

# CITY OF HIGH POINT

## AGENDA ITEM



<b>TITLE:</b> Recommendation on Enterprise Resource Planning (ERP) Implementation Project Manager	
<b>FROM:</b> Bobby Fitzjohn, Financial Services Director Adam Ward, IT Services Director Angela Kirkwood, Human Resources Director	<b>MEETING DATE:</b> June 17, 2024
<b>PUBLIC HEARING:</b> n/a	<b>ADVERTISED DATE/BY:</b> n/a
<b>ATTACHMENTS:</b> Proposal	

**PURPOSE:** City Council is requested to approve the Steering Committee's recommendation for an Implementation Project Manager (IPM) to assist with the Enterprise Resource Planning (ERP) system implementation.

**BACKGROUND:** The City's ERP system is used to manage day-to-day financial and human resource activities. These activities include but are not limited to accounting, billing, payables, procurement, payroll, onboarding, recruitment, and position control. The current ERP system has been in place for more than 15 years and has exceeded its useful life.

The City has decided to move forward with the implementation of a new ERP system. Based on feedback from recent implementations and discussions with city staff and the ERP vendor, the City's ERP Steering Committee has recommended hiring an IPM to assist with the ERP system implementation. The IPM will coordinate the project implementation with City staff and the ERP vendor acting as an extension of the IT Department.

Proposals were solicited from project management firms that are currently engaged in other City projects. Based on their proposal and their experience implementing ERP systems in comparable communities, the Steering Committee recommends contracting with ClientFirst Technology Consulting. They bring expertise and experience to the implementation that cannot be matched by City staff. The team assigned to the project is familiar with the City and its operations and they bring experience working with the ERP vendor on similar implementations. The proposed cost of \$432,000 assumes a 40-hour work week for the year of implementation and will be monitored closely by the Steering Committee.

**BUDGET IMPACT:** Funding has been set aside in previous years and in the FY 2024-25 budget.

**RECOMMENDATION/ACTION REQUESTED:** Staff recommends approval of the proposal for Implementation Project Management and that the appropriate City official and/or employee be authorized to execute all necessary documents to award the project to ClientFirst Technology Consulting in the amount of \$432,000.



*Proposal for*

# **ERP System Implementation Project Management Oversight**

*May 20, 2024*



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May 20, 2024

Mr. Adam Ward  
IT Services Director  
City of High Point  
211 South Hamilton Street  
High Point, NC 27260

**Re: Proposal for ERP System Implementation Project Management Oversight**

Dear Mr. Ward:

ClientFirst appreciates the opportunity to present the City of High Point with our proposal for *ERP System Implementation Project Management Oversight*. Our consultants have implementation project management and oversight experience, including numerous ERP implementations.

**We believe the primary differentiators between ClientFirst and other similar firms include the following:**

- **Experience** – ClientFirst’s professional consultants are experienced in local government systems implementation projects. We do not use trainees or unqualified consultants to support our clients.
- **Adaptable Methodology** – Our implementation methodology is proven, thorough, and adaptable to help us better meet our clients’ needs. We tailor our method to meet the implementation situation without sacrificing quality, increasing risk, or incurring unnecessary costs.
- **Track Record of Success** – While a third of systems implementation projects reportedly fail, and another third produce disappointing results, our success rate is high. We help our clients achieve the results they expect.

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

- Client Satisfaction
- Value for Services
- Risk Mitigation
- Communication and Visibility
- Thoroughness of Methodology
- Quality of Results
- Experienced Consultants

If you have any questions, feel free to contact us at 951.739.7989 or via email at [dkrout@clientfirstcg.com](mailto:dkrout@clientfirstcg.com) for additional information. We appreciate the continued opportunity of serving the City of High Point.

Sincerely,

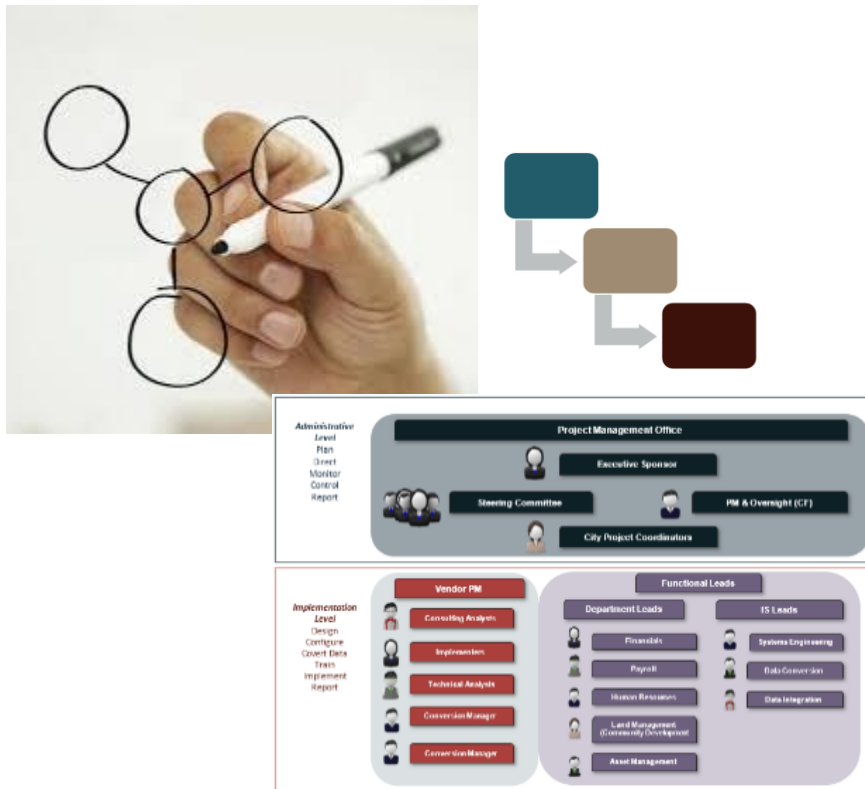


**David W. Krout, CPA** (inactive)  
Partner  
Management Consulting Practice Leader

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The following section describes project organization, roles and responsibilities, and escalation issue processes. Our methodology is designed to keep the project on track, with a best practices approach that helps assure a successful implementation that mitigates risk.



