

## PROFESSIONAL SERVICES AGREEMENT

This Professional Services Agreement (“Agreement”) is dated June 3, 2025 (“Effective Date”) and is between the City of Covina, a California municipal corporation (“City”) and ClientFirst Technology Consulting, a ClientFirst Consulting Group, LLC, dba ClientFirst Technology Consulting (“Consultant”). City and Consultant are sometimes individually referred to as “Party” and collectively as “Parties” in this Agreement.

### RECITALS

A. City desires to utilize the services of Consultant as an independent contractor to evaluate and assist in the selection of a Utility Billing System, assess the Land Management Software currently in the implementation stage, and develop a Technology Master Plan for the City’s computer system.

B. Consultant represents that it is fully qualified to perform such services by virtue of its experience and the training, education and expertise of its principals and employees.

C. City desires to retain Consultant and Consultant desires to serve City to perform these services in accordance with the terms and conditions of this Agreement.

The parties therefore agree as follows:

**1. Term of Agreement.** The term of this Agreement shall be from the Effective Date through June 30, 2026, unless sooner terminated as provided in Section 14 of this Agreement. The City may, upon mutual agreement, extend the contract for one (1) additional one year term. In no event shall the contract be extended beyond June 30, 2027.

**2. Compensation.**

A. Compensation. As full compensation for Consultant’s services provided under this Agreement, City shall pay Consultant a sum not to exceed One hundred seventy eight thousand three hundred eighty dollars (\$178,380) (the “maximum compensation”), based on the hourly rates set forth in the Approved Fee Schedule, attached hereto as **Exhibit A**. Any terms in Exhibit A, other than the payment rates and schedule of payment, are null and void.

B. Expenses. The amount set forth in paragraph A shall include reimbursement for all actual and necessary expenditures reasonably incurred in the performance of this Agreement.

B. Additional Services. City shall not allow any claims for additional services performed by Consultant, unless the City Council and the Consultant Representative authorize the additional services in writing prior to Consultant’s performance of the additional services or incurrence of additional expenses. Any additional services or expenses authorized by the City Council shall be compensated at the rates set forth in **Exhibit A**, or, if not specified, at a rate

mutually agreed to by the parties. City shall make payment for additional services and expenses in accordance with Section 4 of this Agreement.

### **3. Consultant's Services.**

A. Scope of Services. Consultant shall perform the services described in the Scope of Services, attached as **Exhibit B**. City may request, in writing, changes in the scope of services to be performed. Any changes mutually agreed upon by the parties, and any increase or decrease in compensation, shall be incorporated by written amendments to this Agreement.

B. Party Representatives. For the purposes of this Agreement, the City Representative shall be the City Manager, or such other person designated in writing by the City Manager (the "City Representative"). For the purposes of this Agreement, the Consultant Representative shall be David Krout, Managing Partner (the "Consultant Representative"). The Consultant Representative shall directly manage Consultant's services under this Agreement. Consultant shall not change the Consultant Representative without City's prior written consent.

C. Time for Performance. Consultant shall commence the services on the Effective Date and shall perform all services in conformance with the project timeline as reflected in Scope of Services, attached hereto as **Exhibit B**.

D. Standard of Performance. Consultant shall perform all services under this Agreement in accordance with the standard of care generally exercised by like professionals under similar circumstances and in a manner reasonably satisfactory to City.

E. Personnel. Consultant has, or will secure at its own expense, all personnel required to perform the services required under this Agreement. All of the services required under this Agreement shall be performed by Consultant or under its supervision, and all personnel engaged in the work shall be qualified to perform such services. Consultant shall determine the means, methods, and details by which Consultant's personnel will perform the services under this Agreement. Consultant shall be solely responsible for the satisfactory work performance of all personnel engaged in performing the services and compliance with the customary professional standards.

F. Compliance with Laws. The Consultant shall keep itself informed of all local, state and federal ordinances, laws and regulations which in any manner affect those employed by it or in any way affect the performance of its service pursuant to this Agreement. The Consultant shall at all times observe and comply with all such ordinances, laws and regulations. The City and its agents shall not be liable at law or in equity occasioned by failure of the Consultant to comply with this section.

G. Permits and Licenses. Consultant shall obtain and maintain during the Agreement term all necessary licenses, permits and certificates required by law for the provision of services under this Agreement, including a business license.



#### **4. Method of Payment.**

A. Invoices. Consultant shall submit to City an invoice, on a monthly basis or less frequently, for actual services performed pursuant to this Agreement. Each invoice shall itemize the services rendered during the billing period, hourly rates charged, if applicable, and the amount due. If City disputes any of Consultant's fees, it shall give written notice to Consultant within thirty (30) days of receipt of an invoice of any disputed fees set forth on the invoice.

B. Payment. City shall pay all undisputed invoice amounts within thirty (30) calendar days after receipt up to the maximum compensation set forth in Section 2 of this Agreement. City shall not withhold federal payroll, state payroll or other taxes, or other similar deductions, from payments made to Consultant. For all reimbursements authorized by this Agreement, Consultant shall provide receipts on all reimbursable expenses in excess of Fifty Dollars (\$50) in such form as approved by the Finance Director.

C. Audit of Records. Consultant shall make all records, invoices, time cards, cost control sheets and other records maintained by Consultant in connection with this agreement available during Consultant's regular working hours to City for review and audit by City.

**5. Ownership of Documents.** Upon completion of, or in the event of termination or suspension of this Agreement, all original documents, designs, drawings, maps, models, computer files containing data generated for the work, surveys, notes, and other documents prepared in the course of providing the services to be performed ("written products") pursuant to this Agreement shall become the sole property of the City without restriction or limitation upon its use and may be used, reused, disseminated or otherwise disposed of by the City without the permission of the Consultant. With respect to computer files containing data generated for the work, Consultant shall make available to the City, upon reasonable written request by the City, the necessary computer software and hardware for purposes of accessing, compiling, transferring and printing computer files. Consultant may take and retain copies of the written products as desired, but the written products shall not be the subject of a copyright application by Consultant.

#### **6. Independent Contractor.**

A. Consultant is, and shall at all times remain as to City, a wholly independent contractor and not an employee of City. The personnel performing the services under this Agreement on behalf of Consultant shall also not be employees of City and shall at all times be under Consultant's exclusive direction and control. Consultant shall have no power to incur any debt, obligation, or liability on behalf of City. Neither City nor any of its agents shall have control over the conduct of Consultant or any of Consultant's employees. Consultant shall not, at any time, or in any manner, represent that it or any of its officers, agents or employees are in any manner employees of City. Consultant and Consultant's personnel shall not supervise any of City's employees; and City's employees shall not supervise Consultant's personnel. Consultant's personnel shall not wear or display any City uniform, badge, identification number, or other information identifying such individual as an employee of City; and Consultant's personnel shall not use any City e-mail address or City telephone number in the performance of any of the services

under this Agreement. Consultant shall acquire and maintain, at its sole cost and expense, such vehicles, equipment, and supplies as Consultant's personnel require to perform any of the services required by this Agreement. Consultant shall perform the services off of City premises at locations of Consultant's choice, except as otherwise may from time to time be necessary in order for Consultant's personnel to receive projects from City, review plans on file at City, pick up or deliver any work product related to Consultant's performance of the services under this Agreement, or as may be necessary to inspect or visit City locations and/or private property to perform the services. City may make a computer available to Consultant from time to time for Consultant's personnel to obtain information about or to check on the status of projects pertaining to the services under this Agreement.

B. No employee benefits shall be available to Consultant in connection with the performance of this Agreement. Except for the fees paid to Consultant as provided in the Agreement, City shall not pay salaries, wages, or other compensation to Consultant for performing services hereunder for City. City shall not be liable for compensation or indemnification to Consultant for injury or sickness arising out of performing services hereunder. Consultant shall be responsible for and pay all wages, salaries, benefits and other amounts due to Consultant's personnel in connection with their performance of the services under this Agreement and as required by law. Consultant shall be responsible for all reports and obligations respecting such additional personnel, including, but not limited to: Social Security taxes, other retirement or pension benefits, income tax withholding, unemployment insurance, disability insurance, and workers' compensation insurance. Notwithstanding any other agency, state, or federal policy, rule, regulation, statute or ordinance to the contrary, Consultant and any of its officers, employees, agents, and subcontractors providing any of the services under this Agreement shall not become entitled to, and hereby waive any claims to, any wages, salaries, compensation, benefit or any incident of employment by City, including, but not limited to, eligibility to enroll in, or reinstate to membership in, the California Public Employees Retirement System ("PERS") as an employee of City, and entitlement to any contribution to be paid by City for employer contributions or employee contributions for PERS benefits.

C. Consultant shall indemnify and hold harmless City and its elected officials, officers, employees, servants, designated volunteers, and agents serving as independent contractors in the role of City officials, from any and all liability, damages, claims, costs, and expenses of any nature to the extent arising from, caused by, or relating to Consultant's personnel practices. or to the extent arising from, caused by, or relating to the violation of any of the provisions of this Section 6. In addition to all other remedies available under law, City shall have the right to offset against the amount of any fees due to Consultant under this Agreement any amount due to City from Consultant as a result of Consultant's failure to promptly pay to City any reimbursement or indemnification arising under this Section 6. This duty of indemnification is in addition to Consultant's duty to defend, indemnify, and hold harmless as set forth in any other provision of this Agreement.

## **7. PERS Compliance and Indemnification.**

A. General Requirements. The parties acknowledge that City is a local agency member of PERS, and as such has certain pension reporting and contribution obligations to PERS on behalf of qualifying employees. Consultant agrees that, in providing its employees and any other personnel to City to perform the services under this Agreement, Consultant shall assure compliance with the Public Employees' Retirement Law, commencing at Government Code Section 20000, the regulations of PERS, and the Public Employees' Pension Reform Act of 2013, as amended. Without limitation to the foregoing, Consultant shall assure compliance with regard to personnel who have active or inactive membership in PERS and to those who are retired annuitants and in performing this Agreement shall not assign or utilize any of its personnel in a manner that will cause City to be in violation of the applicable retirement laws and regulations.

B. Indemnification. Consultant shall defend (with legal counsel approved by City, whose approval shall not be unreasonably withheld), indemnify, and hold harmless City, and its City and its elected officials, officers, employees, servants, designated volunteers, and agents serving as independent contractors in the role of City officials, from any and all liability, damages, claims, costs, and expenses of any nature to the extent arising from, caused by, or relating to Consultant's violation of any provisions of this Section 7. This duty of indemnification is in addition to Consultant's duty to defend, indemnify, and hold harmless as set forth in any other provision of this Agreement.

**8. Confidentiality.** All data, documents, discussion, or other information (collectively "data") developed or received by Consultant or provided for performance of this Agreement are deemed confidential. Consultant shall keep all data confidential and shall not disclose any data to any person or entity without City's prior written consent. City shall grant such consent if disclosure is legally required. Consultant shall return all data to City upon the expiration or termination of this Agreement. Consultant's covenant under this Section 8 shall survive the expiration or termination of this Agreement.

**9. Conflicts of Interest.** Consultant and its officers, employees, associates and subcontractors, if any, shall comply with all conflict of interest statutes of the State of California applicable to Consultant's services under this Agreement, including the Political Reform Act (Gov. Code, § 81000 *et seq.*) and Government Code Section 1090. During the term of this Agreement, Consultant may perform similar services for other clients, but Consultant and its officers, employees, associates and subcontractors shall not, without the City Representative's prior written approval, perform work for another person or entity for whom Consultant is not currently performing work that would require Consultant or one of its officers, employees, associates or subcontractors to abstain from a decision under this Agreement pursuant to a conflict of interest statute. Consultant shall incorporate a clause substantially similar to this Section 9 into any subcontract that Consultant executes in connection with the performance of this Agreement.

**10. Indemnification.**

A. Indemnities for Third Party Claims.

1) To the fullest extent permitted by law, Consultant shall, at its sole cost and expense, defend, hold harmless and indemnify City and its elected officials, officers, attorneys, agents, employees, designated volunteers, successors, assigns and those City agents serving as independent contractors in the role of City officials (collectively “Indemnitees”), from and against any and all damages, costs, expenses, liabilities, claims, demands, causes of action, proceedings, expenses, judgments, penalties, liens and losses of any nature whatsoever, including fees of accountants, attorneys or other professionals, and all costs associated therewith, and the payment of all consequential damages (collectively “Liabilities”), in law or equity, whether actual, alleged or threatened, which arise out of, are claimed to arise out of, pertain to, or relate to the acts or omissions of Consultant, its officers, agents, servants, employees, subcontractors, materialmen, contractors or their officers, agents, servants or employees (or any entity or individual that Consultant shall bear the legal liability thereof) in the performance of this Agreement, including the Indemnitees’ active or passive negligence, except for Liabilities arising from the sole negligence or willful misconduct of the Indemnitees, as determined by final arbitration or court decision or by the agreement of the parties. Consultant shall defend the Indemnitees in any action or actions filed in connection with any Liability with counsel of the Indemnitees’ choice, and shall pay all costs and expenses, including all attorneys’ fees and experts’ costs actually incurred in connection with such defense. Consultant shall reimburse the Indemnitees for any and all legal expenses and costs incurred by Indemnitees in connection therewith.

2) Consultant shall pay all required taxes on amounts paid to Consultant under this Agreement, and indemnify and hold City harmless from any and all taxes, assessments, penalties and interest asserted against City by reason of the independent contractor relationship created by this Agreement. Consultant shall fully comply with the workers’ compensation law regarding Consultant and Consultant’s employees. Consultant shall indemnify and hold City harmless from any failure of Consultant to comply with applicable workers’ compensation laws. City may offset against the amount of any fees due to Consultant under this Agreement any amount due to City from Consultant as a result of Consultant’s failure to promptly pay to City any reimbursement or indemnification arising under this Subparagraph A. 2).

3) Consultant shall obtain executed indemnity agreements with provisions identical to those in this Section 10 from each and every subcontractor or any other person or entity involved by, for, with or on behalf of Consultant in the performance of this Agreement. If Consultant fails to obtain such indemnity obligations, Consultant shall be fully responsible and indemnify, hold harmless and defend the Indemnitees from and against any and all Liabilities in law or equity, whether actual, alleged or threatened, which arise out of, are claimed to arise out of, pertain to, or relate to the acts or omissions of Consultant’s subcontractor, its officers, agents, servants, employees, subcontractors, materialmen, contractors or their officers, agents, servants or employees (or any entity or individual that Consultant’s subcontractor shall bear the legal liability thereof) in the performance of this Agreement, including the Indemnitees’ active or passive negligence, except for Liabilities arising from the sole negligence or willful misconduct of the Indemnitees, as determined by final arbitration or court decision or by the agreement of the parties.

B. Workers' Compensation Acts not Limiting. Consultant's indemnifications and obligations under this Section 10, or any other provision of this Agreement, shall not be limited by the provisions of any workers' compensation act or similar act. Consultant expressly waives its statutory immunity under such statutes or laws as to City, its officers, agents, employees and volunteers.

C. Insurance Requirements not Limiting. City does not, and shall not, waive any rights that it may possess against Consultant because of the acceptance by City, or the deposit with City, of any insurance policy or certificate required pursuant to this Agreement. The indemnities in this Section 10 shall apply regardless of whether or not any insurance policies are determined to be applicable to the Liability, tax, assessment, penalty or interest asserted against City.

D. Survival of Terms. Consultant's indemnifications and obligations under this Section 10 shall survive the expiration or termination of this Agreement.

## **11. Insurance.**

A. Minimum Scope and Limits of Insurance. Consultant shall procure and at all times during the term of this Agreement carry, maintain, and keep in full force and effect, insurance as follows:

1) Commercial General Liability Insurance with a minimum limit of Two Million Dollars (\$2,000,000) per occurrence for bodily injury, personal injury and property damage and a general aggregate limit of Four Million Dollars (\$4,000,000) per project or location. If Consultant is a limited liability company, the commercial general liability coverage shall be amended so that Consultant and its managers, affiliates, employees, agents and other persons necessary or incidental to its operation are insureds.

2) Automobile Liability Insurance for any owned, non-owned or hired vehicle used in connection with the performance of this Agreement with a combined single limit of Two Million Dollars (\$2,000,000) per accident for bodily injury and property damage. If Consultant does not use any owned, non-owned or hired vehicles in the performance of services under this Agreement, Consultant shall obtain a non-owned auto endorsement to the Commercial General Liability policy required under Subparagraph A. 1) of this Section 11.

3) Workers' Compensation Insurance as required by the State of California and Employer's Liability Insurance with a minimum limit of One Million Dollars (\$1,000,000) per accident for bodily injury or disease. If Consultant has no employees while performing services under this Agreement, workers' compensation policy is not required, but Consultant shall provide an executed declaration that it has no employees.

4) Professional Liability Insurance [or Errors and Omissions Insurance] with minimum limits of Two Million Dollars (\$2,000,000) per claim and in aggregate.

B. Acceptability of Insurers. The insurance policies required under this Section 11 shall be issued by an insurer admitted to write insurance in the State of California with a rating of A:VII or better in the latest edition of the A.M. Best Insurance Rating Guide. Self insurance shall not be considered to comply with the insurance requirements under this Section 11.

C. Additional Insured. The commercial general and automobile liability policies shall contain an endorsement naming the City, its officers, employees, agents and volunteers as additional insureds.

D. Primary and Non-Contributing. The insurance policies required under this Section 11 shall apply on a primary non-contributing basis in relation to any other insurance or self-insurance available to City. Any insurance or self-insurance maintained by City, its officers, employees, agents or volunteers, shall be in excess of Consultant's insurance and shall not contribute with it.

E. Consultant's Waiver of Subrogation. The insurance policies required under this Section 11 shall not prohibit Consultant and Consultant's employees, agents or subcontractors from waiving the right of subrogation prior to a loss. Consultant hereby waives all rights of subrogation against City.

F. Deductibles and Self-Insured Retentions. Any deductibles or self-insured retentions must be approved by City. At City's option, Consultant shall either reduce or eliminate the deductibles or self-insured retentions with respect to City, or Consultant shall procure a bond guaranteeing payment of losses and expenses.

G. Cancellations or Modifications to Coverage. Consultant shall not cancel, reduce or otherwise modify the insurance policies required by this Section 11 during the term of this Agreement. The commercial general and automobile liability policies required under this Agreement shall be endorsed to state that should the issuing insurer cancel the policy before the expiration date, the issuing insurer will endeavor to mail thirty (30) calendar days' prior written notice to City. If any insurance policy required under this Section 11 is canceled or reduced in coverage or limits, Consultant shall, within two (2) business days of notice from the insurer, phone, fax or notify City via certified mail, return receipt requested, of the cancellation of or changes to the policy.

H. City Remedy for Noncompliance. If Consultant does not maintain the policies of insurance required under this Section 11 in full force and effect during the term of this Agreement, or in the event any of Consultant's policies do not comply with the requirements under this Section 11, City may either immediately terminate this Agreement or, if insurance is available at a reasonable cost, City may, but has no duty to, take out the necessary insurance and pay, at Consultant's expense, the premium thereon. Consultant shall promptly reimburse City for any premium paid by City or City may withhold amounts sufficient to pay the premiums from payments due to Consultant.

I. Evidence of Insurance. Prior to the performance of services under this Agreement, Consultant shall furnish City's Risk Manager with a certificate or certificates of insurance and all original endorsements evidencing and effecting the coverages required under this Section 11. The endorsements are subject to City's approval. Consultant may provide complete, certified copies of all required insurance policies to City. Consultant shall maintain current endorsements on file with City's Risk Manager. Consultant shall provide proof to City's Risk Manager that insurance policies expiring during the term of this Agreement have been renewed or replaced with other policies providing at least the same coverage. Consultant shall furnish such proof at least two (2) weeks prior to the expiration of the coverages.

J. Indemnity Requirements not Limiting. Procurement of insurance by Consultant shall not be construed as a limitation of Consultant's liability or as full performance of Consultant's duty to indemnify City under Section 10 of this Agreement.

K. Subcontractor Insurance Requirements. Consultant shall require each of its subcontractors that perform services under this Agreement to maintain insurance coverage that meets all of the requirements of this Section 11.

## **12. Mutual Cooperation.**

A. City's Cooperation. City shall provide Consultant with all pertinent data, documents and other requested information as is reasonably available for Consultant's proper performance of the services required under this Agreement.

B. Consultant's Cooperation. In the event any claim or action is brought against the City relating to Consultant's performance or services rendered under this Agreement, Consultant shall render any reasonable assistance that City requires.

**13. Records and Inspections.** Consultant shall maintain full and accurate records with respect to all matters covered under this Agreement for a period of ten (10) years. Consultant shall, without charge, provide City with access to the records during normal business hours. City may examine and audit the records and make transcripts therefrom, and inspect all program data, documents, proceedings and activities.

## **14. Termination or Suspension of Agreement.**

A. Right to Terminate or Suspend. City may terminate or suspend this Agreement at any time, at will, for any reason or no reason, after giving written notice to Consultant at least seven (7) calendar days before the termination or suspension is to be effective. Consultant may terminate this Agreement at any time, at will, for any reason or no reason, after giving written notice to City at least sixty (60) calendar days before the termination is to be effective.

B. Obligations upon Termination. Consultant shall cease all work under this Agreement on or before the effective date of termination specified in the notice of termination. In the event of City's termination of this Agreement due to no fault or failure of performance by

Consultant, City shall pay Consultant based on the percentage of work satisfactorily performed up to the effective date of termination. In no event shall Consultant be entitled to receive more than the amount that would be paid to Consultant for the full performance of the services required by this Agreement.

**15. Force Majeure.** Consultant shall not be liable for any failure to perform its obligations under this Agreement if Consultant presents acceptable evidence, in City's sole judgment, that such failure was due to strikes, lockouts, labor disputes, embargoes, acts of God, inability to obtain labor or materials or reasonable substitutes for labor or materials, governmental restrictions, governmental regulations, governmental controls, judicial orders, enemy or hostile governmental action, civil commotion, fire or other casualty, or other causes beyond Consultant's reasonable control and not due to any act by Consultant.

**16. Notices.** Any notices, consents, requests, demands, bills, invoices, reports or other communications which either party may desire to give to the other party under this Agreement must be in writing and conclusively deemed effective: (a) on personal delivery, (b) on confirmed delivery by reputable document delivery service or courier service during Consultant's and City's regular business hours, or (c) five business days after deposit in the United States mail, by first class mail, postage prepaid, and addressed to the party to be notified as set forth below:

If to City:  
Attn: Angel Carrillo  
City of Covina  
125 E. College Street  
Covina, California 9123

If to Consultant:  
Attn: David Krout  
ClientFirst Technology Consulting  
1250 Corona Pointe Ct., Suite 209  
Corona, CA 92879

**17. Non-Discrimination and Equal Employment Opportunity.** In the performance of this Agreement, Consultant shall not discriminate against any employee, subcontractor or applicant for employment because of race, color, religious creed, sex, gender, gender identity, gender expression, marital status, national origin, ancestry, age, physical disability, mental disability, medical condition, genetic information, sexual orientation or other basis prohibited by law. Consultant will take affirmative action to ensure that subcontractors and applicants are employed, and that employees are treated during employment, without regard to their race, color, religious creed, sex, gender, gender identity, gender expression, marital status, national origin, ancestry, age, physical disability, mental disability, medical condition, genetic information or sexual orientation.

**18. Prohibition of Assignment and Delegation.** Consultant shall not assign any of its rights or delegate any of its duties under this Agreement, either in whole or in part, without City's prior written consent. City's consent to an assignment of rights under this Agreement shall not release Consultant from any of its obligations or alter any of its primary obligations to be performed under this Agreement. Any attempted assignment or delegation in violation of this Section 18 shall be void and of no effect and shall entitle City to terminate this Agreement. As used in this Section 18, "assignment" and "delegation" means any sale, gift, pledge, hypothecation, encumbrance or



other transfer of all or any portion of the rights, obligations, or liabilities in or arising from this Agreement to any person or entity, whether by operation of law or otherwise, and regardless of the legal form of the transaction in which the attempted transfer occurs.

**19. No Third Party Beneficiaries Intended.** Except as otherwise provided in Section 10, this Agreement is made solely for the benefit of the parties to this Agreement and their respective successors and assigns, and no other person or entity may have or acquire a right by virtue of this Agreement.

**20. Waiver.** No delay or omission to exercise any right, power or remedy accruing to City under this Agreement shall impair any right, power or remedy of City, nor shall it be construed as a waiver of, or consent to, any breach or default. No waiver of any breach, any failure of a condition, or any right or remedy under this Agreement shall be (1) effective unless it is in writing and signed by the party making the waiver, (2) deemed to be a waiver of, or consent to, any other breach, failure of a condition, or right or remedy, or (3) deemed to constitute a continuing waiver unless the writing expressly so states.

**21. Exhibits. Exhibits A and B** constitute a part of this Agreement and are incorporated into this Agreement by this reference. If any inconsistency exists or arises between a provision of this Agreement and a provision of any exhibit, the provisions of this Agreement shall control.

**22. Entire Agreement.** This Agreement and all exhibits referred to in this Agreement constitute the final, complete and exclusive statement of the terms of the agreement between the parties pertaining to the subject matter of this Agreement and supersede all other prior or contemporaneous oral or written understandings and agreements of the parties. No party has been induced to enter into this Agreement by, nor is any party relying on, any representation or warranty except those expressly set forth in this Agreement.

**23. Amendment of Agreement.** This Agreement may be amended only by a writing signed by both parties. The City Manager is authorized to sign an amendment to this Agreement on the City Council's behalf and without the City Council's prior approval to make the following non-substantive modifications to the Agreement: (a) name changes; (b) extensions of time; (c) non-monetary changes in the scope of work; and (d) termination of the Agreement.

**24. Headings.** The headings in this Agreement are included solely for convenience of reference and shall not affect the interpretation of any provision of this Agreement or any of the rights or obligations of the parties to this Agreement.

**25. Word Usage.** Unless the context clearly requires otherwise, (a) the words "shall," "will" and "agrees" are mandatory and "may" is permissive; (b) "or" is not exclusive; and (c) "includes" or "including" are not limiting.

**26. Time of the Essence.** Time is of the essence in respect to all provisions of this Agreement that specify a time for performance; provided, however, that the foregoing shall not be construed to limit or deprive a party of the benefits of any grace or use period allowed in this Agreement.

**27. Governing Law and Choice of Forum.** This Agreement, and any dispute arising from the relationship between the parties to this Agreement, shall be governed by and construed in accordance with the laws of the State of California, except that any rule of construction to the effect that ambiguities are to be resolved against the drafting party shall not be applied in interpreting this Agreement. Any dispute that arises under or relates to this Agreement (whether contract, tort or both) shall be resolved in a municipal, superior or federal court with geographic jurisdiction over the City of Covina.

**28. Attorneys' Fees.** In any litigation or other proceeding by which on party seeks to enforce its rights under this Agreement (whether in contract, tort or both) or seeks a declaration of any rights or obligations under this Agreement, the prevailing party shall be awarded reasonable attorneys' fees together with any costs and expenses, to resolve the dispute and to enforce the final judgment.

**29. Severability.** If a court of competent jurisdiction holds any provision of this Agreement to be illegal, invalid or unenforceable for any reason, the validity of and enforceability of the remaining provisions of this Agreement shall not be affected and continue in full force and effect.

**30. Authority to Execute Agreement.** The person or persons executing this Agreement on behalf of Consultant warrants and represents that he or she has the authority to execute this Agreement on behalf of the Consultant and has the authority to bind Consultant to the performance of its obligations hereunder.

[SIGNATURE PAGE FOLLOWS]

The parties, through their duly authorized representatives, are signing this Agreement on the date stated in the introductory clause.

City:

City of Covina,  
a California municipal corporation

By: \_\_\_\_\_

Name: Chris Marcarello

Title: City Manager

ATTEST:

Consultant:

ClientFirst Technology Consulting, a  
California Limited Liability Company

By: \_\_\_\_\_

Name: David Krout \_\_\_\_\_

Title: Managing Partner \_\_\_\_\_

By: \_\_\_\_\_

Name: Tom Jakobsen \_\_\_\_\_

Title: Senior Partner \_\_\_\_\_

*(Two signatures of corporate officers required  
for corporations under Corporations Code  
Section 313, unless corporate documents*

*authorize only one person to sign this Agreement on behalf of the corporation.)*

By: \_\_\_\_\_

Name: Fabian Velez

Title: Chief Deputy City Clerk

APPROVED AS TO FORM:

By: \_\_\_\_\_

Name: Candice K. Lee

Title: City Attorney

## EXHIBIT A

### APPROVED FEE SCHEDULE

Land Management Software Assessment and Vendor Evaluation Services						
	T. Meser/D. Kraut	C. Hoxie/M. Truncale	Total			
Hours	108	70				
Rates	\$ 225	\$ 205				
	\$ 24,300	\$ 14,350		\$ 38,650		
Technology Master Planning						
	D. Kraut	J. Federico	T. Jakobsen	J. Smith	T. Soto	Total
Hours	87	161	70	83	23	
Rates	\$ 240	\$ 205	\$ 240	\$ 235	\$ 205	
	\$ 20,880	\$ 33,005	\$ 16,800	\$ 19,505	\$ 4,715	
Utility Billing Software Selection Consulting Services						
	D. Kraut/Jamie T. Shell	J. Federico	Total			
Hours	119.5	87.5				
Rates	\$ 225	\$ 205				
	\$ 26,888	\$ 17,938		\$ 44,825		
Total Cost All Projects		\$ 178,380				

**EXHIBIT B**  
**SCOPE OF SERVICES**

As described in attached proposals for:

- Land Management Software Assessment and Vendor Evaluation Services (Attachment B-1)
- Technology Master Planning Services (Attachment B-2)
- Utility Billing Software Selection Consulting Services (Attachment B-3)

*Proposal for*

# **Land Management Software Assessment and Vendor Evaluation Services**

*May 16, 2025*



*Client Locations*

**Coast-to-Coast**

*Practice Locations*

**California**

**Illinois**

**Texas**

**North Carolina**

**800.806.3080**

[www.clientfirstcg.com](http://www.clientfirstcg.com)

**Optimal Technology Guidance**

**CLIENTFIRST**  
TECHNOLOGY CONSULTING

May 16, 2025

Angel Carrillo  
Deputy City Manager  
City of Covina  
125 E. College Street  
Covina, CA 91723

**RE: Proposal for Land Management Software Assessment and Vendor Evaluation Services**

Dear Mr. Carrillo:

ClientFirst appreciates the opportunity to present the City of Covina with our proposal. Our consultants have decades of experience providing Land Management system needs assessments, process reviews, selection services, and implementation project management oversight to municipalities throughout the United States. Key qualifications include:

**Local Government ONLY Focus**—ClientFirst Technology Consulting specializes in helping local government agencies evaluate the solutions that best fit their specific business process requirements, foster buy-in and consensus across the organization, and provide the best value proposition.

**True Independence**—ClientFirst is completely independent and unbiased in its analysis and recommendations. We do not resell software or employ third-party implementers, trainers, or programmers for software solutions.

**Land Management Experience** – ClientFirst has worked with dozens of cities on Land Management projects throughout the US. Our California project team has extensive hands-on implementation experience in software consulting and former careers with Land Management software companies.

**Our clients say we excel in these areas:**

- Following best practices
- Customizing the business process review and new system feature/function requirements for each specific agency
- Building consensus throughout the organization
- Educating staff and transferring knowledge
- Effectively supporting change management and buy-in at all levels
- Improving implementation readiness and reducing risk
- Helping gain management and support of elected officials through education and business-case development

If you have any questions, please get in touch with me at 951.739.7989 or via email at [dkrout@clientfirstcg.com](mailto:dkrout@clientfirstcg.com) for additional information. We appreciate the opportunity to serve the City of Covina.

Sincerely,



**David W. Krout, CPA** (*inactive*)  
*Partner*  
Management Consulting Practice Leader



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Our consultants have assisted local governments with innovative technology solutions for 20 years. Our risk-averse technology planning and the quality of service we provide our clients have resulted in numerous long-term business relationships. Our subject-matter experts offer various technology services our clients often leverage to resolve specific issues. We are confident that no other consulting firm focusing on local governments offers the wide range of IT services that we do.

# Qualifications



**ClientFirst was extremely knowledgeable, and I felt I have learned more from my work with ClientFirst than anyone else I've worked with in that capacity. I haven't met anyone else who's even close to ClientFirst in their level of expertise.**

—Director of Administrative Services  
CA Municipality



## Land Management Systems Specific Experience

The project team assigned to this engagement has combined experience with over 150 Land Management application projects. Our Land Management experience includes:

- Process Reviews and Workflow Improvements
- Process Definition
- Functionality Requirements Definition
- Contract Negotiations
- Hands-on Implementation
- User Training
- Data Conversion Assistance
- Project Management
- Systems Maintenance
- System Updates and Modifications
- Integrations Assistance
- Database Updates
- User Documentation Creation

Our specific experience includes, but is not limited to:

- Online Applications
- Online Payment Integrations
- Mobiles
- GIS Integration
- Electronic Plan Review Process and Integrations
- The Counter Credit Card Integrations
- Interactive Voice Response
- Document Management System Integrations

## Primary Tasks Experience

### Business Process Analysis

The ClientFirst team has decades of collective experience with business process reviews, assessment, and analysis, as well as the documentation of configuration requirements.

### Improvements

The assessment of existing configurations, processes, integrations, contracts, and other components of implementations and software, as well as improvement recommendations, is a service that ClientFirst SMEs have offered for over 20 years.

### Integrations

ClientFirst has assisted many agencies with integrations of custom and standard land management software solutions. Requirements gathering, review, and specification process are key in implementing integrations, specifically for custom integrations.

