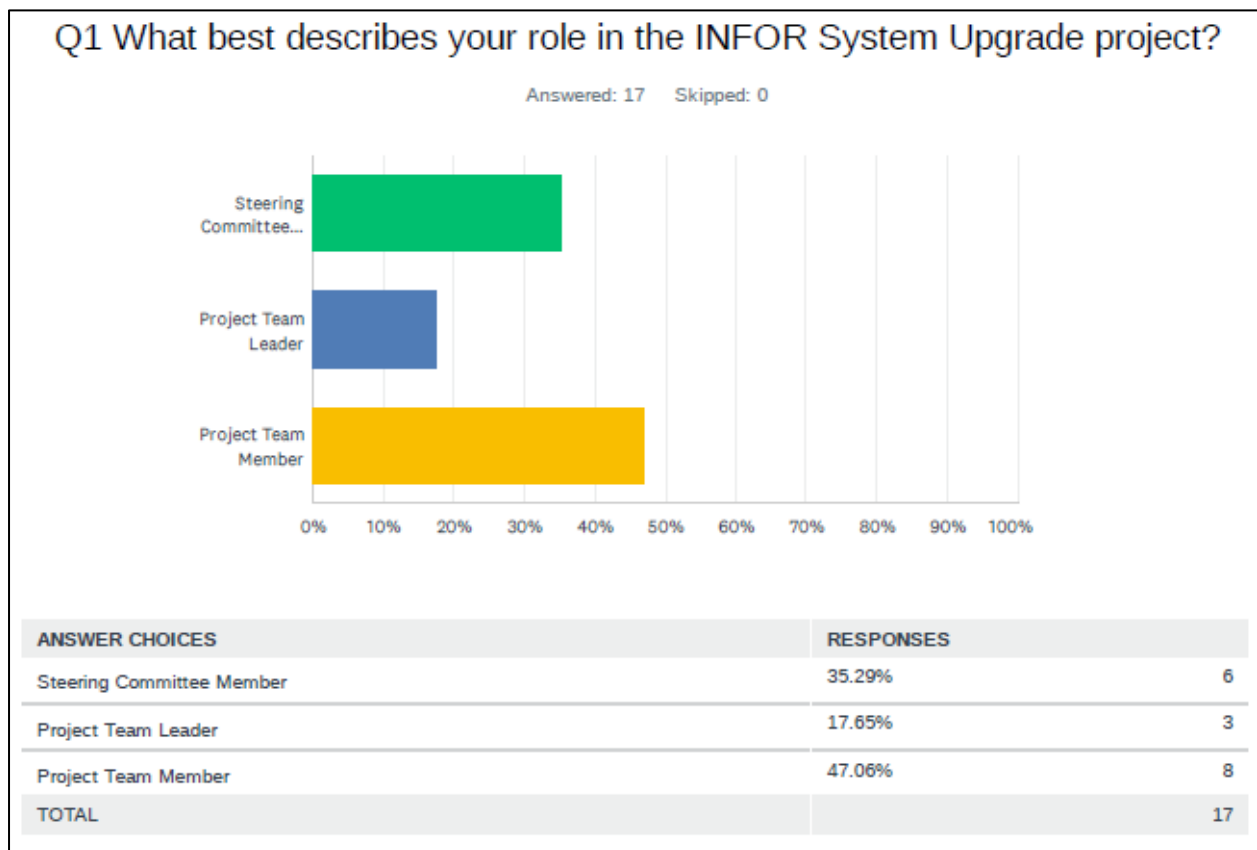
County of Yolo – INFOR Survey Results:

September 27, 2022

Purpose:

The Steering Committee elected to perform an **anonymous survey** on the INFOR project to provide those knowledgeable with the project including the steering committee, project team leaders, and project team members with an opportunity to share their views on the project and obtain in writing the views of staff on the project.

