



LB COAST Project Update

Phase 2 Overview, Position Control Highlight, and Future Vacancy Analysis Plans

Budget Oversight Committee - July 29, 2020

Discussion Topics

- LB COAST Phase 2 Overview
- Position Control Highlight
- Future Vacancy Analysis Plans

A wide-angle photograph of a beach and ocean, tinted in shades of blue. The ocean is on the left, with gentle waves washing onto a sandy beach on the right. In the distance, a city skyline is visible across the water, including a prominent tall building. The sky is filled with soft, white clouds.

LB COAST Phase 2 Overview

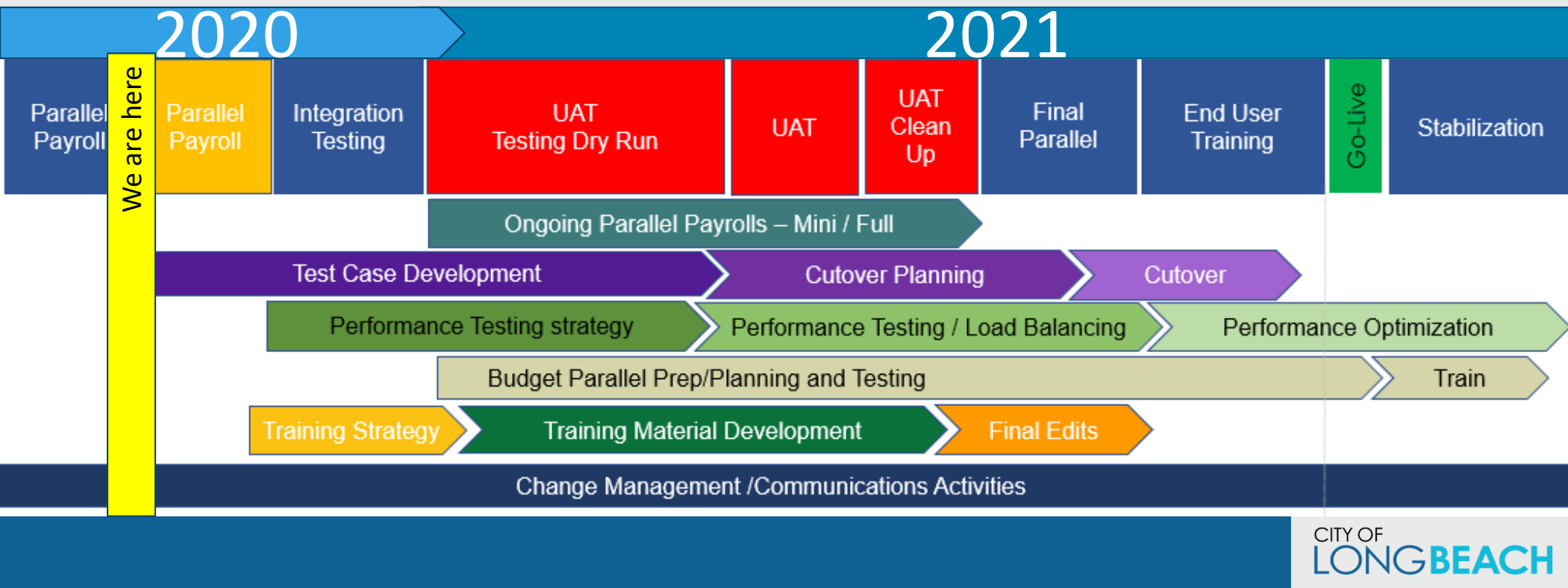
LBCOAST Project Status

- **LBCOAST**
 - Phase 1 Financials –April 2019
 - Stabilization
 - Phase 2 HR/Payroll and Budget
- **Project Refresh**
 - New Project Manager - Audra Balok
 - Change Management
- **Project focus**
 - Software Testing and Validation
 - Business Process Integration
 - End User Training
 - Go Live Preparation

Phase 2 Timeline

- **Project Timeline**

- Go Live Date
- Extended Q3/Q4 2021



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Position Control Highlight

What is Position Control?

- Position Control refers to the tracking of positions in the City and the status of people in them for budgeting, management, and control purpose, during hiring and ongoing personnel management.
- Examples of Position-Control related activities include: personnel actions such as hiring, transfers, etc; updating budgeted positions with current salary/benefit data; updating personnel records after budget adoption for position-related changes; realigning positions to match organizational changes; and vacancy analyses.

Position Control of Today

- There are two old position-related systems that don't talk to each other and must be manually reconciled on an annual basis to keep them generally aligned with each other.

Item	Old Budget System	Old Personnel System
Primary Purpose	Budgeted Positions	Employee Data
Position Data	Individual Positions	Job Class “Buckets”
Employee Data	Annual Snapshot	Live Data

- Getting usable information for budgeting and position management is manual and labor intensive

New Munis Position Control

- One Unified System
 - Single position structure with discreet position records (no more “buckets”)
 - At the start of budget development, updated salary and benefit information is automatically pulled into the budget side
 - After budget adoption, position changes are automatically pushed into the live personnel side
 - Positions are set up as lasting records with better history
- Benefits
 - Less reconciliation
 - Easier and more accurate tracking of vacancies
 - Ability to migrate positions when organizational changes occur
 - Increased transparency as to how a position has historically changed

Status and Path to Completion

- Position Control design and configuration is underway
 - Learning and adjusting as we better understand how to use new system to meet needs
 - Position Control will go live with the rest of Phase II
- Conversion to a single system is a major undertaking
 - Reimagining how we budget and control positions on a technical level under many possible scenarios
 - Aligning needs of multiple departments in a coordinated design
 - Aligning and converting data from the old system to a new, more complex and sophisticated system
- Reporting
 - Data will be in Munis and viewable on a position-by-position basis
 - Custom Simpler reports will be developed to draw out data in meaningful format. A significant amount of this will be developed after go-live.

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Future Vacancy Analysis Plans

Overview of Vacancy Analysis in FY 20

- Last Vacancy Analysis – snapshot as of 2/28
 - Data presented at the 5/27 BOC meeting
 - Asked departments to fill out data while completing Position Control set up
 - Also requested additional information that would help categorize type of vacancy
 - Data showed 788 vacancies out of 5,649 positions (14%)
 - When backing out vacancies due to normal turnover and hiring, data showed 61 vacancies out of 5,649 (1%)
- Positions evaluated by Departments as part of Proposed Budget Process
 - As part of the Proposed FY 21 Budget development process, departments reviewed vacancies for any recommended clean ups or budget savings

Future Vacancy Analysis Plans

- COVID-19 pandemic has significantly changed fiscal landscape and approach towards vacancies in current year
 - Mid-year budgetary actions, including hiring freeze and mid-year savings targets
 - Anticipate more vacancies in FY 20 to generate savings
- Conduct another manual vacancy analysis effort in FY 21
 - As Phase II is still in progress, Budget Office will conduct another citywide vacancy analysis with departments in first half of FY 21.
 - Most effective use of manual analysis as it will be based on new and revised FY 21 budget to compare against