### Data Conversion

The ClientFirst team data conversion experience includes writing data conversion script(s), data mapping and analysis, data testing/validation, and data conversion testing training sessions with the project team. ClientFirst can also assist the project team in identifying and documenting any data conversion issues to ensure the resolution of the data conversion problems. The ClientFirst team has completed data conversion and data imports from different types of sources (Access, SQL, CSV, Excel, AS400) into various formats for conversions or interfaces.



## Reports and Forms

ClientFirst has assisted many agencies with reviewing and classifying forms, correspondences, notices, letters, and permits/business certificates to determine if a merge document or custom SSRS/Crystal Report form or report is the best solution. ClientFirst also has extensive experience creating specifications for custom forms/reports and scripting SSRS forms/reports for clients.

The ClientFirst team has experience creating and modifying many report styles, ranging from simple data lists to managerial data summary reports to visual data representation via graphs and charts. We have provided the following types of report services:

- Meetings with stakeholders
- Discussions regarding the stakeholders' reporting need
- Advising and guiding stakeholders through data and reporting capabilities
- Document report specifications and layouts
- Report scripting and follow-up communications
- Report delivery and review/training with stakeholders
- Any additional report modifications based on stakeholders' feedback

## Testing

The ClientFirst team has assisted with and tested multiple land management software products and integrations to those software products. The team also has extensive experience in test planning and oversight. Hands-on assistance with testing can also be provided if needed by the City.

## Training

The ClientFirst team members have participated in and led power user and end-user training for over 80 agencies across all land management modules. Training for data conversion and integration testing is also an area of expertise.

## Schedule

Project success and timely execution depend on a well-structured project schedule. The ClientFirst team has reviewed project schedules for many different software implementations and guided our clients to ensure enough time was allowed for proper testing and validation of the system, data conversion, and integrations. ClientFirst will represent the City and its goal to complete the land management implementation with a successful Go-Live.

## Ability to Work with Multiple Groups

The ClientFirst approach to reviewing ongoing implementations and project assessments is all-encompassing for the departments that are stakeholders of the software being implemented. Working with all stakeholders across all departments is the key to a successful project and go live.



## Why ClientFirst is the Best Choice

**Experience with Cities**—Our Team's experience working with cities in California and across the country has given our staff the subject-matter expertise to quickly understand operation demands and opportunities and equate them to beneficial IT recommendations and improvements.

**Locally Based**—Our California-based operations can react quickly to on-site project demands without traveling from remote areas. We have staff working nearby nearly every day.

**Independence**—We do not resell hardware or software and always have our client's best interests in mind. We recommend products that are cost-effective, easy to support, and in use every day across our client base. We recommend products that work.

**Stable, Strong, and Growing**—We are a financially stable and profitable firm that has been serving local governments for over 20 years. We continue growing by adding personnel and expanding new office locations.

**Quality of Experience of Our Consultants**—Our management team for this Project consists of four consultants with a collective experience of over 100 years in IT consulting. Our company's leaders and founders have IT consulting and management experience at a Top-Five national accounting and consulting firm.

**IT Assessment and Master Plan Experience**—Our consultants have experience delivering IT Assessments and IT Master Plans focused on local governments, including cities, counties, utilities, and local/regional districts.

**Use of Best Practices**—ClientFirst utilizes PMI, ITIL, COBIT, and EAP concepts, along with our own experience and best practices, as building blocks for completing IT assessments and delivering services. Governance is essential to ensuring that IT strategies and recommendations align with business objectives on an ongoing, repeatable basis.

- PMI (Project Management Institute)
- ITIL (Information Technology Infrastructure Library)
- COBIT (Control Objectives for Information and Related Technology)
- EAP (Enterprise Architecture Planning)

You and all at ClientFirst made an awesome difference in our City. Your light and professional touch kept us and Council on the rails! Look forward to more progress and will hopefully see you again soon.

—City Administrator  
CA Municipality



## Enterprise Applications Consulting Practice Profile

ClientFirst's enterprise applications consulting team has conducted these specific assessments, process reviews, procurements, and implementation assistance for over 20 years.

ClientFirst leverages this experience to the client's advantage through a unique approach to software selection. This approach considers the vendor's perspective while working with clients to navigate the complexities of software assessment, selection, contract negotiation, and implementation.

We identify an organization's strategy, organizational, application, and functional requirements—specific to the client's business processes—to determine which solutions best fit the customer and vendor. Our clients appreciate the honesty and diligence with which we conduct our projects, and many clients continue relying on our services after their first Project with us.

The level of risk and the probability of achieving a successful implementation are directly related to the amount of proper due diligence employed. At ClientFirst, we take every possible step to decrease this risk level through best practices.

Because of the level of due diligence that we require, software vendors welcome the opportunity to respond to our RFP documents. This allows your organization to find the best functionality fit by evaluating an adequate number of qualified vendor responses.



Applications Experience	
General Ledger	CIS & Utility Billing
Budgeting	Tax Billing
Project Accounting	Backflow
Grant Accounting	Service Orders
Accounts Receivable	Work Orders/Preventative
Cash Receipts	Maintenance
Purchasing & Receiving	Inventory Management
Bids Management	Fleet Management
Contract Management	Planning
Accounts Payable	Permitting
Fixed Assets	Inspection
Loans	Code Enforcement
Special Assessments	Land/Parcel/Address
Financial Reporting	Management
Ad Hoc Reporting	Computer-Aided Dispatch
Business Licensing	(CAD)
Applicant Tracking	Records Management
Human Resources	Mobile Computing
Employee Self-Service	Citizen Request Management
Benefits Tracking	GIS
Time & Attendance	Adjudication
Payroll	Citation Management



Community Development Consulting

From the beginning, I was impressed with how inclusive the process has been. I've never been associated with such a collaborative, cooperative, and engaged project. Outstanding process.

—City Manager  
Software Selection



## Government Technology



Focusing on local governments means that we understand the unique needs, processes, protocols, and political nuances involved in the industry. This **understanding and experience** ensures that our strategies and recommendations are practical. Our management team's career experience includes over 3,500 projects for more than 500 local government agencies.

## Local Presence and Practice Locations

We have a local presence with extensive experience in California. ClientFirst is a national firm with practices located in California, Illinois, Texas, and North Carolina.



Corona, CA



Schaumburg, IL



San Antonio, TX



Charlotte, NC

## Business Management Approach

Not all government executives know the latest technology issues and opportunities. Therefore, our approach and deliverables provide a business-management perspective that **allows the layperson to understand the technology issues, strategies, and potential solutions required to make more informed business decisions.**

## Practical Recommendations

We believe in using technology to meet the agency's business objectives; we do not apply technology just for technology's sake. We are serious in our quest to provide clients with practical solutions that meet their requirements. Sometimes, the proper solution includes cutting-edge technology. However, a cost-effective and practical solution using proven technology is often the most beneficial.



## True Independence

ClientFirst believes in practicing **true independence**. We do not resell products or maintain relationships that would result in add-on profit margins or referral fees. Our interest is in **putting the client first** by finding optimum solutions (i.e., the greatest value at the lowest competitive cost) to meet their needs.



## National Recognition

Many of the industry's leading vendors recognize our consultants' work nationally. They appreciate the fairness and objectivity we demonstrate when dealing with their organizations.



## Industry Recognition

### CIO Review

ClientFirst has been featured in *CIO Review* as one of the "20 Most Promising Government Technology Solution Providers".



### National Speakers

ClientFirst personnel have conducted educational sessions at national and local conferences, such as CSMFO, MISAC, and GFOA.



ClientFirst has such a broad and well-rounded experience with cities that they already have a good idea of what will or won't work. Other vendors we have worked with don't have this depth of experience and suggest solutions that are unrealistic in a city government environment.

— IT Director  
CA Municipality



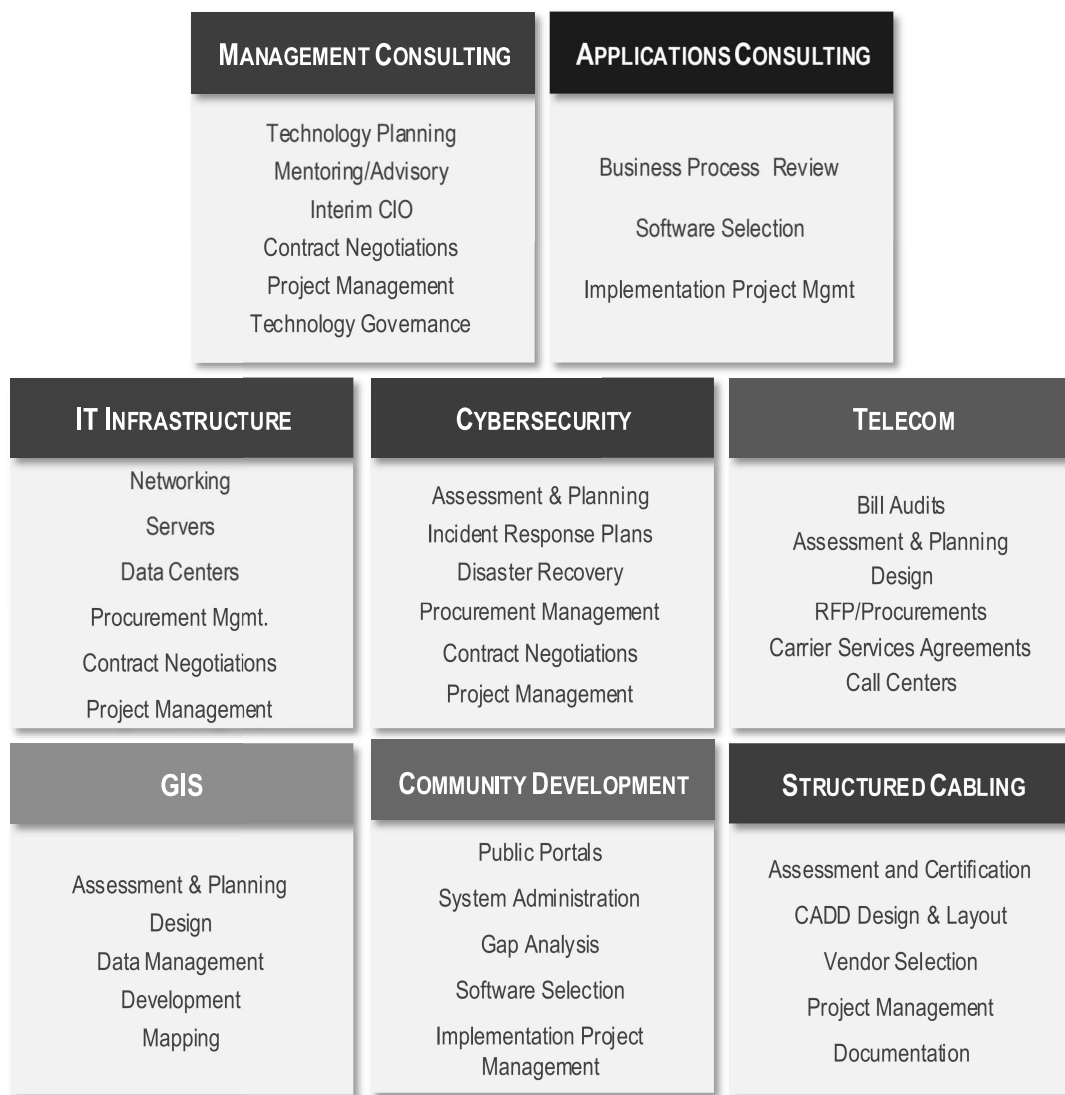
## Diversified Experience

We have extensive experience with various organizations, technologies, and processing environments. In addition, we have significant market knowledge regarding software and hardware providers and are well-informed about vendor and industry developments.

## Integrated Technology Solutions Groups

Whatever the agency's technology needs are, we offer a unique combination of experts in their given disciplines who can guide technology decisions, planning, implementation, and management, chosen according to the specific needs of each Project, working as an integrated team to **provide end-to-end consulting and support services.**

## ClientFirst Integrated Technology Solutions Groups







## Integrated Technology Services

### Applications Consulting

#### ***Business Process Review***

- Business Case Analysis
- Assessment and Recommendations
- Process Analysis and Improvement

#### ***Software Selection***

- Feature / Function Requirements
- Implementation Risk Assessment
- Change Management
- RFP Development
- Vendor Analysis and Evaluation
- Demonstration Facilitation
- Contract Review and Negotiation
- Implementation Project Management
- Ad Hoc Report-Writing Assistance

### IT Infrastructure

#### ***Networking and Servers***

- Assessment, Design, and Installation
- Replication and Redundancy Strategies
- Virtualization
- Cloud Computing
- Wireless
- Data Center Design

#### ***Disaster Recovery***

- Risk Assessment and Business Impact Analysis
- Disaster Recovery Planning
- Hot-Site and Recovery Services Evaluation
- Storage Area Networking
- Backup Strategies and Design

### Cybersecurity

- Assessment and Planning
- Applications and Hardware Security
- Cybersecurity Review
- Security Policy and Control Development
- Intrusion Testing
- Workshops and Training
- Compliance: NIST, NCCoE, PCI, CJIS, NEA/FERC

### Structured Cabling System Design

- Assessment and Certification
- CADD Design and Layout
- RFP / Vendor Selection
- Project Management
- Documentation
- Fiber-Optic Network Design

### Management Consulting

- Technology Strategic/Master Planning
- IT Assessment
- IT Staffing Assessment
- Process Improvement
- Procurement Assistance
- Contract Negotiation
- Project Management
- IT Governance Seminars

### ECMS

- Needs Assessment
- Business Process Review
- System Selection
- Planning
- Implementation Oversight

### GIS

- Assessment and Planning
- Design
- Data Management
- Development
- Mapping

### Community Development

- Public Portals
- System Administration
- Gap Analysis
- Software Selection
- Implementation Project Management

### IT Staffing/Augmentation

- IT Staffing Needs Assessment and Operational Reviews
- Interim IT Management
- Supplemental IT Management Staffing

### Telecommunications Consulting

- VoIP Readiness Review
- Systems Evaluation, Design, Specifications, and RFP Development
- Bill Audits (Cost Analysis and Negotiation)
- Telecom Expense Management (TEM)
- Credit / Refund Requests
- Strategic Planning
- Project Management
- Carrier Services Cost Analysis
- Operational and Workflow Reviews
- System Selection and Contract Negotiations



## Consultants' Collective Experience

We understand that the experience of the individual consultants is a significant factor in hiring a firm to conduct the Project on your behalf. Our consultants have extensive public-sector experience in their respective careers, including projects with the following agencies:

<b>California</b> City of Albany City of Azusa City of Benicia City of Big Bear Lake City of Brentwood City of Brisbane City of Burbank City of Calabasas City of Camarillo City of Carlsbad City of Cathedral City City of Cerritos City of Chico City of Chino City of Clovis City of Colton City of Corona City of Coronado City of Dana Point City of Downey City of Dublin City of Emeryville City of Fairfield City of Foster City City of Fountain Valley City of Glendale City of Glendora City of Healdsburg City of Hemet City of La Habra City of La Mesa City of La Puente City of Laguna Niguel City of Larkspur City of Lathrop City of Lomita City of Menlo Park City of Mission Viejo City of Montclair City of Moreno Valley City of Mountain View City of Murrieta City of Newark City of Norco City of Novato City of Pacific Grove City of Pacifica City of Palm Desert City of Palmdale City of Patterson City of Petaluma City of Piedmont City of Pinole City of Pismo Beach City of Port Hueneme City of Rancho Cucamonga City of Rancho Mirage City of Redlands City of Rialto City of Rohnert Park City of Sacramento City of Salinas City of San Bernardino City of San Clemente City of San Gabriel City of San Jacinto City of San Leandro City of San Pablo City of San Rafael City of Seal Beach City of Sierra Madre City of Simi Valley City of South Gate	City of South Pasadena City of South San Francisco City of St. Helena City of Sunnyvale City of Temecula City of Tracy City of Tulare City of Tustin City of Upland City of Vacaville City of West Covina City of West Sacramento City of Whittier Town of Danville Town of Hillsborough Town of Truckee Town of Yucca Valley County of Butte County of Mariposa County of Mendocino County of Riverside County of San Bernardino County of Tuolumne County of Yolo CA-NV American Water Works Association Castaic Lake Water Agency Castro Valley Sanitary District Cucamonga Valley Water District Glendale Water and Power Hayward Area Recreation and Park District Irvine Unified School District Jurupa Community Services District Livermore Area Recreation and Park District Midpeninsula Regional Open Space District Newhall County Water District Piedmont Police and Fire Ramona Municipal Water District Rincon del Diablo Municipal Water District Rosamond Community Services District San Bernardino Municipal Water San Mateo Fire District San Marino Unified School District Southern California Coastal Water Research Sweetwater Authority Walnut Valley Water District West County Wastewater District Western Municipal Water District Colton Joint Unified School District Irvine Unified School District Lake Elsinore Unified School District Menifee Unified School District Mesa Water District Mountain View School District Romoland School District West Covina Unified School District Ohlone Community College	San Jose Community College University of California Berkeley University of California San Francisco UCSF Medical Center Stanislaus Council of Governments Mechoopda Indian Tribe <b>Alabama</b> City of Pelham <b>Arizona</b> County of Maricopa <b>Connecticut</b> City of Bristol City of New Haven Groton Police and Communications Dispatch Town of Groton <b>Florida</b> City of Cape Coral City of Deerfield Beach City of Dunedin City of Fort Lauderdale City of Pompano Beach City of Port St. Lucie City of Riviera Beach <b>Idaho</b> City of Sandpoint <b>Illinois</b> City of Bloomington City of Champaign City of Countryside City of Crystal Lake City of Highland Park City of Joliet City of Lake Forest City of Moline City of Morton Grove City of Naperville City of Oakbrook Terrace City of Orland Park City of Prospect Heights City of Rockford City of Rock Island City of St. Charles City of Waukegan City of Wood Dale County of DuPage County County of Peoria County County of Sangamon County County of Winnebago County Village of Arlington Heights Village of Cary Village of Glencoe Village of Kenilworth Village of Lake Barrington Village of Libertyville Village of Lincolnwood Village of Matteson Village of Norridge Village of Northbrook Village of Northfield Village of Oak Brook Village of Oak Park Village of Oswego Village of Palos Park Village of River Forest Village of Riverside Village of Westmont Village of Wheeling DuPage County Health Dept. Batavia Public School District	Central Community Unit School District 301 Champaign County Forest Preserve District Civitas Schools Community High School District 99 Community Unit High School District 205 Community Unit School District 300 Community Unit School District 308 Consolidated High School District 230 Consolidated School District Gower School District Hampton School District 29 Harlem School District 122 Harrison School District 36 Harvard Community Unit School District Harvey School District 152 Oswego School District 308 Pace Suburban Bus Division Park Ridge Schools Port Byron Central School District Posen-Robbins SD 143.5 Prospect Heights School District Riverside Public School District 96 Rockford Public Library Rock River Water Reclamation District Sherrard Community Schools St. Charles School District Sunset Ridge School District Lincolnwood Public Library Oak Park Library Oswego Library District Park District of Highland Park <b>Indiana</b> The University of Notre Dame Indianapolis Public Library Indianapolis Public Schools <b>Iowa</b> City of Ankeny City of Bettendorf City of Burlington City of Cedar Rapids City of New Hampton City of West Des Moines County of Johnson County of Linn State of Iowa Burlington Community School District Cedar Rapids Community School District Davenport School District Diocese of Davenport Catholic Schools Knoxville Community School District Mason City School District North Scott School District Des Moines Area Community College Cedar Falls Utilities <b>Kansas</b> City of Shawnee	<b>Michigan</b> University of Michigan Lake Superior State University <b>Minnesota</b> County of Anoka <b>Nevada</b> Town of Pahrump County of Nye <b>New York</b> City of Batavia Village of Ossining <b>North Carolina</b> City of Burlington City of Gastonia City of High Point City of Kinston City of Mount Airy City of Salisbury Arc of Stanley County County of Buncombe County of Cabarrus County of Davie County of Orange St. Augustine College Wake Forest University Eastern Band of Cherokee Indians Salisbury Rowan Utilities <b>Ohio</b> County of Cuyahoga County of Montgomery <b>South Dakota</b> Rapid City Area Schools <b>Texas</b> City of Dallas City of Pflugerville City of University Park County of Denton Corpus Christi Fire Highland Park Police and Fire International Bank of Commerce River Oaks Country Club State Bank of Texas University of Texas Health Science Center Westwood Country Club <b>Utah</b> Washington County School District <b>Virginia</b> Commonwealth of Virginia City of Manassas Park <b>Wisconsin</b> City of Appleton City of Brookfield City of Eau Claire City of Wauwatosa City of West Allis County of Brown County of Kenosha County of Milwaukee County of Waukesha HIDTA Milwaukee Diocese of Madison Catholic Schools Madison School District Shorewood School District Whitnall School District West Allis School District
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The fees, work plan, and schedule are detailed in the following section, showing the steps, associated hours per consultant, and estimated weeks in a concise, easy-to-use format that our clients say they appreciate. We structure our fees to be affordable and tie them directly to the work plan so the hours and deliverables are clearly understood.



# Fees, Work Plan, and Schedule



## Work Plan and Fees

The following work plan outlines the project steps, the hours to be devoted by project team members, and an estimated timeline. The timeline starts on the date of the Kick-Off Meeting.

Step	Land Management Software Assessment and Vendor Evaluation Services	Estimated Timeline Week(s)	Total Billable Hours	Tatjana/ David	Cyndi/ Michael
Phase 1 - Project Management		1-8			
1	Project Management and Planning - Work with the City Project Manager to finalize the project work plan and timelines and arrange communications, logistics, and support. Schedule various meetings with personnel from each functional area to review and discuss existing and information system needs. Provide ongoing project coordination and status updates.	1-8	40	24	16
2	Project Initiation - Work with the City Project Manager to finalize the makeup of the Project Team and document the required roles and responsibilities. This will include the following steps:  Project Team organization includes setting up a PMO office, per Project Management Institute best practices, and module stakeholder teams.  Assist in educating Project Team members and stakeholders on defined roles and responsibilities. This will be facilitated through completing forms for use in workshops, including background concepts, instructions, and finalization.	1-4	10	6	4
Phase 2 - Assessment and Process Reviews		1-6			
3	Assessment Questionnaires/Information Requests - Review information requests related to existing and future information systems must be used with staff during the discovery process.	1-4	6	4	2
4	Background and Analysis - Obtain and analyze background information, including internal questionnaires and surveys.	1-4	10	8	2
5	Business Process Analysis and System Requirements Workshops - Meet with module teams to understand current implementation challenges. Review existing manual and automated systems and operations, including custom-developed work-around systems or processes. Change Management and best practices for vendor selection and implementation preparation will be addressed throughout all workshops. Workshops will also identify deficiencies in current processes and establish expectations for improved design and efficiencies in a modern Land Management solution.	4-6			



Step	Land Management Software Assessment and Vendor Evaluation Services	Estimated Timeline Week(s)	Total Billable Hours	Tatjana/ David	Cyndi/ Michael
	<b>Land Management Applications</b>				
	Planning		5	2.5	2.5
	Building		6	3	3
	Code Enforcement		4	2	2
	Engineering		4	2	2
	Public Works		4	2	2
	Cashiering/Finance and Accounting		3	1.5	1.5
	GIS Integration		2	1	1
	Other Integrations/Interfaces and Conversion Requirements		4	2	2
	Vendor communications		10	6	4
6	<b>System Requirements Documentation</b> - Review information gathered during the process reviews and develop system requirement specifications.		20	8	12
	<b>Phase 3 - Contract and Implementation Plan Review</b>	<b>1-4</b>			
7	<b>Contract Review</b> - Review the existing contract (in a non-legal capacity) to understand the current vendor system and implementation services obligations to the City.	1-4	4	4	
8	<b>Implementation Plan (SOW) Review</b> - Review existing Statement of Work, Implementation Schedule/Plan, Project Management Office, resource requirements, and timelines.	1-4	12	8	4
	<b>Phase 4 - Needs Assessment Report</b>	<b>6-8</b>			
9	<b>Findings and Recommendations Report Memorandum</b> - We will review the information gathered during the business process reviews and develop a Findings and Recommendations Report. This document will include, but not necessarily limited to:	6-8	24	16	8
	Key Findings and Observations				
	Key Recommendations				
	Product and Implementation Challenges				
	Existing Contract Observations				
	Statement of Work Recommendations				

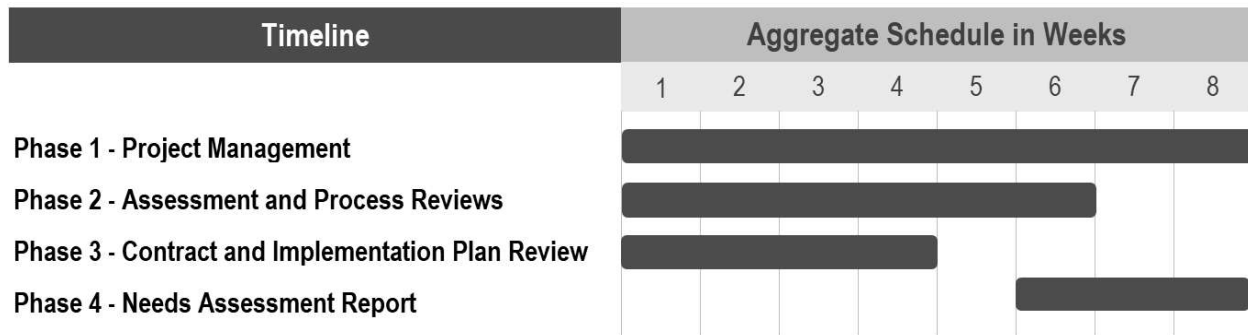


Step	Land Management Software Assessment and Vendor Evaluation Services	Estimated Timeline Week(s)	Total Billable Hours	Tatjana/ David	Cyndi/ Michael
	Estimated Cost Option Considerations				
	Estimated Reimplementation Project Plan/Timeframes				
	Strategy and Direction Options				
10	<b>Present and Finalize Report and Determine Next Steps</b> - Prepare a presentation and present the report to City management and Project Team. The objective will be for the City to determine its go-forward strategy and next steps (e.g., improve the existing system or procure a replacement vendor.	7-8	10	8	2
		Hours	178	108	70
		Rates		\$225	\$205
		Average Hourly Rate	\$217		
		Fees	\$38,650		
		Travel and Related Expenses (not to exceed 10%)	N/A		
		<b>Total Project Costs</b>	<b>\$38,650</b>		



## Estimated Project Timeline

The timeline below illustrates ClientFirst's estimated schedule for each project phase.



*Note: Timelines depend upon City staff's ability to schedule promptly and review requested information and documentation. Delays to any steps by City staff or vendors can impact the project timeline.*

## Project Start

We can begin the initial activities related to this project, such as project coordination and scheduling, within 1-2 weeks of finalizing an agreement regarding this proposal.

## Scope Changes and Management

Alternative scope changes and fee adjustments are possible and depend on specific project needs, staff resources, and capabilities. Minor changes to the scope and methodology stated above will not result in a change in our fees.

If the nature or scope of our work should change significantly during the project, we will discuss such matters and their effect on our fees and obtain written approval before proceeding.

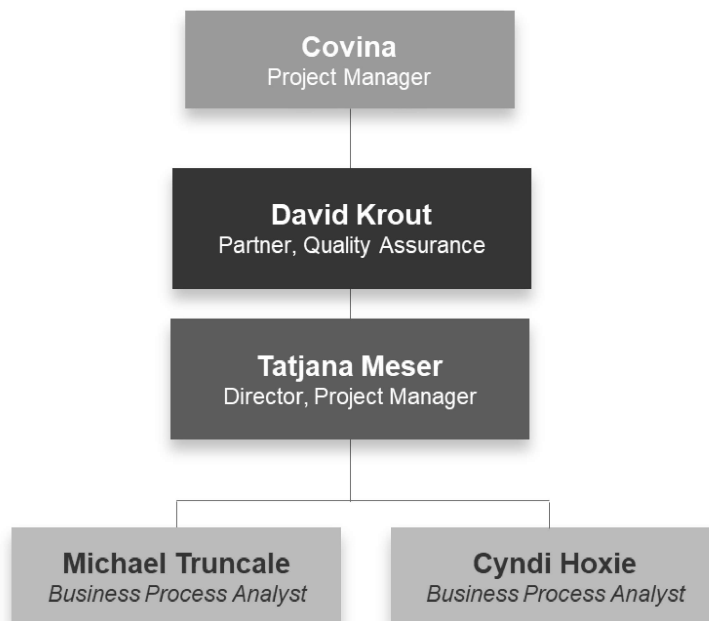
## Payment Terms

We invoice monthly as work proceeds. ClientFirst will provide a detailed accounting of all consulting time and expenses on the invoice. Payments are due within 30 days of receipt via check or ACH.

## Additional Services/Purchases by Other Seeking Public Agencies

ClientFirst acknowledges that other public agencies may seek to "piggyback" under the same terms and conditions of a resulting similar services and/or purchases being offered in this contract or proposal. ClientFirst can agree or disagree to allow contract piggybacks on a case-by-case basis. ClientFirst agrees to extend the same pricing, terms, and conditions as stated in this contract or proposal to every political entity, special district, and related non-profit. It is understood that other entities shall make purchases in their name, make payments, and be liable directly to ClientFirst. The agency shall not be involved or responsible to ClientFirst for other entities' purchases.

The personnel selected for this engagement are experts in their respective disciplines, chosen according to the specific needs of this Project. They will work as an integrated team to provide end-to-end consulting and support services. This section provides detailed profiles for each Project Team member.







## Key Personnel

All assigned personnel have sufficient availability to complete this Project on time and within budget.

**David Krout** - Partner, Enterprise Applications Consulting

### **Project Role: Quality Assurance**

David Krout, CPA (*inactive*), has been working with municipalities nationwide on these application selection projects for over twenty years. David has interviewed thousands of users from all municipal departments in business process workshops.

**Tatjana Meser** – Director, Enterprise Applications Consulting

### **Project Role: Project Manager, Business Process Analyst**

Tatjana Meser has over 14 years of public agency experience. Tatjana formerly worked in the Land Management software industry and has hands-on implementation project experience with over 30 development services departments. Tatjana will serve as the Project Management and business process analyst.

**Cyndi Hoxie** - Applications Consultant

### **Project Role: Business Process Analyst**

Cyndi Hoxie has over 30 years of Public Sector experience, including 15 years with municipal governments in Building and Code Enforcement. Cyndi has spent over 16 years assisting agencies with land management enterprise application systems, including project management, conversion, interfaces, workflow analysis, and systems configuration.

**Michael Truncale** – Applications Consultant

### **Project Role: Business Process Analyst**

Michael Truncale has over 18 years of public agency experience. Michael formerly worked in the Land Management software industry and has hands-on implementation project experience with over 40 development services departments. Michael will serve as a business process analyst and senior management consultant and assist with project coordination.



# David W. Krout, CPA *(Inactive)*

## Partner – Enterprise Applications Consulting Practice Leader

David Krout has 27 years of experience assisting local governments with a broad scope of information technology needs. He specializes in working with organizations to identify their strategic, organizational, application, and functional requirements to determine which system and/or specific applications are a proper fit for both the agency and the vendor.

David's unique and diversified background in business management, accounting, and management consulting has allowed him to collaborate with C-level executives and department staff from a practical, business-management perspective to maximize their technology utilization.

Having also worked for a leading local government enterprise software provider, David brings a unique understanding of consulting, client representation, and vendor relationships to the collaboration between the agency and software vendors.

### Highlights

- Served on the National Committee for Information Technology for the Institute of Management Accountants
- Former President, Institute of Management Accountants, Inland Empire Chapter
- Former Government IT Consulting Manager for RSM McGladrey, the nation's fifth-largest CPA and consulting firm
- Featured speaker for the California Society of Municipal Finance Officers (CSMFO), Municipal Information Systems Association of California (MISAC), and Texas Association of Government Information Technology Managers
- Project lead with over 100 public-sector agencies throughout the United States

### Agency Experience

City of Albany  
City of Batavia  
City of Bloomington  
City of Brentwood  
City of Brisbane  
City of Burbank  
City of Burlington  
City of Camarillo  
City of Carlsbad  
City of Cathedral City  
City of Cedar Hill  
City of Chico  
City of Chino  
City of Clovis  
City of Colton  
City of Corona  
City of Coronado  
City of Dana Point  
City of Dublin  
City of Emporia  
City of Farmers Branch  
City of Foster City  
City of Gastonia  
City of Healdsburg  
City of Hemet  
City of High Point  
City of Highland Park  
City of Hutto  
City of Indio  
City of La Habra  
City of La Puente  
City of Laguna Niguel  
City of Lake Forest  
City of Larkspur  
City of Lomita  
City of Manassas Park

City of Menlo Park  
City of Mission Viejo  
City of Mountain View  
City of Murrieta  
City of Newark  
City of Novato  
City of Pacifica  
City of Palm Desert  
City of Palmdale  
City of Pelham  
City of Petaluma  
City of Piedmont  
City of Rancho Mirage  
City of Redlands  
City of Rialto  
City of Riviera Beach  
City of Rosemead  
City of St. Helena  
City of Salisbury  
City of San Bernardino  
City of San Gabriel  
City of San Jacinto  
City of San Leandro  
City of Sandpoint  
City of Shawnee  
City of Sierra Madre  
City of Simi Valley  
City of South Gate  
City of Tracy  
City of Tustin  
City of West Covina  
City of West Des Moines  
City of West Sacramento  
City of Whittier  
City of Wilton Manors  
City of Windsor

County of Buncombe  
County of Butte  
County of Denton  
County of Douglas  
County of Lassen  
County of Mendocino  
County of Orange  
County of Plumas  
County of Riverside  
County of San Bernardino  
Town of Danville  
Town of Groton  
Town of Hillsborough  
Town of Truckee  
Town of Windsor  
Town of Woodside  
Village of Northfield  
Village of Oswego  
Village of Park Forest  
Village of River Forest  
Coachella Valley MVCD  
East Bay Regional Park District  
El Toro Water District  
Four Rivers Sanitation Authority  
Jurupa Community Services District  
Las Angeles Community Development Authority  
Las Virgenes Municipal Water District  
Mesa Water District  
Midpeninsula Regional Open Space District

Ramona Municipal Water District  
Rincon del Diablo Water District  
Riverside County Sheriff's Office  
San Bernardino Municipal Water  
Walnut Valley Water District  
West County Wastewater District  
Western Municipal Water District  
Castaic Lake Water Agency  
Castro Valley Sanitary District  
Cucamonga Valley Water District  
Gastonia Water & Power  
Glendale Water and Power



### CREDENTIALS, DEGREES, AND AFFILIATIONS

- Certified Public Accountant (CPA) (Inactive)
- Bachelor of Science in Business Administration and Accounting – CSU San Bernardino

### SPECIALTIES

- Business Process Reviews
- Applications Requirements Definition
- Enterprise Applications Architecture
- Current System Needs Analysis and Improvement
- New Software Selection Assistance
- Technology Master Planning
- Project Management and Oversight
- Conversion Assistance and Planning
- Contract Reviews and Negotiations



Certified Public Accountant  
*(Inactive)*

It has been absolutely key to this project that ClientFirst, especially Dave, knows the governmental environment, its limitations and its opportunities.