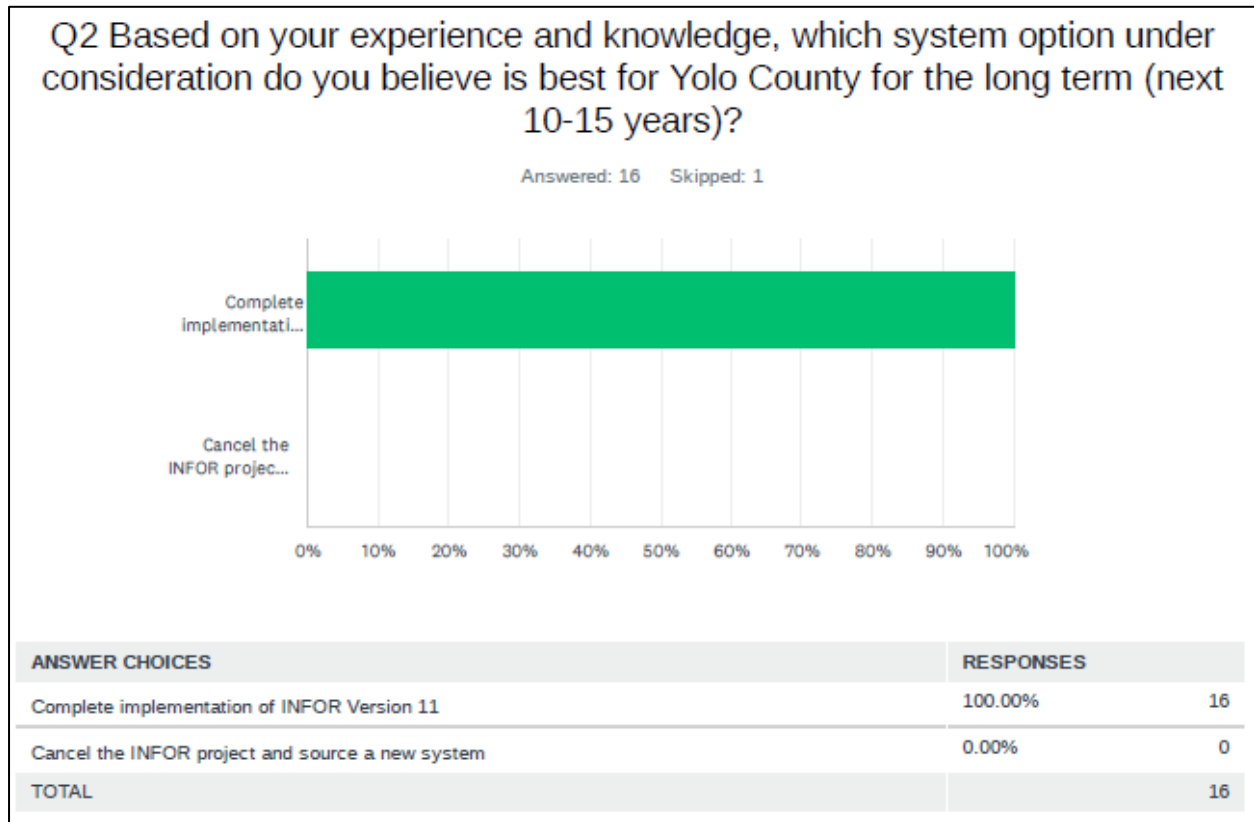
Question # 1



The survey was sent to the 6 members of the Steering Committee representing CAO, Finance, HR, IT, and HHS, 3 project team leads over Finance, Human Resources, and Supply Chain, and 11 members of the Project team who are knowledgeable of the project.

The overall response rate was 85% of the 20 individuals who were requested to participate with 100% Steering Committee participation, 100% Project Team Lead participation and 73% participation from the Project team despite a short turnaround time.

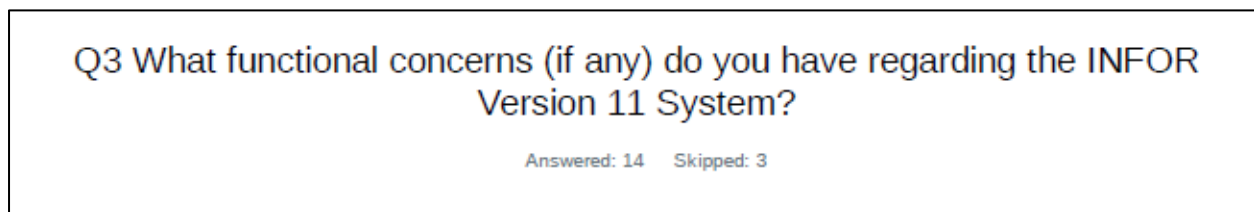
Question # 2



All respondents were asked their preference of whether to complete implementation of the INFOR Version 11 system or to cancel the project and source a new system, based on their experience and knowledge, framed as what was in the best long-term interest of the County (described as the next 10-15 years).

