



# Work Session Summary Minutes

OREGON

## Enterprise Resource Planning (ERP) Discussion

March 25, 2025. 3:00 PM

Courthouse Square, 555 Court St. NE, Salem  
5th Floor, Suite 5232, Commissioners Board Room

### ATTENDANCE:

**Commissioners:** Colm Willis, and Kevin Cameron.

**Board's Office:** Jan Fritz, Chris Eppley, and Chad Ball.

**Legal Counsel:** Scott Norris, Steve Elzinga,

**Plante Moran:** Natalie Schwarz, Annie Gallagher, Chris Achkar

**Finance:** Jeff White, Toby Giddings

**Information Technology:** Gary Christofferson, Barret Crowe,

**Human Resources:** Allycia Weathers, Salvador Llerenas

**Business Services:** Tamra Goettsch,

Commissioner Colm Willis called the meeting to order at 3:00 p.m.

### Summary

The meeting discussed the selection of Oracle Fusion Cloud as the ERP system and Sierra-Cedar as the implementation partner. The project, initiated in November 2023, involved weekly meetings and a comprehensive RFP process. The selected system will replace the outdated Oracle system, offering improved functionality, reduced manual processes, and better data management. The implementation will cost \$6.6 million initially, with an annual subscription of \$500,000. Sierra-Cedar's commitment to 56,000 hours of staffing was highlighted as a key factor. The goal is to start implementation by June 2025.

### Plante Moran Presentation

- Project Initiation:
  - Began in November 2023 with contract signed with Plante Moran.
- Governance Structure:
  - Established project steering committee.
  - Weekly meetings with representatives from all major departments.
  - Included project management team, functional process owners, and technical experts.
- Project Objectives:
  - Implement a modern, cloud-based ERP system.
  - Improve functionality and reporting.
  - Eliminate redundant manual processes.
  - Streamline data management and accessibility.

- Evaluation Process:
  - Captured approximately 1,300 requirements:
    - Across HR, finance, payroll, and technical areas.
  - Conducted comprehensive needs assessment and gap analysis.
  - Developed detailed Request for Proposal (RFP).
  - Received 17 initial proposals.
  - Shortlisted to 5 vendors through multiple evaluation rounds.
- Demonstration Phase:
  - Conducted 9 total days of vendor demonstrations.
  - Involved approximately 20 in-person and 40 virtual participants.
  - Evaluated software capabilities, implementation approaches, and vendor fit.
- Key Evaluation Criteria:
  - Software requirements and capabilities.
  - Implementation approach.
  - Technical requirements.
  - Cloud readiness.
  - Cost considerations.
  - Vendor background and references.
- Final Recommendation:
  - Oracle Fusion Cloud selected as the software solution.
  - Sierra Cedar recommended as implementation partner.
  - Estimated 18-month implementation timeline.
  - Total implementation cost \$6.6 million.
  - Annual subscription cost of \$500,000.

## Questions

- Discussed implementation costs:
  - \$6.6 million one-time implementation.
  - \$500,000 annual subscription
- Explored potential additional modules not included in initial pricing:
  - Inventory management, learning management, pensions.
- Addressed staffing needs for implementation, including backfill strategies.
- Examined change management processes and workflow improvements.
- Confirmed fixed pricing for first five years with potential 4% annual increase after.

## Other

- Current system is outdated and lacks modern functionality.
- New system will provide better reporting and streamlined processes.
- Employees showed excitement about potential system improvements.
- Payroll and HR processes will be significantly modernized.
- Mobile and self-service capabilities will be introduced.

## Next Steps

- Notify vendors of recommendation.
- Begin contract negotiations.
- Submit final vendor contract to Board of Commissioners.
- Tentative implementation start in July 2025.
- Develop detailed implementation and change management plan.
- Prepare for 18-month implementation process.

**Adjourned** – time: 4:20 p.m.  
**Minutes by:** Mary Vityukova  
**Reviewed by:** Gary L. White