—Director of Administrative Services  
CA Municipality



# Tatjana Meser

## Director, Enterprise Applications Consulting

Tatjana Meser has over 14 years of experience with local government agency software implementations. Her in-depth experience with software configuration, business analysis, and user needs assessment allows Tatjana to oversee project implementations of standard and customized software successfully.

Skilled in all facets of the project life cycle for application software, she has experience with functional and technical requirements development, gap analysis, system analysis, design, specifications, unit and system testing, implementation planning, execution, lessons learned, and system documentation.

These business improvement and process consistency efforts have created significant cost savings through move-efficient business processes and have reduced overall implementation costs.

Having worked with numerous government agencies as a vendor, Tatjana also brings an understanding, perspective, and ability to manage all the parties necessary for delivering lasting operational success.

## Highlights

- Project oversight and management services for multiple community development implementations with custom integration to financial, tax, and business licensing systems
- Industry experience includes work with City and County agencies

## Agency Experience

City of Batavia  
City of Beaumont  
City of Carlsbad  
City of Cedar Hill  
City of Chico  
City of Corona  
City of Coronado  
City of Dana Point  
City of Escondido  
City of Fairfield  
City of Farmers Branch  
City of Fontana  
City of Glendora  
City of Greenville  
City of Hesperia  
City of Idaho Falls  
City of Keller  
City of Key West  
City of Lakeland  
City of Larkspur

City of Mill Valley  
City of Mission Viejo  
City of Monrovia  
City of Newark  
City of Novato  
City of Oceanside  
City of Palm Desert  
City of Palmdale  
City of Petaluma  
City of Piedmont  
City of Pinole  
City of Pismo Beach  
City of Rancho Palos Verdes  
City of Rocklin  
City of Salinas  
City of San Bernardino  
City of San Clemente  
City of South Gate  
City of St. Cloud  
City of St. Helena

City of St. Paul  
City of Vacaville  
City of Vallejo  
City of West Covina  
City of West Sacramento  
City of Wood Dale  
Town of Windsor  
Town of Woodside  
Village of Lincolnwood  
Village of Oswego  
Village of River Forest  
Village of Westmont  
County of Butte  
County of Calaveras  
County  
County of Mendocino  
County of Shasta  
County of Yuba  
County of Hanover



## CREDENTIALS, DEGREES, AND AFFILIATIONS

- Bachelor of Arts in International Studies – UC San Diego
- Project Management Institute Member – Inland Empire Chapter

## SPECIALTIES

- Project Management
- Conversion, Interface Planning, and Implementation Support
- Understanding of public sector departmental operations and application systems
- Workflow analysis and mapping
- Business Process Redesign
- System Configuration and Training
- Test and Go Live Plan Creation



I just wanted to say that I thought the training sessions were very informative and clear, and I learned a lot from it. I appreciate your time spent to train us. Thank you so much!

—Account Clerk  
CA Municipality



# Cyndi Hoxie

## *Enterprise Applications Senior Management Consultant*

Cyndi Hoxie has over 30 years of Public Sector experience, including 15 years in municipal government Building and Code Enforcement. She has spent over 19 years assisting agencies with land management enterprise application systems, with her last position as a product owner of a mid-tier land management software representing the software needs of government agencies nationwide.

Cyndi's applications experience ranges from being a frontline, daily land management software user to extensive applications support and software implementor and project manager of software implementations. Her diverse experiences allowed her to represent clients' needs and drive the development of land management software with the end user in mind. Cyndi now utilizes her vast land management systems knowledge to provide agencies with hands-on application support, maintenance, data management, reporting writing, training, and consulting advisory.

### Highlights

- Experience with planning, permitting, inspections, code enforcement, and tax and licensing processes
- Project oversight and management services for multiple community development implementations
- Experience with custom integrations specifically for financial, tax, and business licensing systems
- Business process gap analysis and workflow documentation
- Extensive knowledge of business and technical processes of enterprise applications

### Agency Experience

City of Aurora  
City of Aventura  
City of Bakersfield  
City of Boynton Beach  
City of Brentwood  
City of Broken Arrow  
City of Carlsbad  
City of Cary  
City of Champaign  
City of College Station  
City of Coral Springs  
City of Crestview  
City of Delray Beach  
City of Folsom  
City of Fresno  
City of Grand Prairie  
City of Greenville  
City of Gresham  
City of Las Vegas  
City of Los Altos  
City of Manchester  
City of Marietta  
City of Miami Springs  
City of Mission Viejo

City of Newberg  
City of Norfolk  
City of North Port  
City of Novato  
City of Oswego  
City of Pearland  
City of Piedmont  
City of Pinole  
City of Plano  
City of Pompano Beach  
City of Rio Rancho  
City of St. Cloud  
City of St. Helena  
City of St. Petersburg  
City of Salinas  
City of San Bernardino  
City of San Clemente  
City of Solana Beach  
City of Tamarac  
City of West Palm Beach  
City of Winter Haven

Town of Davie  
Town of Lady Lake  
Town of Los Altos Hills  
Town of Normal  
Town of Windsor  
Village of Lincolnwood  
County of Butte  
County of Hanover  
County of Mendocino



### CREDENTIALS

- Certified Scrum Product Owner

### SPECIALTIES

- Project Management
- Conversion, Interface Planning, and Implementation Support
- Understanding of public sector departmental operations and application systems
- Workflow analysis and mapping
- System Configuration and Training
- Test and Go Live Plan Creation



**Cyndi, Thank you so much for accomplishing this huge task in a short period of time! We would not have been able to do this without you.**

—City Manager  
CA Municipality



# Michael Truncale

## **Enterprise Applications Senior Management Consultant**

Michael Truncale has over 18 years of experience working directly with municipalities and government agencies with software implementations. His experience includes business process assessments, project planning, software implementation, application configuration, custom integrations, scoping customization needs, managing multiple teams across disciplines, process documentation, and project management related to enterprise applications.

Having worked for a leading local government enterprise software provider, Michael brings a strong understanding of software implementation, consulting, process knowledge, functional knowledge, and customer needs and concerns throughout and post-implementation.

Michael's in-depth knowledge of agency processes, technical and functional background, and passion for helping people enable him to identify gaps and quickly provide quantifiable solutions.

### **Highlights**

- Business process gap analysis
- Multi-phased agency-wide software implementations
- Extensive knowledge of business and technical processes of enterprise applications
- Facilitator between C-level and functional roles

### **Agency Experience**

City of Ann Arbor  
City of Bellingham  
City of Brentwood  
City of Bryan  
City of Canton  
City of Carlsbad  
City of Chico  
City of College Station  
City of Colleyville  
City of East Palo Alto  
City of Edmond  
City of Emeryville  
City of Elk Grove  
City of Escondido  
City of Gladstone  
City of Glendora  
City of Golden  
City of Greeley  
City of Greer  
City of Helena  
City of Larkspur  
City of Medford  
City of Norwalk  
City of Novato  
City of Pearland  
City of Pflugerville  
City of Piedmont  
City of Pinole  
City of Poway  
City of Prescott

City of Round Rock  
City of Sammamish  
City of San Bernardino  
City of San Clemente  
City of San Marcos  
City of Tracy  
City of Tukwila  
City of Vacaville  
City of Walla Walla  
City of West Covina  
City of Westminster  
City of Wildwood  
Butte County  
Glenn County  
Hanover County  
Lewis and Clark County  
Lincoln County  
Manatee County  
Mendocino County  
Nassau County  
Spotsylvania County  
Summit County  
Yuma County  
Town of Castle Rock  
Town of Flower Mound  
Town of Parker  
Town of Windsor  
Town of Woodside



### **CREDENTIALS, DEGREES, AND AFFILIATIONS**

- Bachelor of Arts in Business Administration – California State University of San Marcos
- Project Management Institute Member – San Diego Chapter

### **SPECIALTIES**

- Project Management
- Implementation Project Management
- Business Process Reviews
- Current System Needs Analysis and Improvement
- Project Management Oversight
- Conversion, Interface Planning, and Implementation Support
- Understanding of public sector departmental operations and application systems
- Workflow analysis and mapping
- Business Process Redesign
- System Configuration and Training
- Test and Go-Live Plan Creation



**First of all, great work. You are an elite communicator. It's honestly your best skill and to be clear you are top notch in everything else.**

—Senior Information Systems Analyst  
CA Municipality

**Michael...the speed of this delivery is amazing and the deliverable is just so clean. Well done. I'm looking forward to working more with you.**

—Senior Information Systems Analyst  
CA Municipality



# References

We believe our clients are our best salespeople. The references listed here are examples of clients with similar needs. Each of these clients has retained our services many times. We pride ourselves on client satisfaction and strive to maintain long-term relationships with our clients as partners.



## City of Mission Viejo

200 Civic Center, Mission Viejo, CA 92691

**David Meyer, Director of Information Technology**

**949.470.8447**

[dmeyer@cityofmissionviejo.org](mailto:dmeyer@cityofmissionviejo.org)



## City of San Clemente

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**Brian Brower, Information Technology Manager**

**949.283.3721**

[BrowerB@san-clemente.org](mailto:BrowerB@san-clemente.org)



## City of Dana Point

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**Sea Shelton, Admin Services Director**

**949.248.3501**

[sshelton@danapoint.org](mailto:sshelton@danapoint.org)



## City of Carlsbad

1635 Faraday Ave., Carlsbad, CA 92008

**Maria Callandar, IT Director**

**760.602.2454**

[maria.callander@carlsbadca.gov](mailto:maria.callander@carlsbadca.gov)



## Town of Windsor

9291 Old Redwood Highway, Windsor, CA 95492

**Julé Taylor, Senior Management Analyst**

**707.838.5365**

[jtaylor@townofwindsor.com](mailto:jtaylor@townofwindsor.com)



# Appendix: City of Rancho Mirage Published Digital Transformation Article

ClientFirst has assisted the City of Rancho Mirage with various Technology Projects, starting with a citywide Technology Master Plan and Roadmap to transform the City and its operations digitally. The following article was published to showcase these digital transformation improvements. We also jointly presented these transformation efforts at the annual California Society of Municipal Finance Officers (CSMFO) conference.

*Proposal for*

# Technology Master Planning

*May 16, 2025*



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May 16, 2025

Dr. Shawn Granger  
IT Manager  
City of Covina  
125 E. College St.  
Covina, CA 91723

**RE: Proposal for Technology Master Planning**

Dear Dr. Granger:

ClientFirst appreciates the opportunity to present the City of Covina with our proposal, which includes developing and articulating a vision for the effective use of technology to support the City.

At ClientFirst, we have a proven track record of educating and building consensus among staff members, departmental leadership, senior management, and elected officials. Our expertise lies in assessing the current environment, reviewing alternatives, and providing the City with specific recommendations and supporting documentation regarding strategy and tactical implementation.

**Methodology and Approach** – ClientFirst customizes industry best practices for Technology Assessment and Master Planning in a practical way to meet the unique needs of each agency. We provide:

- Assessments for business department applications, technology utilization, and operational needs
- IT infrastructure, cybersecurity, operations, service delivery, and staffing assessments
- Development of strategies, goals, objectives, and recommendations
- Comprehensive technology initiative recommendations with budgets, timelines, and resource requirements
- Master planning workshops with operational departments, IT management, IT Planning Committee, and executive management
- Master Plan reports and supporting documentation
- Tracking and measurement of plan objectives and initiatives

**Truly Independent** – ClientFirst is a truly independent technical services and consulting firm. We are certified in multiple technologies, but we DO NOT resell hardware and software, nor represent those that do. Therefore, there is no risk of our analysis being biased toward a particular solution.

**Local Government and Municipal Focus** – Our management team's career experience includes over 3,500 projects for more than 500 local government agencies.

If you have any questions, feel free to contact us at the contact information listed below for additional information. We look forward to the opportunity to serve the City of Covina.

Sincerely,



**David W. Krout, CPA** *(inactive)*  
Partner  
Management Consulting Practice Leader



**Tom Jakobsen**  
Partner  
IT Infrastructure and Operations Consulting Practice Leader



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TRANSFORMATION ARTICLE .....57**

ClientFirst is well-equipped to assist the City in this endeavor. The following pages outline key differentiators that set our services apart from other IT consulting firms and an overview of the project.





## Technology Master Plan Objective

The objective of the Assessment and Planning process includes developing and articulating a vision for the effective use of technology to support the work of the City, assuring the proper technical resources and organization structure to manage the information technology (IT) function effectively. The plan also identifies strategies for developing and implementing technology initiatives in support of the organization's department operational needs and Master Plan. We also focus on planning and recommending improvements in the City's business applications to make those applications more effective in supporting the departments and the organization's goals.

We create a well-documented plan to guide the IT team and the City's operational departments over the next five years in planning, procuring, implementing, and managing current and future technology investments, as well as resources related to operational technology and information technology service delivery. The plan is the result of a thorough analysis of the following:

- Interviews and workshops involving all levels of the City's operational staff, including the management team, end-users, and other stakeholders
- Existing network infrastructure, cybersecurity, risk management, policies, staffing, funding, applications, business systems, projects, processes, telecommunications, training, and other investments and resources currently in use by the City
- Identification and prioritization of projects to undertake over the next five years
- Identification of needs to accommodate current and future technology requirements, such as IT operations and management, legal requirements, cybersecurity requirements, service delivery, training, cloud computing, smart city technologies, and more

**Experience with Government Agencies** – We have experience working with government agencies nationwide. Our staff has subject-matter expertise, enabling us to quickly understand operational demands and opportunities and equate them to beneficial technology improvements and recommendations.

Frankly, IT is a hard topic to handle, and they're not boring or too technical. It was invaluable to have them on site meeting with people, because their communication style is much better than others I've seen.

—Director of Administrative Services  
CA Municipality

## Approach to Technology Assessment and Master Planning

*Technology Assessment and Master Planning* are processes by which information technology supports an organization's goals and objectives. This process *aligns technology strategies and objectives with key business processes and drivers*.

**More than a Strategic Plan** – The industry standard in IT planning for the past decade has been a high-level strategic analysis to develop a *strategic plan*. Though helpful, such a plan lacks the depth and practical guidance necessary to successfully (1) implement the plan, (2) meet business goals through technology initiatives, and (3) maintain the plan into the future.



**Technology Master Plan**

ClientFirst takes the strategic plan to a new level with our Technology Assessment and Master Plan, which provides several key features:

- Collaborative Needs Assessment
- Education and Prioritization Workshops
- Step-by-Step Roadmap
- Resource Assignments
- Project Budgets
- Project Timelines

**Tactical** – Our emphasis is on providing the City with a technology plan that is both strategic and tactical. We aim to create a plan that fully documents each initiative and can be used without our continued help.

**Business Perspective** – We approach Technology Assessment and Master Planning from a business perspective and create deliverables everyone in the organization understands, from the IT technicians to upper-level management and elected officials.

**Collaborative and More Comprehensive** – Our process is intended to create an interactive, collaborative environment conducive to sharing ideas while building a single vision for the future of the City's information technology function, decision-making, and ongoing support. This collaborative effort results in a detailed and comprehensive action plan that should be viewed as a fluid, "living" set of documents. We train agency staff on the adopted technology initiatives and projects and how to implement the plan over the next five years.



**Practical and Sustainable** – Because of our **focus on budget realities and sustainable solutions**, the solutions we recommend will be **practical and cost-effective**. Receiving a plan that is too costly to implement and sustain does not help the City in the long run.



**Use of Best Practices** – ClientFirst utilizes PMI, COBIT, ITIL, and EAP concepts as building blocks, drawing on our experience and best practices to guide our Technology Assessments and System Selections. Governance is essential to ensuring technology strategies and recommendations align with business objectives in an ongoing, repeatable process.

- PMI (Project Management Institute)
- ITIL (Information Technology Infrastructure Library)
- National Institute of Standards and Technology (NIST)
- Criminal Justice Information Services (CJIS)
- Payment Card Industry Data Security Standards (PCI-DSS)
- COBIT (Control Objectives for Information and Related Technology)
- EAP (Enterprise Architecture Planning)

## Firm Resources and Commitment

We consider technology planning projects to be our firm's premier service offering. We are a diversified firm with a wide range of subject-matter experts committed to promptly completing this project. We have included the steps necessary to attend meetings, advise staff on matters specific to the scope of services, prepare and present reports to City Management and members of the City's Council (if desired), and assist with due diligence and disclosure processes relevant to the scope of services.

### Project Team Resources

We will assign this project to a comprehensive multi-discipline team. This team is assembled from practice leaders in our firm's Management Consulting, Enterprise Applications and Business Processing, and IT Infrastructure practices.

All project team members are **ClientFirst employees** and are **not hired as third-party subcontractors**. This ensures **consistency, continuity, and quality** in our deliverables.

### Experience that Enhances the Master Planning Process

One of the unique qualities of ClientFirst is our breadth of service practice areas, summarized below. As a firm, our recommendations are based on **real-life experience resulting from performing and delivering these services daily**. Our continued engagement with our clients provides significant opportunities to stay current **with industry trends and emerging technologies while preserving our independence** by not reselling vendor products.

#### *IT Staffing and Leadership Experience*

- **Interim IT Management**—Our firm's senior talent has held CIO, CTO, and IT Director positions in local government and led national, government-solution-based software companies. We have placed these resources at various government organizations to fill IT leadership vacancies and assist in hiring and transitioning to replacement IT leadership.
- **Staffing Assessment and Organization** – Our IT leadership experience helps our government clients update IT staffing structures and develops their IT teams to be more productive and efficient and deliver a higher level of service.

#### *IT Infrastructure*

- **IT Infrastructure Resources** – Our firm has government-agency-experienced network engineers and senior system administrative talent. We utilize these experts in our Technology Assessment and Planning engagements for their real-world experience in making meaningful recommendations.



- **Cybersecurity and Disaster Recovery** – Our firm has extensive cybersecurity incident response, disaster recovery, and business continuity assessment and planning experience.
- **Data Center, Telecommunications, and Infrastructure Cabling** – A key resource in our firm is our data center, telecommunications, and structured cabling talent. They have designed, selected, and implemented state-of-the-art telephone and telecommunications systems for hundreds of local government agencies. Our team's experience includes data center design, inside/outside cable-plant expertise, fiber-optic, and wireless specialization.
- **IT Support Experience** – We provide IT support and act as the IT department or management for several agencies in Illinois. These teams have real-life experience managing government agencies' IT operations and can impart their knowledge when assisting with Technology Assessment and Planning recommendations and initiatives.

### ***Local Government Application and Process Improvement Expertise***

- **Application Knowledge** – We have experienced enterprise application consultants who have assessed, reviewed, and assisted in the selection of all local government application suites, including Financial and Accounting, People Management, CIS/Utility Billing, Land Management, Work Orders and Asset Management, Public Safety, Parks and Recreation, Community Services, and more. They have worked with thousands of end-users in all agency departments. This experience helps us make effective departmental application and operational technology recommendations.
- **Application Implementation** – We have experienced Implementation Project Management staff. This is helpful to the Technology Assessment and Planning process because we know what it takes to implement these solutions according to Best Practices.
- **Process Improvement** – A key aspect of applications and operational technology is using these tools to eliminate manual and duplicate processes, reduce shadow systems, and improve processes to achieve higher productivity and service to departments and citizens.

### **Experience in Multilevel Communication and Advising Clients**

For a plan to be successful, it must be communicated and understood at all levels, from top to bottom. We provide deliverables and present materials to facilitate the communication of the plan across the organization to readers of multiple audiences. We also have experience effectively presenting to executive management and elected officials to gain buy-in and support for the necessary strategies and resources to implement a long-term Technology Master Plan.

From the beginning, I was impressed with how inclusive the process has been. I've never been associated with such a collaborative, cooperative, and engaged project. Outstanding process.

—City Manager  
IL Municipality



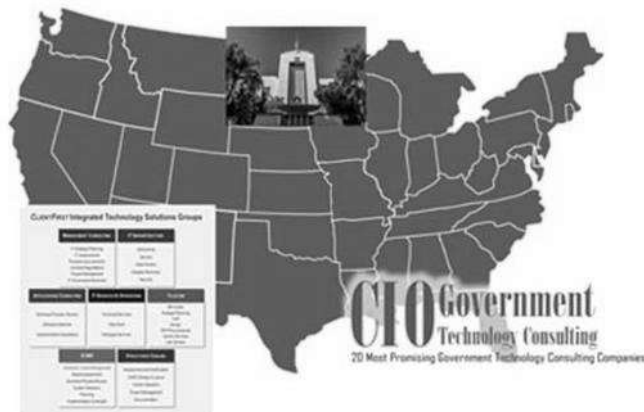


## Similar Engagements

The list below includes the list of clients for whom we have completed Technology Master/Strategic Planning projects.

City of Albany	City of West Des Moines	Missouri Basin Municipal Power
City of Azusa	City of West Sacramento	San Bernardino Municipal Water
City of Big Bear Lake	City of Wilton Manors	Southern California Coastal Water Research
City of Brentwood	Town of Danville	Sweetwater Authority
City of Brisbane	Town of Groton	Western Municipal Water District
City of Burbank	Town of Groton Police	Civitas Schools
City of Camarillo	Town of Windsor	Consolidated High School District 230
City of Colton	Town of Woodside	Dubuque Community School District
City of Corona	Town of Yucca Valley	East Aurora CUSD 129
City of Countryside	Village of Cary	Elgin School District U-46
City of Dublin	Village of Glencoe	Harrison School District 36
City of Escondido	Village of Kenilworth	Illinois Action for Children
City of Gastonia	Village of Lake Barrington	Illinois Municipal Retirement Fund
City of Glendora	Village of Libertyville	Indian Prairie Community Unit School District 204
City of Healdsburg	Village of Lincolnwood	J. Sterling Morton School District 201
City of Hemet	Village of Lincolnwood	Lincolnwood Public Library
City of Highland Park	Village of Lincolnwood Police	Morton High School District
City of Hutto	Village of Matteson	Naperville Community Unit School District 203
City of La Habra	Village of Morton Grove	Naperville Park District
City of Lake Forest	Village of Norridge	Norridge Park District
City of Larkspur	Village of Northbrook	North Scott School District
City of Manassas Park	Village of Northfield	Northbrook Public Library
City of Menlo Park	Village of Oak Brook	Northern Illinois University
City of Mission Viejo	Village of Oak Park	Oswego Library District
City of Mount Airy	Village of Ossining	Oswego School District 308
City of Murrieta	Village of Palos Park	Park District of Highland Park
City of Naperville	Village of River Forest	Park Ridge Schools
City of Newark	Village of Riverside	Ramona Water
City of Norco	County of Atascosa	Riverside County Sheriff's Department
City of Oakbrook Terrace	County of Davie	Riverside Public School District 96
City of Pacific Grove	County of Denton	Rosamond Community Services District
City of Palm Desert	County of Mariposa	San Jose Community College
City of Petaluma	County of Mendocino	Stanislaus Council of Governments
City of Pflugerville	CA-NV American Water Works Association	West Covina Unified School District
City of Piedmont	Castaic Lake Water Agency	
City of Pismo Beach	Castro Valley Sanitary District	
City of Rancho Mirage	Cucamonga Valley Water District	
City of Rialto	East Bay Regional Park District	
City of Riviera Beach	Four Rivers Sanitation	
City of Salinas	Hayward Area Recreation & Park District	
City of Salisbury	Jurupa Community Services District	
City of San Gabriel	Los Angeles County Development Authority	
City of San Leandro	Midpeninsula Regional Open Space District	
City of San Pablo		
City of Sandpoint		
City of Seal Beach		
City of Sierra Madre		
City of South Gate		
City of South San Francisco		
City of St. Charles		
City of Tustin		
City of Vacaville		
City of West Covina		

Our consultants have assisted local governments with innovative technology solutions for over 20 years. Our risk-averse technology planning and the quality of service we provide our clients have resulted in numerous long-term business relationships. Our subject-matter experts offer various technology services our clients often leverage to resolve specific issues. We are confident that no other consulting firm focusing on local governments offers the wide range of IT services that we do.



ClientFirst was extremely knowledgeable, and I felt I have learned more from my work with ClientFirst than anyone else I've worked with in that capacity. I haven't met anyone else who's even close to ClientFirst in their level of expertise.

—Director of Administrative Services  
CA Municipality



## Government Technology



Focusing on local governments means that we understand the unique needs, processes, protocols, and political nuances involved in the industry. This **understanding and experience** ensures that our strategies and recommendations are practical. Our management team's career experience includes over 3,500 projects for more than 500 local government agencies.

## Local Presence and Practice Locations

We have a local presence with extensive experience in California. ClientFirst is a national firm with practices located in California, Illinois, Texas, and North Carolina.



Corona, CA



Schaumburg, IL



San Antonio, TX



Charlotte, NC

## Business Management Approach

We understand that not all government executives know the latest technology issues and opportunities. Therefore, our approach and deliverables provide a business-management perspective that **allows the layperson the ability to understand the technology issues, strategies, and potential solutions required to make more informed business decisions.**

## Practical Recommendations

We believe in using technology as a tool to meet the agency's business objectives; we do not apply technology just for technology's sake. We are serious in our quest to provide clients with practical solutions that meet their requirements. Sometimes, the proper solution includes cutting-edge technology. However, a cost-effective and practical solution using proven technology is often the most beneficial.



## True Independence

ClientFirst believes in practicing **true independence**. We do not resell products or maintain relationships that would result in add-on profit margins or referral fees. Our interest is in **putting the client first** by finding optimum solutions (i.e., the greatest value at the lowest competitive cost) to meet their needs.



## National Recognition

Many of the industry's leading vendors recognize our consultants nationally for their work. They appreciate the fairness and objectivity we demonstrate when dealing with their organizations.

## Industry Recognition

### CIO Review

ClientFirst has been featured in CIO Review as one of the "20 Most Promising Government Technology Solution Providers".



### National Speakers

ClientFirst personnel have conducted educational sessions at national and local conferences such as CSMFO, MISAC, and GFOA, among others.





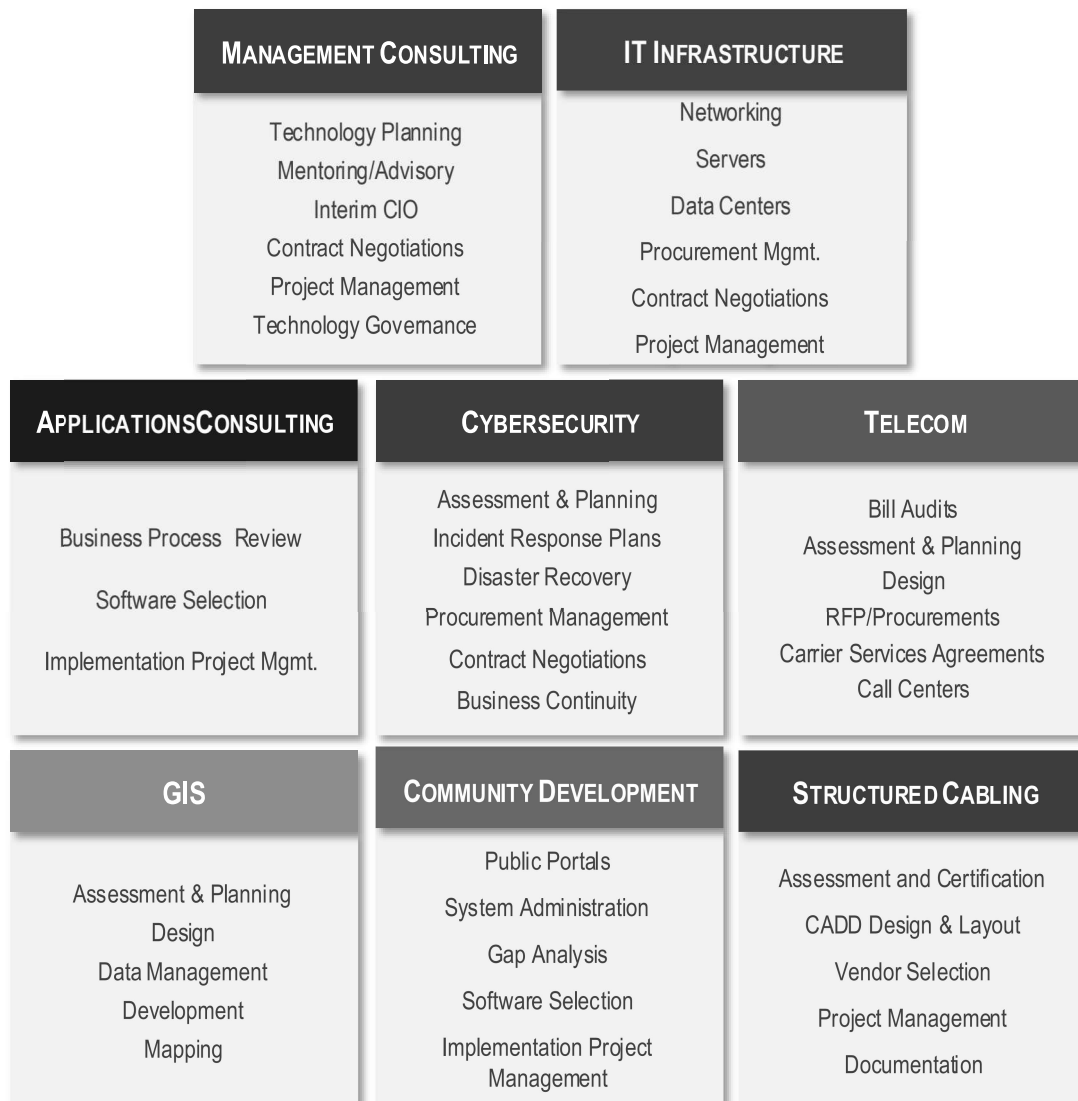
## Diversified Experience

We have **extensive experience with a wide variety of organizations and technology and processing environments**. In addition, we have significant market knowledge regarding software and hardware providers and are well-informed with respect to vendor and industry developments.

## Integrated Technology Solutions Groups

Whatever the agency's technology needs are, we offer a unique combination of experts in their given disciplines who can guide technology decisions, planning, implementation, and management, chosen according to the specific needs of each project, working as an integrated team to **provide end-to-end consulting and support services**.

## ClientFirst Integrated Technology Solutions Groups





## Integrated Technology Services

### Management Consulting

- Technology Strategic/Master Planning
- IT Assessment
- IT Staffing Assessment
- Process Improvement
- Procurement Assistance
- Contract Negotiation
- Project Management
- IT Governance Seminars

### Applications Consulting

#### **Business Process Review**

- Business Case Analysis
- Assessment and Recommendations
- Process Analysis and Improvement

#### **Software Selection**

- Feature / Function Requirements Definition
- Implementation Risk Assessment
- Change Management
- RFP Development
- Vendor Analysis and Evaluation
- Demonstration Facilitation
- Contract Review and Negotiation
- Implementation Project Management
- Ad Hoc Report-Writing Assistance

### Community Development

- Public Portals
- System Administration
- Gap Analysis
- Software Selection
- Implementation Project Management

### Telecommunications Consulting

- VoIP Readiness Review
- Systems Evaluation, Design, Specification, and RFP Development
- Bill Audits (Cost Analysis and Negotiation)
- Telecom Expense Management (TEM)
- Credit / Refund Requests
- Strategic Planning
- Project Management
- Carrier Services Cost Analysis
- Operational and Workflow Review
- System Selection and Contract Negotiation

### GIS

- Assessment and Planning
- Design
- Data Management
- Development
- Mapping

### IT Infrastructure

#### **Networking and Servers**

- Assessment, Design, and Installation
- Replication and Redundancy Strategy
- Virtualization
- Cloud Computing
- Wireless
- Data Center Design

#### **Disaster Recovery**

- Risk Assessment and Business Impact Analysis
- Disaster Recovery Planning
- Hot-site and Recovery Service Evaluation
- Storage Area Networking
- Backup Strategies and Design

### Cybersecurity

- Assessment and Planning
- Applications and Hardware Security
- Cybersecurity Review
- Security Policy and Control Development
- Intrusion Testing
- Workshops and Training
- Compliance: NIST, NCCoE, PCI, CJIS, NEA/FERC

### Structured Cabling System Design

- Assessment and Certification
- CADD Design and Layout
- RFP / Vendor Selection
- Project Management
- Documentation
- Fiber-Optic Network Design

### IT Staffing/Augmentation

- IT Staffing Assessment and Operational Review
- Interim IT Management
- Virtual CIO Service
- Supplemental IT Management Staffing

### IT Services and Operations

#### **IT Technical and Managed Services**

- On-Site or Remote Support
- Inventory and Licensing Management
- Network, Server, Selection, Implementation, Configuration, and Management
- Security Systems Support
- Remote Systems Monitoring



## Areas of Expertise

The consultants assigned to this engagement have direct experience in a broad range of products and services.