## Industry Implementation Background and Risk Issues

### Enterprise Systems Implementation Findings – Independent Sources

A recent customer survey shows that Enterprise Implementation Projects:<sup>[1]</sup>

- Have only a 7% chance of on-time implementation
- Will likely cost more than estimated
- Will likely deliver unsatisfying results (only 21% will realize half or more of expected benefits)
- Have a 50% chance that users will use the applications

Another recent customer survey shows that:<sup>[2]</sup>

- Only 32% of projects are on time and budget, deliver all required features and functions, and achieve measurable business and stakeholder benefits.
- Approximately 44% of projects are “challenged” (late, over budget, and/or with less than the required features and functions).
- 24% of these projects failed (were canceled before completion or were delivered and never used).

Reasons for the problems:<sup>[1]</sup>

- Nearly 40% of those surveyed said that a “*lack of employee buy-in and executive support*” was the biggest challenge.
- One-third identified “*lack of internal expertise*” as a problem.

A recent KPMG survey of 252 organizations found that:

- 69% of project failures are due to a lack of and/or improper implementation of project management methodologies, including:
  - ♦ Inadequate project management: 32%
  - ♦ Lack of communication: 20%
  - ♦ Lack of familiarity with the scope and complexity of project management: 17%

### **The Gartner Group**

- “... more than 80 percent of IT projects are conceived of and funded in a fragmented manner, with little in the way of overall planning.”

### **CFO Magazine**

- “Perhaps an even more serious problem [than troubled IT projects] — and one that is even more impossible to measure — involves IT projects misaligned with organizational strategy. Even if these projects succeed ... they can be fiascos that consume massive quantities of money, talent, and time unless they truly help the organization.”

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<sup>1</sup> Panorama Group, Based on a survey of more than 1,300 online respondents and focus group participants who had implemented ERP within the last three years.

<sup>2</sup> Standish Group, CHAOS Summary.

## Our Experience

We have provided project management and implementation assistance for many projects throughout our careers. Some of the issues we have encountered include:

- People Issues
  - ♦ Executive and/or user commitment and support
  - ♦ Resistance to change (e.g., process changes, new ways of doing things, etc.)
  - ♦ Providing the *right* people with enough *time* when needed
  - ♦ Overestimation of people's abilities, availability, and/or support needs
  - ♦ "Challenged" third-party support (i.e., under-qualified, "compromised" agendas, availability, conflicting commitments, "Go-Live" syndrome, etc.)
- Project Management Issues
  - ♦ Under-qualified PM resources (i.e., knowledge, experience, etc.)
  - ♦ Inadequate planning (i.e., project requirements, bad estimates of time, people, and budget)
  - ♦ Poor communication (i.e., unclear goals and objectives, improper expectations, timely project information, etc.)
  - ♦ Poor project monitoring and controlling (i.e., scope, production, cost, and velocity)
  - ♦ Inadequate product training and knowledge transfer
  - ♦ Inadequate product testing
  - ♦ Conflicting duties and reports (i.e., objectivity, loyalty, etc.)
  - ♦ Lack of time (i.e., regular job vs. project duties — the focus should be on Enterprise project responsibilities)
- Systems Issues
  - ♦ Software functionality (i.e., wrong system, missing components, etc.)
  - ♦ Systems performance (e.g., undersized servers, communications equipment, etc.)
  - ♦ Infrastructure issues and failures (i.e., incompatibility with other systems components)

## Approach

### Project Management Office Defined

Project Management Office (PMO), as defined by the Project Management Institute (PMI), is the application of knowledge, skills, tools, and techniques to project activities to meet project requirements. Project management is accomplished through the appropriate application and integration of 42 project-related processes comprising the five process groups of (1) initiating, (2) planning, (3) executing, (4) monitoring and controlling, and (5) closing.

PMO typically includes:

- Identifying and documenting project requirements
- Addressing the needs, concerns, and expectations of the stakeholders
- Balancing competing project constraints, including scope, quality, schedule, budget, resources, and risk

To be successful, tasks must be done in the proper order, as skipping steps, re-sequencing, or lack of focus all reduce the chances of success. Creativity may be allowed within the general structure but is based on specific circumstances.

## Organization Structure

The following PMO information is a *guide*. Every project is unique, and the method must be tailored to the situation, people, time, money, scope, and other constraints.

An Enterprise implementation is **not a technology project**. It is an investment in an “organizational transformation and process improvement” project.

Technology can help **enable and accelerate** the transformation, but it cannot **cause** a transformation.

### ***Project Initiation***

The components of Project Initiation are outlined below:

- Project Organization
- Stakeholder Identification
- Develop Project Charter
  - ♦ The Project Charter is a clear and shared understanding and authorization to complete the project. It includes:
    - A statement of business needs and objectives
    - An agreement on the deliverables
    - An overview of the plan to accomplish the project on time and within budget
    - Clear accountability for realizing the benefits
    - Relevant metrics
    - An effective benefits realization process
    - Project Kick-Off Meeting
    - Defined PMO Roles

### ***Project Planning***

- Confirm Project Scope, Deliverables, Work Plan, Resources, and Budget
- Plan for:
  - ♦ Project Governance
  - ♦ Quality Assurance
  - ♦ Risk Mitigation
  - ♦ Project Communication and Information Management
  - ♦ Project Reporting
  - ♦ Project Document
  - ♦ Project Team
  - ♦ Organizational Change Management
  - ♦ Post-Implementation Support

### ***Project Monitoring, Controlling, and Reporting***

- Scope Management
- Work Plan and Production Monitoring and Management
- Budget Monitoring
- Quality Assurance Management
- Application Design and Configuration
- Infrastructure Deployment
- Training and Knowledge Transfer
- Data Conversion
- Reports, Queries, Forms, and Analytics



- Interfaces and Integrations
- Modifications and Enhancements
- Testing and Systems Validation
- Documentation Production
- Deliverables Assurance

***Additional Project Monitoring, Controlling, and Reporting Responsibilities***

- Risk Management and Mitigation
- Project Communication and Information Management
- Status Reporting
- Status Meetings
- Information Repository and Sharing
- Project Team Management
- Change and Issue Management
- Post-Implementation Support Readiness
- Organizational Change Management

***Project Completion and Assessment***

- Post-Implementation Assessment (optional)
- Support, Growth, and Maintenance Planning

## Project Management Office



## Methodology for Decision-Making

Below, we have included the methodology that we use for escalation. Change orders can present challenges, so we have included a brief overview of our recommended approach.

