



NEXTGEN

BRINGING GEORGIA
TO THE FOREFRONT
OF TECHNOLOGY

SPEAKERS

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AGENDA

PART 1

- I. About SAO + DOAS + USG
- II. NextGen Introduction
- III. NextGen Timeline
- IV. NextGen Engagement
- V. What's next? Process Mapping

PART 2

- I. Procurement Timeline
- II. Expectations
- III. Next Steps



PART 1

SAO

The State Accounting Office (SAO) was established in 2004 to provide enterprise business solutions. SAO is responsible for the following:

- Establishing statewide accounting and reporting standards and practices.
- Operating and improving statewide financial and human capital management systems.
- Preparing the state's Annual Comprehensive Financial Report; the annual audited financial statement for the entire state.
- Training state accounting and payroll personnel in new policies, procedures and standards.
- Improving accountability, efficiencies and internal controls.

DOAS

The Department of Administrative Services (DOAS) is responsible for generating enterprise efficiencies and maximizing opportunities to improve enterprise administrative performance in five program areas:

- Human Resource Administration provides enterprise expertise in personnel policy and practices to help agencies attract, develop and retain a high performing workforce.
- State Purchasing negotiates statewide competitive contracts to reduce cost, offers technical assistance in conducting and assessing competitive bids, and provides efficient purchasing systems, standards, specifications, training on best practices, and compliance reviews.
- Risk Management directs the State's internal workers' compensation, liability, property, and unemployment insurance programs.
- Fleet Management provides guidance on vehicle purchases, assignment, usage, maintenance, operation, and disposal.
- Surplus Property is responsible for the identification and disposition of state and federal surplus property to state and local governments, eligible non-profits, and the public.

USG

The University System of Georgia (USG) was created in 1931, unifying public higher education in Georgia.

- USG is composed of 26 higher education institutions including four research universities, four comprehensive universities, nine state universities and nine state colleges.
- USG institutions enrolled more than 340,000 students in Fall 2021.
- USG currently uses the PeopleSoft HCM and Financials systems for most of its 26 colleges and universities.
- USG faces similar challenges for Human Capital Management and Financial systems as State agencies and entities.
- USG is participating in the NextGen project to determine if potential solutions could also meet the needs of the USG and the Unified Enterprise Resource Planning (ERP) strategic plan goal.
- USG Unified ERP project has additional scope to include Student Information Systems.

WHAT IS NEXTGEN?

- New, cloud-based software solution to replace the PeopleSoft TeamWorks system that was installed in Georgia 20 years ago
- Will be tailored to work for our new remote workforces
- Offers streamlined, paperless processes and procedures

WHAT IS NEXTGEN?

- Offers more modern functionalities like online vendor bill pay
- Data monitoring that offers real-time analytics
- Statewide learning management system
- Streamlined contract management

WHY DO WE NEED NEXTGEN?

- Ease of workflow
- Ease of processing
- Standardized procedures
- Evolution of business requirements
- Cost of system maintenance
- Retaining skilled workers
- More business solutions

TIMELINE

PHASE 0 | Competitive Evaluation

- Evaluating available vendors and services
- ID subject matter experts to participate in analysis

PHASE 1 | Supplier Selection

- Determine build requirements
- Continue process mapping

PHASE 2 | Implementation

- Design, development, configuration, testing, training
- Create future statewide support organization

PHASE 3 | Optimization

- Refine processes
- Realign staff to better support platform

WHAT DO WE NEED FROM YOU?

- **Be part of the transformation!**
- **Help us bring Georgia to the forefront of technology**
 - **NextGen will better support our employees**
 - **It will make it easier to do business**
 - **It will better equip us to serve the people of Georgia**

WHAT DO WE NEED FROM SUBJECT MATTER EXPERTS?

- **Participation in deep dive demonstrations and will share their agency's priorities**
- **Participation in test labs and feedback to help in the supplier selection process**

WHAT'S NEXT? PROCESS MAPPING

SCOPE

- Step 1: Project Planning
- Step 2: Current State Analysis
- Step 3: Best Practices Analysis
- Step 4: Future State Definition

FOCUS AREAS

- Human Capital Management (HCM)
- Payroll and Related Supporting Functions
- Finance and Accounting
- Procurement
- System Support and Maintenance

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PART 2

PROCUREMENT TIMELINE

TO DATE

- **Sept. 2021:** Request for information (RFI) released
- **Oct. 2021:** Received supplier responses to RFI
- **Oct. – Nov. 2021:** Committee reviewed responses
- **Nov. – Dec. 2021:** High-level demonstrations
- **Jan. – Feb. 2022:** Entities provided participants for deep dive demonstrations
- **Feb. 2022 – Present:** Deep Dive Demonstration planning

NEXT STEPS

Deep dive demonstrations scheduled for

- *April 27 – May 6: System 1 Demo
- *May 16 – May 25: System 2 Demo

Evaluator validation

- Test Drive of Software TBD (July –August)

*Actual dates/times will be adjusted to reflect your assignment to specific module evaluations

DEEP DIVE DEMONSTRATIONS

Suppliers will provide a demonstration of software capabilities in the following functional groups:

- Core Human Resources - performance management, talent management, and learning management
- Payroll, Labor Distribution, Time and Attendance
- Financial Management including General Ledger, Accounts Payable, Accounts Receivable, Grants, Projects, Budgeting, etc
- Procurement including eProcurement, vendor management, contracts, strategic sourcing, P-card & hosted catalog.
- Data/Technology

SUBJECT MATTER EXPERTS

- Your input as a subject matter expert (SME) is critical to the success of the selection process as it brings the voice and experience of the users to the table. We have invited suppliers to provide demonstrations of their proposed solutions. SMEs will have the opportunity to participate in system demonstrations and provide feedback. All activities will be completed remotely.
- Members have provided guidance on whether they wish to participate as an **Evaluator** or an **Advisor**.