**ClientFirst** has such a broad and well-rounded experience with cities that they already have a good idea of what will or won't work. Other vendors we have worked with don't have this depth of experience and suggest solutions that are unrealistic in a city government environment.

— IT Director  
CA Municipality

### IT INFRASTRUCTURE & OPERATIONS EXPERIENCE

- Data Center Management
- Cable Infrastructure
- Wireless Systems
- Routers and Switches
- Server Installation, Configuration and Troubleshooting
- Network Troubleshooting and Configuration
- Security Systems Support
- Network Management
- Event Monitoring
- Patch Management
- Inventory Management
- Licensing Management
- Software Distribution
- Remote Network and Desktop Monitoring

Desktop Monitoring  
• Remote Network and

### TELECOM EXPERIENCE

- Systems Evaluation and Assessments
- Telecommunications System Management
- Voice and Data Cable Infrastructure Design and Engineering
- LAN/WAN Assessments, Design, Procurement, and Implementation
- VoIP (Voice-over-Internet Protocol) Readiness Reviews and Assessments
- Telecom Billing Audits and Cost Reviews
- Strategic IT and Telecommunications Planning
- Systems Design and Alternative Analysis
- Business Continuation Planning and Disaster Recovery Planning
- Call Center Planning and Operational Design
- Competitive System and Vendor Selection
- Project Management and Implementation

Implementation  
• Project Management and

### DEPARTMENT AREA EXPERIENCE

- Council
- Administration
- Building and Safety
- City Clerk
- Finance
- Fire
- Library
- Utility Billing
- Customer Service/Call Centers
- Payroll
- Human Resources
- Planning
- Police
- Purchasing
- Public Works
- Parks and Recreation
- Engineering
- Geographic Information System (GIS)
- Water
- Wastewater
- Sanitation
- Field Operations
- Laboratories
- Environmental Services
- Facilities
- Treatment Plants
- Fleet Management
- Engineering
- Warehousing
- SCADA
- Information Systems

Information Systems  
• SCADA

### APPLICATION AREA EXPERIENCE

- General Ledger
- Budgeting
- Project Accounting
- Grant Accounting
- Cash Receipts
- Purchasing and Receiving
- Bids Management
- Contract Management
- Accounts Payable
- Fixed Assets
- Loans
- Special Assessments
- Financial Reporting
- Business Licensing
- Applicant Tracking
- Human Resources
- Employee Self-Service
- Benefits Tracking
- Time and Attendance
- Payroll
- CIS and Utility Billing
- Customer Service / Call Centers
- Backflow
- Service Orders
- Work Orders / Preventative Maintenance
- Inventory and Fleet Management
- Planning, Permitting, Inspection and Code Enforcement
- Land/Parcel/Address Management
- Computer-Aided Dispatch (CAD)
- Records Management
- Mobile Computing
- Citizen Request Management (CRM)
- Geographic Information System (GIS)
- Adjudication
- Citation Management
- Database Management

Database Management  
• Database Management

## Technical Certifications

ClientFirst consultants collectively possess an extensive portfolio of certifications, revealing their commitment to ongoing professional training and ensuring our clients can access the latest information in the field.







## Consultants' Collective Experience

We understand that the experience of the individual consultants is a significant factor in hiring a firm to conduct the project on your behalf. Our consultants have extensive public-sector experience in their respective careers, including projects with the following agencies:

<b>California</b>	City of Simi Valley	Western Municipal Water District	Village of Barrington Hills	Lake Superior State University
City of Albany	City of South Gate	Colton Joint Unified School District	Village of Cary	<b>Nevada</b>
City of Azusa	City of South Pasadena	Fontana Unified School District	Village of Glencoe	County of Nye
City of Benicia	City of South San Francisco	Irvine Unified School District	Village of Itasca	Town of Pahrump
City of Big Bear Lake	City of St. Helena	Lake Elsinore Unified School District	Village of Kenilworth	County of Douglas
City of Brentwood	City of Sunnyvale	Menifee Unified School District	Village of Lake Barrington	<b>New York</b>
City of Brisbane	City of Temecula	Mountain View School District	Village of Libertyville	City of Batavia
City of Burbank	City of Tracy	Ohlone Community College	Village of Lincolnwood	Village of Ossining
City of Calabasas	City of Tulare	Palm Springs School District	Village of Lisle	<b>North Carolina</b>
City of Camarillo	City of Tustin	Romoland School District	Village of Matteson	City of Burlington
City of Carlsbad	City of Upland	San Jose Community College	Village of Morton Grove	City of Gastonia
City of Cathedral City	City of Vacaville	San Marino Unified School District	Village of Norridge	City of High Point
City of Cerritos	City of West Covina	University of California Berkeley	Village of Northbrook	City of Kinston
City of Chico	City of West Sacramento	University of California San Francisco	Village of Northfield	City of Mount Airy
City of Chino	City of Whittier	West Covina Unified School District	Village of Oak Brook	City of Salisbury
City of Clovis	Town of Danville	Mechoopda Indian Tribe	Village of Oak Park	Town of Wake Forest
City of Colton	Town of Hillsborough	Piedmont Police and Fire	Village of Orland Park	County of Buncombe
City of Corona	Town of San Anselmo	Stanislaus Council of Governments	Village of Oswego	County of Cabarrus
City of Coronado	Town of Truckee	UCSF Medical Center	Village of Palos Park	County of Davie
City of Dana Point	Town of Windsor	<b>Alabama</b>	Village of Park Forest	County of Orange
City of Downey	Town of Woodside	City of Pelham	Village of River Forest	Arc of Stanley County
City of Dublin	Town of Yucca Valley	<b>Arizona</b>	Village of Riverside	St. Augustine College
City of Emeryville	County of Butte	County of Maricopa	Village of Westmont	Wake Forest University
City of Escondido	County of Lassen	<b>Connecticut</b>	Village of Wheeling	Eastern Band of Cherokee Indians
City of Fairfield	County of Mariposa	City of Bristol	County of DuPage	Salisbury Rowan Utilities
City of Foster City	County of Mendocino	City of New Haven	County of Peoria	<b>Ohio</b>
City of Fountain Valley	County of Plumas	Groton Police	County of Sangamon	County of Cuyahoga
City of Glendale	County of Riverside	Town of Groton	County of Winnebago	County of Montgomery
City of Glendora	County of San Bernardino	<b>Florida</b>	Addison School District	<b>South Dakota</b>
City of Healdsburg	County of Tuolumne	City of Cape Coral	Batavia Public Library	Rapid City Area Schools
City of Hemet	County of Yolo	City of Deerfield Beach	Batavia Public School District	<b>Texas</b>
City of La Habra	CA-NV American Water Works Association	City of Dunedin	Bloomington School District	City of Cedar Hill
City of La Mesa	Castaic Lake Water Agency	City of Fort Lauderdale	Bunker Hill School District	City of Dallas
City of La Puente	Castro Valley Sanitary District	City of Oakland Park	Champaign County Forest Preserve District	City of Farmers Branch
City of Laguna Niguel	Coachella Valley Mosquito Vector Control District	City of Pompano Beach	Four Rivers Sanitation District	City of Hutto
City of Larkspur	Cucamonga Valley Water District	City of Port St. Lucie	Norridge Park District	City of Pflugerville
City of Lathrop	East Bay Regional Park District	City of Riviera Beach	Park District of Highland Park	City of University Park
City of Lomita	El Toro Water District	City of Wilton Manors	Central Community Unit	Corpus Christi Fire
City of Menlo Park	Fresno Irrigation District	Collier County Board of County Commissioners	<b>Indiana</b>	County of Atascosa
City of Mission Viejo	Glendale Water and Power	<b>Idaho</b>	The University of Notre Dame	County of Denton
City of Montclair	Hayward Area Recreation and Park District	City of Sandpoint	Indianapolis Public Library	Highland Park Police and Fire
City of Moreno Valley	Jurupa Community Services District	<b>Illinois</b>	Indianapolis Public Schools	North Texas Emergency Communications Center
City of Mountain View	Las Virgenes Water District	City of Bloomington	<b>Iowa</b>	University of Texas
City of Murrieta	Livermore Area Recreation and Park District	City of Champaign	City of Ankeny	<b>Utah</b>
City of Newark	Mesa Water District	City of Countryside	City of Bettendorf	Washington County School District
City of Norco	Midpeninsula Regional Open Space District	City of Crystal Lake	City of Burlington	<b>Virginia</b>
City of Novato	Newhall County Water District	City of Highland Park	City of Cedar Rapids	Commonwealth of Virginia
City of Pacific Grove	Novato Sanitary District	City of Joliet	City of Des Moines	City of Manassas Park
City of Pacifica	Palmdale Water District	City of Lake Forest	City of New Hampton	<b>Wisconsin</b>
City of Palm Desert	Ramona Municipal Water District	City of Moline	City of West Des Moines	City of Appleton
City of Palmdale	Rincon del Diablo Municipal Water District	City of Morton Grove	County of Johnson	City of Brookfield
City of Patterson	Rosamond Community Services District	City of Naperville	County of Linn	City of Eau Claire
City of Petaluma	San Bernardino Municipal Water	City of Oakbrook Terrace	State of Iowa	City of Wauwatosa
City of Piedmont	San Mateo Consolidated Fire District	City of Orland Park	Burlington Community School District	City of West Allis
City of Pinole	Southern California Coastal Water Research	City of Prospect Heights	Cedar Rapids Community School District	County of Brown
City of Pismo Beach	Sweetwater Authority	City of Rock Island	Davenport School District	County of Kenosha
City of Port Hueneme	Union Sanitary District	City of Rockford	Dubuque Community School District	County of Milwaukee
City of Rancho Cucamonga	Walnut Valley Water District	City of St. Charles	Knoxville Community School District	County of Waukesha
City of Rancho Mirage	West County Wastewater District	City of Waukegan	Mason City School District	Village of Hales Corner
City of Redlands		City of Wood Dale	North Scott School District	HDTA Milwaukee
City of Rialto		Village of Arlington Heights	Des Moines Area Community College	Diocese of Madison Catholic Schools
City of Rohnert Park			<b>Kansas</b>	Madison School District
City of Rosemead			City of Emporia	Shorewood School District
City of Sacramento			City of Shawnee	Whitnall School District
City of Salinas			<b>Michigan</b>	West Allis School District
City of San Bernardino			University of Michigan	
City of San Clemente				
City of San Gabriel				
City of San Jacinto				
City of San Leandro				
City of San Pablo				
City of San Rafael				
City of Seal Beach				
City of Sierra Madre				

The fees, work plan, and schedule are detailed in the following section, showing the steps, associated hours per consultant, and estimated weeks in a concise, easy-to-use format that our clients say they appreciate. We structure our fees to be affordable and tie them directly to the work plan so the hours and deliverables are clearly understood.



## Work Plan and Fees

The following work plan outlines the project steps, the hours to be devoted by project team members, and an estimated timeline. The timeline starts on the date of the Kick-Off Meeting.

Step	Technology Master Planning	Estimated Timeline Week(s)	Total Billable Hours	David	Janet	Tom	James	Toby
<b>Project Coordination</b>								
1	Overall Project Coordination	1-26	36	6	24	6		
<b>Phase 1: Project Initiation</b>								
2	Project Organization and Kick-Off Meeting with City Project Manager and Key Personnel	1-4	11	3	6	1	1	
	Project Team organization to include PMO office per Project Management Institute best practices							
	Assist in educating Project Team members and stakeholders on defined roles and responsibilities. This will be accomplished by providing forms to complete for use in workshops, including background concepts, instructions, and information requests							
	Conduct formal Kick-Off Meeting to officially start the project and provide an overview of the project to Project Team members, key stakeholders, and other engagement participants							
3	Develop Questionnaires/Information Requests	1-4	3		2	1		
4	Obtain and Review Background Information and Preparation	1-4	13	8	2	1	1	1
<b>Phase 2: Needs Assessment</b>								
5	General Data Collection/Gathering, Distribution of Questionnaires, and Collection of Completed Questionnaires/Surveys	1-4	12	2	8	2		
6	<b>Management and Functional Department Interview Workshops</b>	5-7						
	City Manager		4	1	1	1	1	
	Administration/ Economic Development/ Public Information		4	2	2			
	Finance / Business License		4	2	2			
	Human Resources		3	1.5	1.5			
	City Clerk		3	1.5	1.5			
	Community Development: Planning		3	1.5	1.5			
	Community Development: Building		3	1.5	1.5			



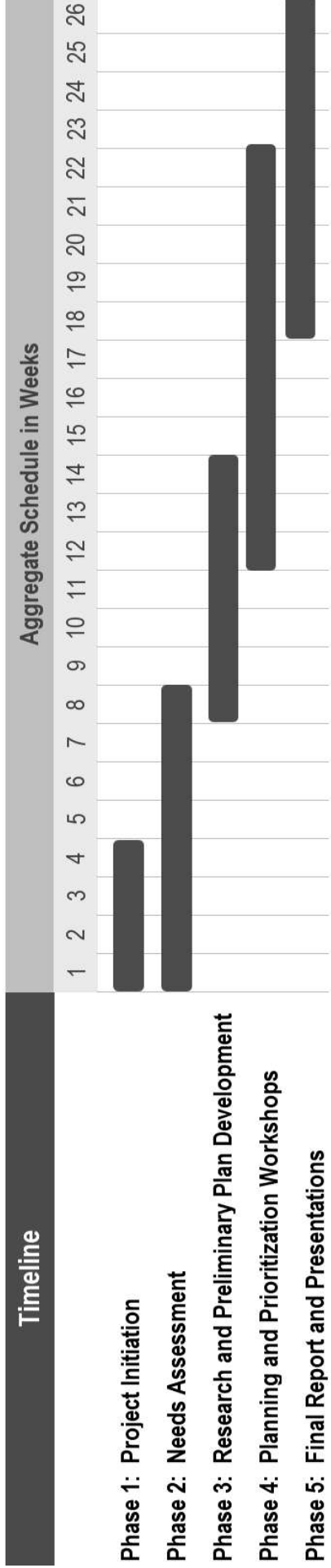
Step	Technology Master Planning	Estimated Timeline Week(s)	Total Billable Hours	David	Janet	Tom	James	Toby
	Community Development: Code Enforcement		3	1.5	1.5			
	Parks and Recreation		4	2	2			
	Covina Theater		3	1.5	1.5			
	Public Works: Engineering		3	1.5	1.5			
	Public Works: Environmental Services		3	1.5	1.5			
	Public Works: Transportation		3	1.5	1.5			
	Public Works: Water Division		4	2	2			
	Library		3	1.5	1.5			
	Police		4	2	2			
7	<b>IT Infrastructure, Operations, and Staffing Reviews</b>	<b>4-6</b>						
	IT Function Interviews							
	IT Management		8			4	4	
	IT Managed Service Provider		4			2	2	
	GIS		8			4		4
	IT Information Gathering Activities, including: Tour IT Facilities		10			4	4	2
	Assessment and Information Gathering, including: IT Staffing and Support Needs (current and future)							
	Cybersecurity Framework (Recent Security Audit)		18			2	16	
	Disaster Recovery, Business Continuity, and Risk Management							
	Storage and Backups							
	IT Network and Infrastructure							
	Servers, Server Applications, and Management							
	Telecommunications							
	Services, Lines, and Equipment							
	Operations, including Support/Service Agreements							
	Emergency Operations and Emergency Response Plans							
	Email, Message Archiving, Records Retention							
	IT Policies and Procedures							
	Metrics Review							
	IT Projects, PMO, and Budgets							

Step	Technology Master Planning	Estimated Timeline Week(s)	Total Billable Hours	David	Janet	Tom	James	Toby
	Website and Social Media Review							
	Audiovisual Systems							
	Data Management							
	IT Governance							
8	<b>Documentation</b>	<b>6-8</b>						
	Summarize Findings and Observations, Gap Analysis		50	4	22	4	16	4
	<b>Phase 3: Research and Preliminary Plan Development</b>	<b>8-14</b>						
9	Develop Key Strategies, Goals and Objectives	8-9	6	2	2	2		
10	Develop Preliminary Initiatives, Findings, Alternatives, and Recommendations	8-12	58	4	24	4	22	4
	Current IT Environment Summary and Condition		Included					
	All Applications/Systems, including ERP, Enterprise Content Management, GIS, all departmental-based solutions, etc.		Included					
	Reporting and Business Intelligence		Included					
	Application Architecture and Integration		Included					
	Management and Operational Reporting		Included					
	User Training Needs		Included					
	Data Management		Included					
	Site Security (Video and Physical)		Included					
	IT and Telecommunications Infrastructure		Included					
	Network		Included					
	Servers, Storage, and Backups		Included					
	Desktop, Handhelds, Mobiles		Included					
	IT Operations		Included					
	Software Licensing and License Management		Included					
	Service Desk and Metrics		Included					
	Email and Message Archiving		Included					
	Management and Productivity Tools		Included					
	IT Staffing and Support Needs (current and future)		Included					
	IT Policies and Procedures		Included					
	Technology Governance		Included					
	Cybersecurity Framework		Included					

Step	Technology Master Planning	Estimated Timeline Week(s)	Total Billable Hours	David	Janet	Tom	James	Toby
	Business Continuity/Disaster Recovery/Emergency Operations		Included					
	Cloud Strategies: Computing/Cloud Storage		Included					
	GIS and GIS Integration		Included					
	SCADA Support Requirements		Included					
	Technology Master Plan Implementation Methodology		Included					
	Emerging and Innovative Technologies		Included					
11	Preliminary Budgets	12-14	14	4	4	2	4	
12	Develop Preliminary Assessment Report	12-14	20	2	8	2	4	4
13	Preliminary Prioritizations	12-14	5	2	1	2		
<b>Phase 4: Planning and Prioritization Workshops</b>								
14	Develop Workshop Materials	12-14	14	2	4	2	4	2
15	Workshops - Departments and Project Team	15-16	8	4	4			
16	Workshops - IT Management (IT Staffing, Budgets, Strategies, and GIS)	12-16	10			4	4	2
17	Prioritization Workshops - Project Committee	18-20	6	2	2	2		
18	Workshops - Executive Management	20-22	12	4	4	4		
19	Revisions	16-22	12	2	8	2		
<b>Phase 5: Final Report and Presentations</b>								
20	Develop Final Report and Supporting Documentation	18-20	18	4	8	6		
21	Develop Presentation Materials	18-20	6	2	2	2		
22	Final Report Presentation - City Management	25-26	8	4		4		
Hours by Consultant			424	87	161	70	83	23
Rate				\$240	\$205	\$240	\$235	\$205
Fees			\$94,905					
Travel and Related (Mileage)			N/A					
<b>Total Cost (Not-to-Exceed)</b>			<b>\$94,905</b>					

## Estimated Project Timeline

The timeline below illustrates ClientFirst's estimated schedule for each project phase.



*Note: Timelines are dependent upon the City staff's ability to schedule workshops and review requested information and documentation in a timely manner. Delays to any steps by City staff can impact on the overall project timeline.*



## Project Start

We can begin the initial activities related to this project, such as project coordination and scheduling, within 1-2 weeks of finalizing an agreement regarding this proposal.

## Scope Changes and Management

Alternative scope changes and fee adjustments are possible and depend on specific project needs, staff resources, and capabilities. Minor changes to the scope and methodology stated above will not result in a change in our fees.

If the nature or scope of our work should change significantly during the project, we will discuss such matters and their effect on our fees and obtain written approval before proceeding.

## Payment Terms

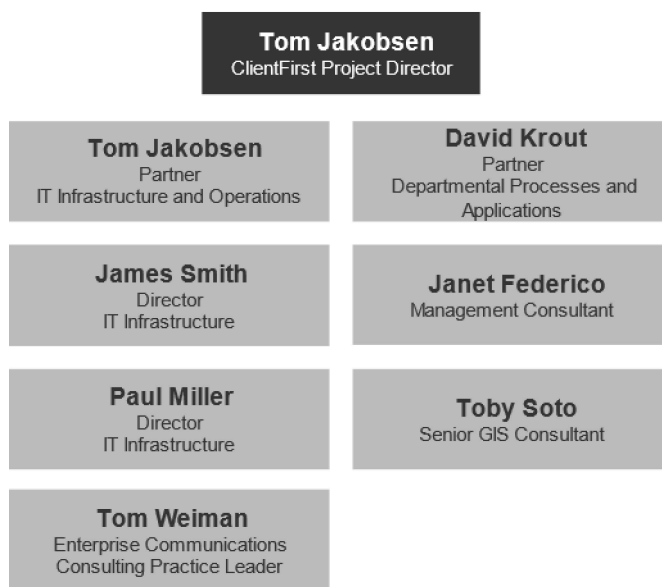
We invoice monthly as work proceeds. ClientFirst will provide a detailed accounting of all consulting time and expenses on the invoice. Payments are due within 30 days of receipt via check or ACH.

## Additional Services/Purchases by Other Seeking Public Agencies

ClientFirst acknowledges that other public agencies may seek to "piggyback" under the same terms and conditions of a resulting similar services and/or purchases being offered in this contract or proposal. ClientFirst can agree or disagree to allow contract piggybacks on a case-by-case basis. ClientFirst agrees to extend the same pricing, terms, and conditions as stated in this contract or proposal to every political entity, special district, and related non-profit. It is understood that other entities shall make purchases in their name, make payments, and be liable directly to ClientFirst. The agency shall not be involved or responsible to ClientFirst for other entities' purchases.



The personnel selected for this engagement are experts in their given disciplines, chosen according to the specific needs of this project. They work as an integrated team to provide end-to-end consulting and support services. This section provides detailed profiles for each Project Team member.





# Tom Jakobsen

## Partner – IT Infrastructure and Operations Consulting Practice Leader

Tom Jakobsen has over 40 years of experience in the information technology arena. His interdisciplinary experience has given him a unique understanding of the interrelationship between IT infrastructure, operations, and business applications. Tom focuses on IT Strategic Planning, Governance, mentoring, Virtual CIO, and other IT management projects. Tom has over 20 years of experience in local government infrastructure, operations, staffing, and project management.

### Highlights

- Former National IT Infrastructure Consulting Practice Leader for RSM McGladrey, the nation's fifth-largest CPA and consulting firm
- Virtual CIO for multiple agencies
- Mentor for newly appointed IT Directors and CIOs
- IT Strategic advisor for cities, counties, and not-for-profits
- Two-time Interim CIO at Illinois Action for Children
- Managed hundreds of IT consulting projects with dozens of municipalities and local governments

### Agency Experience

City of Albany	City of Rohnert Park	Castaic Lake Water Agency	Chicago International
City of Azusa	City of Salinas	Castro Valley Sanitary District	Charter Schools
City of Big Bear Lake	City of San Bernardino	Four Rivers Sanitation Authority	CUSD 300
City of Bloomington	City of San Leandro	Ramona Municipal Water District	DeKalb CUSD 428
City of Brentwood	City of San Pablo	San Bernardino Municipal Water	Durand CUSD 322
City of Brisbane	City of Sandpoint	Sweetwater Authority	East Aurora SD 131
City of Burbank	City of Seal Beach	Western Municipal Water District	Elmhurst SD 205
City of Calabasas	City of Sierra Madre	Forest Preserve District of Will County	Geneva CUSD 304
City of Carlsbad	City of Simi Valley	Naperville Park District	Glenview SD 34
City of Cedar Hills	City of South Gate	Norridge Park District	Harlem SD 122
City of Chino	City of South San Francisco	Park District of Highland Park	Harvard SD 50
City of Corona	City of St. Charles	Illinois Action for Children	Indian Prairie CUSD 204
City of Downey	City of University Park	Jurupa Community Service District	Morton HSD 201
City of Dublin	City of Vacaville	Los Angeles County Development Authority	Mount Prospect SD 57
City of Emeryville	City of West Covina	Midpeninsula Regional Open Space District	Naperville CUSD 203
City of Farmers Branch	City of West Des Moines	Steppenwolf Theatre	Niles Township HSD 219
City of Foster City	City of West Sacramento	Indianapolis Public Library	Orland Park D230
City of Glendora	City of Wilton Manors	Oak Park Library	Oswego CUSD 308
City of Hayward	County of Atascosa	Oswego Public Library District	Park Ridge-Niles SD
City of Healdsburg	County of Denton	Rockford Library	Salt Creek SD 48
City of Hemet	County of Davie	Stanislaus Council of Governments	San Marino USD
City of Highland Park	County of Mariposa	Moraga-Orinda Fire District	St. Charles CUSD 303
City of Hutto	County of Mendocino	Riverside County Sheriff's Department	Township HSD 214
City of Joliet	County of Tuolumne	Arie Crown Hebrew Day School	West Covina USD
City of La Habra	Town of Danville	Batavia UCSD 101	Wheaton SD 200
City of La Puente	Town of Groton	Carpentersville UCSD 300	
City of Laguna Niguel	Town of Woodside	Central Burlington SD 301	
City of Lake Forest	Town of Yucca Valley	Orland Park CHSD 230	
City of Larkspur	Town of Windsor		
City of Manassas Park	Village of Arlington Heights		
City of Menlo Park	Village of Barrington Hills		
City of Mission Viejo	Village of Bloomingdale		
City of Murrieta	Village of Cary		
City of Norco	Village of Glencoe		
City of Newark	Village of Homewood		
City of Oakbrook Terrace	Village of Lake Barrington		
City of Pacific Grove	Village of Libertyville		
City of Palm Desert	Village of Lincolnwood		
City of Palmdale	Village of Northbrook		
City of Piedmont	Village of Northfield		
City of Pismo Beach	Village of Oak Brook		
City of Pflugerville	Village of Oak Park		
City of Port Hueneme	Village of Ossining		
City of Rancho Cucamonga	Village of Palos Park		
City of Rancho Mirage	Village of Park Forest		
City of Redlands	Village of River Forest		
City of Rialto	Village of Riverside		
City of Riviera Beach	Village of South Barrington		
City of Rockford	Village of Wheeling		



### CREDENTIALS, DEGREES, AND AFFILIATIONS

- Bachelor of Science in Mathematics and Economics – University of Iowa
- Member, Project Management Institute, Midwest Chapter
- Member, University of Iowa Graduate College, External Advisory Board

### SPECIALTIES

- Network Design, Procurement, Implementation, and Oversight
- Cybersecurity
- Disaster Recovery
- IT Operations Management
- Virtual CIO/IT Management
- IT Management Mentoring
- IT Governance
- Policies Development
- Project Management
- Assessments, Strategy, and Planning



Tom, I've been meaning to thank you for your expertise and guidance... assisting us in moving forward on all fronts.

—City Manager  
IL Municipality

Know that I am extremely satisfied with the team we have assembled. It is comforting to have steady hands guiding us into the 21st century!

—City Administrator  
CA Municipality



# David W. Krout, CPA *(Inactive)*

## Partner – Enterprise Applications Consulting Practice Leader

David Krout has 25 years of experience assisting local governments with a broad scope of information technology needs. He specializes in working with organizations to identify their strategic, organizational, application, and functional requirements to determine which system and/or specific applications are a proper fit for both the agency and the vendor.

David's unique and diversified background in business management, accounting, and management consulting has allowed him to collaborate with C-level executives and department staff from a practical, business-management perspective to maximize their technology utilization.

Having also worked for a leading local government enterprise software provider, David brings a unique understanding of consulting, client representation, and vendor relationships to the collaboration between the agency and software vendors.

### Highlights

- Served on the National Committee for Information Technology for the Institute of Management Accountants
- Former President, Institute of Management Accountants, Inland Empire Chapter
- Former Government IT Consulting Manager for RSM McGladrey, the nation's fifth-largest CPA and consulting firm
- Featured speaker for the California Society of Municipal Finance Officers (CSMFO), Municipal Information Systems Association of California (MISAC), and Texas Association of Government Information Technology Managers
- Project lead with over 140 public-sector agencies throughout the United States

### Agency Experience

City of Batavia	City of Pelham	Village of Oswego	Rosamond Community
City of Bloomington	City of Piedmont	Village of River Forest	Services District
City of Brentwood	City of Rancho Mirage	CA-NV American Water	Salisbury-Rowan Utilities
City of Brisbane	City of Redlands	Works Association	San Bernardino
City of Burbank	City of Rialto	Castaic Lake Water	Municipal Water
City of Burlington	City of Riviera Beach	Agency	Southern California
City of Carlsbad	City of Rosemead	Castro Valley Sanitary	Coastal Water
City of Camarillo	City of Salisbury	District	Research (SCCWRP)
City of Chino	City of Sandpoint	Colton Joint Unified	Walnut Valley Water
City of Clovis	City of San Gabriel	School District	District
City of Colton	City of San Jacinto	Cucamonga Valley	West County
City of Corona	City of Shawnee	Water District	Wastewater District
City of Coronado	City of Sierra Madre	Gastonia Water & Power	Western Municipal
City of Dublin	City of Simi Valley	Glendale Water and	Water District
City of Foster City	City of South Gate	Power	Mechoopda Indian Tribe
City of Gastonia	City of Tustin	HIP Housing	Eastern Band of
City of Healdsburg	City of West Covina	Lake Elsinore Unified	Cherokee Indian
City of Hemet	City of West Des Moines	School District	
City of Highland Park	County of Butte	Menifee Unified	
City of Indio	County of Buncombe	School District	
City of La Habra	County of Denton	Mesa Water	
City of La Puente	County of Mendocino	District	
City of Laguna Niguel	County of Orange	Midpeninsula	
City of Lake Forest	County of Riverside	Regional Open	
City of Larkspur	County of San	Space District	
City of Lomita	Bernardino	Ramona Municipal	
City of Manassas Park	Town of Danville	Water District	
City of Menlo Park	Town of Groton	Rincon del Diablo	
City of Mission Viejo	Town of Hillsborough	Municipal Water	
City of Murrieta	Town of Truckee	District	
City of Pacifica	Village of Glencoe	Rock River	
City of Palm Desert	Village of Lincolnwood	Reclamation	
City of Palmdale	Village of Northfield	District	



### CREDENTIALS, DEGREES, AND AFFILIATIONS

- Certified Public Accountant (CPA) (Inactive)
- Bachelor of Science in Business Administration and Accounting – CSU San Bernardino

### SPECIALTIES

- Business Process Reviews
- Applications Requirements Definition
- Enterprise Applications Architecture
- Current System Needs Analysis and Improvement
- New Software Selection Assistance
- Technology Master Planning
- Project Management and Oversight
- Conversion Assistance and Planning
- Contract Reviews and Negotiations



Certified Public Accountant  
(Inactive)

It has been absolutely key to this project that ClientFirst, especially Dave, knows the governmental environment, its limitations, and its opportunities.

—Director of Administrative Services  
CA Municipality



# James Smith

## Senior Director, IT Infrastructure Consulting

James Smith is a seasoned technology executive with a remarkable career spanning over 25 years. A diverse array of high-level roles in the Information Technology sector characterizes his career. James has solidified his reputation as an accomplished leader, adept manager, and visionary technology strategist.

Throughout his professional journey, James has demonstrated a penchant for driving success in various capacities. His expertise encompasses a spectrum of specialties, including sales and services engagement processes, systems design consulting, sales management, and managed services. He possesses a unique knack for formulating and executing IT strategies, developing technology plans, and offering expert insights in cloud services consulting, business continuity, disaster recovery, and deep storage solutions.

### Highlights

- Leveraged over 25 years of proven experience in high-level positions within the Information Technology field
- Demonstrated leadership as an accomplished leader, manager, and technology strategist with a track record of success in developing, designing, and selling IT solutions
- Proficient in communicating and implementing IT strategies, managing high-visibility initiatives, and providing technology consulting at the Director, Vice President, and CxO levels nationwide
- Specialties encompass a wide range of areas, including sales and services engagement processes, systems design consulting, sales management, and managed services
- Expertise in IT strategy and technology plan development, cloud services consulting, business continuity, disaster recovery, master data management, distributed end-user technologies, and end-to-end systems architecture

### Agency Experience

City of Azusa  
City of Calabasas  
City of Cedar Hill  
City of Farmers Branch  
City of Mountain View  
City of Oakland Park  
City of Petaluma  
City of Sandpoint  
City of South Gate  
City of Whittier  
Town of Windsor  
Village of Lincolnwood  
Village of River Forest  
County of Kings  
County of Travis

El Toro Water District  
Bloomington School District  
Byron School District  
DeKalb School District  
Des Plaines School District  
Elmhurst School District  
Hoover Schrum District  
Jurupa School District  
Oak Lawn School District  
Salt Creek School District  
Sycamore School District  
Township High School District  
DuPage County Sheriff  
ESQ Region 20

Harris County Toll Authority  
Placer County Sheriff  
Riverside County Sheriff's Department  
Aurora Public Library  
Alamo Community College  
DeVry University  
Kishwaukee College  
Moraine Valley Community College  
Oakton Community College  
Rock Valley College  
Roosevelt University



### SPECIALTIES

- Engagement Management
- Systems design consulting
- IT Support Services
- Contract Negotiations
- Staff Augmentation
- IT strategy and technology plan development
- Cloud services
- IT Cost Optimization
- Business continuity and disaster recovery
- Deep data management expertise
- Distributed end-user technologies
- End-to-end systems architecture



# Paul Miller

## **Director, IT Infrastructure Consulting**

Paul Miller is a seasoned IT professional known for his pragmatic and solution-oriented approach to management. With a wealth of experience leading teams and overseeing intricate projects, he has consistently demonstrated his ability to navigate complexity and deliver results. His leadership style cultivates an environment of excellence, emphasizing quality, service, and profitability.

