



# Enterprise Resource Planning (ERP) 101

Executive Committee | Item 5

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## Purpose

### Understand SANDAG's software platforms by overviewing:

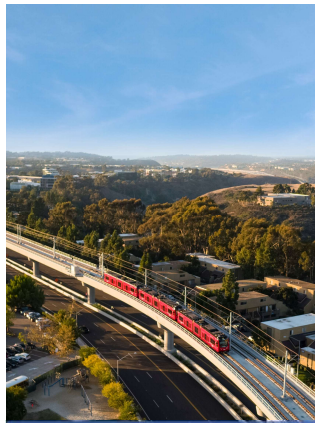
- The background, context, and purpose for use of current systems
- SANDAG's ERP Implementation
- Systems that supplement the ERP
- Connection to corrective action plans
- Connection to daily operations

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# What We Do



**PLAN**



**BUILD**



**PRESERVE**



**PROVIDE**

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# Organizational Maturity Model

**Previously**  
Audits and assessments had findings and observations indicative of Stage 1 information systems processes

**STAGE 1: Heroes**

- Informal and manual processes
- Ad hoc
- Data in silos
- Data difficult to access
- Reliance on institutional knowledge

**STAGE 2: Defined**

- Systems exist but are fragmented
- Data quality begins to improve
- Processes documented and repeatable
- Processes partially standardized
- Roles and responsibilities aligned

**STAGE 3: Managed**

- Processes standardized across departments
- Core systems integrated
- Data more reliable, timely, consistent
- Able to analyze performance in act of proactivity

**STAGE 4: Quantitatively Managed**

- All processes have KPIs
- Systems support automation
- Systems support cross-functional operations
- Data-driven decisions
- Clear accountability

**STAGE 5: World Class**

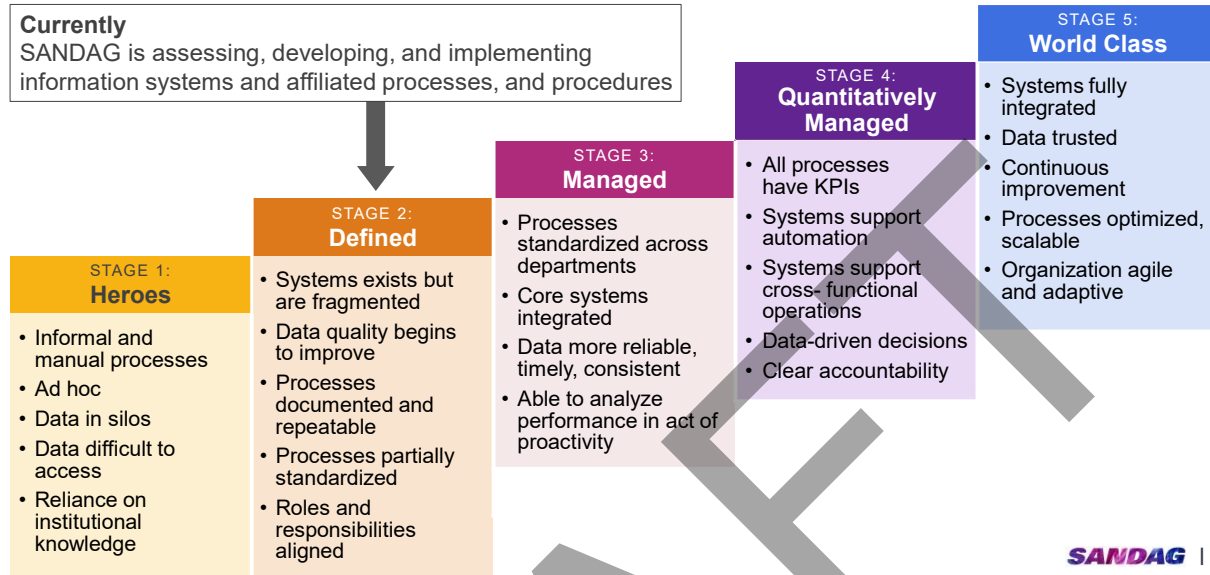
- Systems fully integrated
- Data trusted
- Continuous improvement
- Processes optimized, scalable
- Organization agile and adaptive

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# Organizational Maturity Model

## Currently

SANDAG is assessing, developing, and implementing information systems and affiliated processes, and procedures