Of those who responded, 16 or 100% of those responding indicated that their preference was to complete the existing project. One individual indicated that in their role as a project team member they were neutral and see both benefits and drawbacks from either approach and that any system would likely present some level of challenge.

Question # 3



The question was asked in open-ended form whether there were concerns about the how the new system functions. A summary of the concerns mentioned are as follows:

- County departments need to be open to organizational process changes
- Sufficient staff must be available to maintain the system

- Need for documented policies and procedures to prevent one-offs or errors requiring correction by central services departments
- Ability to automate however departments must understand how automation works to maintain it
- Not having County accounts payable staff consolidated
- Still completing full test of payroll and want to ensure testing is completed error free
- Fund accounting system still new and staff getting comfortable with features
- System still prefers some functions to be done centrally. Some modifications still needed to align workflows with decentralized county structure
- County may be inflexible in the way we do things, structures and processes may be outdated
- Cash balancing may be more challenging than in our current version
- Disappointed that timekeeping improvements will happen later and cost accounting of payroll is deferred.
- Timecards and time studies are not integrated at this time
- INFOR utilizes some third parties such as tax reporting that adds complexity
- Would like the steering committee more involved on key decisions
- INFOR works in a more standardized environment, worry about the level of customization needed
- Other systems the County owns may need to integrate with INFOR
- Concern about deprioritizing of purchasing other functionality desired in future

Overall, the comments from the 14 staff that responded are less about the system not meeting the County's need but for the County to ensure our business processes and procedures, staffing, and energy is spent on aligning with how the system functions and ensuring its designed well to be appropriately maintained. There was also discussion about concern that time keeping was deferred and whether the Board would be willing to invest in the system as needed in the future.

Q4 What benefits (if any) do you see from the INFOR Version 11 System?

Answered: 17 Skipped: 0

This question was to focus on the benefits the County will derive from moving forward with the project. Benefits of the system are described robustly in a separate document for the Board's consideration. The survey results were used to help to inform that summary.

Q5 What additional information would you like the Board of Supervisors to know about the system project and options?

Answered: 14 Skipped: 3

This question was intended to capture any additional information that staff involved with the project felt it was important to communicate. The themes are described below:

- Infor has conjured negative emotion however have been inspired by the positive feedback, renewed energy and hope that improved conditions are on the horizon
- Board may want to think carefully about the expense of a new system and high cost involved with the new learning curve involved
- Some of County's best talent may become disengaged if project is cancelled
- Benefits outweigh the concerns but need to have extensive conversations with departments and their staff to prepare them for change
- Board may want to view the project as partnership with management and not in adversarial lens
- Team is being thoughtful, open and diligent in making design decisions to solve pain points
- When considering other options, Board should consider if departments can wait for that delayed functionality
- Board should know staff are giving everything we have to the project
- Board may be putting too much emphasis on the past and should detach from sunk costs
- Other products may have significantly higher cost and may not guarantee more benefit
- Board and leadership may want to provide more guidance and collaborative role to ensure the project heads in a successful direction
- Backfill staff provided are insufficient to unburden project team from other work
- Several key decisions that will pay long term benefits have required additional time and effort to implement
- Would like to see more board and department head leadership on the project
- Concerned that doing it right to properly implement, design enhancements, and train people takes time and unclear if that time will be allowed
- Difficult to add additional staff and get them fully up to speed at this stage of the project. Thus core team is shouldering significant burden to achieve the objectives
- INFOR is cost effective for this level of system complexity. Alternative costs for other systems such as disruption, retraining and other costs are being underestimated
- Backfill positions were harmed by difficulties filling these limited term positions.

Conclusion:

This document summarizing the five-question survey is intended to share a broad overview of the views of the individuals who are most knowledgeable with the project to assist the Board with their deliberation.