Paul is deeply dedicated to facilitating the success of individuals, leaders, and teams, consistently surpassing goals and expectations. A strong sense of urgency, ownership, and personal accountability underscores his proficiency in strategic planning, adept decision-making, and innovative problem-solving. Committed to continuous personal and professional development, Paul Miller remains a driving force in the IT industry.

## **Highlights**

- Leading Digital Transformation and Information Security teams
- Translating internal audit requirements into actionable plans
- Expertise in technology architecture, networking, applications, and information security
- Delivering complex technical solutions and cross-functional collaboration
- Leading a team in assessing and designing IT solutions across various services
- Developing pursuit strategies for complex engagements and RFPs
- Creating customer-facing documents and technical presentations
- Growing and maintaining key vendor technical knowledge and certifications

## **Agency Experience**

City of Albany  
 City of Corona  
 City of Country Club Hills  
 City of Glendale  
 City of Mountain View  
 City of Petaluma  
 City of South Gate  
 City of Whittier  
 Town of Windsor  
 Village of Itasca  
 Village of Lincolnwood  
 Village of Northfield  
 Windstream Enterprise  
 Coachella Valley Mosquito Vector Control District  
 Las Virgenes Municipal Water District  
 Riverside County Sheriff's Department  
 Jurupa School District  
 Salt Creek School District  
 Arthur Andersen & Co

Bank of America  
 CenturyLink (Lumen)  
 Community and Economic Development (CEDA)  
 Hewlett Packard  
 IBM Global Services  
 Rich Township District 227  
 University of Illinois



## **CREDENTIALS, DEGREES, AND AFFILIATIONS**

- Bachelor of Science in Software Engineering – DePaul University
- ITILv2 Foundation

## **SPECIALTIES**

- Digital Transformation Leader
- Information Security Expert
- Complex Technical Solutions Delivery
- Networking and Applications Proficiency
- Internal Audit Translation to Actionable Plans
- Network Infrastructure and Security
- Strategic Engagement Pursuits
- Customer Liaison and Relationship Management
- Vendor Technical Knowledge and Certifications Management
- Technical Training and Team Guidance
- Business Development and Renewals





# Janet Federico, MBA

## Management Consultant

Janet Federico has over 14 years of experience with local and federal government agency software implementations. Her in-depth experience with software configuration, business analysis, and user needs assessment allows her to successfully oversee project implementations of standard and customized software.

Skilled in all facets of the project life cycle for application software, she has experience with functional and technical requirements development, gap analysis, system analysis, design, specifications, unit and system testing, implementation planning, execution, lessons learned, and system documentation.

Janet also has over six years of experience working with organizations to identify their strategic, organizational, application, and functional requirements to determine which system and/or specific applications are a proper fit for the agency and vendor.

Additionally, having worked for a leading local government enterprise software provider, Janet brings a strong understanding of software implementation, consulting, process knowledge, and functional knowledge, along with customer needs and concerns throughout and post-implementation.

## Highlights

- Multi-phased agency-wide software implementations
- Extensive knowledge of business and technical processes about enterprise applications

## Agency Experience

City of Bartlesville	City of Norco	Town of Woodside	Jurupa Community
City of Batavia	City of Pacifica	Village of Hinsdale	School District
City of Bentonville	City of Patterson	Village of Orland Park	Los Angeles County
City of Carlsbad	City of Piedmont	County of Champaign	Development
City of Cathedral City	City of Salinas	County of Collin	Authority
City of Cedar Hill	City of San Bernardino	County of Denton	Las Virgenes Water
City of Clovis	City of Simi Valley	County of Douglas	District
City of Coronado	City of South Gate	County of Lassen	County of Lassen
City of Corvallis	City of Tracy	County of Mendocino	County of
City of Decatur	City of Tulare	County of Minnehaha	Mendocino
City of Emporia	City of Tulsa	County of St. Joseph	Riverside Co
City of Farmers	City of West	Coachella Valley	Sheriff's Dept
Branch	Sacramento	Mosquito Vector	State of Texas
City of Fort Smith	City of Whittier	Control District	(DFPS)
City of Glendora	City of Wichita	East Bay Regional	
City of High Point	City of Wilton Manors	Park	
City of Highland Park	City of Windsor	District	
City of Hutchinson	City of Wisconsin	El Toro	
City of Hutto	Springs	Water	
City of Menlo Park	City of Wood Dale	District	
City of Mountain View	Town of Whittier		
City of Newark	Town of Windsor		



## CREDENTIALS, DEGREES, AND AFFILIATIONS

- Master of Business Administration – Ellis College
- Bachelor of Science in Applied Management – Kaplan University

## SPECIALTIES

- Project Management
- Conversion, Interface Planning, and Implementation Support
- Understanding of public sector departmental operations and application systems
- Workflow analysis and mapping
- Business Process Redesign
- System Configuration and Training
- Test and Go Live Plan Creation



I just wanted to say that I thought the training sessions were very informative and clear, and I learned a lot from it. I appreciate your time spent to train us. Thank you so much!

—Account Clerk  
CA Municipality



# Tom Weiman

## Practice Leader, Enterprise Communications Consulting

Tom Weiman has provided IT and telecommunications consulting for over 30 years. He has experience consulting in telecommunications, data networks (LAN/WAN), and cable infrastructure.

Tom's unique combination of voice, data, and infrastructure experience provides our clients with years of design, selection, and implementation experience with all facets of IT and telecommunications. Tom has direct experience in the detailed design of contact centers, IVR operations, and the integration of voice and data services for multi-location clients.

## Highlights

- Lead Project Manager, State of Wisconsin, saving the state over \$90 million in telecommunications service costs
- Former Partner and National Telecom Consulting Project Leader for RSM McGladrey, the nation's fifth-largest CPA and consulting firm
- Call Center Campus Instructor at Purdue University, Center for Customer-Driven Quality
- Provided telecommunications consulting services to nearly 300 public agencies throughout the United States, including government agencies, non-profit organizations, healthcare and financial institutions, and educational institutions at the K-12 and higher education levels

## Agency Experience

City of Bettendorf  
City of Bloomington  
City of Brentwood  
City of Burbank  
City of Calabasas  
City of Camarillo  
City of Cape Coral  
City of Chino  
City of Corona  
City of Countryside  
City of Deerfield Beach  
City of Downey  
City of Dunedin  
City of Eau Claire  
City of Escondido  
City of Fort Lauderdale  
City of Foster City  
City of Kinston  
City of La Habra  
City of La Puente  
City of Laguna Niguel  
City of Lake Forest  
City of Mason City  
City of Matteson  
City of Miami Springs  
City of Moline  
City of Mount Airy  
City of Mount Dora  
City of Murrieta  
City of Naperville  
City of New Hampton  
City of New Haven  
City of Oakbrook Terrace  
City of Orland Park  
City of Palm Desert  
City of Palmdale  
City of Piedmont  
City of Pompano Beach  
City of Port St. Lucie  
City of Prospect Heights  
City of Rancho Cucamonga  
City of Rancho Mirage  
City of Redlands  
City of Rock Island  
City of Rockford  
City of Sacramento  
City of Salisbury  
City of San Clemente  
City of San Gabriel  
City of San Rafael  
City of Sierra Madre

City of Sioux Falls  
City of South Pasadena  
City of South San Francisco  
City of St. Charles  
City of Upland  
City of Waukegan  
City of Wauwatosa  
City of West Allis  
City of West Covina  
City of West Des Moines  
City of West St. Paul  
County of Buncombe  
County of Cabarrus  
County of DuPage  
County of Milwaukee  
County of Montgomery  
County of Orange  
County of Peoria  
County of San Bernardino  
County of Sangamon  
County of Tazewell  
County of Tuolumne  
County of Will  
County of Winnebago  
County of Yolo  
Town of Danville  
Town of Truckee  
Village of Arlington Heights  
Village of Cary  
Village of Lincolnwood  
Village of Northfield  
Village of Oak Brook  
Village of Oak Park  
Village of Palos Park  
Village of River Forest  
Village of Riverside  
Civitas Schools  
Consolidated SD 158  
Algonquin CUSD 300  
Arlington Heights Township  
HSD 214  
Assumption Catholic High  
School, Davenport  
Batavia SD 101  
Burlington Central CUSD 301  
Castaic Lake Water Agency  
Cedar Rapids Community  
School District  
Davenport Community Schools  
Davenport School District  
DeKalb CUSD 428

Diocese of Davenport Catholic  
Schools  
Diocese of Madison Catholic  
Schools  
Dubuque Community School  
District  
Eastern IL University  
Elgin School District  
Forest Preserve District of Will  
County  
Geneva Community Unit SD  
304  
Glenview Schools  
Gower School District 62  
Hampton SD 29  
Harlem SD 122  
Harrison SD 36  
Harvard CUSD 50  
IL Action for Children  
Illinois State University  
Indian Prairie CUSD 204  
Irvine School District  
Knoxville Community School  
District  
Livermore Area RFD  
Madison School District  
Mason City School District  
Mount Prospect SD 57  
Naperville CUSD 203  
Newhall County Water District  
Norridge Park District  
North Scott School District  
Oak Park Public Library  
Ohlone Community College  
Omaha Public Power District  
(OPPD)  
Orland Park CHSD  
230  
Oswego CUSD 308  
Oswego Public  
Library District  
PACE Suburban Bus  
Division RTA  
Park District of  
Highland Park  
Park Ridge-Niles  
CCSD 64  
Port Byron Central  
School District  
Rapid City Area  
Schools

Riverdale CUSD 100  
Riverside SD 96  
Rockford Public Library  
Salisbury-Rowan Utilities  
(SRU)  
San Bernardino Municipal  
Water Department  
San Jose/Evergreen  
Community College  
Schaumburg Township District  
Library  
Sherrard Community Schools  
Shorewood School District  
South Florida Water  
Management  
St. Ambrose University  
St. Charles CUSD 303  
Sunset Ridge SD 29  
University of Chicago  
University of Michigan  
University of Notre Dame  
Wahlert Catholic High School  
Washington County School  
District  
West Allis School District  
West Aurora SD 129  
Wheaton-Warrenville SD 200  
Whitnall School District  
Cedar Falls Utilities  
Central Illinois Power  
Church of Our Savior



## CREDENTIALS, DEGREES, AND AFFILIATIONS

- Bachelor of Arts in Communications — St. Ambrose University
- Ongoing training from Avaya/Cisco/ShoreTel/Nortel/Mitel/NEC, and others
- Past President and current member of the Iowa Telecommunications Users Group (ITUG)
- Member, All Major Vendor Consultant Programs
- Member, Association of Communications Technology Professionals in Higher Education (ACUTA)
- Member, Building Industry Consulting Services, International (BICSI)
- Member, Healthcare Information and Management Systems Society (HIMSS)
- Member, Society of Telecommunications Consultants (STC)
- Member, Institute of Electrical and Electronics Engineers (IEEE)

## SPECIALTIES

- Billing Audits and Cost Reviews
- Carrier Services Cost Analysis
- Competitive Hardware and Services RFP Development and Evaluations
- Implementation Project Management
- Operational Assessment and Workflow
- Strategic Telecommunications Planning
- VoIP Readiness Assessments and Review



I would like to thank both of you, especially Tom, for all the hard work you did for us. We could not have done this RFP process successfully without your help.

—IS Manager  
CA Municipality



# Toby Soto

## Senior GIS Consultant

Toby Soto has 26 years of GIS experience in the local government sector. Toby's previous GIS positions in local government provide clients with tremendous GIS implementation and integration experience. He understands the link between Business Unit GIS needs, technical requirements, and a practical, cost-effective GIS strategy. Toby is an industry expert in GIS Leadership and Management and regularly publishes GIS-related articles and resources. He hosts monthly webinars addressing GIS managers' pain points and best practices.



## EDUCATION

- CSU Fullerton

## SPECIALTIES

- GIS Strategic Planning
- GIS Implementation
- GIS Integration
- GIS Web Development
- GIS Mobile Applications
- Open Data/ Philanthropy

## Highlights

- Esri SAG Award with the City of Anaheim GIS
- 2011 Implemented Project ViewFinder Application, saving the City of Anaheim \$100,000 per year in repaving cost
- Extensive GIS presentations at Esri's User Conferences, Meetups, User Groups, Podcasts, and Webinars
- Former Orange County GIS Users Group Coordinator
- Multiple Local Government GIS Implementations and Implementations
- Former IT Manager, City of Lake Elsinore
- Former Chief of Technical Information, Western Riverside County Regional Conservation Authority

## Project Experience

- Process Streamlining and Redefinition
- Process Workflow Creation
- Software Configuration and Troubleshooting
- Project Management
- GIS Strategy and Organization Development
- GIS Policy Development
- Open Data Strategy Development
- Business Process Analysis
- Web/Cloud-Based Technology and Workflow Optimization
- GIS ROI Analysis
- GIS Web App Development
- Citizen Access GIS Web Maps Development
- GIS Migration and Workflow Development
- ETL Conversions
- Cognos and Crystal Reports
- GIS Enterprise Application Integrations
- Implementation and Maintenance of Online GIS Services
- Database Administration
- GIS Budget Development
- GIS Leadership Coaching and Mentoring
- Server Management
- Network Analysis and Maintenance
- CIP Project Tracking

## Agency Experience

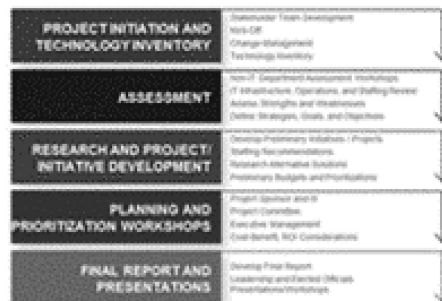
City of Anaheim	City of Riverside	Four Rivers Sanitation Authority
City of Azusa	City of Salinas	Jurupa Community Services District
City of Brisbane	City of San Clemente	Las Virgenes Water District
City of Carlsbad	City of Sandpoint	Riverside County Sheriff's Department
City of Cathedral City	City of Simi Valley	West County Wastewater
City of Cedar Hill	City of Tracy	Western Riverside County Regional Conservation Authority
City of Dana Point	City of Vacaville	Disneyland (GIS Programmer/Analyst – Water/Electric utilities)
City of Diamond Bar	City of West Sacramento	
City of Larkspur	City of Whittier	
City of Lake Elsinore	City of Windsor	
City of Mountain View	City of Wood Dale	
City of Newark	Town of Windsor	
City of Pflugerville	Village of Oswego	
City of Piedmont	Riverside County	
City of Pinole	Mendocino County	
City of Rancho Cucamonga	East Bay Regional Park District	
City of Rancho Mirage	El Toro Water District	



ClientFirst works with organizations to transform their approach to and decisions regarding information technology by educating and building consensus among staff, departmental leadership, management, and elected officials. Our approach assesses the current environment, reviews alternatives, and makes specific recommendations with supporting documentation regarding strategy and tactical implementation.



IT Management		
Communications Management		
User Support	Infrastructure	Business Applications
Desktop Management	Network Management	Applications Analysis / Ad Hoc Reporting
Office Productivity Solutions (e.g., Office Email, Internet)	Network Management	Custom Administration
Peripherals		Programming
Help Desk / Webmaster		
Security Management		
License / Inventory / Asset Management		
Special Projects	Special Projects	Special Projects



I was extremely pleased with the product ClientFirst delivered and the process used in their consulting. The City didn't have any leadership for the IT department, and I was looking for a company that could develop a roadmap for the City. I felt ClientFirst kept everyone engaged and informed.

—Director of Finance and Administrative Services  
Technology Master Planning



## Technology Planning Process Methodology

We have developed a five-phase methodology on which we base our Technology Assessment and Planning projects. This serves as the cornerstone of the project, allowing the collaborative process to shape and develop our recommendations and approach, enabling us to tailor each step to fit each client's unique specifications. We work in partnership with our clients to improve their information technology environments so they can better meet the needs of staff and constituents.



ClientFirst is very sensitive to how well they're communicating at all levels, able to communicate across a variety of skill sets, and be effective communicating with the IT side, as well as the user side of a project. This quality is very helpful.

—City Manager  
CA Municipality



## Project Initiation and Information Gathering

### Project Kick-Off and Initiation

The project kick-off is a time to review the City's available documentation and background information and set expectations for the project. We provide information requests and questionnaires for the operational departments and other stakeholder groups to complete.

After obtaining and reviewing the background information, we meet with the Project Manager and Technology Planning Committee to review the work plan, establish overall responsibilities and communications, schedule meetings, and finalize the project plan details.

## Assessment

### Operational Department Reviews

Operational department reviews focus on understanding technology's current and future use to support the organization's business operations. The best source of information regarding gaps and issues with technology is the individuals who work with it daily. We conduct workshops with representatives from each department at all levels. This allows users to voice concerns, share gaps in IT services, and identify strengths and weaknesses of current technology and business processes.



Workshop discussion topics include:

- Enterprise and Departmental Application Needs
- Business Processes
- Improvements and Automation
- Application Interfaces and Data Sharing
- GIS
- Reporting Issues
- User IT Support Needs
- User Training Recommendations
- Departmental Application Analyst Needs
- Enterprise Communications
- Remote Access and Mobile Computing
- Emerging and Smart Technologies
- Regulatory Compliance Issues
- Technology Governance
- Smart Technologies and AI
- ROI or Cost-Benefit Considerations

### IT Infrastructure and IT Operations Review

ClientFirst conducts infrastructure reviews with highly qualified subject-matter experts, performing infrastructure and operations reviews with systems engineers who continually design, implement, and maintain IT infrastructure.

We propose to assess the City's technology by pillar based on technology issues, business issues, risks by application, and infrastructure elements (data centers, servers, network equipment, data clusters).

Our infrastructure and operations workshops focus on assessing the City's network infrastructure, cybersecurity readiness, and IT service delivery. We plan to meet with IT management to discuss the current budget and existing and planned IT-related projects. We will also interview IT staff to understand better areas that function smoothly and areas that require attention.

Our IT operations subject-matter experts design, procure, support, and manage infrastructure and operations daily for numerous local government agencies. We address potential areas for



improvement, such as artificial intelligence, staff productivity, collaboration alternatives, policies and procedures, security, disaster recovery, business continuity, and many more.

ClientFirst provides specific recommendations, including projects, approaches, and best practices. We do not resell hardware or software, so our recommendations and examples are vendor-agnostic. The options we suggest are tailored to accommodate agency skill sets, knowledge, current environment, strategic direction, and budget realities.

We provide unique service options beyond traditional Technology Assessment and Plans because of the depth of our team's IT Infrastructure and IT Operations practices. Our clients benefit from these in-depth technical services because of the long-term value they add to the assessment and planning.

## Cybersecurity Risk Assessment and Framework

Cybersecurity reviews are based on NIST, CIS Controls V8.2, and CJIS V5.9.4. All IT infrastructure, operations, and services assessment activities will consider these cybersecurity standards. Cybersecurity recommendations will be provided separately in a confidential format and will include findings, recommendations, and budget. We expect assessment results to include related findings, recommendations, and initiatives.

- IT Network and Infrastructure
- Cybersecurity Readiness
- IT Operational Readiness
- Incident Response Capabilities
- Resiliency
- Policies, Procedures, and Effective Cybersecurity Processes
- Cybersecurity Budgetary Requirements

## IT and Cybersecurity Policies

Technology Policy reviews aim to establish guidelines for the appropriate controls to protect the technology life cycle with a roadmap for improving technology practices, enhancing the overall security posture, and ensuring compliance with relevant standards and regulations.

Existing technology policies will be benchmarked against the National Institute of Standards and Technology (NIST) and Criminal Justice Information Services (CJIS) industry standards. We propose to provide policy improvement comments and recommendations that help define the minimum security requirements associated with creating, modifying, transmitting, disseminating, storing, or destroying data and other required standards.

## Incident Response and Disaster Recovery Planning

Incident Response and Disaster Recovery Planning are essential for preparing for, responding to, and recovering from incidents or natural disasters. It provides a structured approach to handling data breaches, malware infections, ransomware attacks, denial of service (DoS) attacks, and other threats.

Incident Response Plans outline Detection, Containment, Eradication, Recovery, and Close-out guidelines for security incidents. Key Incident Response and Disaster Recovery Planning components include defining a response team, a classification and prioritization methodology, describing tools for detection, remediation, reporting, response procedures, and Communication Plans.



## IT Business Continuity Planning (BCP)

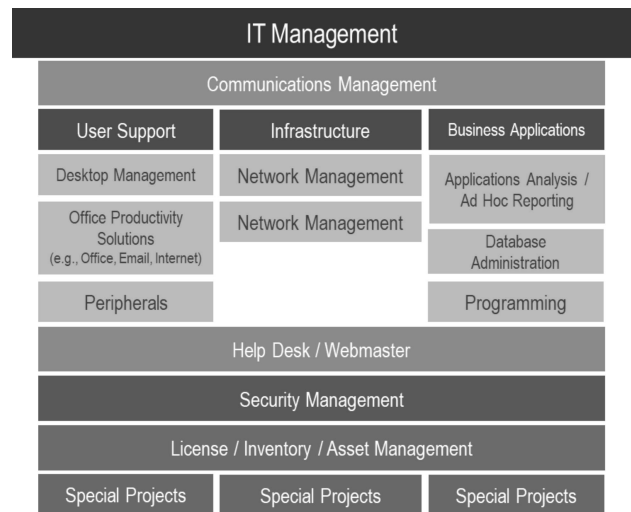
BCP involves assessing the risks to processes and creating policies, plans, and procedures to minimize the impact those risks might have on the City if they were to occur. BCP is used to maintain the continuous operation of the City in the event of an emergency. The goal is to implement a combination of policies, procedures, and processes such that a potentially disruptive event has as little impact on the City as possible.

We propose to provide sample plans, recommendations, and key next steps related to incident response preparedness and establishment of the above plans.

## IT Staffing Assessment

ClientFirst's project team includes an IT Operations Practice Leader who manages daily IT support operations for multiple agencies and ongoing contract IT Management and CIO services. This daily, hands-on experience results in real-world, relevant recommendations regarding support for current and emerging technologies.

ClientFirst will perform an IT staffing Needs Assessment and review existing IT outsourcing contracts and arrangements. We will examine the City's current and future resource requirements, service-delivery model, IT support structure, staff capabilities, and skill sets. After identifying strengths and weaknesses, we will discuss potential structures, skill sets, and training options. Staffing recommendations and other metrics will be based on benchmark surveys of similar organizations and our experience in managing similar IT environments.



Their current and relevant experience with government agencies was a real value. They could provide valid examples, and in many cases provide apples-to-apples comparisons, so it made the process easier. ClientFirst had direct experience about what other cities had done and how well it worked for them, so their recommendations were supported by meaningful examples and experiences, making the process feel very personalized.

— Administrative Services Director  
CA Municipality



## Technology Initiative Determination

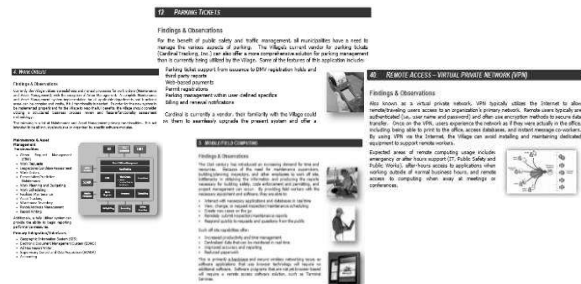
We assess overall technology strengths and weaknesses. From there, we determine key strategies, goals, and objectives to address identified issues, which are provided in a preliminary report summarizing our findings, observations, and corresponding technology initiatives. Initiative categories include:

- Best Practices
- Technology Governance
- Departmental Applications and Systems
- Smart Technologies
- GIS
- IT Infrastructure
- IT Operations
- Cybersecurity
- Telecommunications
- IT Staffing

## Technology Initiative Development

After categorizing the technology initiatives, we research implementation and support costs and prioritize them based on their importance to daily business operations. We then consolidate them into a Current State Technology Assessment and Recommendations Report, which is used for our workshops. This report contains descriptions of our findings and observations, recommendations, next steps, preliminary budgets, implementation timelines, and any dependencies identified in the process. As noted earlier, PMI, COBIT, and ITIL are applied to adopt and incorporate best practices into the City's operations. We expect to identify approximately 60-100 technology projects or initiatives in the following categories:

- Application Enhancements
- Business Process Improvements and Training Needs
- GIS Improvements
- Network Infrastructure
- Telecommunications Infrastructure
- Business Continuity
- Cybersecurity
- Help Desk and Metrics
- Policies and Procedures
- Emerging and Smart Technologies
- Cloud Computing
- Information Technology Staffing and Training
- SCADA Network Infrastructure
- Technology Governance



Additionally, we include planning for ongoing operations, maintenance and support budgets, and developing project durations for each major initiative.

I received a lot of feedback from the departments about how they can see the positive changes that are ahead and have a much-improved opinion of the City's IT department. It has had a very positive impact on the IT team members. A woman in the department wanted to retire this year but has decided to delay her retirement for five years because she is so excited about the new purpose. Staff members are excited about coming to work because they have a new plan and manager, with new training and education, and a new purpose for their efforts.

— Director of Finance and Administrative Services  
FL Municipality



## Planning and Prioritization Workshops

With our Current State Technology Assessment and Recommendations Report, we conduct planning and prioritization workshops and discuss our findings and recommendations with the Project Manager, Department of Information Technology, Technology Planning Committee, and executive management.

These workshops aim for the consulting team and City staff to develop a consensus on the recommendations and objectives. The workshop format is conducive to a free-flowing discussion of ideas while allowing City staff to question our assumptions, budgetary cost models, recommended priorities, and solutions.

### Departments and Project Team Workshops

The Departments and Project Team Workshop focuses mainly on operational needs, such as business processes, user productivity, software improvements, and customer service.

We strive to understand the City's budgetary constraints and develop creative solutions within those constraints. We will work with the City to prioritize projects via cost-benefit analysis and other ROI considerations.



### IT Infrastructure and Operations Workshops

This workshop focuses primarily on findings and recommendations related to the City's IT infrastructure, day-to-day operations, metrics, policies, and staffing. We have included IT Management and Staff workshops to improve our recommendations and begin the process of transitioning the Technology Master Plan to IT.

### Cybersecurity, IT Business Continuity, and Disaster Recovery Workshops

Workshops would address incident response, disaster recovery, and business continuity gaps and recommend the next steps. The goal is to ensure that plans will be robust, actionable, and well-understood by all relevant stakeholders in the future.

### Prioritization Workshops

Once the entire project team is educated on the technology initiatives for the five-year planning period, we conduct a two-part prioritization workshop. The initial prioritization will be conducted without the Project Committee seeing the project cost estimates. Priorities are then adjusted after considering budget and resource realities.

The workshop methodology prepares team members for the ongoing task of Technology Governance by helping them understand resource limitations and their effect on technology priorities. This workshop broadens each team member's horizons to include a better understanding of colleagues' needs in other departments.

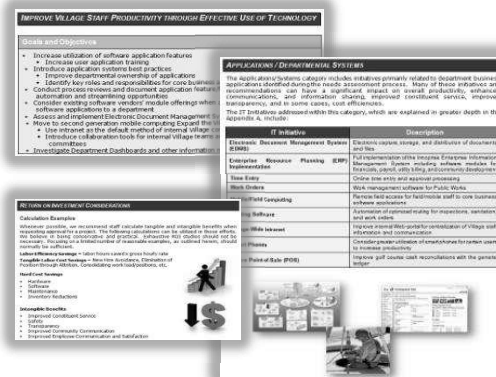
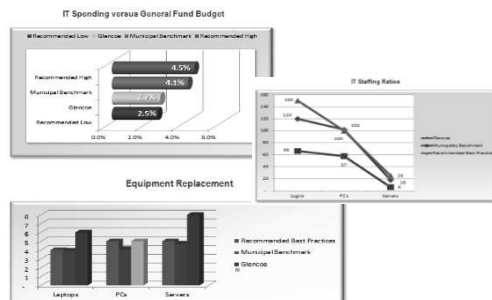
**ClientFirst keeps an eye on the costs. I feel David Krout's accounting background was evident in the way CF evaluated expenses. They were always looking for the "low-hanging fruit", the "big win", and the most cost-effective way for the agency to achieve its goals. Their approach was very real-world. With other consultants, it seemed like the suggested solutions were pretty canned or the latest-and-greatest in the industry, instead of solutions that were specific to the agency's situation.**

— IT Director  
CA Municipality

We conduct an Executive Committee Workshop to educate and gain feedback from the City Executive Team. City leadership needs to understand the prioritization and importance that the Information Technology Department and other departments have placed on the various initiatives. The Executive Team will be able to consider these prioritizations and then make final priority and budget adjustments from the leadership's point of view.

[illegible]

We finalize our findings, recommendations, budgets, and implementation timelines to create the City's Technology Assessment and Master Plan Report, complete with supporting documentation. We will present the final report to City Executive Management and the City Council.





We believe our clients are our best salespeople. The references listed here are examples of clients with similar needs. Each of these clients has retained our services many times. We pride ourselves on client satisfaction and strive to maintain long-term relationships with our clients as partners.



I would absolutely recommend ClientFirst to other entities, and continue to hire them for our projects.

—City Manager  
CA Municipality



## Client References



### City of Mission Viejo

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**Keith McDonald, IT Division Manager**

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**GeorgeAnne MeggersSmith, Assistant City Manager**

**707.449.5651**

[GeorgeAnne.MeggersSmith@cityofvacaville.com](mailto:GeorgeAnne.MeggersSmith@cityofvacaville.com)



### City of South San Francisco

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**Tony Barrera, IT Director**

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### City of Newark

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**Edwin Miranda, Information Officer/Information Technology Director**

**510.578.4893**

[ed.miranda@newark.org](mailto:ed.miranda@newark.org)



### San Leandro, CA

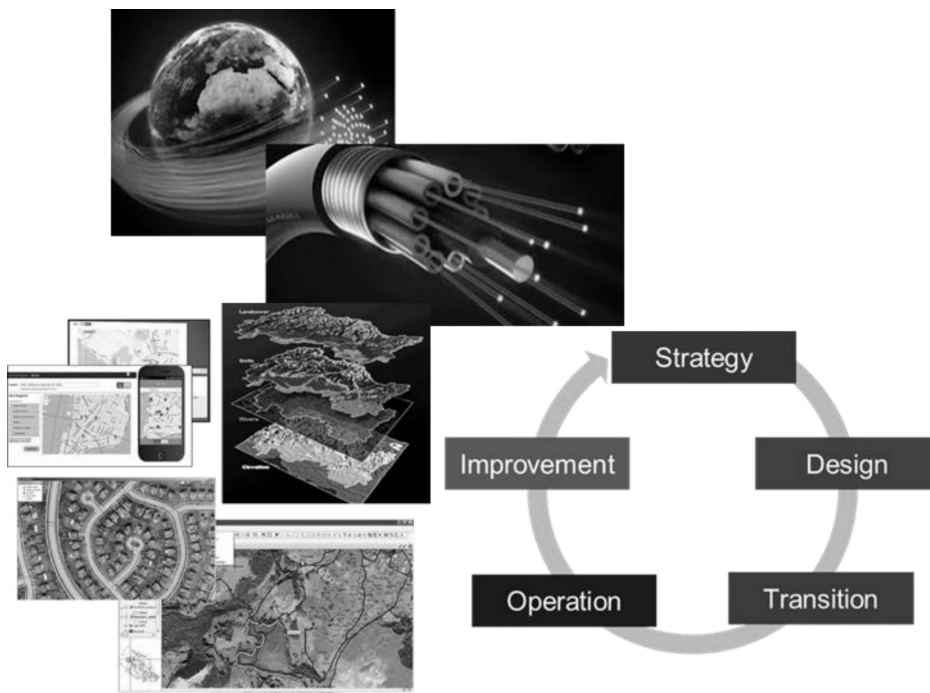
835 East 14th Street, San Leandro, CA 94577

**Janelle Cameron, Assistant City Manager**

**510.577.3390**

[jcameron@sanleandro.org](mailto:jcameron@sanleandro.org)

The following section includes additional information to properly evaluate ClientFirst's response to this Request for Proposal. ClientFirst is uniquely positioned for this critical master planning project due to our diversified technology consulting disciplines and the hands-on project types we routinely provide to our many government client agencies.



## IT Infrastructure Consulting

A core competency of ClientFirst is the design and implementation of digital infrastructure. We have ongoing projects that include pre-construction planning, structured connectivity system design, outside plant fiber design, network design, resiliency upgrades, implementation, support, and maintenance. This includes the design and implementation of the following elements:

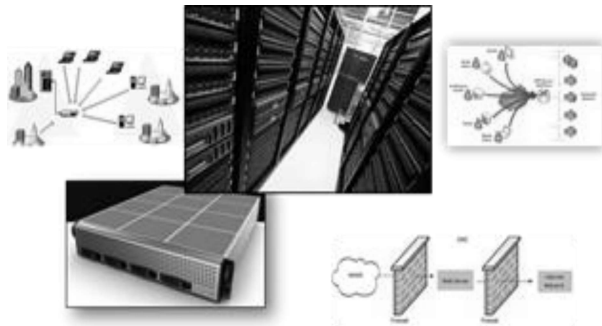
- Networks
- Hyperconverged and Virtual Environments
- Cloud Computing
- Video Surveillance Systems
- Door Access Control Systems
- Structured Connectivity Systems
- Outside Plant Fiber Optic Design
- Disaster Recovery and Redundant Systems
- Secure Networks for Public Safety Applications
- Cybersecurity
- Public Safety Communications
- Unified Messaging Design, Selection, and Implementation
- IoT Networks



IT Infrastructure Consulting

At ClientFirst, we believe in a collaborative approach. We work closely with each client, understanding their unique requirements, and then design, procure, and implement the most suitable solution. Our extensive experience with Public Works bid projects and traditional RFP and vendor selection methodologies ensures we can cater to a wide range of client needs.