### Escalation Process

The escalation chain below allows sufficient time (given the specific circumstances) at each level for the individual(s) designated to determine a resolution before escalating an issue to the next level. Our firm also assists at these levels, including background and, in some cases, potential resolution options.

- Level 1 – Implementation Functional Area Leads
- Level 2 – Project Management Team (Vendor, City Project Manager, ClientFirst Project Technical Advisor)
- Level 3 – Project Executive Sponsor

The City must document the specific issue escalating in the form of an email message, written memo, or a letter if it is a matter to be addressed by a third party or the vendor. The email message, memo, or written letter should be addressed and directed to the individual at the next level. Following this protocol will help ensure that the communication is effectively received and that no time is lost due to misunderstanding what issue is being escalated.

### Change Order Process

The process to evaluate and approve a proposed change will require the final review and approval of the Project Sponsor, Executive Sponsor, and/or the Project Committee (or all of the above, based on City policy) for final review and approval. Such changes will likely significantly impact project scope, time, and/or cost.

## Conceptual Plan and Approach

### Project Background

The City requires assistance with project implementation services, project coordination, communication, and advisory tasks for the implementation of the new ERP system. In this role, ClientFirst will perform project implementation assistance services as an extension of the IT division.

The system implementation is expected to take 12 months and include multiple financial modules and professional services performed by the vendor project team. At a high level, for each module, the following steps will be required: design, design documentation, setup, configuration, data conversion, data conversion testing, user acceptance, end-user training, Go Live, and post-Go Live support. Reporting requirements will also be included.

City Project Managers/Coordinators will lead the City Finance, Human Resources, and Information Technology teams. The City's Module Leads serve as co-project managers and coordinators for the implementation of software modules within their respective areas of expertise. The ERP vendor will provide a project manager responsible for coordinating all vendor tasks. The Vendor Project Manager will primarily interface with the City Project Managers/Coordinators and Module Leads.

ClientFirst Technology Consulting will provide project implementation assistance and long-range project continuity. The ClientFirst methodology and approach are defined in more detail within this proposal.

In the *Approach* section, we describe the typical project implementation assistance process and the organization required for a project of this scope.

## Roles and Responsibilities

One of the most important aspects of successful implementation is allocating sufficient resources across the team. Implementation of an enterprise (multi-department systems is an incredibly time-consuming task, requiring a significant commitment with IT and the departmental user community). ClientFirst will supplement the City's Project Managers/Coordinators, users, and some IT tasks to reduce the number of committed hours that are normally required by City staff. The ClientFirst implementation assistance team will be working closely with Module Leads on their implementation tasks. By working closely with the user community, this effort will significantly reduce departmental users' customary required hours by approximately 50-75%.

Project Team Role	Key Responsibilities
Executive Sponsor (City)	<ul style="list-style-type: none"> <li>• Establish and communicate target vision and goals for project</li> <li>• Secure pre-implementation buy-in from management and users</li> <li>• Secure senior management (department heads) commitment for implementation resources</li> <li>• Attend monthly meetings, as necessary</li> <li>• Update policies as needed</li> <li>• Approve escalation procedures</li> </ul>
Project Managers/ Coordinators (City)	<ul style="list-style-type: none"> <li>• Work in conjunction with the Vendor Project Manager and the ClientFirst Project Management/Oversight Manager</li> <li>• Co-manage project plans, resources, schedules, budgets, and deliverables with the Vendor Project Manager</li> <li>• Communication planning</li> <li>• Communicate project information to users and management</li> <li>• Coordinate internal customer project activities</li> <li>• Escalate issues that require management decisions</li> <li>• Manage transition from system development to operational support</li> <li>• Track open City and vendor tasks</li> <li>• Generate Project Status Report for Project Management implementation team</li> <li>• Prepare for and participate in the vendor's periodic Project Management implementation status meetings</li> <li>• Distribute Project Management implementation team meeting minutes</li> <li>• Prepare for and facilitate internal City staff meetings</li> <li>• Distribute internal City status meeting minutes</li> <li>• Help resolve delayed tasks</li> <li>• Review and approve escalation procedures</li> <li>• Review and approve test plans</li> <li>• Communicate training plans</li> <li>• Review and approve Go Live plans</li> <li>• Communicate Go Live plans</li> </ul>

Project Team Role	Key Responsibilities
Module Leads (City)	<ul style="list-style-type: none"> <li>• Work in conjunction with the City Project Managers/ Coordinators and the ClientFirst Project Management/Oversight Manager</li> <li>• Co-manage module-based project plans, resources, schedules, budgets, and deliverables with the City Project Managers/ Coordinators</li> <li>• Participate in vendor and internal project meetings as needed</li> <li>• Communicate project information to users and City Project Managers/Coordinators</li> <li>• Coordinate internal customer project activities for their respective module(s)</li> <li>• Escalate issues that require management decisions to the City Project Managers/Coordinators</li> <li>• Manage the transition from module development to operational support</li> <li>• Track open City and vendor tasks specific to their respective module(s)</li> <li>• Provide input to City Project Managers/Coordinators for the Project Status Report</li> <li>• Prepare City Project Managers/Coordinators for the vendor's periodic Project Management implementation status meetings</li> <li>• Distribute Project Management implementation team meeting minutes</li> <li>• Distribute internal City status meeting meetings</li> <li>• Resolve delayed tasks</li> <li>• Manage the execution of module-based tasks and activities</li> <li>• Develop Go Live plans for City Project Managers/Coordinators to review and approve</li> <li>• Lead project within module area user groups, including the development and execution of: <ul style="list-style-type: none"> <li>◆ Business process and workflow automation</li> <li>◆ System configuration, including user security</li> <li>◆ Data conversion mapping</li> <li>◆ Department forms/reports development</li> <li>◆ Testing plans and scripts</li> <li>◆ Training plans</li> <li>◆ Process documentation</li> <li>◆ Go live cutover plans</li> <li>◆ Initial post-go-live support</li> </ul> </li> </ul>