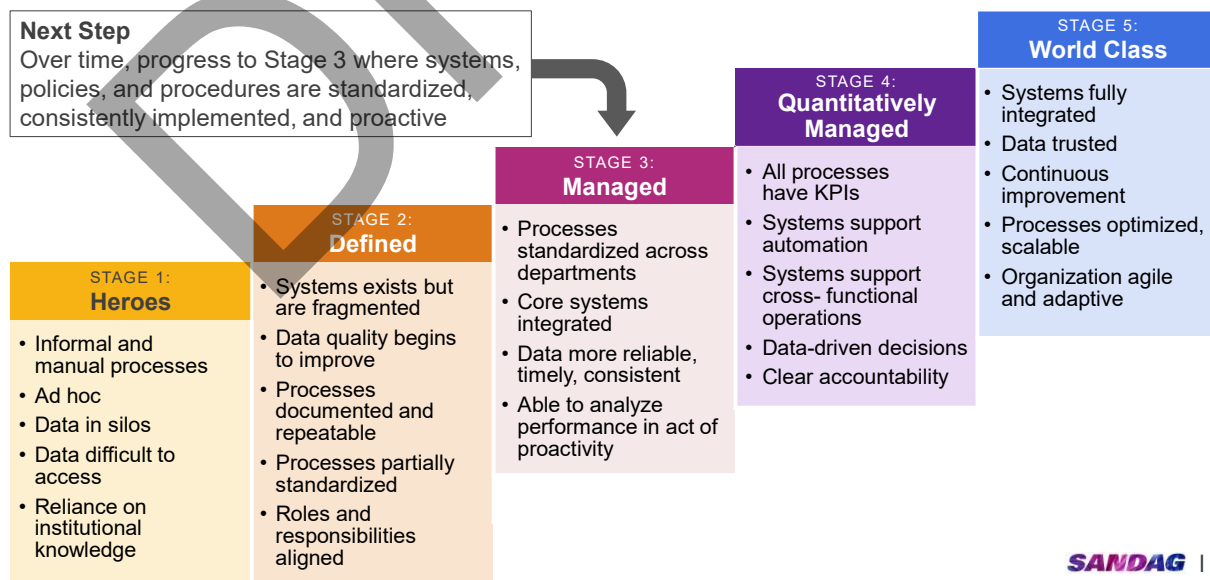


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# Organizational Maturity Model

## Next Step

Over time, progress to Stage 3 where systems, policies, and procedures are standardized, consistently implemented, and proactive



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# Enterprise Resource Planning (ERP) System

## The ERP is:

- A single software system that connects administrative functions like Finance, Human Resources, Payroll, and reporting.
- The system is an out of the box product designed to support a variety of government organizations with limited configurations.