We provide ongoing contract administration expertise for Public Works bid projects with the Public Works Department. We utilize a traditional American Institute of Architects (AIA) methodology for these projects, including cut sheet review and approval, weekly project meetings, multiple site visits (as needed), punch lists, and documentation close-out.



Often, our clients ask us to provide implementation project management for complex multi-vendor infrastructure upgrades. We utilize traditional project management methodologies to develop, track, and, if necessary, expedite these projects. We work with our clients to establish realistic completion dates and then work to resolve any issues encountered during the project in a time-sensitive way. The projects we manage are completed on budget and within the timeframes provided by the client.

From the beginning, I was impressed with how inclusive the process has been. I've never been associated with such a collaborative, cooperative, and engaged project. Outstanding process.

— City Manager  
Software Selection



## Project Management Services

ClientFirst stands out in the IT infrastructure consulting industry by offering highly skilled technicians and providing clients with seasoned Project Managers. These professionals, who spend over 75% of their time working with public agencies, bring industry best practices. This unique blend of knowledge and experience has led to numerous success stories from IT departments nationwide.

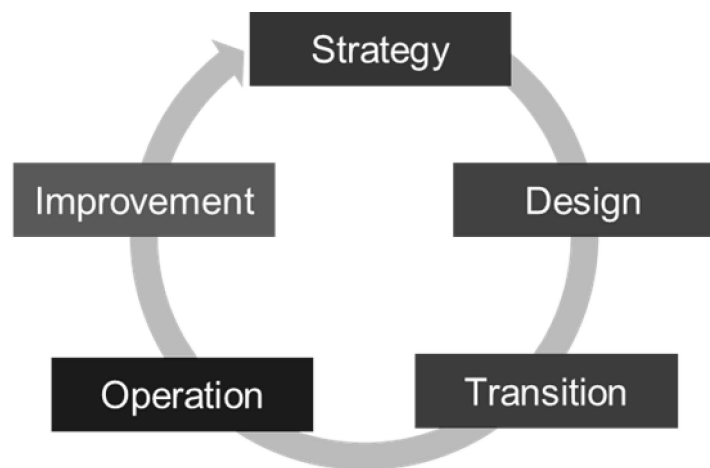
Our IT Management practice area works with clients to improve the quality of their IT management and service delivery. We apply our knowledge to each client's situation and customize our management style to fit their needs.

We provide our clients with a complete project management methodology that improves communication and service delivery and lays the groundwork for high-quality, low-cost solutions that meet the City's needs.

Because we are a full-service, independent consulting firm, we can provide non-biased expertise in all areas of information technology.

### *Our methodology includes:*

- **Strategic Planning** – Maintaining a Five-Year Strategic Plan and Capital Replacement Plan
- **Project Planning** – Planning and executing individual projects on time and within budget
- **Budgeting** – Working with our client to maintain their IT budget and meet budgetary goals
- **Regular Communications** – Communicating upcoming goals, objectives, and IT support status through monthly or quarterly IT committee meetings
- **Rapid Escalation** – Rapidly escalating critical problems within ClientFirst so the right subject-matter expert can be engaged to resolve the problem quickly and efficiently
- **Attention to Detail** – Working to maintain accurate documentation and track maintenance and vendor contracts and software licenses to ensure that there are no surprises in these often-overlooked areas
- **Regular Measurement** – Measuring our accomplishments monthly and working to improve our performance
- **Productivity Improvement** – Continually assessing areas for improved business processes rather than simply maintaining existing systems



## Cybersecurity

In an era where cyber threats are increasingly sophisticated and pervasive, safeguarding your organization's digital assets is paramount. ClientFirst Technology Consulting stands at the forefront of cybersecurity, offering comprehensive, organization-wide methodologies to fortify your defenses against cybercrime and security breaches. Our approach encompasses every facet of the digital enterprise, ensuring that potential weaknesses are identified and remediated before they can be exploited.



**Cybersecurity Consulting**

At ClientFirst, we adhere to the highest standards of cybersecurity practices, utilizing the National Institute of Standards and Technology (NIST) framework and collaborating with the National Cybersecurity Center of Excellence. These rigorous frameworks guide our processes, ensuring that our clients receive the most up-to-date and effective strategies for protecting their digital infrastructure.

Our end-to-end cyber consulting services cover all critical areas, from initial assessment to ongoing support. We thoroughly evaluate your current cybersecurity posture, identifying vulnerabilities and potential risks. Based on this assessment, we develop a tailored strategy and plan to enhance your security measures. Our services include detailed specifications and procurement support, ensuring you acquire the best technologies and solutions to meet your needs. Furthermore, we provide continuous training and program development, equipping your team with the knowledge and skills necessary to maintain a robust cybersecurity environment.

With ClientFirst Technology Consulting, you gain a trusted partner dedicated to securing your digital enterprise. We are committed to delivering proactive, innovative solutions that protect your organization against the ever-evolving landscape of cyber threats.



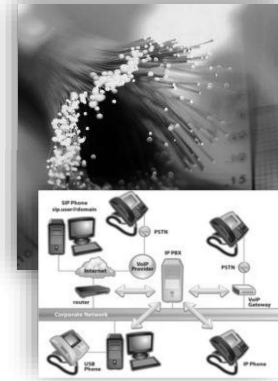
## Telecommunications and Unified Communications Consulting

ClientFirst's unified communications consulting practice provides multi-channel communications solutions design and procurement assistance for clients ready to move beyond traditional telephony services.

Our staff is unique in the telecommunications consulting industry, providing agencies with digital communications platforms that can be used to support multi-channel call center solutions. We provide our clients with a focused, experienced, and innovative team of professionals.

We provide a wide breadth of professional services that include:

- Systems evaluation and assessments
- Unified Communications system management projects
- VoIP (Voice-over-Internet Protocol) readiness reviews and assessments
- Telecom billing audits and cost reviews
- Strategic digital communications planning
- Systems design and alternative analysis
- Business continuation planning and disaster recovery planning
- Call center planning and design
- Competitive system and vendor selection
- Project management and implementation projects



ClientFirst is recognized nationally by many of the industry's leading vendors because they appreciate the fairness and objectivity we demonstrate when dealing with their organizations. This high visibility results in the best competitive proposals in response to ClientFirst's RFP documents. It provides our clients the information to make informed decisions and realize the best value for their purchasing dollars.

**I have never seen such professionalism and thoroughness in managing an RFP as I have with ClientFirst. Whether or not we win this contract, I would be happy to provide a reference if you ever need it.**

— Vendor  
Vendor Selection Assistance



**Telecom Consulting**



## Geographic Information System (GIS) Master Planning

ClientFirst assists in helping to develop improvements in Geographic Information Systems (GIS). With the ever-evolving use of technology in agency decision-making, the importance of GIS systems cannot be understated. Choosing sites, maintaining assets, planning distribution networks, drawing boundaries, capturing data, and other activities involve questions of geography and special imagery.

GIS Master Planning sets forth procedures and methods used to determine where an agency envisions going with GIS in the future, which can include:

- Improvements to the GIS Enterprise
- Evaluating potential data sources and data needs
- Evaluating hardware and software solutions
- Updating and standardizing GIS databases
- Developing additional GIS applications
- Creating or improving interfaces to enterprise application systems
- Improved GIS data accuracy or granularity
- Staffing requirements
- Prioritized resource requirements
- Planning for the long-term maintenance of the GIS system and the data
- Development of a GIS-specific budget tied to the various elements or initiatives within the GIS Master Plan



GIS has become a basic building block for many enterprise applications and is incorporated into all ClientFirst Technology Planning engagements.

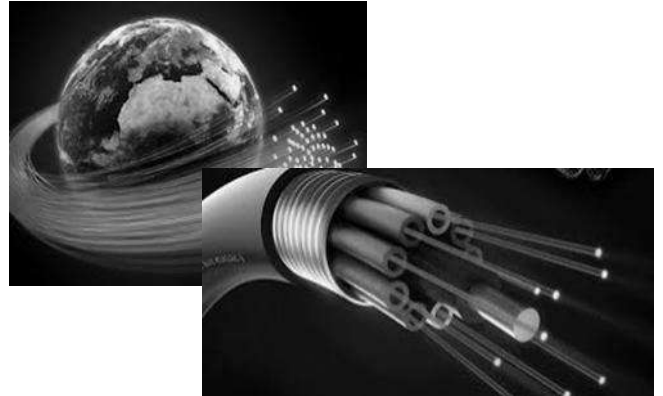


## Fiber-Optic Cabling

ClientFirst understands the need for a reliable fiber-optic cable infrastructure, especially as remote work requires more reliable communications connections.

Fiber optic planning can guide the design, construction, implementation, maintenance, regulation, and funding of an agency's fiber optics assets and related technologies. We work to help each client review their existing fiber-optic cable plant and its use. We are then able to create a guide regarding the development and utilization of this important infrastructure resource using the following approach:

- Site Visits and Existing Conditions Review
- Interview Stakeholder Departments
- Contract and Installation Q & A
- Research Alternatives and Potential Opportunities
- Identify Potential Business Opportunities
- Develop Broadband Installation Standards
- Resiliency Recommendations
- Identify Ongoing Maintenance Recommendations
- Identify Potential Funding/Joint Partnership Ideas
- Develop a Report and Budget Plan
- Workshop Discussion



In addition to evaluating an organization's fiber-optic needs and developing strategies to address those needs, we design and administer inside-plant and outside-plant fiber-optic cabling installations for our clients.

## Enterprise Applications Consulting

ClientFirst has a unique approach to Enterprise Applications consulting. Our Enterprise Application Consulting practice has expanded over the years and is now comprised of, but not limited to, the following elements:

- Process Review/Improvement, Assessment, and Business Case Justification
- Selection Services, including RFP development, proposal analysis, demonstration management, due diligence, and contract negotiation
- Implementation Project Management, including all phases of implementation. This process includes ensuring all manual processes are improved, paper is eliminated, and internal and external customers receive services electronically and have access to information.
- Post-implementation review to ensure objectives/goals and utilization levels were met, including a plan to close any identified post-implementation gaps.
- Implementation Rescue Projects – We have the history and ability to assess enterprise application implementations that have become challenged or gone off the rails. Through analysis, we determine the problem(s) so implementation management best practices can be applied and the project can succeed. This may often include intermediary services to address problem issues with the existing vendor.
- Application Gap Analysis and Utilization Improvement for existing enterprise applications that are viable but require reconfiguration and setup, training, or other needs
- Integration – between applications, with tools (ECMS, GIS, Field-Based mobiles), desktop/office applications, external entities (payment processors, banks, PERS, etc.), and much more.
- Review the Technology Department's application support resources, including staff inventory, availability, skill sets, etc.

### Applications Consulting Services

#### PROCESS REVIEWS

Business Case Analysis  
Assessment and Recommendations  
Process Analysis and Improvement

#### SOFTWARE SELECTION

Feature/Function Requirements  
Implementation Risk Assessment  
Change Management  
Vendor Analysis and Evaluation  
Contract Review and Negotiation

#### PROJECT OVERSIGHT

Implementation Project Management  
Conversion Assistance  
Integration / Interface Assistance

#### APPLICATIONS IMPROVEMENT

Assessment of Current Needs & Gaps  
Assessment of Features, Training, Support, & Reporting Issues  
Vendor Proposal Review & Demonstration Management  
Change Management  
Risk Assessments



Enterprise Applications Consulting

In years past, it was typical to see the largest line item in an organization's IT budget was related to hardware infrastructure and the staff to support this hardware (servers, desktops, printers, servers, network equipment, etc.) Cities have often seen their Software Application budget line items grow. Technology Departments often need to adjust to address this change. They are adding more Application Software Business Analysts to their organizations to support the user community's expanding software needs and demands.



This growth in software results from an organization's need to eliminate manual and paper-based processes to use software to gain efficiencies and increase productivity. Still, it is also to improve public access and to provide electronic services to the public. This also includes access and electronic services to internal customers (employees) and access to information and services for management, leadership, and elected officials to improve effective decision-making.

Our specialization in local government and cities provides an in-depth knowledge of all the related local government operations and applications and the vendors that provide them.

### Applications Experience

General Ledger	CIS & Utility Billing
Budgeting	Tax Billing
Project Accounting	Backflow
Grant Accounting	Service Orders
Accounts Receivable	Work Orders/Preventative
Cash Receipts	Maintenance
Purchasing & Receiving	Inventory Management
Bids Management	Fleet Management
Contract Management	Planning
Accounts Payable	Permitting
Fixed Assets	Inspection
Loans	Code Enforcement
Special Assessments	Land/Parcel/Address
Financial Reporting	Management
Ad Hoc Reporting	Computer-Aided Dispatch
Business Licensing	(CAD)
Applicant Tracking	Records Management
Human Resources	Mobile Computing
Employee Self-Service	Citizen Request Management
Benefits Tracking	GIS
Time & Attendance	Adjudication
Payroll	Citation Management

The level of detail ClientFirst explored in our software project was extremely valuable. We had attempted to do the same effort a few years ago, and there was no comparison. Through a needs assessment process, ClientFirst collected a tremendous amount of valuable details.

—IT Coordinator  
Software Selection

### Departmental / Functional Area Experience

Council/Board	Parks & Recreation
Administration	Engineering
Building & Safety	GIS
City Clerk	Water & Waste Water
Finance	Sanitation
Fire	Field Operations
Library	Laboratories
Utility Billing	Environmental
Customer Service/Call	Sciences
Centers	Facilities
Payroll	Treatment Plants
Human Resources	Fleet Management
Planning	Engineering
Police	Warehousing
Purchasing	SCADA
Public Works	Information Systems

From the beginning of our software selection process, I was impressed with how inclusive the process has been. I've never been associated with such a collaborative, cooperative, and engaged project. Outstanding process.

—City Manager  
Software Selection



Community Development Consulting



# Appendix 1: Case Studies

The following case studies are California agencies that ClientFirst has worked with to transform their technology environments digitally. These case studies began with Technology Master Planning. The cities' technology governance and commitment at all levels, including city councils, has since resulted in significant digital transformation that has improved internal business department processes, management decision-making, transparency, citizen services, and citizen engagement. Also separately is a sample Information Technology Plan recently completed for another California municipality.



## City of Rancho Mirage

### ***Project Background***

ClientFirst started with a citywide Technology Master Plan. We also jointly presented these transformation efforts at the annual California Society of Municipal Finance Officers (CSMFO) conference. Also, see the attached published article on the City's digital transformation efforts, *City of Rancho Mirage Published Digital Transformation Article*.

Other following projects have included:

- Technology Master Planning
- IT Organization Improvement Assistance
- Enterprise Software Needs Assessment
- ERP Selection and Contract Negotiations
- Audio Visual System Design, RFP, and Implementation Oversight
- Contract Management Process Review and Improvements
- Disaster Recovery Planning Services
- Cybersecurity Assessment and Risk Mitigation
- EDMS Needs Assessment Services
- Electronic Mail Implementation Consulting Services
- IT Management Mentoring and Advisory Services
- Wireless Network Design – Amphitheater, Library, Park Spaces
- Network Improvement Vendor Procurement
- Work Order/Asset Management Preliminary Assessment

### ***Description of Services Performed and Outcomes***

ClientFirst developed a Technology Master Plan to address the City's desire to integrate and automate business applications securely. This project included working with an ongoing City Council sub-committee. ClientFirst presented the Plan to the Council, and the Council approved funding of the plan. ClientFirst worked with City staff to upgrade technology infrastructure, resident connectedness, and application improvement and integration. The Master Plan also included a comprehensive analysis of the IT human resources to ensure the City had the resources to maintain existing technology, implement new technology projects, and maintain the environment that would be put in place as part of the implementation of the Technology Master Plan. A significant piece of the future IT organizational structure included increased business analyst talent to help implement and support critical enterprise applications.



ClientFirst assisted with the ERP system selection, which was concluded on time and within budget. Departmental assistance was also provided for selecting a new Contract Administration system.

Technical assistance was provided for the development of a Disaster Recovery Plan. ClientFirst worked with Departments to develop a prioritized recovery plan that met the needs of the City.



## City of Piedmont

### ***Project Background***

ClientFirst started with a citywide Technology Master Plan and has continued to assist the City in transforming the City and City operations digitally. Projects have included:

- Technology Plan development and successful funding
- Technology Plan management, annual plan updates, and Council updates on the status of the plan
- Fiber optic system upgrades
- Ongoing Technology Governance Committee participation as their senior IT advisor
- CAD/RMS vendor strategy and roadmap upgrade
- Wide area network improvements
- Initial IoT wireless network deployment
- ERP software selection and business process improvement analysis
- ERP software implementation project management
- Land Management Assessment & Improvement Plan
- Ongoing Land Management process improvements
- Cloud computing strategy analysis
- Public Safety Verizon Private Cloud analysis, implementation, and resiliency
- Public Safety Scheduling and Time and Attendance Procurement Management
- Cybersecurity Incident Response
- Telecommunications System Design and Procurement Management
- Website constituent survey, redesign, and social media rollout
- Coordination of 5G cellular tower, including Council briefings
- Cybersecurity improvement and roadmap and Cybersecurity Council briefings
- Hyperconverged system selection and project oversight
- Ongoing IT Strategic Advisory services

### ***Description of Services Performed and Outcomes***

Digital transformation has been a key strategy of the City of Piedmont's Council. This was initiated with the selection of ClientFirst to develop a Technology Strategic Plan in conjunction with a Citizen Advisory Committee. Unsurprisingly, as a Bay Area community, the Citizen Advisory Committee has strong technologists, including the first US employee of Skype (now an "angel investor"). ClientFirst worked collaboratively with the Citizen Advisory Committee to develop and prioritize the Plan and then jointly presented the Plan and budget to the Council. ClientFirst continues to oversee the plan's implementation as the City's technology advisor, presenting ongoing updates to the Council.

ClientFirst is also the primary technology consultant for the City, assisting with implementing recommended initiatives, including best practices, departmental applications, smart



technologies, civic engagement, IT infrastructure, day-to-day IT staffing and operations, cybersecurity, and communications.

Prior to the plan, the City's overall systems were largely siloed, legacy, and end-of-life. Some previously implemented systems were implemented in a manner that provided little opportunity to take advantage of the improved technology. Automation was limited, and resident services were mostly manual, with limited use of technology to automate business processes. Overuse of shadow systems and manual processes was still the norm.



## Mendocino County

### ***Project Background***

ClientFirst started with a County-wide Technology Master Plan and Roadmap to digitally transform the County and its operations. Other following projects have included:

- Technology Plan development and funding
- Technology Plan management and semi-annual plan updates in conjunction with mid-year and annual Board of Supervisors budget workshops
- Initial risk mitigation projects to increase the resiliency of critical systems
- Emergency Operations Center redesign and refresh of EOC technology and equipment (Phase 1 & 2)
- Public Safety Cabling and Fiber Optic Improvements
- Public Safety and Radio Data Center Space Planning
- Detailed public safety County-wide radio assessment, cost analysis, and successful funding request
- Fiber Optic Systems Upgrades
- Procurement Business Process Review and Improvements
- Cannabis Permit and Licensing Process Improvements Efficiency Study
- Budgeting Process Improvements
- Point Arena Radio & Microwave Project Management (Improved Public Safety Radio Resiliency)
- County-Wide Radio and Broadband Upgrade Project Management
- Property Tax System Assessment and Project Restart
- Property Tax System Implementation Oversight
- Cannabis Permits & License Business Process Review and Improvements
- Cannabis E-Permitting
- Cybersecurity Roadmap and Board Presentation
- Network Upgrade RFP & Project Management Assistance
- IT Strategic Advisory Services
- IT staffing and staff roadmap to support digital transformation and Board goal of increased efficiency



### ***Description of Services Performed and Outcomes***

ClientFirst was initially engaged to develop a multi-year Technology Master Plan and Roadmap. The initial five-year plan is budgeted at over \$20 million. The initial assessment also uncovered several high-risk areas. County management placed the project on hold but immediately allocated \$605K to mitigate many high-risk items. ClientFirst provided oversight and project management services to implement these risk mitigation measures. The Board appropriated \$1MM for Phase 1 projects and has subsequently appropriated over \$1MM every six months for additional project work. ClientFirst provides oversight for approximately twenty-five Technology Master Plan projects. ClientFirst also manages the Master Plan budget and project portfolio, with project additions and subtractions based on Board and Executive Office priorities.

In addition to managing the Technology Master Plan, ClientFirst provides detailed project management and vendor selection assistance for various projects. Implementation assistance augments staff for critical or high-profile projects such as E-Permitting (now implemented for about 65% of permit types), Cannabis business process improvements, public safety and emergency operations projects, preparations and replacement of a fragile end-of-life tax system, and others.

Also, ClientFirst and Mendocino County jointly presented at the California Society of Municipal Finance Officers (CSMFO) on process improvements resulting from these digital transforming projects.



## Appendix 2: City of Rancho Mirage Published Digital Transformation Article

ClientFirst has assisted the City of Rancho Mirage with various Technology Projects, starting with a citywide Technology Master Plan and Roadmap to transform the City and its operations digitally. The following article was published to showcase these digital transformation improvements. We also jointly presented these transformation efforts at the annual California Society of Municipal Finance Officers (CSMFO) conference.



# RMINSIDER

Fall 2018 / Official publication of the City of RANCHO MIRAGE, California

## Staying Connected

*Rancho Mirage Moves Forward With Master IT Plan*

*by June Allan Corrigan*



**Technology** — what would we do without it? Now deeply ingrained in our culture, it enables us to access information with a mere swipe or tap. It streamlines an infinite number of once onerous tasks. Still, in spite of the obvious advantages, many people would counter there's a definite yin-yang element to proceedings. As our dependency on technology only continues to increase, so does the specter of irretrievable data loss, not to mention the very real dangers of cybercrime. Never one to be left behind, the City of Rancho Mirage is committed to staying up-to-date with current technological advances. Yet it does so with mindful intent — the same way the City approaches every endeavor it undertakes. You can rest assured that with every technological step forward the City safeguards the preservation of the personal approach to customer service, never losing sight of the value of in-person communication.

### Careful Planning



In 2015, the City of Rancho Mirage retained the services of a leading technology consulting group that specializes in government. A team of professionals came in and analyzed the state of technology in the City as a whole. Their focus included examining existing hardware and network infrastructure, applications, and business systems — all in a bid to improve information technology (IT) environments so they can better serve the needs of the City. The consultants identified, prioritized, and recommended projects the City should embark upon, and they consolidated all of their findings in a five-year IT Master Plan.

One phase of the five-year IT Master Plan destined to positively impact both City staff and residents is a new Enterprise Resource Planning (ERP) system. An ERP system aids the flow of internal business processes and allows for communication between City departments and its internal functions and data. The City of Rancho Mirage's current ERP system is 20 years old, and implementation of its new form is currently underway. The upgraded ERP system is ushering in upgrades like paperless invoicing guaranteed to significantly reduce processing time. Electronic timesheets will simplify matters for employees and the payroll department alike. Meanwhile, the City's permitting process will soon be streamlined. And citizens will be able to check a permit's status remotely and pay online.

### Safe & Secure

While it is exciting to get on board with the latest technological advances, one of the City's primary concerns is keeping data secure. A significant portion of the five-year IT Master Plan centers around security systems and practices, including a disaster recovery plan designed to protect City systems and data. "We've implemented systems and multiple layers of security to protect ourselves as well as residents who share their data with us," says Jason Jaurigue, the City's Senior IT Manager. "We perform routine backup procedures so in the event something does happen, we always have a backup of our data that is secure. Additionally, everyone who works for the City has to be trained on security so it's a team effort to identify potential threats."

### Government 2.0

These days it isn't enough to simply inform residents that City information is available to them. Some may be aware of the fact, others not, but the goal should always be to harness new technologies and share information in a creative way so the public can access it in whatever manner they choose. This is yet another tenet of the five-year IT Master Plan recommended for Rancho Mirage — one that will soon manifest itself in a freshly designed City website as well as the launch of a new City app! "A City app is another platform for us to communicate with our residents and visitors," City Manager Isaiah Hagerman says. "Some people may be signed up for our e-blasts, others may read the *R/M Insider* cover to cover. Some people may come to City Council meetings, others may watch RMTV. One of my goals moving forward is to always make sure we're communicating with our residents as effectively as possible."

The new City app aims to make information readily accessible to Rancho

Mirage residents. "We want an app that engages the citizen so they'll know what is going on in the community," Jaurigue says. "If there's an accident or construction ahead, we want to be able to alert the community. If they want to reach out to City Councilmembers, the app will provide contact information." The app will also share highlights of City Council meetings including links to charts and graphs to better illustrate Council decisions. Of course, the app will be a perfect vehicle to get the word out about events happening around the City — whether it's Art Affaire kicking off the season in November, upcoming concerts at the outdoor amphitheater, or the wide variety of programming available at the Rancho Mirage Library & Observatory. The new, user-friendly City app will keep everyone in the loop!





### Delving Deeper

The five-year IT Master Plan includes an initiative to augment the City's Geographic Information System (GIS), or mapping software. A 2016 update to the City's General Plan included the development of a Public Web App which allows residents and staff to access parcel, property, and zoning information on a GIS-based tool. Its development was the first part of a long-term strategy to make GIS technology more accessible to the public. The GIS-based tool is housed on the City's website under the Planning department. "Residents can type in their property address, zoom down to their parcel, and examine a series of layers, such as zoning and flood plain information," explains Jeremy Gleim, the City's Development Services Director.

Ongoing GIS software enhancements will benefit both City staff and residents. The City will be able to consolidate several software programs into the GIS-based format, which will enhance productivity and efficiency. "Eventually we will have a fully integrated city-wide GIS program where people can apply for building permits and other kinds of permits online. They will even be able to submit project plans online. That is the direction we're headed. These technological improvements will create a more sustainable and streamlined workflow plus increased accessibility for residents," says Gleim.

Moving forward, the City will continue to expand GIS mapping capabilities and will add layers to the map as projects allow. For example, the new and broader GIS system will be able to indicate existing as well as proposed telecommunication fiber networks around the City. "We're investing in our infrastructure. We want to be able to show our citizens and businesses coming in — this is the current fiber network in Rancho Mirage, and these are the areas where we are planning on improving coverage," says Jaurigue. "It's all about customer service and streamlining the business process by providing whatever information is needed."

### A Pledge

As the City strives to implement initiatives recommended in the five-year IT Master Plan, security systems and practices will always factor prominently in proceedings. The paper trail that was emblematic of old ways of doing business is giving way to a

cloud-based system. The City of Rancho Mirage is on board, considering it essential to embrace technological advances to support the work of the City and the needs of its citizens. Rest assured that as the City moves forward, it remains ever mindful of its responsibility to keep all data safe and secure.

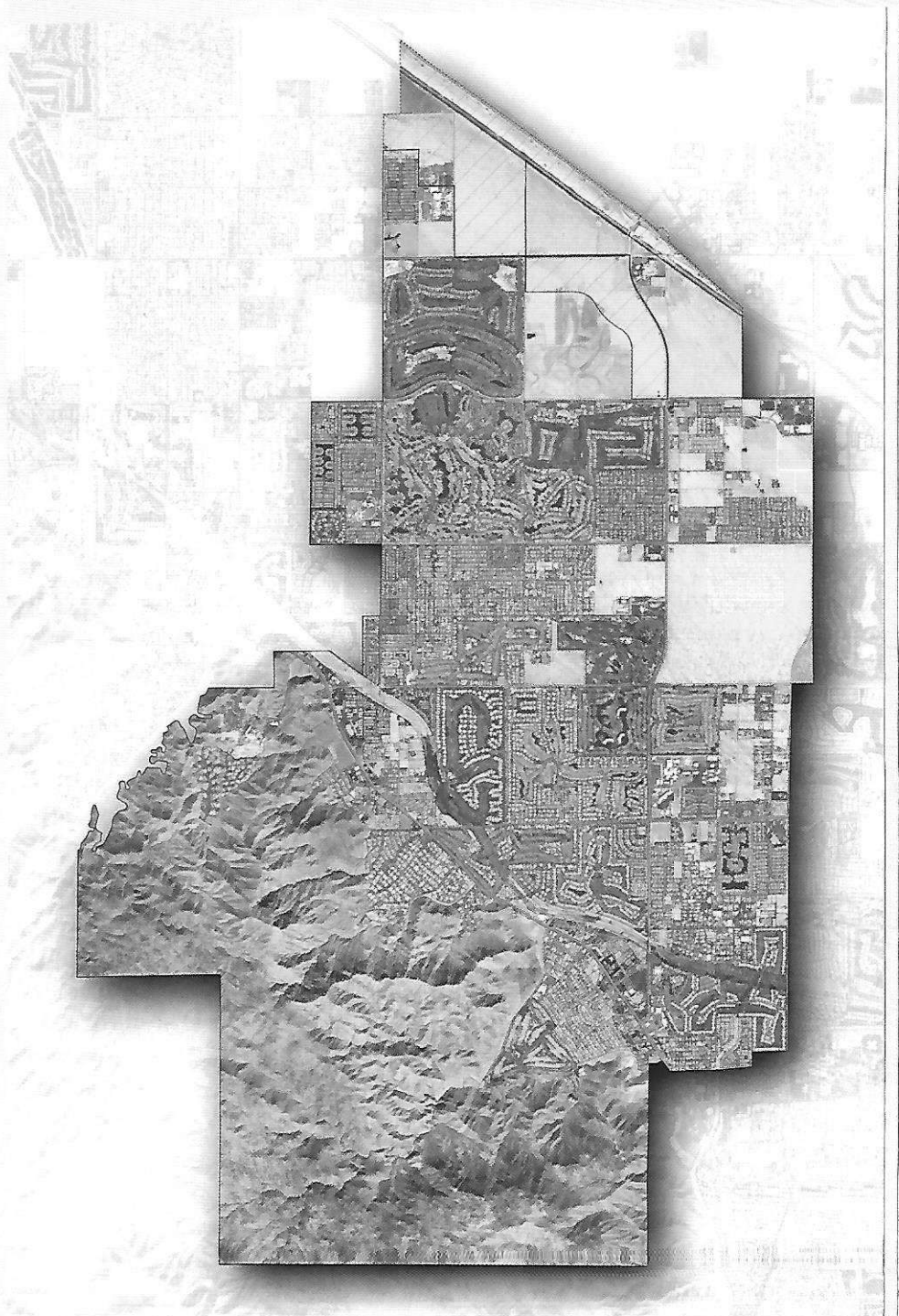


Image shows Rancho Mirage Land Use & Zoning Map, which is available on the City's new GIS-based web application.

*Proposal for*

# **Utility Billing Software Selection Consulting Services**

*May 16, 2025*



*Client Locations*  
**Coast-to-Coast**

*Practice Locations*  
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North Carolina  
Texas**

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[www.clientfirstcg.com](http://www.clientfirstcg.com)

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TECHNOLOGY CONSULTING

May 16, 2025

Shawn Granger  
IT Manager  
City of Covina  
125 E. College Street  
Covina, CA 91723

**RE: Proposal for Utility Billing Software Selection Consulting Services**

Dear Mr. Granger:

ClientFirst appreciates the opportunity to present the City of Covina with our proposal to evaluate and assist in selecting a Utility Billing System. Our consultants have decades of experience providing Utility Billing system assessments, process reviews, selection services, and implementation project management oversight to municipalities throughout the United States. Key qualifications include:

**Local Government ONLY Focus** – ClientFirst Technology Consulting specializes in helping local government agencies evaluate the Utility Billing solutions that best fit their agency's specific business process requirements, foster buy-in and consensus across the organization, and provide the best value proposition.

**Local Presence** – Although ClientFirst works throughout the United States, we are based in California.

**True Independence** – ClientFirst is completely independent and unbiased in its analysis and recommendations. We do NOT resell software or employ third-party implementers, trainers, or programmers for software solutions.

**Expertise and Experience** – ClientFirst has worked with hundreds of cities and counties. The proposed project team has a track record of successful local government software assessments, evaluations, and implementations throughout the United States.

**Our clients say we excel in these areas:**

- Following best practices
- Customizing the business process review and new system feature/function requirements for each specific agency
- Building consensus throughout the organization
- Educating staff and transferring knowledge
- Effectively supporting change management and buy-in at all levels
- Improving implementation readiness and reducing risk
- Helping gain management and support of elected officials through education and business-case development

**Why ClientFirst is the Best Choice**

- We pride ourselves on our ability to listen and communicate, affecting positive change at all personnel levels, including elected officials.
- We truly put our client's needs first. You are not just another project to us.
- Our partners are hands-on and do not just provide high-level oversight or project management assistance.
- We customize our deliverables to meet the unique requirements of each client. No cookie-cutter or boilerplate processes or deliverables.



- We not only follow best practices but also educate staff at all levels on best practices in a manner that helps them understand the relevance to their organization and their role within the project.
- We seek to partner with our clients as integrated subject-matter experts and advisors.
- We work to help digitally transform your organization, transfer knowledge, manage change, and ingrain best practices into your processes and implementation.

