



Monterey County, California

CASE STUDY

Government

Improves efficiency and control

"I am proud to report that our ERP project will come to a close on budget and on time. In fact, with a little budget left over. With this, we plan to explore other opportunities for efficiency we discovered with CGI during this successful project. This was the right project for the County, with the right vendor, CGI to support and guide us." – Ed Munoz, ERP Project Manager

ORGANIZATION

- 4,500 employees
- \$1 Billion annual budget

WHY CGI

- Ongoing relationship, trust
- Built-for-government functionality
- Philosophy of enterprise system
- Focused on client need
- Trust and open communication
- Exchange of ideas that benefit the County and client community

THE RESULTS

- Reduced total cost of ownership
- Accelerated approvals and payments
- Eliminated some feeder systems
- Improved agency collaboration
- Improved access to information

2009 BEST FIT INTEGRATOR

In 2009, CGI and CGI Advantage received a Best Fit Integrator Award from the Center for Digital Government, compliments of Monterey County, CA.

The Challenge

A CGI Advantage Financial Management client since 1985, including budgeting and procurement, Monterey County, CA was looking to modernize. The aging technology required a large amount of manual effort and paper processing. This coupled with their manual human resources process, a stand-alone payroll system and no integration with financial management, required a high level of redundant data entry and data inconsistency. The County recognized they were not moving in the right direction.

Following an independent assessment by the Government Finance Officers Association, the County realized they needed to define a new organizational structure, establish a new Chart of Accounts, and establish a fully integrated Human Resources/Payroll system.

The direction from the County's Executive Steering Committee was for a vendor that would provide the best practices available for state and local government ERP. After looking at the marketplace of available state and local ERP solutions, and some not very heart-warming white papers on the shockingly low rate of ERP project success in the public sector, the County turned to its long-time trusted partner, CGI.

"CGI's dedication to the state and local government market is unparalleled and so is the government experience they bring to every engagement," said Ed Munoz, ERP Project Manager, "With 190+ (CGI Advantage) government clients they have an unmatched knowledge of who is doing what and what is working well. We knew we could trust CGI to bring us the best practices we required."

In 2007, the County selected the web-based, built-for-government CGI Advantage ERP solution to upgrade their Financial Management system, including Procurement, as well as Human Resources Management, Performance Budgeting and Fixed Assets to replace their legacy processes.

The Strategy

The project kicked-off in August 2007 to implement CGI Advantage Financial Management, Procurement and Performance Budgeting, beginning with a preliminary implementation assessment to set the course.

“This highly collaborative process,” continued Mr. Munoz, “Is a hallmark of CGI’s implementation methodology and a very valuable experience for the County.”

This critical step in the implementation process brought together department financial managers, walking them through the web-based ERP application. Based on experience with the software and numerous governments across the country, CGI highlighted options for change to accommodate the County’s requirements. For example, health, sheriffs, and social services departments rely heavily on programs and off-site funding – something those department heads would be paying very close attention to throughout the project. Once complete, the assessment served as the foundation for the official contract and project plan.

“By the time we kicked off the project,” said Mr. Munoz, “We had the technology in place, departmental understanding of business process changes and full commitment from the County Steering Committee and Board of Supervisors.”

The Results

The County went live with Debt Management in September 2008, followed by Performance Budgeting in December 2008, to accommodate their 2009/2010 budget. This meant County departments got first hand experience with the new Chart of Accounts and organizational structure. This was followed by a go-live with Training Management in March 2009, Investments in April 2009 and Financial Management in July 2009. Today 27 departments, including the County Hospital, use the centralized system, realizing the following benefits:

- Paper no longer floats around the organization; it flows concisely, electronically
- Departments have real time access to accurate information
- Departments have better control, entering purchase orders, requesting payments, posting journal vouchers, monitoring workflow and approvals.
- Staff is refocused on more critical tasks such as analysis.
- With p-cards small purchase orders process immediately, allowing us to focus on volume discounts because we are paying vendors faster.
- Departments now budget to a much lower level, capturing more information faster for greater visibility and accountability to their citizens.
- The County was very impressed with the out-of-the-box integration between HR and Financial Management, which has reduced redundant data entry and improved data consistency.

For more information, please contact:

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“CGI experts speak the business of government,” said Ed Munoz, “Every consultant understands how governments operate and how (CGI Advantage) ERP can best support their unique requirements. This went a long way to controlling the scope and budget of the County’s project.”

Continuous Improvement

The next phase of the project, currently in progress is replacing the County’s manual HR/Payroll process with CGI Advantage Human Resources Management and Payroll solution, scheduled to go-live in January 2010.