Project Team Role	Key Responsibilities
Project Management/Oversight Manager (ClientFirst)	<ul style="list-style-type: none"><li>• Work in conjunction with the Vendor Project Manager and City Project Managers/Coordinators as a liaison</li><li>• Prepare for and participate in the vendor project kick-off meeting</li><li>• Assist with communication planning</li><li>• Attend vendor discovery needs assessment workshops</li><li>• Assist with tracking, escalating, and documenting issues that require management decisions</li><li>• Assist with the tracking of open City and vendor tasks</li><li>• Prepare for and participate in the vendor's periodic implementation status meetings</li><li>• Review vendor status meeting reports</li><li>• Prepare for and participate in internal City status meetings</li><li>• Prepare for and participate in post internal City staff debriefs with the City Project Managers/Coordinators</li><li>• Assist the City Project Managers/Coordinators with the preparation of period status summary reports</li><li>• Prepare and present monthly status reports to the City Project Managers/Coordinators and Executive Team</li><li>• Escalate issues that require management decisions</li><li>• Help resolve delayed tasks</li><li>• Provide subject-matter expertise for implementation, conversions, integrations, etc.</li><li>• Mediate escalation issues between City and vendor</li><li>• Assist with the review of the testing plans</li><li>• Assist with the review of the training plans</li><li>• Assist with project communications</li></ul>

## Project Hours Allocation (Work Plan/Schedule)

The components of an implementation work plan are variable, and, as a result, we have separated the work plan into three groups, summarized below.

### Project Initiation/Coordination

The “Project Initiation Component” of the proposed Project Implementation Services is a set of defined step/task deliverables.

### Recurring Project Assistance

“Recurring Project Assistance” activities represent an average weekly number of hours for project implementation service deliverable activities. We will bill for these weekly hours accumulatively monthly.

The City will assign its own Implementation Project Managers/Coordinators, who will be the City’s primary lead project implementation resource. To assist, ClientFirst will augment the City’s Project Managers/Coordinators by monitoring and overseeing the project process, as well as providing subject matter expertise and advisory services. ClientFirst responsibilities would include:

- Using our experience to assist, make recommendations, and counsel the City’s Project Managers/Coordinators and Implementation Project Team as they maneuver through and conduct their implementation activities
- Observing and reporting any anomalies, risks, or red flags that may harm the project schedule, project/system quality, or financial budget
- Providing recommended action plans to resolve or mitigate any of the above anomalies, risks, or red flags
- If requested, mediating disputes or disagreements between the vendor and the City
- Making any other observations or recommendations that may improve implementation
- Acting as an observer in any performance or acceptance testing

The following pages include tables containing the detailed steps/activities for each component of the work plan.

### Additional As-Needed Activities (optional)

“Additional As-Needed Activities” represent optional services that our firm will or can deliver if needed and approved by the City. This list of activities is provided as a summary of services and is not meant to limit any other activities or services you may wish to have us perform.

The work plan and schedule are detailed in the following section, showing the steps, associated hours per consultant, and the estimated schedule in weeks in a concise, easy-to-use format that our clients say they appreciate.

Task	Estimated Timeline (weeks)	Total Estimate Hours	Consultant		
			Senior	Project	Analyst
<b>Project Coordination</b>	1-14	16	16		
Project Coordination - Work with the City's Project Manager to finalize the project work plan and manage communications, logistics, and support each functional area, with the Project Manager assistance to review and discuss existing and future enterprise information system needs. Provide ongoing project coordination and status updates.	1-12			16	
Act as a liaison between the executive project team, vendors, and other stakeholders.					2
<b>Phase 1 - Needs Assessment</b>					
1. Develop project charter and project plan.					
2. Conduct initial project meeting with City staff.					
3. Develop project charter and project plan.					
4. Conduct initial project meeting with City staff.					
<b>Phase 2 - System Selection</b>					
1. Develop project charter and project plan.					
2. Conduct initial project meeting with City staff.					
3. Develop project charter and project plan.					
4. Conduct initial project meeting with City staff.					