For any questions, contact me at 951.739.7989 or via email at [dkrout@clientfirstcg.com](mailto:dkrout@clientfirstcg.com) for additional information. We look forward to the opportunity of serving the City of Covina as one of our many satisfied clients.

Sincerely,

A handwritten signature in black ink, appearing to read "DKrout", with a long, sweeping horizontal line extending to the right.

**David W. Krout, CPA** *(inactive)*  
*Partner*  
Management Consulting Practice Leader



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# Project Team

## Team Member Roles

### Project Director/Manager – Jamie Shell

The Project Director oversees the ClientFirst project activities and the quality assurance of the deliverables. This person also helps direct the ClientFirst project team consultants assigned to the project.

### Application Consultants – Janet Federico

ClientFirst assigns two or more Application Consultants to every project for continuity and backup. These consultants perform the business analysis and necessary tasks to provide the deliverables defined in the project scope.

## Key Personnel

All assigned personnel have sufficient availability to complete this project on time and within budget.

### David Krout – Partner, Enterprise Applications Consulting

#### Project Role: Quality Assurance Director, Business Process Analyst, and Solutions Architecture

David Krout, CPA (inactive), has been continually working with local governments nationwide on application improvement and selection projects for 25 years. David has worked with over 140 agencies and has interviewed thousands of users in business process reviews for all city and county departments. David created the Firm's tools and approach for identifying opportunities, improving processes, and incorporating these improvements into existing or new software and technology solutions.

### Jamie Shell – Director, Enterprise Applications Consulting

#### Project Role: Project Manager, Lead Business Process Analyst

Jamie Shell (**former municipal Finance Director**) has over 27 years of public sector experience, including ten years in local government finance. He has successfully managed and implemented projects for **over 50 public-sector agencies** throughout the United States. He will serve as the Selection Project Manager and Business Process Analyst.

### Janet Federico – Applications Consultant

#### Project Role: Business Process Analyst

Janet Federico has over 25 years of IT experience and over 14 years of experience with government agency software implementations. She has experience with functional and technical requirements development, gap analysis, system analysis, design, specifications, unit and system testing, implementation planning, execution, lessons learned, and system documentation. Janet's enterprise application-specific experience includes over 25 projects.



# David W. Krout, CPA *(Inactive)*

## Partner – Enterprise Applications Consulting Practice Leader

David Krout has 25 years of experience assisting local governments with a broad scope of information technology needs. He specializes in working with organizations to identify their strategic, organizational, application, and functional requirements to determine which system and/or specific applications are a proper fit for both the agency and the vendor.

David's unique and diversified background in business management, accounting, and management consulting has allowed him to collaborate with C-level executives and department staff from a practical, business-management perspective to maximize their technology utilization.

Having also worked for a leading local government enterprise software provider, David brings a unique understanding of consulting, client representation, and vendor relationships to the collaboration between the agency and software vendors.

### Highlights

- Served on the National Committee for Information Technology for the Institute of Management Accountants
- Former President, Institute of Management Accountants, Inland Empire Chapter
- Former Government IT Consulting Manager for RSM McGladrey, the nation's fifth-largest CPA and consulting firm
- Featured speaker for the California Society of Municipal Finance Officers (CSMFO), Municipal Information Systems Association of California (MISAC), and Texas Association of Government Information Technology Managers
- Project lead with over 100 public-sector agencies throughout the United States

### Agency Experience

City of Albany  
City of Batavia  
City of Bloomington  
City of Brentwood  
City of Brisbane  
City of Burbank  
City of Burlington  
City of Camarillo  
City of Carlsbad  
City of Cathedral City  
City of Cedar Hill  
City of Chico  
City of Chino  
City of Clovis  
City of Colton  
City of Corona  
City of Coronado  
City of Dana Point  
City of Dublin  
City of Emporia  
City of Farmers Branch  
City of Foster City  
City of Gastonia  
City of Healdsburg  
City of Hemet  
City of High Point  
City of Highland Park  
City of Hutto  
City of Indio  
City of La Habra  
City of La Puente  
City of Laguna Niguel  
City of Lake Forest  
City of Larkspur  
City of Lomita  
City of Manassas Park  
City of Menlo Park  
City of Mission Viejo

City of Mountain View  
City of Murrieta  
City of Newark  
City of Novato  
City of Pacifica  
City of Palm Desert  
City of Palmdale  
City of Pelham  
City of Petaluma  
City of Piedmont  
City of Rancho Mirage  
City of Redlands  
City of Rialto  
City of Riviera Beach  
City of Rosemead  
City of St. Helena  
City of Salisbury  
City of San Bernardino  
City of San Gabriel  
City of San Jacinto  
City of San Leandro  
City of Sandpoint  
City of Shawnee  
City of Sierra Madre  
City of Simi Valley  
City of South Gate  
City of Tracy  
City of Tustin  
City of West Covina  
City of West Des Moines  
City of West Sacramento  
City of Whittier  
City of Wilton Manors  
City of Windsor  
County of Buncombe  
County of Butte  
County of Denton  
County of Douglas

County of Lassen  
County of Mendocino  
County of Orange  
County of Plumas  
County of Riverside  
County of San Bernardino  
Town of Danville  
Town of Groton  
Town of Hillsborough  
Town of Truckee  
Town of Windsor  
Town of Woodside  
Village of Northfield  
Village of Oswego  
Village of Park Forest  
Village of River Forest  
Coachella Valley MVCD  
East Bay Regional Park District  
El Toro Water District  
Four Rivers Sanitation Authority  
Jurupa Community Services District  
Las Angeles Community Development Authority  
Las Virgenes Municipal Water District  
Mesa Water District  
Midpeninsula Regional Open Space District  
Ramona Municipal Water District  
Rincon del Diablo Water District  
Riverside County Sherriff's Office

San Bernardino Municipal Water  
Walnut Valley Water District  
West County Wastewater District  
Western Municipal Water District  
Castaic Lake Water Agency  
Castro Valley Sanitary District  
Cucamonga Valley Water District  
Gastonia Water & Power  
Glendale Water and Power



### CREDENTIALS, DEGREES, AND AFFILIATIONS

- Certified Public Accountant (CPA) (Inactive)
- Bachelor of Science in Business Administration and Accounting – CSU San Bernardino

### SPECIALTIES

- Business Process Reviews
- Applications Requirements Definition
- Enterprise Applications Architecture
- Current System Needs Analysis and Improvement
- New Software Selection Assistance
- Technology Master Planning
- Project Management and Oversight
- Conversion Assistance and Planning
- Contract Reviews and Negotiations



Certified Public Accountant  
*(Inactive)*

It has been absolutely key to this project that ClientFirst, especially Dave, knows the governmental environment, its limitations and its opportunities.

—Director of Administrative Services  
CA Municipality



# Jamie T. Shell, PMP

## Director, Enterprise Applications Consulting

Jamie Shell has over 25 years of public sector experience, including ten years working in local government finance (Finance Director) and over 15 years assisting local governments with various information technology needs. He specializes in working with organizations to identify their strategic, organizational, application, and functional requirements to determine which system and/or specific applications are a proper fit for both the agency and the vendor.

Jamie's background in local government finance, project management, and software implementation has allowed him to work jointly with C-level executives, agency/department heads, and staff to maximize their technology utilization.

Having worked in government and as an enterprise software provider, Jamie brings a unique understanding of the perspectives of both the agency and software vendors.

## Highlights

- Former municipal Finance Director
- Served as President of the Eastern Kansas Government Finance Officers Association (2005)
- Former manager of Client Services with one of the largest government ERP vendors
- Former manager of Professional Services with another major government ERP vendors
- Successfully managed onsite and remote projects for over 50 public-sector agencies throughout the United States

## Agency Experience

City of Alpharetta  
City of Atlanta  
City of Barrie  
City of Batavia  
City of Battle Ground  
City of Bentonville  
City of Branson  
City of Carlsbad  
City of Cathedral City  
City of Cedar Hill  
City of Chattanooga  
City of Clovis  
City of Coronado  
City of Dubuque  
City of East Point  
City of Edmont  
City of Elgin  
City of Elmhurst  
City of Emporia  
City of Evanston  
City of Farmers Branch  
City of Flagstaff  
City of Fort Collins  
City of Gallup  
City of Glendora  
City of Grand Rapids  
City of Henderson  
City of High Point  
City of Hoover  
City of Hutto  
City of Indianapolis/ Marion County  
City of Kansas City  
City of Medford

City of Memphis  
City of Mesa  
City of Miami  
City of Minden  
City of Naperville  
City of New Port Richey  
City of Newark  
City of Norco  
City of Novato  
City of Oviedo  
City of Pacifica  
City of Palm Desert  
City of Pearlman  
City of Petaluma  
City of Piedmont  
City of Pismo Beach  
City of Port Angeles  
City of Poulso  
City of Prescott  
City of Richmond  
City of Salinas  
City of San Bernardino  
City of Simi Valley  
City of St. Petersburg  
City of South Gate  
City of Stockton  
City of Tracy  
City of Tulare  
City of Tyler  
City of Vacaville  
City of West Covina  
City of West Hollywood  
City of West Lafayette  
City of West Sacramento

City of Wilmington  
City of Wilton Manors  
City of Woodside  
County of Clermont  
County of Cook  
County of Denton  
County of Douglas  
County of Kauai  
County of Lassen  
County of Mendocino  
County of Nassau  
County of New Castle  
County of Plumas  
County of Ramsey  
County of San Juan  
County of San Mateo  
Town of Cary  
Town of New Canaan  
Town of Isle of Palms  
Town of Prescott Valley  
Town of Vail  
Town of Windsor  
Village of Lincolnwood  
State of New Jersey  
State of New Mexico  
California State Auditor's Office  
California State Controller's Office  
California Office of Emergency Services  
Ewing Marion Kauffman Foundation  
Province of Nova Scotia

State of Hawaii Campaign Spending Commission  
State of Massachusetts Comptroller's Office  
State of Maine Treasurer's Office  
State of Michigan Administrative Office of Courts  
State of Rhode Island Treasurer's Office  
State of Virginia Dept of Rail & Public Transportation  
Ewing Marion Kauffman Foundation  
Castaic Lake Water Agency  
Coachella Valley MVCD  
Coachella Valley Water District  
Commodities Futures Trading Commission  
Cucamonga Valley Water District  
East Bay Regional Park District  
Four Rivers Sanitation Authority  
Los Angeles Community Development Authority  
Las Virgenes Water District  
Riverside County Sheriff's Department  
TrueNorth Educational Cooperative  
West County Wastewater District  
Jurupa CSD



## CREDENTIALS, DEGREES, AND AFFILIATIONS

- Project Management Professional (PMP)
- Bachelor of Science in Business Administration and Accounting – Missouri Western State University

## SPECIALTIES

- Certified Prosci Change Management Practitioner
- Business Process Reviews
- Applications Requirements Definition
- Enterprise Applications Architecture
- Current System Needs Analysis and Improvement
- New Software Selection Assistance
- Technology Master Planning
- Project Management and Oversight
- Conversion Assistance and Planning
- Contract Reviews and Negotiations





# Janet Federico, MBA

## Management Consultant

Janet Federico has over 14 years of experience with local and federal government agency software implementations. Her in-depth experience with software configuration, business analysis, and user needs assessment allows her to successfully oversee project implementations of standard and customized software.

Skilled in all facets of the project life cycle for application software, she has experience with functional and technical requirements development, gap analysis, system analysis, design, specifications, unit and system testing, implementation planning, execution, lessons learned, and system documentation.

Janet also has over six years of experience working with organizations to identify their strategic, organizational, application, and functional requirements to determine which system and/or specific applications are a proper fit for the agency and vendor.

Additionally, having worked for a leading local government enterprise software provider, Janet brings a strong understanding of software implementation, consulting, process knowledge, functional knowledge, and the customers' needs and concerns throughout and post-implementation.

## Highlights

- Multi-phased agency-wide software implementations
- Extensive knowledge of business and technical processes about enterprise applications

## Agency Experience

City of Bartlesville	City of Tulsa
City of Batavia	City of West Sacramento
City of Bentonville	City of Wichita
City of Carlsbad	City of Wilton Manors
City of Cathedral City	City of Windsor
City of Cedar Hill	City of Wisconsin Springs
City of Clovis	City of Wood Dale
City of Coronado	City of Wood Dale
City of Corvallis	Town of Whittier
City of Decatur	Town of Woodside
City of Emporia	Village of Hinsdale
City of Farmers Branch	Village of Orland Park
City of Fort Smith	County of Champaign
City of Glendora	County of Collin
City of High Point	County of Denton
City of Highland Park	County of Douglas
City of Hutchinson	County of Minnehaha
City of Hutto	County of St. Joseph
City of Mountain View	Coachella Valley Mosquito
City of Newark	Vector Control District
City of Norco	East Bay Regional Park
City of Pacifica	District
City of Piedmont	El Toro Water District
City of Salinas	Jurupa Community School
City of San Bernardino	District
City of Simi Valley	Los Angeles County
City of South Gate	Development Authority
City of Tracy	Las Virgenes Water District
City of Tulare	County of Lassen

County of Mendocino  
Riverside Co Sheriff's Dept  
State of Texas (DFPS)



## CREDENTIALS, DEGREES, AND AFFILIATIONS

- Master of Business Administration – Ellis College
- Bachelor of Science in Applied Management – Kaplan University

## SPECIALTIES

- Project Management
- Conversion, Interface Planning, and Implementation Support
- Understanding of public sector departmental operations and application systems
- Workflow analysis and mapping
- Business Process Redesign
- System Configuration and Training
- Test and Go Live Plan Creation



I just wanted to say that I thought the training sessions were very informative and clear, and I learned a lot from it. I appreciate your time spent to train us. Thank you so much!

—Account Clerk  
CA Municipality



# Firm Qualifications

## Enterprise Applications Consulting Practice Profile

ClientFirst's enterprise applications consulting team has conducted these specific assessments, process reviews, procurements, and implementation assistance for over 20 years.

ClientFirst leverages this experience to the client's advantage through a unique approach to software selection. This approach considers the vendor's perspective while working with clients to navigate the complexities of software assessment, selection, contract negotiation, and implementation.

We identify an organization's strategy, organizational, application, and functional requirements—specific to the client's business processes—to determine which solutions best fit the customer and vendor. Our clients appreciate the honesty and diligence with which we conduct our projects, and many clients continue relying on our services after their first project with us.

The level of risk and the probability of achieving a successful implementation are directly related to the amount of proper due diligence employed. At ClientFirst, we take every possible step to decrease this risk level through best practices.

Because of the level of due diligence that we require, software vendors welcome the opportunity to respond to our RFP documents. This allows your organization to find the best functionality fit by evaluating an adequate number of qualified vendor responses.

### Applications Consulting Services

#### PROCESS REVIEWS

Business Case Analysis  
Assessment and Recommendations  
Process Analysis and Improvement

#### SOFTWARE SELECTION

Feature/Function Requirements  
Implementation Risk Assessment  
Change Management  
Vendor Analysis and Evaluation  
Contract Review and Negotiation

#### PROJECT OVERSIGHT

Implementation Project Management  
Conversion Assistance  
Integration / Interface Assistance

#### APPLICATIONS IMPROVEMENT

Assessment of Current Needs & Gaps  
Assessment of Features, Training, Support, & Reporting Issues  
Vendor Proposal Review & Demonstration Management  
Change Management  
Risk Assessments

### Applications Experience

General Ledger	CIS & Utility Billing
Budgeting	Tax Billing
Project Accounting	Backflow
Grant Accounting	Service Orders
Accounts Receivable	Work Orders/Preventative
Cash Receipts	Maintenance
Purchasing & Receiving	Inventory Management
Bids Management	Fleet Management
Contract Management	Planning
Accounts Payable	Permitting
Fixed Assets	Inspection
Loans	Code Enforcement
Special Assessments	Land/Parcel/Address
Financial Reporting	Management
Ad Hoc Reporting	Computer-Aided Dispatch
Business Licensing	(CAD)
Applicant Tracking	Records Management
Human Resources	Mobile Computing
Employee Self-Service	Citizen Request Management
Benefits Tracking	GIS
Time & Attendance	Adjudication
Payroll	Citation Management



Enterprise Application Consulting Services



## Government Technology



Focusing on local governments means that we understand the unique needs, processes, protocols, and political nuances involved in the industry. This **understanding and experience** ensures that our strategies and recommendations are practical. Our management team's career experience includes over 3,500 projects for more than 500 local government agencies.

## Local Presence and Practice Locations

We have a local presence with extensive experience in California. ClientFirst is a national firm with practices located in California, Illinois, Texas, and North Carolina.



Corona, CA



Schaumburg, IL



San Antonio, TX



Charlotte, NC

## Business Management Approach

Not all government executives know the latest technology issues and opportunities. Therefore, our approach and deliverables provide a business-management perspective that **allows the layperson to understand the technology issues, strategies, and potential solutions required to make more informed business decisions.**

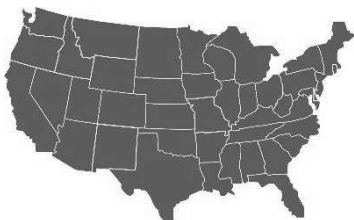
## Practical Recommendations

We believe in using technology to meet the agency's business objectives; we do not apply technology just for technology's sake. We are serious in our quest to provide clients with practical solutions that meet their requirements. Sometimes, the proper solution includes cutting-edge technology. However, a cost-effective and practical solution using proven technology is often the most beneficial.



## True Independence

ClientFirst believes in practicing **true independence**. We do not resell products or maintain relationships that would result in add-on profit margins or referral fees. Our interest is in **putting the client first** by finding optimum solutions (i.e., the greatest value at the lowest competitive cost) to meet their needs.



## National Recognition

Many of the industry's leading vendors recognize our consultants' work nationally. They appreciate the fairness and objectivity we demonstrate when dealing with their organizations.



## Industry Recognition

### CIO Review

ClientFirst has been featured in *CIO Review* as one of the "20 Most Promising Government Technology Solution Providers".



### National Speakers

ClientFirst personnel have conducted educational sessions at national and local conferences, such as CSMFO, MISAC, and GFOA.



ClientFirst has such a broad and well-rounded experience with cities that they already have a good idea of what will or won't work. Other vendors we have worked with don't have this depth of experience and suggest solutions that are unrealistic in a city government environment.

— IT Director  
CA Municipality



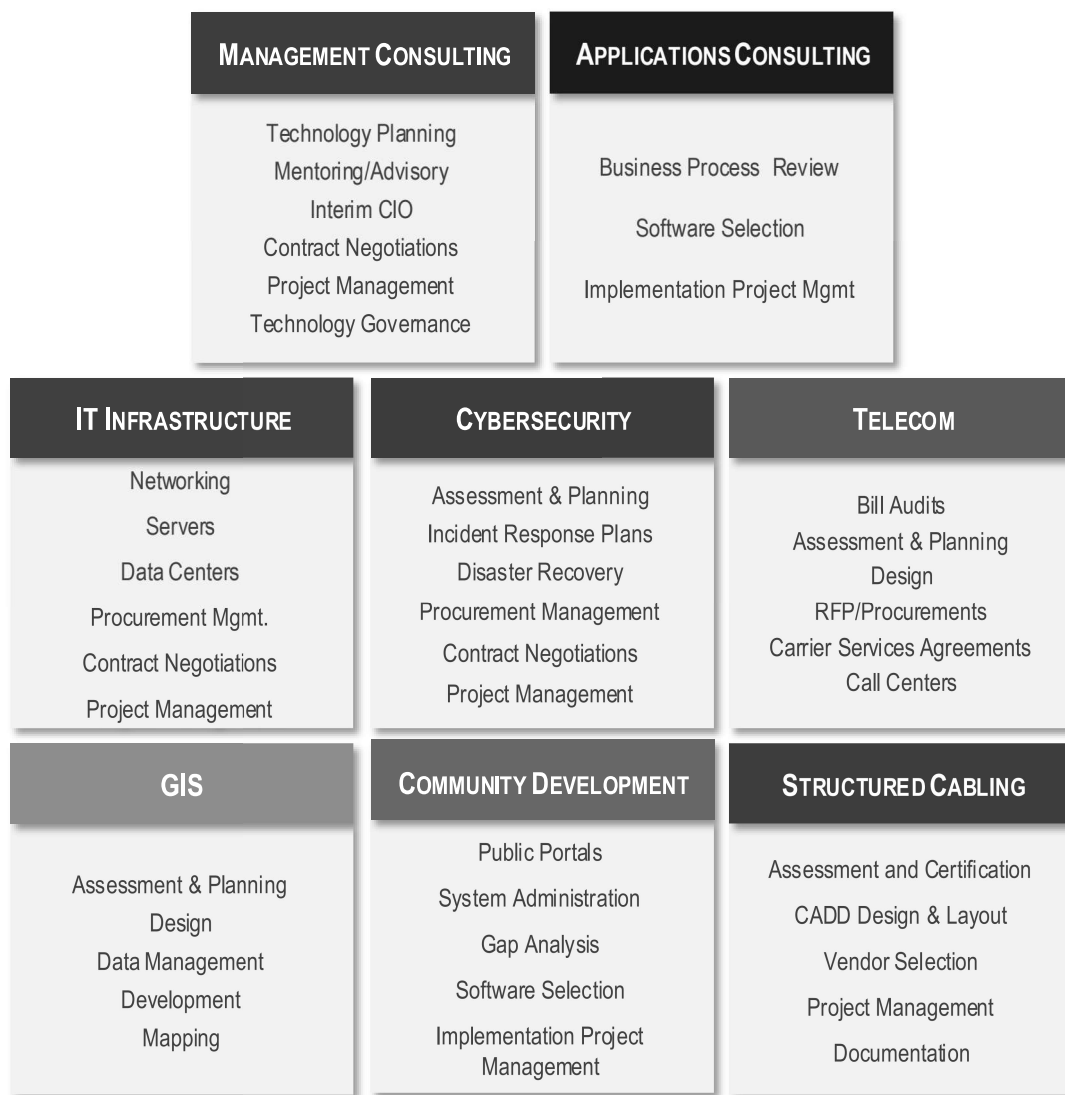
## Diversified Experience

We have **extensive experience with various organizations, technologies, and processing environments. In addition, we have significant market knowledge regarding software and hardware providers and are well-informed about vendor and industry developments.**

## Integrated Technology Solutions Groups

Whatever the agency's technology needs are, we offer a unique combination of experts in their given disciplines who can guide technology decisions, planning, implementation, and management, chosen according to the specific needs of each project, working as an integrated team to **provide end-to-end consulting and support services.**

## ClientFirst Integrated Technology Solutions Groups







## Integrated Technology Services

### Applications Consulting

#### ***Business Process Review***

- Business Case Analysis
- Assessment and Recommendations
- Process Analysis and Improvement

#### ***Software Selection***

- Feature / Function Requirements
- Implementation Risk Assessment
- Change Management
- RFP Development
- Vendor Analysis and Evaluation
- Demonstration Facilitation
- Contract Review and Negotiation
- Implementation Project Management
- Ad Hoc Report-Writing Assistance

### IT Infrastructure

#### ***Networking and Servers***

- Assessment, Design, and Installation
- Replication and Redundancy Strategies
- Virtualization
- Cloud Computing
- Wireless
- Data Center Design

#### ***Disaster Recovery***

- Risk Assessment and Business Impact Analysis
- Disaster Recovery Planning
- Hot-Site and Recovery Services Evaluation
- Storage Area Networking
- Backup Strategies and Design

### Cybersecurity

- Assessment and Planning
- Applications and Hardware Security
- Cybersecurity Review
- Security Policy and Control Development
- Intrusion Testing
- Workshops and Training
- Compliance: NIST, NCCoE, PCI, CJIS, NEA/FERC

### Structured Cabling System Design

- Assessment and Certification
- CADD Design and Layout
- RFP / Vendor Selection
- Project Management
- Documentation
- Fiber-Optic Network Design

### Management Consulting

- Technology Strategic/Master Planning
- IT Assessment
- IT Staffing Assessment
- Process Improvement
- Procurement Assistance
- Contract Negotiation
- Project Management
- IT Governance Seminars

### ECMS

- Needs Assessment
- Business Process Review
- System Selection
- Planning
- Implementation Oversight

### GIS

- Assessment and Planning
- Design
- Data Management
- Development
- Mapping

### Community Development

- Public Portals
- System Administration
- Gap Analysis
- Software Selection
- Implementation Project Management

### IT Staffing/Augmentation

- IT Staffing Needs Assessment and Operational Reviews
- Interim IT Management
- Supplemental IT Management Staffing

### Telecommunications Consulting

- VoIP Readiness Review
- Systems Evaluation, Design, Specifications, and RFP Development
- Bill Audits (Cost Analysis and Negotiation)
- Telecom Expense Management (TEM)
- Credit / Refund Requests
- Strategic Planning
- Project Management
- Carrier Services Cost Analysis
- Operational and Workflow Reviews
- System Selection and Contract Negotiations



## Consultants' Collective Experience

We understand that the experience of the individual consultants is a significant factor in hiring a firm to conduct the project on your behalf. Our consultants have extensive public-sector experience in their respective careers, including projects with the following agencies:

<b>California</b> City of Albany City of Azusa City of Benicia City of Big Bear Lake City of Brentwood City of Brisbane City of Burbank City of Calabasas City of Camarillo City of Carlsbad City of Cathedral City City of Cerritos City of Chico City of Chino City of Clovis City of Colton City of Corona City of Coronado City of Dana Point City of Downey City of Dublin City of Emeryville City of Escondido City of Fairfield City of Foster City City of Fountain Valley City of Glendale City of Glendora City of Healdsburg City of Hemet City of La Habra City of La Mesa City of La Puente City of Laguna Niguel City of Larkspur City of Lathrop City of Lomita City of Menlo Park City of Mission Viejo City of Montclair City of Moreno Valley City of Mountain View City of Murrieta City of Newark City of Norco City of Novato City of Pacific Grove City of Pacifica City of Palm Desert City of Palmdale City of Patterson City of Petaluma City of Piedmont City of Pinole City of Pismo Beach City of Port Hueneme City of Rancho Cucamonga City of Rancho Mirage City of Redlands City of Rialto City of Rohnert Park City of Rosemead City of Sacramento City of Salinas City of San Bernardino City of San Clemente City of San Gabriel City of San Jacinto City of San Leandro City of San Pablo City of San Rafael City of Seal Beach City of Sierra Madre	City of Simi Valley City of South Gate City of South Pasadena City of South San Francisco City of St. Helena City of Sunnyvale City of Temecula City of Tracy City of Tulare City of Tustin City of Upland City of Vacaville City of West Covina City of West Sacramento City of Whittier Town of Danville Town of Hillsborough Town of San Anselmo Town of Truckee Town of Windsor Town of Woodside Town of Yucca Valley County of Butte County of Lassen County of Mariposa County of Mendocino County of Plumas County of Riverside County of San Bernardino County of Tuolumne County of Yolo CA-NV American Water Works Association Castaic Lake Water Agency Castro Valley Sanitary District Coachella Valley Mosquito Vector Control District Cucamonga Valley Water District East Bay Regional Park District El Toro Water District Fresno Irrigation District Glendale Water and Power Hayward Area Recreation and Park District Jurupa Community Services District Las Virgenes Water District Livermore Area Recreation and Park District Mesa Water District Midpeninsula Regional Open Space District Newhall County Water District Novato Sanitary District Palmdale Water District Ramona Municipal Water District Rincon del Diablo Municipal Water District Rosamond Community Services District San Bernardino Municipal Water San Mateo Consolidated Fire District Southern California Coastal Water Research Sweetwater Authority Union Sanitary District Walnut Valley Water District West County Wastewater District	Western Municipal Water District Colton Joint Unified School District Fontana Unified School District Irvine Unified School District Lake Elsinore Unified School District Menifee Unified School District Mountain View School District Ohlone Community College Palm Springs School District Romoland School District San Jose Community College San Marino Unified School District University of California Berkeley University of California San Francisco West Covina Unified School District Mechoopda Indian Tribe Piedmont Police and Fire Stanislaus Council of Governments UCSF Medical Center <b>Alabama</b> City of Pelham <b>Arizona</b> County of Maricopa <b>Connecticut</b> City of Bristol City of New Haven Groton Police Town of Groton <b>Florida</b> City of Cape Coral City of Deerfield Beach City of Dunedin City of Fort Lauderdale City of Oakland Park City of Pompano Beach City of Port St. Lucie City of Riviera Beach City of Wilton Manors Collier County Board of County Commissioners <b>Idaho</b> City of Sandpoint <b>Illinois</b> City of Bloomington City of Champaign City of Countryside City of Crystal Lake City of Highland Park City of Joliet City of Lake Forest City of Moline City of Morton Grove City of Naperville City of Oakbrook Terrace City of Orland Park City of Prospect Heights City of Rock Island City of Rockford City of St. Charles City of Waukegan City of Wood Dale Village of Arlington Heights	Village of Barrington Hills Village of Cary Village of Glencoe Village of Itasca Village of Kenilworth Village of Lake Barrington Village of Libertyville Village of Lincolnwood Village of Lisle Village of Matteson Village of Morton Grove Village of Norridge Village of Northbrook Village of Northfield Village of Oak Brook Village of Oak Park Village of Orland Park Village of Oswego Village of Palos Park Village of Park Forest Village of River Forest Village of Riverside Village of Westmont Village of Wheeling County of DuPage County of Peoria County of Sangamon County of Winnebago Addison School District Batavia Public Library Batavia Public School District Bloomingdale School District Bunker Hill School District Champaign County Forest Preserve District Four Rivers Sanitation District Norridge Park District Park District of Highland Park Central Community Unit <b>Indiana</b> The University of Notre Dame Indianapolis Public Library Indianapolis Public Schools <b>Iowa</b> City of Ankeny City of Bettendorf City of Burlington City of Cedar Rapids City of Des Moines City of New Hampton City of West Des Moines County of Johnson County of Linn State of Iowa Burlington Community School District Cedar Rapids Community School District Davenport School District Dubuque Community School District Knoxville Community School District Mason City School District North Scott School District Des Moines Area Community College <b>Kansas</b> City of Emporia City of Shawnee <b>Michigan</b> University of Michigan	Lake Superior State University <b>Nevada</b> County of Nye Town of Pahrump County of Douglas <b>New York</b> City of Batavia Village of Ossining <b>North Carolina</b> City of Burlington City of Gastonia City of High Point City of Kinston City of Mount Airy City of Salisbury Town of Wake Forest County of Buncombe County of Cabarrus County of Davie County of Orange Arc of Stanley County St. Augustine College Wake Forest University Eastern Band of Cherokee Indians Salisbury Rowan Utilities <b>Ohio</b> County of Cuyahoga County of Montgomery <b>South Dakota</b> Rapid City Area Schools <b>Texas</b> City of Cedar Hill City of Dallas City of Farmers Branch City of Hutto City of Pflugerville City of University Park Corpus Christi Fire County of Atascosa County of Denton Highland Park Police and Fire North Texas Emergency Communications Center University of Texas <b>Utah</b> Washington County School District <b>Virginia</b> Commonwealth of Virginia City of Manassas Park <b>Wisconsin</b> City of Appleton City of Brookfield City of Eau Claire City of Wauwatosa City of West Allis County of Brown County of Kenosha County of Milwaukee County of Waukesha Village of Hales Corner HDTA Milwaukee Diocese of Madison Catholic Schools Madison School District Shorewood School District Whitnall School District West Allis School District
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# Project Description and Scope of Services

## Project Background and Understanding

The City of Covina seeks consultant software selection and advisory services to prepare for a new Utility Billing system. The City is seeking a consulting project team to lead the development of a plan to implement a Utility Billing system utilizing best practices, automated workflows, flexible reporting capabilities, project management tools, and other applications suitable for the organization to select software that meets the City's needs now and into the future.

### Project Objectives

1. Perform analysis of the existing software solutions and determine requirements for the future "off-the-shelf" system(s)
2. Improve and streamline operational/business processes, including the reduction of manual paper processes and redundant shadow systems
3. Adopt the use of industry best business practices
4. Complete a successful implementation of the system on time and within budget

### Utility Billing System Scope (Modules)

#### *CIS/Utility Billing Applications*

- Customer Information/Service
- Billing
- Cash Handling
- Service/Work Order Management
- Meter Reading

#### *Integrations/Interfaces and Conversion Requirements*

Our experience and practice will allow us to deliver these tasks with added value and benefit. It is important to understand that the process steps and best practices are critical in building a base of understanding to prepare the City for a successful implementation. Throughout our workshops, change management, knowledge transfer, best practices, and realistic expectation-setting are constant themes.



## Methodology

Implementing modern enterprise application systems is essential to any Digital Transformation Strategy. Application system improvements start with business process analysis to streamline and eliminate manual and paper-intensive processes, as well as the ability to take advantage of mobility, improved data analytics and reporting, and implementing citizen interaction technologies wherever possible.

Our collaborative approach to software needs assessment, process review, and selection projects shapes. It develops our recommendations and approach, enabling us to tailor each step to fit our client's needs and specifications. We view this as a partnership with the City to improve the enterprise application environment.





## Project Coordination and Management

### Project Coordination and Management

We will work with the City Project Manager to finalize the project work plan and timelines and arrange communications, logistics, and support. We also provide ongoing project coordination and status updates.

### Project Kick-Off and Project Team Development

We conduct a formal Kick-Off Meeting and then work with the Project Manager from the organization to finalize the Project Charter, Communications Plan, and the makeup of the Project Team (Project Management Office or PMO). PMO is a Project Management Institute best practice.