SME EVALUATORS

- Evaluators will serve as **voting committee members**. Evaluators will be required to participate in supplier demonstrations for the specific module (HR / Finance / Procurement etc.) they are assigned.
- Evaluators must provide feedback on the supplier demonstration by providing scores and written comments. Evaluators will be provided a scoring tool and questions to assist in the review process. Following the demonstrations and completion of the scoring, Evaluators must meet to validate and discuss scoring.
- Evaluators must have knowledge of the module they are scoring, be willing to commit time to the validation and scoring process and be present for all scheduled activities.
- Training will be provided and all activities will be completed remotely.

SME ADVISORS

- Advisors will serve as **nonvoting committee members**. Advisors will be required to participate in supplier demonstrations for the specific modules they are assigned.
- Following the demonstrations, advisors will be asked to provide feedback via survey. The information provided by advisors will be shared with the Evaluators for consideration during the validation of each module.
- Advisors must have knowledge of the module they are evaluating, be willing to commit time to participate in the demonstrations and provide feedback via survey.
- All activities will be completed remotely.

SME EVALUATION PARTICIPANT FORM

As a participant in the review process, you are required to complete the NextGen Project Subject Matter Expert (SME) Evaluation Participant Form, through which you will confirm your understanding of the requirements for confidentiality and avoidance of conflicts of interest. Please click on the following link to access and complete the form by

April 7 / End of Day TODAY: <https://www.surveymonkey.com/r/NextGenEvalForm>

REVIEW COMMITTEE

- Provide neutral, professional, and intelligent assistance in the review of responses/demonstrations
- May or may not be a voting member of the committee or contribute to the committee by scoring supplier responses
- Recommendations to the State play a vital role in Georgia's procurement process, which endeavors to provide an equitable and competitive process for supplying state government needs and utilizing state resources

MEMBER PARTICIPATION

- Members are expected to complete an individual review/assessment of each supplier demonstration.
- Members agree to actively participate in the review process in a professional manner and follow guidance provided by the issuing officer.
- Members must possess professional confidence in his/her contribution to the committee recommendation with the understanding that the recommendation could lead to the selection of the recommended supplier.

CONFLICTS OF INTEREST

- Member must avoid any appearance of impropriety and must immediately disclose to the Issuing Officer any material transaction or relationship (of the member, the member's spouse or the member's immediate family) that reasonably could be expected to give rise to a conflict of interest,
 - present or prospective employment,
 - involvement in litigation or other dispute, and/or
 - personal or financial interest such as stock ownership.

CONFIDENTIAL OR PROPRIETARY INFORMATION

- Throughout the review process, the member agrees to maintain the confidentiality of the review process. **No member shall transmit, communicate, or otherwise convey preliminary conclusions or results concerning the supplier responses or the likely outcome of the review process. The member agrees that ALL internal workings of the review committee will be kept confidential as directed by the issuing officer.**
- Member agrees to hold the Protected Information in strictest confidence; not disclose Protected Information to any third party without the written consent of the State's representatives authorized to grant such consent (except as required by law); take all reasonable steps to safeguard Protected Information; and not use Protected Information for any purpose other than for purposes of completing the member's duties as a review committee member.

RESTRICT CONTACT WITH SUPPLIERS

- **Member understands that committee members are strictly prohibited from participating in any contact with suppliers participating in the RFI until the RFI process is concluded or as otherwise directed by the Issuing Officer.**
- The only permissible contact is if a member's job requires contact with a supplier that has submitted a response to the RFI in order to administer a supplier's existing contract, the member may work with the supplier as required by the job duties and the contract; however, the member is strictly prohibited from discussing the RFI responses under review.
- Otherwise, any contact with suppliers will be conducted through the Issuing Officer. Any questions from suppliers or anyone else must be referred to the Issuing Officer. If a supplier will have contact with the member's spouse or immediate family members during the RFI process, this must be immediately disclosed by the member to the Issuing Officer for appropriate action in accordance with the "Conflicts of Interest" provision of this form.
- Any member who is contacted for any reason by a supplier potentially interested in the RFI (including but not limited to potential future employment or other personal or financial interest in the supplier) shall promptly report the information to the member's supervisor and the Issuing Officer. The state entity and/or DOAS may consider removing the member from any further participation in the RFI review process.

DISCLOSURE OF WORKING DOCUMENTS

- In the course of actively participating in the review process, member acknowledges that he/she may develop working documents, which capture the member's thoughts, questions, discussions, scoring, and/or any review of the supplier responses.
- Examples of working documents include handwritten or electronic notes created by the member during the review process.
- ALL working documents are state entity records and state property and must be submitted to the Issuing Officer at the end of the review process.
- As state entity records, the working documents are subject to public inspection based on Georgia law.
- Further, all materials provided to the member must be returned to the Issuing Officer.

SUPPLIERS RESPONDING TO RFI

- Send an email to doas.nextgen@doas.ga.gov to request the list of responding suppliers.

NEXT STEPS

- Complete SME Evaluation Participant Form online survey by **April 7 / End of Day TODAY**
- Attend upcoming training for evaluators/advisors (multiple opportunities to attend)
- Scripts/Scoring Sheets provided by Module
- Schedule actual dates/times for specific module evaluations including providing virtual meeting links
 - HR/Performance Management/Talent Management/Learning Management
 - Payroll/Absence Management/Labor Distribution
 - Financial Management
 - Procurement
 - Technology/Data Management

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Email questions to doas.nextgen@doas.ga.gov

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