



Oak Park Elementary School District 97

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TO: Dr. Carol Kelley, Superintendent of Schools
Board of Education

FROM: Rob Grossi, Crystal Financial, Consultant
Michael Arensdorff, Senior Director of Technology

SUBJECT: Financial & Human Resources System Replacement

DATE: April 21, 2020

Report format: Informational report, with Q&A at board table, seeking board approval on May 12, 2020

Preview of purpose and content of report: Included below is an overview of the bid process, bid summary and recommendation for the Financial & Human Resources System Replacement proposal

Budgetary impact: Currently, District 97 is paying \$28,481.56 per year to Weidenhammer for annual maintenance for our current Alio system. The replacement to a new, more robust and effective system will be \$227,777 for the first year (includes licensing, training, migration and all yearly costs), \$50,561 average per year for the next five years. The total 5 year price is for a total of \$430,020. For years 6-10, we anticipate the cost to be \$304,392.

Data to be presented: April 21, 2020, approval on May 12, 2020

Oak Park District 97 has been using a financial and human resources system that has/is creating inefficiencies and struggles to complete tasks that have led to direct and indirect costs that will be addressed with a new system in place. This is something that has also been identified in the annual financial audit over the last 2+ years. Due to this and the district getting some key staff in place to embark on the planning and execution of a new system this recommendation is now coming to the board.

On November 18, Michael Arensdorff kicked off the project with key district leaders to identify key goals, to complete a SWOT (strengths, weaknesses, opportunities, threats) analysis, identify timeline and key next steps. The staff in attendance and part of the project core leadership team were: Rob Grossi, Patrick King, Gina Herrmann, and Jeanne Keane. Mark Sheahan and Felicia Starks-Turner are part of

this team, but were not able to make this meeting. They both later connected with Michael to get an update and provide feedback. The goals for the project that were identified were the following:

1. Effective and efficient systems (reporting, budgeting, day-to-day operations)
2. Transform business operations (Transform the way we operate)
3. Develop consistency in business department
4. Data Analytics - Equity of resources
5. System Alignment/Integration

Following this meeting, the team began drafting a request for a proposal to be reviewed and released on December 4, 2019 and proposals to be opened on December 18, 2019. The RFP was submitted in the paper and sent out to five vendors. From December 18 through the winter break the team communicated via email to stay on track with key targets. Then the core leadership team met on January 9 to review the proposals received, which were from Infinite Visions and Skyward. At this meeting the core team also discussed new project timelines, checked to make sure all current timelines were met, determined an extended team to participate in demonstrations with both vendors from the district office and school buildings and continued to map out the key timeline target dates for the specific project. Next, Michael setup demonstrations with both vendors on January 22 with Skyward and February 5 with Infinite Visions. These demonstrations were attended either one or both by the following staff members: core leadership team, Siania Obidi, Tulicia Edwards, Mable Lampley, LaToya Champ, Sandy Merges, Tasha Guerino, Echelon Jackson, Michelle Lottie, Anna Harlan, Tanesha Watkins, and Sue Vercnocke. Both demonstrations were between 3-4 hours and both of the vendors walked through the features and functions of their systems and how to complete the specific workflows. This allowed the District 97 team to witness and ask questions about the process and evaluate the two with our current system. Following both sessions, Michael sent out a survey to the District 97 participants to gather feedback on each tool and any followup questions. During and after both demonstrations we received great feedback from the staff at the district office and school buildings about how much better both systems would be for their workflow, creating a more efficient and effective use of their time and empowering the organization to do more with the system to create even better systems and processes in the district. Also, Michael provided an update on January 28, to the Cabinet regarding the process and current status. On January 31, Rob Grossi and Michael presented to the FORC committee an update as well of the current status, fielded questions and the upcoming next steps.

Following the demonstrations the core leadership team continued to work through the key next steps via email and consistent touch bases. On February 24 Michael met with Rob Grossi to discuss any further questions for the vendors. On February 25, Michael, Patrick King and Mark Sheahan reviewed the proposals again to dive deeper in and determine if there were any other questions for the vendors. Michael met separately with other core leadership members to get feedback. On February 26, Michael shared through questions and updates with Skyward. February 27, Michael and Rob Grossi spoke with Infinite Visions to ask follow up questions, share an update on timeline and request the updated proposal following the questions we

had for them. Skyward and Infinite Visions provided updated proposals prior Friday, March 6. At this time Patrick King also setup site visits to Downers Grove SD 58 (Infinite Visions) on March 5 and Naperville SD203 (Skyward) on March 13, to meet with their business and HR departments to talk further about their implementation of the solution and ask specific questions about the solutions themselves. Patrick had to reschedule the March 13 visit to Naperville due to schools starting to close for COVID-19. Patrick was able to do a call with Naperville SD203 on April 3, 2020. Following the site visit/call and updated proposals the core leadership team met on Wednesday April 1, to finalize the recommendation for the new solution and the additional action steps. When we looked at all of the features and tools side by side, they were very similar and both would provide an enhanced solution for our district and end users to meet the goals identified by the team, however as you can see below we are recommending to move forward with Infinite Visions. We believe their model of rolling out incremental upgrades, positive support and training we heard during our reference checks, and competitive pricing makes this the best solution for District 97 moving forward.

Recommendation:

Based on feedback from staff, site visits, interviews and discussions with school districts utilizing both Skyward and Infinite Visions, as each system services in excess of 100 Illinois school districts, it is recommended that the Board of Education approve Infinite Visions as the software to replace the current Alio system. It is also recommended that the conversion date be pushed back to July 1, 2021, rather than January 1, 2021 partly due to the disruption in services caused by the impact of COVID-19 and partly due to the desire to systematically improve multiple systems throughout the district that can and will be impacted by the new software. Finally, it is recommended that this purchase be considered a critical expenditure as it will greatly enhance efficiencies, accountability, compliance and best practices throughout the operations of the District.

[Here is a link](#) to the completed capex form for this project.

[Here is a link](#) to the completed equity analysis tool.

[Here is a link](#) to the contract with Infinite Visions for the next five years.

[Here is a link](#) to a sample implementation plan that we will work with Infinite Visions to personalize for D97 upon approval.