## Project Initiation/Coordination and Recurring Project Oversight

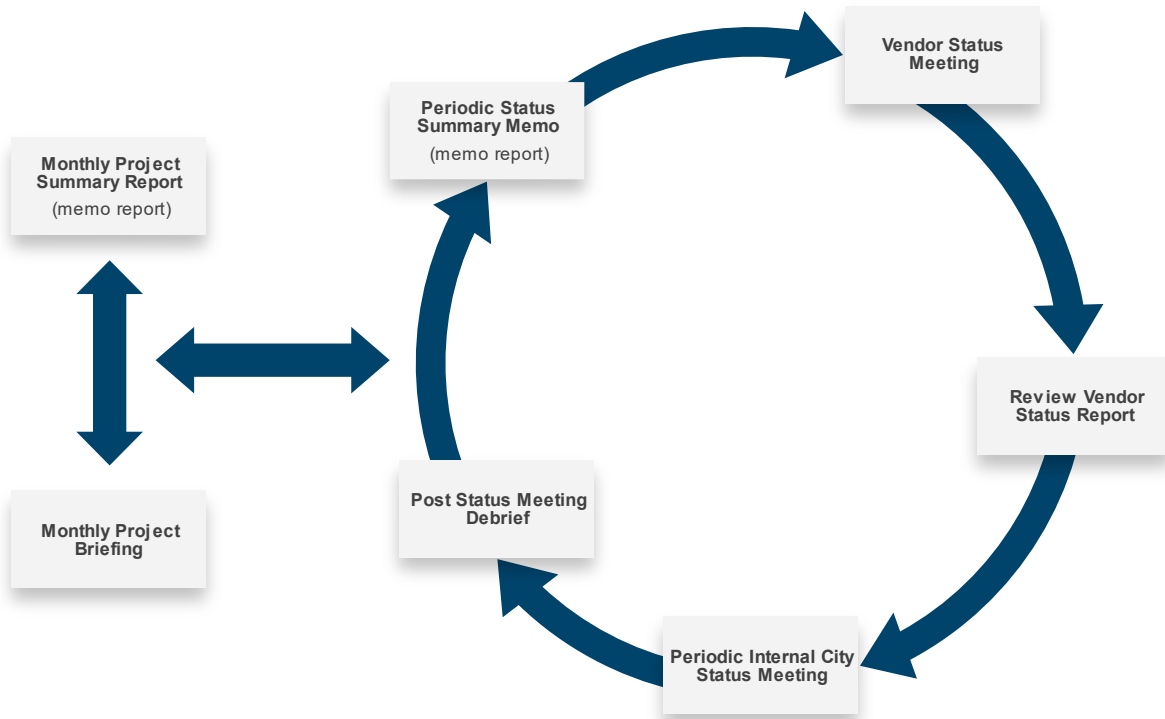
Activity	ERP System Project Implementation Assistance Services	
	<b>Project Initiation/Coordination</b>	
	<b>Description:</b> These Project Initiation activities are a set of defined step/task deliverables. These activities will be conducted at the beginning of each Project Phase. The activities defined below will be invoiced as they are fulfilled.	
1	<b>Project Coordination and Planning</b> - Work with the City Project Managers/Coordinators to finalize the project management plan and arrange communications, logistics, and support.	
2	<b>Develop/Review Baseline Project Documents and Plans</b> - Review or develop a baseline of the project plan, including the following:	
	Scope Definition	
	Statement of Work	
	Project Team (PMO - Project Management Office) Staffing and Operation Guidelines	
	Resources w/ Roles and Responsibilities	
	Project Timeline/Schedule	
	Project Budget	
	Subsidiary Plans as needed (Change Management, Training, Data Conversion, Interfaces, Modifications, Technology Requirements, etc.)	
	Risk Matrix Dashboard	
3	<b>Vendor Project Kick-Off Meeting</b> - Participate in the Vendor Project Kick-Off Meeting with Vendor and City stakeholders and City Project Team members.	
4	<b>Vendor Discovery Needs Assessment Process</b> - Attend vendor discovery module walkthroughs, assessment, analysis workshops (as-is/to-be), and assist with review of vendor deliverables.	

**Recurring Project Oversight**

**Description:** These “Recurring Project Oversight” activities represent an average weekly number of hours for the deliverables defined below. Our firm’s policy is to bill monthly as the project proceeds. We will review and present the progress billing on a quarterly basis to the City. The average billing is for the project-to-date. If the estimated average billing for the remainder of the project should exceed the weekly average presented below, we will promptly notify the City, and the two parties will agree upon how to proceed with future billings.

**Periodic Activities** - These typically occur weekly, although the frequency will vary based on project status at any point within implementation schedule and on agreed-upon vendor arrangements.

<b>5</b>	<b>Vendor Status Meeting</b> - Participate in the vendor’s periodic status meeting as an advocate for the City and:
	Ask questions to clarify and make suggestions as necessary
	Assist and support the City in presenting their points
	Note points of interest or concern from meeting discussion/outcomes (ClientFirst to email notation to City Project Managers/Coordinators, as necessary)
<b>6</b>	<b>Review Vendor Status Report</b> - Review the Vendor’s post-status meeting report and provide comments. (ClientFirst to email comments to City Project Managers/Coordinators, as necessary)
<b>7</b>	<b>Periodic Internal City Status Meetings</b> - Support the City Project Manager, prepare for and attend the periodic Internal City status meeting to include:
	<i>Status Meeting Agenda Preparation</i> - Support the City Project Manager in preparing the Status Meeting Agenda using the provided ClientFirst template. This will include a review of the agenda by ClientFirst and finalization and distribution of the agenda by the City Project Managers/Coordinators.
	<i>Internal City Project Status Meeting</i> - Participate and support the City Project Managers/Coordinators by attending the periodic status meeting with Module Leads and any Project Team Staff as needed. The main ClientFirst tasks in this meeting are to:
	Assist the City Project Managers/Coordinators in ensuring the tasks/next steps assigned to both the Vendor and the City from the previous Vendor’s Status Meeting have been achieved.
	Assist the City Project Managers/Coordinators in discussing any issues or items that have occurred or have been experienced since the previous Vendor’s Status Meeting.
	Assist the City Project Managers/Coordinators in presenting upcoming tasks and deliverables, including any control points/milestones that require acceptance/sign-off by the City. This will also include the identification of individuals/parties assigned to these tasks.
	Review any relevant risks, concerns, and other observations that may affect the timeline or budget or impact the potential success of any upcoming task/event.
<b>8</b>	<b>Project Manager/ClientFirst Debrief</b> - A post-Internal Status Meeting debrief between the City Project Managers/Coordinators and ClientFirst to sync up on project status, upcoming tasks, activities, and responsibilities, as well as discuss options for risk mitigation and issues resolution.
<b>9</b>	<b>Periodic Status Summary Report (Memo)</b> - Support the City Project Managers/Coordinators in preparing the Status Memo using the ClientFirst provided template. This Status Memo will include a summary of observations and recommendations as an outcome of the Internal Status Meeting and post-Status Meeting Debrief.
<b>10</b>	<b>Weekly Project Oversight/Management Assistance Activities</b> - General assistance, including miscellaneous oversight activities and email communications. Also, provide a vendor invoice review (if/or as necessary).
<b>Monthly Activities</b> - Note: Monthly hours below are displayed in “weekly equivalents” for calculation purposes.	
<b>11</b>	<b>Monthly Status Summary Report (Memo)</b> - Provide the City with a monthly status report memo, including:
	A list of critical milestones completed
	Status of project schedule (ahead, on schedule, or behind) with relative notation
	Status of project budget (under, on budget, or over) with relative notation
	Comments and recommendations related to any observed anomalies, red flags, or obvious risks that may have a negative impact on the project schedule, the quality of project deliverables, or the budget
	List of critical upcoming project steps with any necessary preparation recommendations
<b>12</b>	<b>Monthly Project Briefing</b> - Monthly meetings, as necessary, with the City Project Managers/Coordinators and City Executive Team to present the monthly status report.