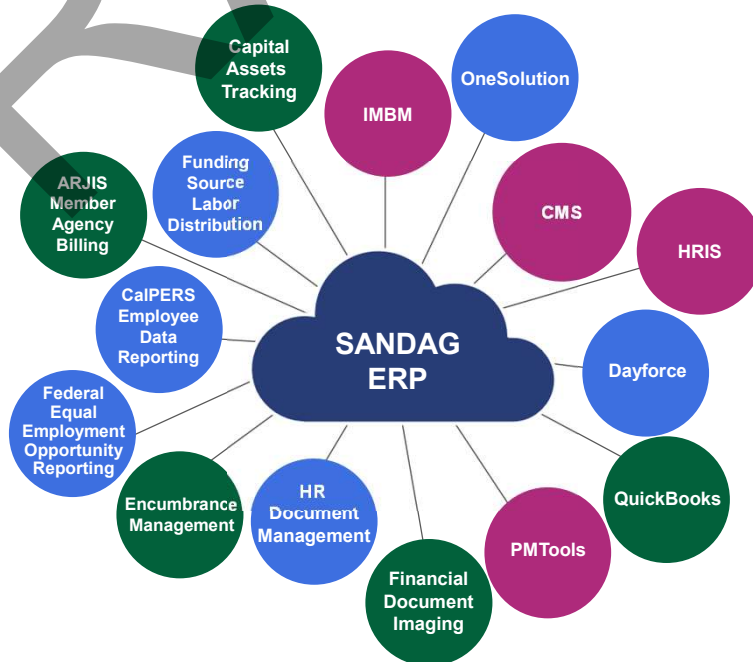


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## ERP

Consolidated from 15 systems to 5

- Financial**  
Completed
- Human Resources**  
Completed
- Ongoing Systems**



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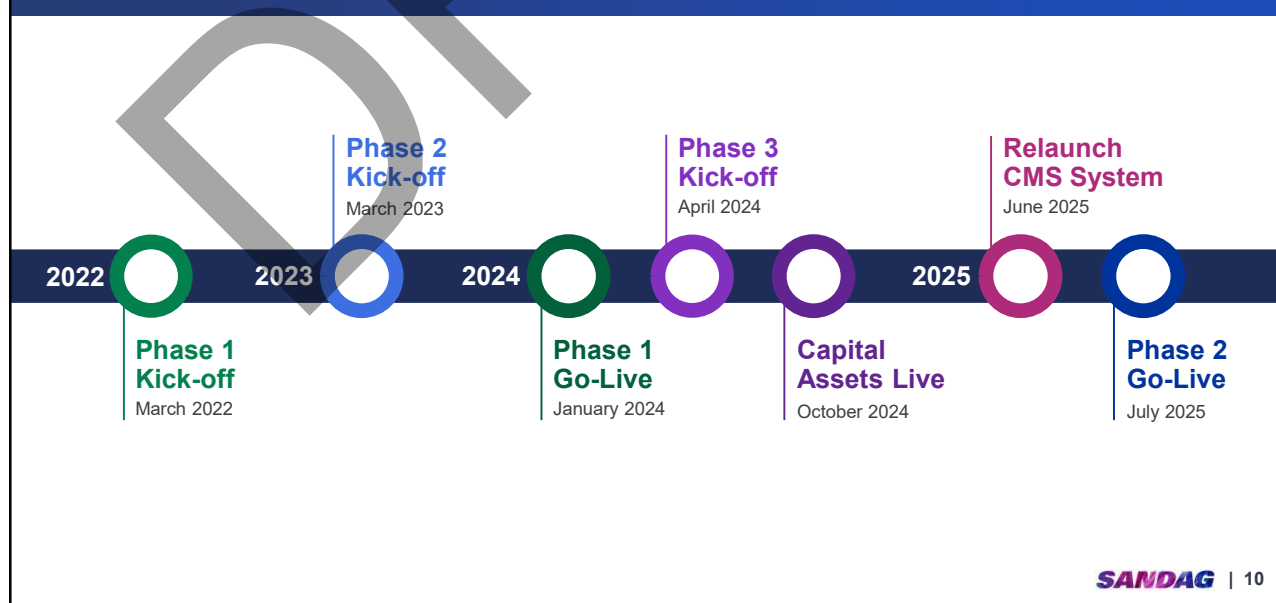
# ERP Implementation

Functionality by phase



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# ERP Implementation Timeline



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## Integrated Ecosystem

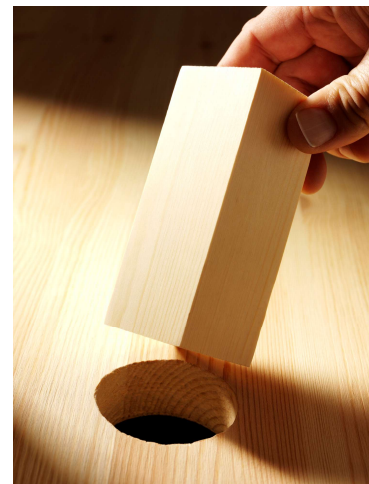
- **Employee recruitment**
  - NeoGov recruiting system in place
- **Employee training**
  - Learning Management System currently being implemented
- **Budgeting for labor costs**
  - Using in-house legacy systems and exploring alternative solutions
- **Planning and contracting for goods and services**
  - CMS system in place
- **Inventory management**
  - Freshworks system in place for Admin, IT, and Public Affairs
- **Planning and managing resources for capital projects**
  - Identifying system requirements for future procurement
- **Toll customer accounts, and trip transaction processing, and variable tolling**
  - Back Office System (BOS)
  - Roadside System
- **Grants management**
  - Identifying system requirements for future procurement

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## Areas of Opportunity

- ERP user interface is not intuitive
- Assess whether we change how we do our work
- ERP training into formalized training plan
- Embedded ERP Subject Matter Experts (SMEs) by department
- Future integrations and system improvements
- Evaluate ERP usage and remaining gaps in business need



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## Ongoing Evaluation and Integration

### Continue to:

- Address audit recommendations
- Assess systems capabilities
- Document and implement internal controls



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