### Stakeholder Groups Development

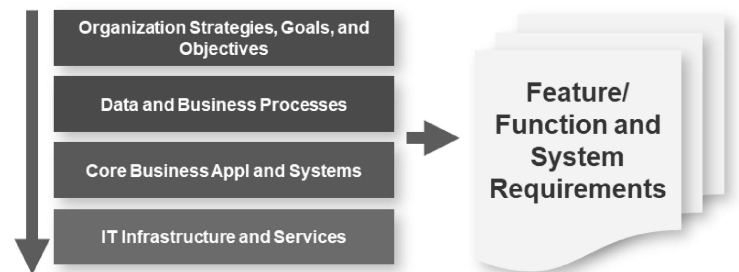
We also assist in developing stakeholder teams, by module, according to enterprise application management and support best practices. These module teams identify process owners, power users, users with analyst and ad hoc report-writer skills, module leads, and other cross-functional project team members. This is critical to defining roles and responsibilities and engaging departments to take an active ownership role in their business processes and the new system that will become the backbone of those processes.

#### Task 1 Deliverables

- ♦ Project Management Office Setup
- ♦ Project Plan
- ♦ Communications Plan
- ♦ Timelines
- ♦ Kick-Off Meeting
- ♦ Stakeholder Teams Development
- ♦ Executive/Project Status Reports

## Phase 1: Assessment and Business Process Reviews

We utilize a collaborative approach to perform the assessment and determine the needs and requirements of the City. In this process, engaging end-users, support staff, management, and elected officials (if requested) ensures everyone has an active role in identifying the unique requirements of the City. This results in enhancing user and management buy-in, which is critical to the success of an implementation project.



### Information Requests and Background Analysis

We obtain and analyze the following background information, as available:

- Organization charts
- Documented processes
- Key reports
- Forms and correspondence
- All utilized software and systems
- All utilized software and systems interfacing with other functions
- Other applicable information

#### Task 2 Deliverables

- ♦ Questionnaire and Information Requests
- ♦ Process Review Workshops
- ♦ New System Requirements Documentation
- ♦ Process Review and Workflow Documentation
- ♦ Assessment and Recommendations Report



## Business Process Review and Requirements Interview Workshops

We meet with the Module Stakeholder Teams to review existing manual and automated systems and operations, including any custom-developed, work-around systems and processes to identify and uncover current and future needs. Our scope includes process reviews of As-Is and To-Be functionality, with deliverables focusing on feature/function requirements of the replacement system for inclusion in an RFP process.

## System Requirements Documentation

We review information gathered during the interview process and develop specifications for all functional and data system requirements (features/functions). Most deliverables will be provided in MS Word, Excel, and PowerPoint. We will ask the Core Project Team to review and suggest modifications to all our deliverables throughout the project. All final deliverables will be a collaboration between ClientFirst and the Core Project Team through workshop reviews, prioritizations, document edit suggestions, and final decisions on recommendations.

## Phase 2: Develop Request for Proposals (RFP)

### Preliminary Vendor Research

We will prepare a list of pre-screened information system vendors and their contact information. Our objective will be to identify vendors specializing in government agencies with applications for future system needs already being used in live production.

### Review and Assist in Development of Request for Proposals (RFP) with Electronic Response Forms

We create criteria, business objectives, and instructions documentation for developing RFP documents with Electronic Vendor Response Forms that thoroughly compare all qualified vendors. We generate the following document materials, as applicable:

- Application Software: Processing and Reporting Requirements
  - ♦ Average Processing Volumes
  - ♦ Conversion Requirements
  - ♦ Interface Requirements
  - ♦ Other Application Considerations
- Systems Software
  - ♦ Operating System
  - ♦ Languages
  - ♦ Productivity Tools
  - ♦ Database
  - ♦ Other Systems Software
- Hardware
  - ♦ Platform Architecture Preferences
  - ♦ Service and Support Requirements
  - ♦ Other Technical Requirements
- Documentation
- Technical and User Training
- Other Required Proposal Elements
  - ♦ Vendor Instructions
  - ♦ Pre-Formatted Total-Cost-of-Ownership Forms:



- Acquisition Costs
- Maintenance Costs
- Other Relevant Cost Considerations
- ♦ Vendor-Related Information:
  - Number, Type, and Size of Users
  - Financial Condition
  - Support SLAs
  - Implementation Approach
  - Other Vendor Considerations

### **Issue RFP and Facilitate Vendor Response Activities**

We assist in communicating with vendors according to appropriate procurement requirements while preparing their proposals. Written questions and answers are utilized to answer and respond to information requests.



## Phase 3: Vendor Proposal Evaluation and Finalist Vendor Selection

### Vendor Proposal Evaluations

We obtain any additional information necessary to analyze and evaluate proposal responses. This ensures that vendors can provide the desired services. We will provide a Summary Vendor Proposal Analysis. We also work with the module/functional area teams to review the software vendors' noncompliant feature/function responses and the negative impact they will have on actual business operations. Prioritizing the vendor's weaknesses at this level differentiates the vendor's ability to be a close fit for the agency's desired process improvements.

### Analysis Results Workshop

ClientFirst conducts a workshop, including analyzing vendor responses with the Core Project Team and Module Stakeholder Team leads. The analysis will include vendor side-by-side comparisons of functionality, customer base, references, technology, and pricing.

### Develop Demonstration Documents

We prepare agendas with guides ("scripts") for vendor demonstrations to be sent to the vendor for their preparation. We will assist the City in preparing additional examples and scripts where necessary.

#### Task 4 Deliverables

- ♦ Preliminary Vendor Proposal Analysis Report
- ♦ Detailed Vendor Comparison Analysis Matrix
- ♦ Vendor Short-List Workshop
- ♦ Demonstration Agenda and User Evaluation Forms
- ♦ Reference Checking / Site-Visit Evaluation Forms
- ♦ Post Demonstration Due Diligence Follow-up Matrix

### Reference and Site-Visit Forms Preparation

We prepare forms to be used by Project Team members to conduct finalist reference checks and prepare a Site-Visit Form for City personnel to use during site visit(s).

### Facilitate Vendor Demonstrations

The software demonstrations should address all key and pertinent requirements the organization defines.

The organization's personnel will evaluate the vendor demonstrations using Demonstration Evaluation Forms. These forms use a rating system to assist with the comparison of vendors. These forms also assist in identifying the specific strengths and weaknesses of each vendor from the agency's staff perspective.

### Post-Demonstration Reference Checks, Site Visits, and Due Diligence/Follow-Up

We assist with due diligence of the vendor finalist, including the management of post-demonstration follow-up issues, as needed. Follow-up issues may include, but are not limited to:

- Memoranda regarding follow-up requirements
- Vendor communications
- Conversion and potential modification issues
- Facilitation of additional demonstrations
- Reviewing hardware requirements
- Site-visit preparation assistance and site-visit checklists





## Facilitate Final Vendor Selection

ClientFirst meets with the City's Project Team to facilitate discussion and finalize the vendor selection. The Vendor Demonstration Evaluations, additional analysis, and potential risk issues will facilitate finalist selection.

## Phase 4: Implementation Plan Review and Contract Negotiations

### Implementation Plan (SOW) Review

We work with the agency and vendor to review the statement of work (SOW), which includes the implementation plan, project management team, resource requirements, vendor-versus-agency staff responsibilities, and timelines.

### Contract Review and Negotiation Assistance

ClientFirst assists with contract review and negotiation assistance (in a non-legal capacity). We assume contract review and negotiations with a single primary vendor. Additional required and/or requested hours will be billed on a pre-approved, time-and-materials basis.

**ClientFirst approached projects with a good strategy and delivered real-world insights and suggestions for solutions.**

—Assistant IT Director  
Software Selection

**When ClientFirst sees a unique situation, they don't try to dictate a response based on previous experiences. ClientFirst is open to listen and find creative solutions.**

—IS Director  
Software Selection





Step	Utility Billing Software Selection Assistance	Estimated Timeline Week(s)	Total Billable Hours	Jamie/ David	Janet
5	Business Process Review and Requirements Workshops - Meet with module teams to review existing manual and automated systems and operations, including any custom-developed workaround systems or processes. Change management and best practices for vendor selection and implementation preparation will be addressed throughout all workshops. Workshops will also identify deficiencies in current process and establish expectations or improved design and efficiencies in a modern Utility Billing solution.	5-6			
	<b>CIS/Utility Billing Applications</b>				
	Customer Information/Service		3	1.5	1.5
	Billing		2	1	1
	Cash Handling		2	1	1
	Service/Work Order Management		2	1	1
	Meter Reading		1	0.5	0.5
	<b>Integrations/Interfaces and Conversion Requirements</b>		1	0.5	0.5
6	<b>System Requirements Documentation</b> - Review information gathered during the process reviews and develop system requirement specifications.	6-7	20	12	8
7	<b>System Requirements and Documentation Revisions</b> - Incorporate and revise the process review and requirements specification documents by incorporating feedback from the organization, following the organization's review of materials.	7-8	6	4	2
<b>Phase 3 - Develop Request for Proposals (RFP)</b>		<b>6-10</b>			
8	<b>Preliminary Vendor Communication/Research</b> - In the preliminary vendor communication/research, we will prepare a list of pre-screened information system vendors and their contact information based on the assessment process and new system requirements. Our objective will be to identify vendors specializing in government agencies that have applications for future needs that are already in use in the industry.	6-7	4	4	
9	<b>Develop Request for Proposals (RFP) Documents</b> - We will prepare draft Request for Proposal (RFP) documents with Electronic Response Forms. Assumes a single RFP and process for all software modules. Agency responsible for RFP finalization and distribution. Additional RFPs will require a change order. RFP will include, but will not be limited to, the following:  Formatted to receive proposals for SaaS/cloud and on-premise proposal options, including required infrastructure of each option (new system hardware, network, system software, and workstation requirements)  Detailed implementation service requirements  Migration or conversion from existing to new system (cost and timeline)	7-8	18	12	6
				Included	Included
				Included	Included
				Included	Included



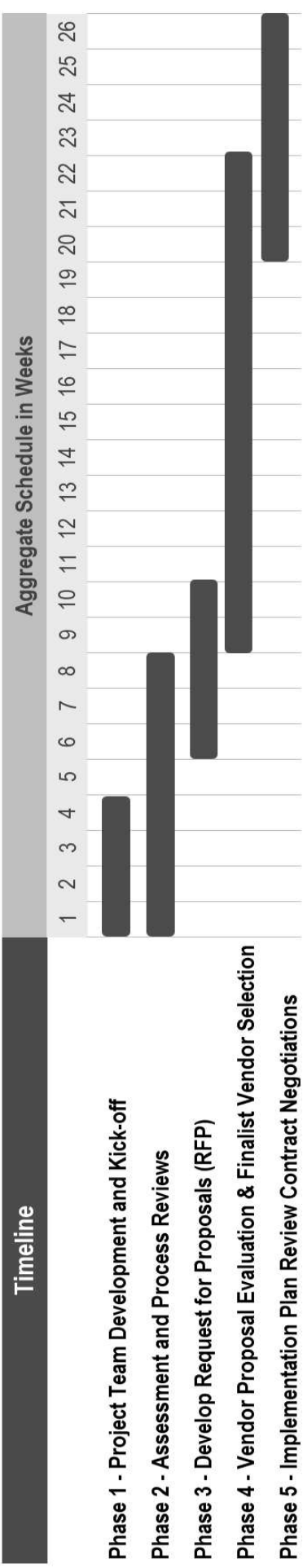
Step	Utility Billing Software Selection Assistance	Estimated Timeline Week(s)	Total Billable Hours	Jamie/ David	Janet
	Review of system and technical specifications			Included	Included
	Training cost and schedule			Included	Included
	Implementation estimated costs and timelines			Included	Included
10	<b>RFP Issuance and Facilitate Vendor Response Activities</b> - Assist the Agency in issuing the RFP, and facilitate pre-proposal vendor response activities, including:  Manage vendor questions and answers during established proposal response timelines.  If necessary, assist with required RFP addenda.	9-10	4	2	2
<b>Phase 4 - Vendor Proposal Evaluation and Finalist Vendor Selection</b>					
11	<b>Vendor Proposal Evaluations</b> - Analyze and evaluate proposal responses. Provide an initial Summary Vendor Comparison Worksheet and Vendor Executive Summary Analysis Memorandum.	14-15	16	4	12
12	<b>Vendor Analysis Workshop to Determine Vendor Finalists (Shortlist)</b> - Conduct an analysis results workshop that includes the review of the Vendor Comparison Worksheet and Vendor Executive Summary Analysis. We will use a Finalist Decision Guide to conduct this workshop and determine a vendor shortlist.	16	4	2	2
13	<b>Develop Demonstration Documents, Agenda, and Coordination</b> - Develop demonstration documents, including preparing an agenda and demonstration scripts or guides for vendor demonstrations. These will be sent to vendor finalists for their advance preparation. Also, prepare Vendor Demonstration Evaluation Forms for use by all participating Agency staff during demonstration sessions. We will also prepare a form to be used by Project Team members to conduct finalist reference checks and/or calls and prepare a Site-Visit Form for Agency personnel to use during site visit(s).	9-10	8	4	4
14	<b>Facilitate Vendor Demonstrations</b> - Assist the Agency in scheduling demonstration dates and facilitate initial vendor demonstrations to ensure pertinent requirements are addressed. Agency personnel will evaluate vendor demonstrations using Demonstration Evaluation Forms. These forms use a rating system to assist with the comparison of vendors. Hours estimate based on three vendors at one day each. Additional vendor demonstration assistance will require a change order and will be billed on a pre-approved time-and-materials basis.	17-20	30	6	24
15	<b>Post Demonstration/Visit/Reference Check Due Diligence and Follow-Up</b> - Assist with additional finalist vendor(s) follow-up issues and due diligence. This may include additional demonstrations, Q&A facilitation, reference checking, site-visit assistance, etc. Additional required and/or requested hours will be billed on a pre-approved time-and-materials basis.	18-22	16	12	4
16	<b>Facilitate Final Vendor Selection</b> - Conduct a meeting with the Agency's Project Team to facilitate discussion and finalize the vendor selection. The Vendor Demonstration Evaluations, in combination with additional due diligence analysis, will be used to facilitate the selection of a finalist.	18-22	4	2	2



Step	Utility Billing Software Selection Assistance	Estimated Timeline Week(s)	Total Billable Hours	Jamie/ David	Janet
Phase 5 - Implementation Plan Review Contract Negotiations					
17	Implementation Plan (SOW) Review - Work with the Agency and the selected vendor to review and finalize Statement of Work, Implementation Schedule/Plan, Project Management Office, resource requirements, and timelines.	20-26	8	6	2
18	Contract Review and Negotiation Assistance - Assist with contract review and negotiation assistance (in a non-legal capacity). Assumes contract review and negotiations with a single primary vendor. Additional required and/or requested hours will be billed on a pre-approved time-and-materials basis.	20-26	18	18	
		Hours	207	119.5	87.5
		Rates		\$ 225	\$ 205
		Average Hourly Rate	\$ 217		
		Fees	\$ 44,825		
		Travel and Related Expenses (not to exceed 14%)	N/A		
		Total Project Costs	\$ 44,825		

### Estimated Project Timeline

The timeline below illustrates ClientFirst's estimated schedule for each project phase.



Note: Timelines depend upon City staff's ability to schedule promptly and review requested information and documentation. Delays to any steps by City staff or vendors can impact the project timeline.



## Project Start

We can begin the initial activities related to this project, such as project coordination and scheduling, within 1-2 weeks of finalizing an agreement regarding this proposal.

## Scope Changes and Management

Alternative scope changes and fee adjustments are possible and depend on specific project needs, staff resources, and capabilities. Minor changes to the scope and methodology stated above will not result in a change in our fees.

If the nature or scope of our work should change significantly during the project, we will discuss such matters and their effect on our fees and obtain written approval before proceeding.

## Payment Terms

We invoice monthly as work proceeds. ClientFirst will provide a detailed accounting of all consulting time and expenses on the invoice. Payments are due within 30 days of receipt via check or ACH.

## Additional Services/Purchases by Other Seeking Public Agencies

ClientFirst acknowledges that other public agencies may seek to "piggyback" under the same terms and conditions of a resulting similar services contract and/or purchases being offered in this contract or proposal. ClientFirst can agree or disagree to allow contract piggybacks on a case-by-case basis. ClientFirst agrees to extend the same pricing, terms, and conditions as stated in this contract or proposal to every political entity, special district, and related non-profit. It is understood that other entities shall make purchases in their name, make payments, and be liable directly to ClientFirst. The agency shall not be involved or responsible to ClientFirst for other entities' purchases.



# References



## City of Clovis

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**559.324.2108**

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## City of Carlsbad

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**Maria Callandar, IT Director**

**760.602.2454**

maria.callander@carlsbadca.gov



## City of Simi Valley

2929 Tapo Canyon Road, Simi Valley, CA 93063

**Garry Boswell, Director Information Systems**

**805.583.6330**

gboswell@simivalley.org



# Appendix 1 – Case Studies

The following case studies are California agencies that ClientFirst has worked with to transform their technology environments digitally. These case studies began with Technology Master Planning. The cities' technology governance and commitment at all levels, including city councils, has since resulted in significant digital transformation that has improved internal business department processes, management decision-making, transparency, citizen services, and citizen engagement. Also separately is a sample Information Technology Plan recently completed for another California municipality.



## City of Rancho Mirage

### **Project Background**

ClientFirst started with a citywide Technology Master Plan. We also jointly presented these transformation efforts at the annual California Society of Municipal Finance Officers (CSMFO) conference. Also, see the attached published article on the City's digital transformation efforts, *City of Rancho Mirage Published Digital Transformation Article*.

Other following projects have included:

- Enterprise Software Needs Assessment
- ERP Selection and Contract Negotiations
- EDMS Needs Assessment Services
- Technology Master Planning
- IT Organization Improvement Assistance
- Audio Visual System Design, RFP, and Implementation Oversight
- Contract Management Process Review and Improvements
- Disaster Recovery Planning Services
- Cybersecurity Assessment and Risk Mitigation
- Electronic Mail Implementation Consulting Services
- IT Management Mentoring and Advisory Services
- Wireless Network Design – Amphitheater, Library, Park Spaces
- Network Improvement Vendor Procurement
- Work Order/Asset Management Preliminary Assessment

### **Description of Services Performed and Outcomes**

ClientFirst developed a Technology Master Plan to address City's desire to securely integrate and automate business applications. This project included working with ongoing City Council sub-committee. ClientFirst presented the Plan to Council, and Council approved funding of the plan. ClientFirst worked with City staff to upgrade technology infrastructure, resident connectedness, and applications improvement and integration. The Master Plan also included a comprehensive analysis of the IT human resources to ensure the City had the resources to maintain existing technology, implement new technology projects, and maintain the environment that would be put in place as part of the implementation of the Technology Master Plan. A significant piece of the future IT organizational structure included increased business analyst talent to help implement and support critical enterprise applications.

ClientFirst assisted with the ERP system selection, which was concluded on time and within budget. Departmental assistance was also provided for selecting a new Contract Administration system.





Technical assistance was provided for the development of a Disaster Recovery Plan. ClientFirst worked with Departments to develop a prioritized recovery plan that met the needs of the City.



## City of Piedmont

### ***Project Background***

ClientFirst started with a citywide Technology Master Plan and has continued to assist the City in transforming the City and City operations digitally. Projects have included:

- ERP software selection and business process improvement analysis
- ERP software implementation project management
- Land Management Assessment & Improvement Plan
- Ongoing Land Management process improvements and systems maintenance
- Public Safety Scheduling and Time and Attendance Selection and Implementation Project Management
- Technology Plan development and successful funding
- Technology Plan management, annual plan updates, and Council updates on the status of the plan
- Fiber optic systems upgrades
- Ongoing Technology Governance Committee participation as their senior IT advisor
- CAD/RMS vendor strategy and roadmap upgrade
- Wide area network improvements
- Initial IoT wireless network deployment
- Cloud computing strategy analysis
- Public Safety Verizon Private Cloud analysis, implementation, and resiliency
- Cybersecurity Incident Response
- Telecommunications System Design and Procurement Management
- Website constituent survey, redesign, and social media rollout
- Coordination of 5G cellular tower, including Council briefings
- Cybersecurity improvement and roadmap and Cybersecurity Council briefings
- Hyperconverged system selection and project oversight

### ***Description of Services Performed and Outcomes***

Digital transformation has been a key strategy of the City of Piedmont's Council. This was initiated with the selection of ClientFirst to develop a Technology Strategic Plan in conjunction with a Citizen Advisory Committee. Unsurprisingly, as a Bay Area community, the Citizen Advisory Committee has strong technologists, including the first US employee of Skype (now an "angel investor"). ClientFirst collaborated with the Citizen Advisory Committee to develop and prioritize the Plan and then jointly presented the Plan and budget to the Council. ClientFirst continues to oversee the plan's implementation as the City's technology advisor, presenting ongoing updates to the Council.

ClientFirst is also the primary technology consultant for the City, assisting with implementing recommended initiatives, including best practices, departmental applications, smart technologies, civic engagement, IT infrastructure, day-to-day IT staffing and operations, cybersecurity, and communications.

Before the plan, the City's overall systems were largely siloed, legacy, and end-of-life. Some previously implemented systems were implemented in a manner that provided little opportunity to take advantage of the improved technology. Automation was limited, and resident services



were mostly manual, with limited use of technology to automate business processes. Overuse of shadow systems and manual processes was still the norm.



## Mendocino County

### ***Project Background***

ClientFirst started with a County-wide Technology Master Plan and Roadmap to digitally transform the County and its operations. Other following projects have included:

- ERP Business Process Review and Improvements
- Tax Billing and Assessment Implementation Project Management
- Justice Software Implementation Management
- Software vendor contract negotiations – multiple systems
- Procurement Business Process Review and Improvements
- Budgeting Process Improvements
- Cannabis Permit and Licensing Process Improvements Efficiency Study
- Technology Plan development and funding
- Technology Plan management and semi-annual plan updates in conjunction with mid-year and annual Board of Supervisors budget workshops
- Initial risk mitigation projects to increase the resiliency of critical systems
- Emergency Operations Center redesign and refresh of EOC technology and equipment (Phase 1 & 2)
- Public Safety Cabling and Fiber Optic Improvements
- Public Safety and Radio Data Center Space Planning
- Detailed public safety County-wide radio assessment, cost analysis, and successful funding request
- Fiber Optic Systems Upgrades
- Point Arena Radio & Microwave Project Management (Improved Public Safety Radio Resiliency)
- County-Wide Radio and Broadband Upgrade Project Management
- Property Tax System Assessment and Project Restart
- Property Tax System Implementation Oversight
- Cannabis Permits & License Business Process Review and Improvements
- Cannabis E-Permitting
- Cybersecurity Roadmap and Board Presentation
- Network Upgrade RFP & Project Management Assistance
- IT Strategic Advisory Services
- IT staffing and staff roadmap to support digital transformation and Board goal of increased efficiency



### ***Description of Services Performed and Outcomes***

ClientFirst was initially engaged to develop a multi-year Technology Master Plan and Roadmap. The initial five-year plan is budgeted at over \$20 million. The initial assessment also uncovered several high-risk areas. County management placed the project on hold but immediately allocated \$605K to mitigate many high-risk items. ClientFirst provided oversight and project management services to implement these risk mitigation measures. The Board appropriated \$1MM for Phase 1 projects and has subsequently appropriated over \$1MM every six months for additional project work. ClientFirst provides oversight for approximately twenty-five Technology Master Plan projects. ClientFirst also manages the Master Plan budget and project portfolio, with project additions and subtractions based on Board and Executive Office priorities.

In addition to managing the Technology Master Plan, ClientFirst provides detailed project management and vendor selection assistance for various projects. Implementation assistance is provided to augment staff for critical or high-profile projects such as E-Permitting (now implemented for about 65% of permit types), Cannabis business process improvements, public safety and emergency operations projects, preparations and replacement of a fragile end-of-life tax system, and others.

Also, ClientFirst and Mendocino County jointly presented at the California Society of Municipal Finance Officers (CSMFO) on process improvements resulting from these digital transforming projects.



# Appendix 2 – City of Rancho Mirage Published Digital Transformation Article

ClientFirst has assisted the City of Rancho Mirage with various Technology Projects, starting with a citywide Technology Master Plan and Roadmap to transform the City and its operations digitally. The City published the following article to showcase these digital transformation improvements. ClientFirst also jointly presented these transformation efforts at the annual California Society of Municipal Finance Officers (CSMFO) conference.

# RMINSIDER

Fall 2018 / Official publication of the City of RANCHO MIRAGE, California

## Staying Connected

*Rancho Mirage Moves Forward With Master IT Plan*

*by June Allan Corrigan*





**Technology** — what would we do without it? Now deeply ingrained in our culture, it enables us to access information with a mere swipe or tap. It streamlines an infinite number of once onerous tasks. Still, in spite of the obvious advantages, many people would counter there's a definite yin-yang element to proceedings. As our dependency on technology only continues to increase, so does the specter of irretrievable data loss, not to mention the very real dangers of cybercrime. Never one to be left behind, the City of Rancho Mirage is committed to staying up-to-date with current technological advances. Yet it does so with mindful intent — the same way the City approaches every endeavor it undertakes. You can rest assured that with every technological step forward the City safeguards the preservation of the personal approach to customer service, never losing sight of the value of in-person communication.

### Careful Planning



In 2015, the City of Rancho Mirage retained the services of a leading technology consulting group that specializes in government. A team of professionals came in and analyzed the state of technology in the City as a whole. Their focus included examining existing hardware and network infrastructure, applications, and business systems — all in a bid to improve information technology (IT) environments so they can better serve the needs of the City. The consultants identified, prioritized, and recommended projects the City should embark upon, and they consolidated all of their findings in a five-year IT Master Plan.

One phase of the five-year IT Master Plan destined to positively impact both City staff and residents is a new Enterprise Resource Planning (ERP) system. An ERP system aids the flow of internal business processes and allows for communication between City departments and its internal functions and data. The City of Rancho Mirage's current ERP system is 20 years old, and implementation of its new form is currently underway. The upgraded ERP system is ushering in upgrades like paperless invoicing guaranteed to significantly reduce processing time. Electronic timesheets will simplify matters for employees and the payroll department alike. Meanwhile, the City's permitting process will soon be streamlined. And citizens will be able to check a permit's status remotely and pay online.

### Safe & Secure

While it is exciting to get on board with the latest technological advances, one of the City's primary concerns is keeping data secure. A significant portion of the five-year IT Master Plan centers around security systems and practices, including a disaster recovery plan designed to protect City systems and data. "We've implemented systems and multiple layers of security to protect ourselves as well as residents who share their data with us," says Jason Jaurigue, the City's Senior IT Manager. "We perform routine backup procedures so in the event something does happen, we always have a backup of our data that is secure. Additionally, everyone who works for the City has to be trained on security so it's a team effort to identify potential threats."

### Government 2.0

These days it isn't enough to simply inform residents that City information is available to them. Some may be aware of the fact, others not, but the goal should always be to harness new technologies and share information in a creative way so the public can access it in whatever manner they choose. This is yet another tenet of the five-year IT Master Plan recommended for Rancho Mirage — one that will soon manifest itself in a freshly designed City website as well as the launch of a new City app! "A City app is another platform for us to communicate with our residents and visitors," City Manager Isaiah Hagerman says. "Some people may be signed up for our e-blasts, others may read the *R/M Insider* cover to cover. Some people may come to City Council meetings, others may watch RMTV. One of my goals moving forward is to always make sure we're communicating with our residents as effectively as possible."

The new City app aims to make information readily accessible to Rancho

Mirage residents. "We want an app that engages the citizen so they'll know what is going on in the community," Jaurigue says. "If there's an accident or construction ahead, we want to be able to alert the community. If they want to reach out to City Councilmembers, the app will provide contact information." The app will also share highlights of City Council meetings including links to charts and graphs to better illustrate Council decisions. Of course, the app will be a perfect vehicle to get the word out about events happening around the City — whether it's Art Affaire kicking off the season in November, upcoming concerts at the outdoor amphitheater, or the wide variety of programming available at the Rancho Mirage Library & Observatory. The new, user-friendly City app will keep everyone in the loop!



### Delving Deeper

The five-year IT Master Plan includes an initiative to augment the City's Geographic Information System (GIS), or mapping software. A 2016 update to the City's General Plan included the development of a Public Web App which allows residents and staff to access parcel, property, and zoning information on a GIS-based tool. Its development was the first part of a long-term strategy to make GIS technology more accessible to the public. The GIS-based tool is housed on the City's website under the Planning department. "Residents can type in their property address, zoom down to their parcel, and examine a series of layers, such as zoning and flood plain information," explains Jeremy Gleim, the City's Development Services Director.

Ongoing GIS software enhancements will benefit both City staff and residents. The City will be able to consolidate several software programs into the GIS-based format, which will enhance productivity and efficiency. "Eventually we will have a fully integrated city-wide GIS program where people can apply for building permits and other kinds of permits online. They will even be able to submit project plans online. That is the direction we're headed. These technological improvements will create a more sustainable and streamlined workflow plus increased accessibility for residents," says Gleim.

Moving forward, the City will continue to expand GIS mapping capabilities and will add layers to the map as projects allow. For example, the new and broader GIS system will be able to indicate existing as well as proposed telecommunication fiber networks around the City. "We're investing in our infrastructure. We want to be able to show our citizens and businesses coming in — this is the current fiber network in Rancho Mirage, and these are the areas where we are planning on improving coverage," says Jaurigue. "It's all about customer service and streamlining the business process by providing whatever information is needed."

### A Pledge

As the City strives to implement initiatives recommended in the five-year IT Master Plan, security systems and practices will always factor prominently in proceedings. The paper trail that was emblematic of old ways of doing business is giving way to a

cloud-based system. The City of Rancho Mirage is on board, considering it essential to embrace technological advances to support the work of the City and the needs of its citizens. Rest assured that as the City moves forward, it remains ever mindful of its responsibility to keep all data safe and secure.

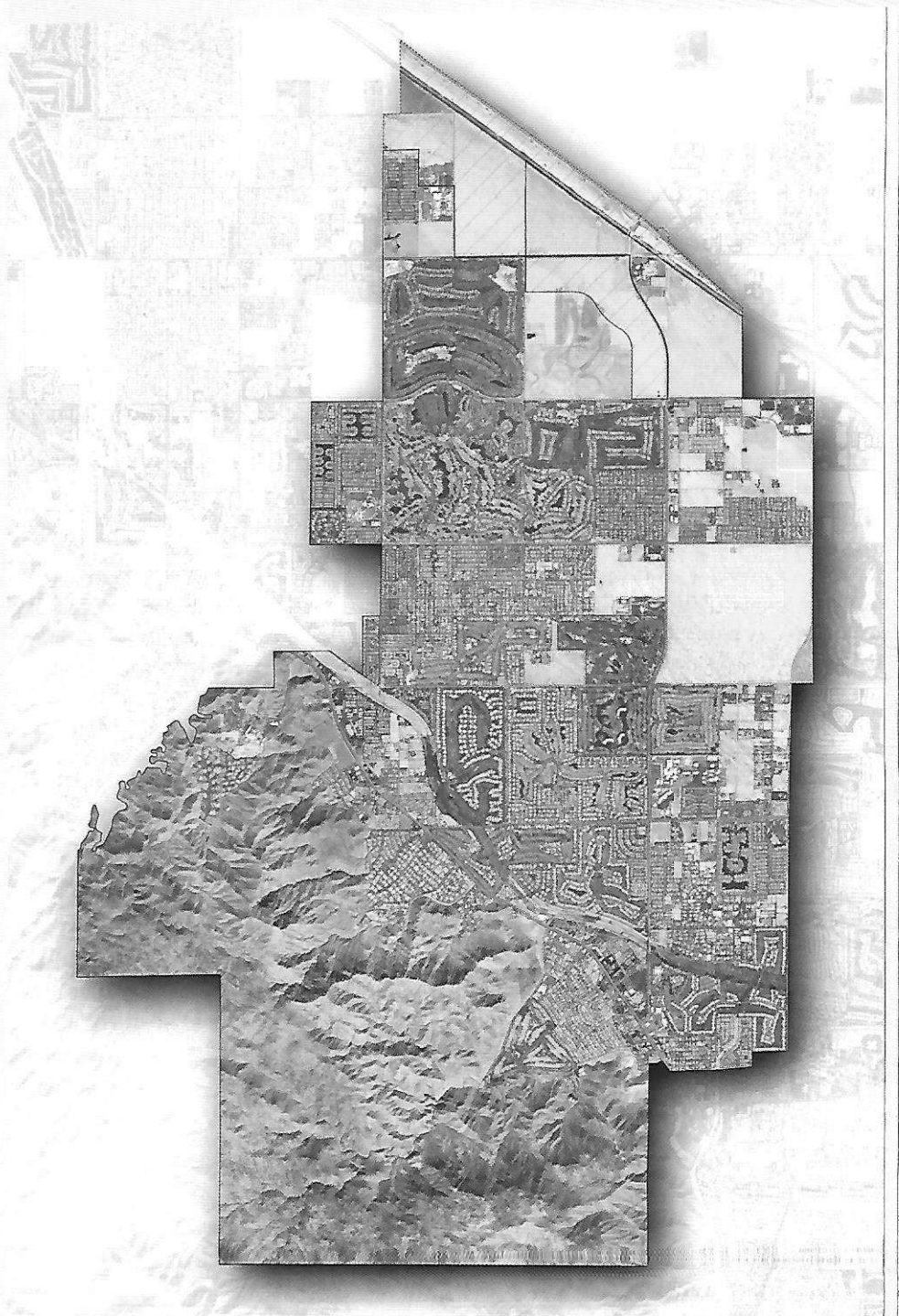


Image shows Rancho Mirage Land Use & Zoning Map, which is available on the City's new GIS-based web application.