## Additional “As-Needed” Activities

Activity	ERP System Project Implementation Services Additional As-Needed Activities	
	<i>Additional As-Needed Activities (Time &amp; Materials)</i>	
	<b>Description:</b> These “Additional Activities” represent services that ClientFirst can or will deliver if/when needed. Although numbered, the activities are not sequential and are not a full representation of all the services that can be provided.	
	<b>Business Processes and Workflows</b>	
1	Conduct review meetings/workshops with the City to document business workflows and configuration improvements that will be used to improve system utilization.	
	<b>System Configuration</b>	
2	Hands-on assistance with system configuration and configuration validation.	
3	Hands-on assistance with public portal configuration and configuration validation.	
	<b>Data Conversion</b>	
4	Hands-on assistance with data conversion.	
5	Hands-on assistance in legacy data clean-up or scrubbing.	
6	Hands-on assistance in data conversion validation.	
	<b>Testing</b>	
7	Assist with hands-on testing of existing and/or new configurations, migrated data, integrations, etc.	
	<b>Interface/Integration</b>	
8	Develop Interface/Integration design documents and advise delivery and testing schedules.	
	<b>Modifications/Enhancements</b>	
9	Develop Modification/Enhancement design documentation.	

Activity	ERP System Project Implementation Services Additional As-Needed Activities	
Reporting		
10	Identify and document all unique custom reporting requirements and identify the tools (Advanced Search, Merge Document, SSRS, Vendor analytics application) and means by which these reports will be generated.	
Project Quality Control and Acceptance Testing		
11	Execute acceptance test plan reviews.	
12	Cutover hour-by-hour planning.	
Go-Live Readiness Review and Cutover Planning		
13	Vendor Readiness Review Demonstration	
14	Acceptance Test Completion	
15	Cutover Plan Finalization	
16	End-User Training Plan and Custom Documentation/Materials	
Go-Live and Issue Resolution		
17	Hands-on Go-Live preparations	
18	After Go-Live support	
Project Closeout		
19	Project Closure - Final issue resolutions. Monthly team meetings may be desirable post-Go-Live.	
20	Project Closure Report - Final accounting, future recommendations, and lessons learned.	
Post-Implementation Review		
21	Conduct lessons learned sessions one month after Go-Live.	
22	Conduct post-implementation interviews and workshops (6-12 months after Go-Live).	
23	Provide post-implementation Review Report highlighting fulfillment, gaps, and gap closure strategies.	
Executive Communication		
24	Provide updates and presentation meetings to elected officials, as necessary, in addition to monthly briefing meetings.	
25	Assist the City's Public Information Officer in preparing communications to the media, elected officials, other outside agencies, and community members related to the system implementation, as deemed appropriate by the City Executive Stakeholders.	

The fee information for the project is summarized in this section. We structure our fees to be affordable and match them to the Work Plan so the hours and deliverables are clearly understood.



## Fee Summary

Our fees are based upon actual time spent on a project at our standard rates, plus travel expenses. Our fee estimate is based on the scope, approach, and work plan(s) outlined in this proposal. Our estimated fees are based on the current project schedule. Should the project be delayed or extended, our fees may change. If City staff change significantly during a project, our fees may change based on the additional work required to maintain project continuity (see component 3). Additional days or hours required by the City will be approved in advance and billed at the agreed hourly rate. A summary of the fees is outlined in the tables below.

Hours Summary	Weekly Hours
Hours	40

12-Month Project Implementation Oversight Estimate		
Cost Category	Comments	Budgetary Estimates
Project Initiation/Coordination and Recurring Project Oversight	Project initiation, vendor analysis/ discovery, and recurring project implementation assistance.	\$432,000
Additional "As-Needed Activities"	Optional - These items are optional and dependent on the City's needs and will only be delivered with the City's prior confirmation and approval.	To be delivered only per the Agency's request
Travel Expenses	Not included.	If desired by the Agency, travel expenses will be billed at cost.
TOTAL 12-Month Budget Estimate		\$432,000

*Note: The City will need to appropriate additional funding if additional months are required and additional project implementation assistance from ClientFirst is required. ClientFirst reserves the right to increase hourly rates after each 12-month incremental period, not to exceed 5%.*

Summary Rates	
Consultant Level	Hourly Rate
Partner/Project Director	\$225
Project Manager/Implementation Assistance	\$225

## 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 are dependent on specific project needs and 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.

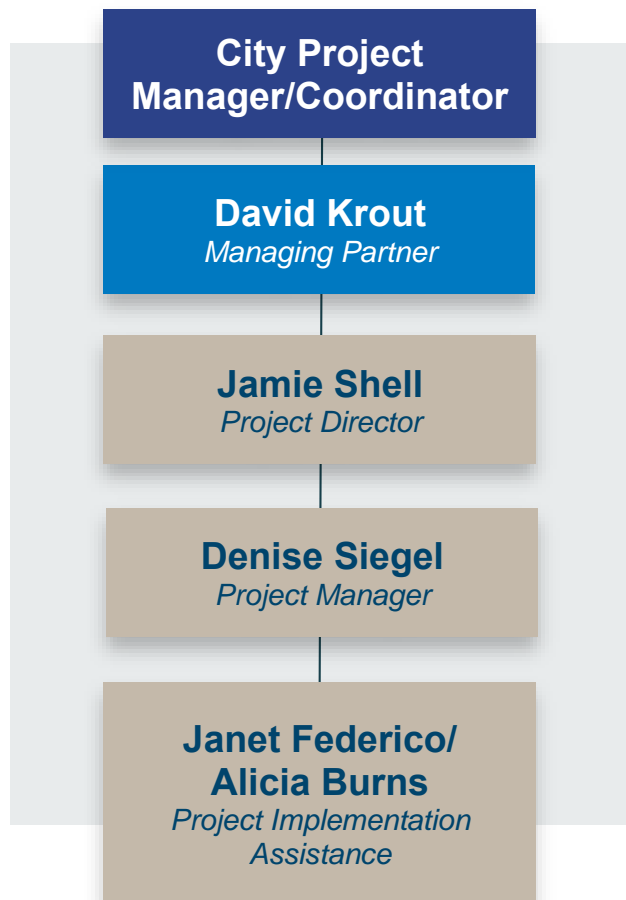
## Payment Terms

We invoice monthly as work proceeds. ClientFirst will provide 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 has the option to 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 each and every political entity, special district, and related non-profit. It is understood that other entities shall make purchases in their own name, make payments, and be liable directly to ClientFirst. The agency shall in no way 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, working as an integrated team to provide end-to-end consulting and support services. Detailed profiles for each Project Team member are found in this section.





## Team Member Roles

### Project Director

The Project Director oversees client relationships and directs high-level project activities and general project coordination. This individual is typically a partner or senior manager within the firm. This individual plays an important role in quality control and quality assurance (QA). In this QA role, this person reviews the project status on a regular basis and reviews the project deliverables.

Jamie Shell (**former municipal Finance Director**) has 25 years of public sector experience, including 10 years working 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 Project Director.

### Project Manager

The Project Manager oversees the day-to-day ClientFirst project activities and management of the deliverables. This person also directs the other ClientFirst project team members assigned to the project and is the primary day-to-day contact for the client and the client's assigned internal project manager.

Denise Siegel (**former county Accounting Manager**) has 21 years of finance and accounting experience, including 5 years Workday software implementation projects. She will serve as the Project Manager.

### Project Implementation Technical Advisors

Janet Federico has over 20 years of IT experience and over 12 years 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.

Alicia Burns has over 17 years of IT experience and 15 years of experience implementing ERP systems. She also 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.

### City-Assigned Project Manager(s)/Coordinator(s)

The City will also be responsible for assigning a Project Manager who will work together with the ClientFirst Project Implementation Technical Advisors. This person will also be responsible for coordinating City resources during the conduct of the project and will ensure that City responsibilities are fulfilled per the project schedule and work plan.

# Jamie T. Shell, PMP

## Director, Enterprise Applications Consulting

Jamie Shell has over 25 years of public sector experience, including 10 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 given him the ability 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

County of Clermont	City of Henderson	City of West	State of Virginia Dept of
County of Cook	City of High Point	Sacramento	Rail & Public
County of Denton	City of Hoover	City of Wilmington	Transportation
County of Douglas	City of Indianapolis/	City of Wilton Manors	Ewing Marion Kauffman
County of Kauai	Marion County	City of Woodside	Foundation
County of Lassen	City of Kansas City	Town of Cary	Castaic Lake Water
County of Mendocino	City of Medford	Town of New Canaan	Agency
County of Nassau	City of Memphis	Town of Isle of Palms	Coachella Valley Water
County of New Castle	City of Mesa	Town of Prescott Valley	District
County of Ramsey	City of Miami	Town of Vail	Commodities Futures
County of San Juan	City of Minden	Town of Windsor	Trading Commission
County of San Mateo	City of Naperville	Village of Lincolnwood	Cucamonga Valley Water
City of Alpharetta	City of New Port Richey	State of New Jersey	District
City of Atlanta	City of Norco	State of New Mexico	Four Rivers Sanitation
City of Barrie	City of Oviedo	California State	Authority
City of Batavia	City of Pacifica	Auditor's Office	West County Wastewater
City of Battle Ground	City of Palm Desert	California State	District
City of Bentonville	City of Pearland	Controller's Office	Jurupa CSD
City of Branson	City of Piedmont	California Office of	
City of Carlsbad	City of Port Angeles	Emergency Services	
City of Cedar Hill	City of Poulsbo	Ewing Marion Kauffman	
City of Chattanooga	City of Prescott	Foundation	
City of Clovis	City of Richmond	Province of Nova Scotia	
City of Coronado	City of Salinas	State of Hawaii	
City of Dubuque	City of San Bernardino	Campaign Spending	
City of East Point	City of Simi Valley	Commission	
City of Edmonton	City of St. Petersburg	State of Massachusetts	
City of Elgin	City of South Gate	Comptroller's Office	
City of Elmhurst	City of Stockton	State of Maine Treasurer's	
City of Evanston	City of Tyler	Office	
City of Flagstaff	City of Vacaville	State of Michigan	
City of Fort Collins	City of West Covina	Administrative Office of	
City of Gallup	City of West Hollywood	Courts	
City of Glendora	City of West Lafayette	State of Rhode Island	
City of Grand Rapids		Treasurer's Office	



### 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



# Denise Siegel, CPA, MBA

## Management Consultant

Denise Siegel has over 21 years of finance and accounting experience, including managing multiple ERP implementation projects and five years as an accounting manager for a county agency. She specializes in the development of complex business requirements, functionality and fit-gap analysis, security configuration, testing and defect resolution, data conversion, third-party integrations, as well as communications and change management.

Denise's background in software implementations has given her the ability 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 project manager, Denise brings a unique understanding of the perspectives of both the agency and software implementor.

## Highlights

- Former public sector Accounting Manager
- Managed multiple full ERP implementation projects, including Workday, PeopleSoft and Oracle implementations
- Highly experienced CPA and MBA with expertise in Financials and Adaptive Planning, driving digital transformations, SOW analysis, negotiation, and SOX-compliant best practices deployment.
- Proficient in functionality and reporting fit-gap analysis, FDM/BP/security configuration, leading testing & defect resolution cycles, and system optimization, including AI & ML functionality.
- Skilled in data conversion activities, third-party integrations, reducing client customization footprint, and designing/deploying communication and change management strategies
- Led and co-managed Workday Financials implementation projects for various organizations, including a \$1B publicly traded food distributor, a \$695M non-profit entity, a \$9B comprehensive healthcare organization, and an \$857M financial regulatory organization
- Engaged with internal and external stakeholders, managed SOWs, developed business requirements, and updated configuration workbooks
- Facilitated testing, defect triage, job aid development, end-user training, and post-production support

## CREDENTIALS, DEGREES, AND AFFILIATIONS

- Certified Public Accountant (CPA) (Inactive)
- Masters Business Administration – University of Maryland
- Bachelor of Science in Accounting – University of Maryland

## SPECIALTIES

- Workday Implementation Project Management
- Business Requirements Development
- Fit – Gap Analysis
- Security Configuration
- Testing and Defect Resolution
- Data Conversion
- Third-party Integration
- Change Management
- End-user Training and Job Aid Development
- Post Production Support



Certified Public Accountant

# Janet Federico, MBA

## Management Consultant

Janet Federico has over 20 years of information technology experience and twelve 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.

Ms. Federico also has over six years of experience 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.

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

## Highlights

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

## Agency Experience

County of Collin  
County of Denton  
County of Lassen  
County of Mendocino  
County of Minnehaha  
County of St. Joseph  
City of Batavia  
City of Bartlesville  
City of Bentonville  
City of Carlsbad  
City of Clovis  
City of Coronado  
City of Corvallis  
City of Decatur  
City of Fort Smith  
City of Glendora  
City of High Point  
City of Highland Park

City of Hutchinson  
City of Hutto  
City of San Bernardino  
City of Tulsa  
City of Westmont  
City of West Sacramento  
City of Wichita  
City of Wilton Manors  
City of Wisconsin Springs  
City of Wood Dale  
Village of Hinsdale  
Village of Orland Park County of Champaign  
Town of Windsor  
Town of Woodside  
East Bay Regional Park District  
Jurupa Community Services District  
Los Angeles County Development Authority  
State of Texas (DFPS)



## CREDENTIALS, DEGREES, AND AFFILIATIONS

- Ellis College, Old Westbury, NY  
– Master of Business Administration
- Kaplan University, Davenport, IA  
– BS, Applied Management

## 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

# Alicia Burns, PMP, CSP-PO, CSM

## Management Consultant

Alicia Burns has over 15 years of experience implementing ERP systems for both the private and public sectors. Her education and experience in the realm of implementation have allowed her to obtain knowledge in implementation planning, business process analysis and consulting, system analysis and design, user acceptance testing planning and assistance, end-user training planning, go-live planning, and technical and functional specifications.

Alicia's career in implementations began as a payroll functional lead on the client side of an ERP implementation for a company that had 6,000 employees spread across multiple states. She made the jump to software implementations full-time for a major private enterprise distributor and transitioned to supporting the public sector thereafter.

As she is skilled in the Agile methodologies of project management, Alicia values client involvement and open communication about projects and is also able to navigate through the twists that a software implementation can bring.

Alicia's tenure at a major government enterprise software provider allows her to assess business needs, track project flow, and assist clients in developing best practice solutions.

Alicia is committed to delivering high-quality work that meets or exceeds client expectations.

## Highlights

- Multi-phased ERP application implementations
- In-depth knowledge of various payroll/HR platforms
- Well-versed in Agile project management methodologies

## Agency Experience

County of Lassen  
County of Mendocino  
City of Alameda  
City of Burlingame  
City of Cathedral City  
City of Coronado  
City of Diamond Bar  
City of Dublin  
City of Dublin  
City of Farmers Branch  
City of Fontana  
City of Gilroy  
City of Great Falls  
City of Hanford  
City of Independence  
City of Lancaster  
City of Lemoore  
City of Long Beach  
City of Long Beach Harbor  
City of Oxnard  
City of Petaluma  
City of Piedmont  
City of Port Hueneme  
City of Redlands  
City of Richland

City of Richmond  
City of Rohnert Park  
City of Yorba Linda  
East Side Union Highschool District  
Muskogee Creek Nation  
Muskogee Creek Nation Tribal Health  
Maricopa Association of Governments  
San Diego Association of Governments  
City of Nampa  
Helix Water District  
Santa Margarita Water District  
San Bernardino Municipal Water District  
Desert Water Agency  
Golden Gate Bridge, Highway, and Transportation District



## CREDENTIALS, DEGREES, AND AFFILIATIONS

- Bachelor of Science Information Technology Management – Cal State East Bay
- Bachelor of Science Business Operations and Resource Management Cal State- East Bay
- Project Management Professional (PMP)-PMI
- Certified Product Owner Scrum Professional (CPOSP)-Six Sigma
- Certified Scrum Master

## SPECIALTIES

- Project Management
- Business Process Review
- Implementation planning
- Go-live planning
- Best Practice
- Creative Solutions





# 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 given him the ability 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

County of Butte  
County of Buncombe  
County of Denton  
County of Mendocino  
County of Orange  
County of Riverside  
County of San Bernardino  
City of Batavia  
City of Bloomington  
City of Brentwood  
City of Brisbane  
City of Burbank  
City of Burlington  
City of Carlsbad  
City of Camarillo  
City of Chino  
City of Clovis  
City of Colton  
City of Corona  
City of Coronado  
City of Dublin  
City of Foster City  
City of Gastonia  
City of Healdsburg  
City of Hemet  
City of Highland Park  
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 Murrieta  
City of Pacifica  
City of Palm Desert  
City of Palmdale  
City of Pelham  
City of Piedmont  
City of Rancho Mirage  
City of Redlands  
City of Rialto  
City of Riviera Beach  
City of Rosemead  
City of Salisbury  
City of Sandpoint  
City of San Gabriel  
City of San Jacinto  
City of Shawnee  
City of Sierra Madre  
City of Simi Valley  
City of South Gate  
City of Tustin  
City of West Covina  
City of West Des Moines  
Town of Danville  
Town of Groton  
Town of Hillsborough  
Town of Truckee  
Village of Glencoe  
Village of Lincolnwood  
Village of Northfield

Village of Oswego  
Village of River Forest  
CA-NV American Water Works Association  
Castaic Lake Water Agency  
Castro Valley Sanitary District  
Colton Joint Unified School District  
Cucamonga Valley Water District  
Gastonia Water & Power  
Glendale Water and Power  
HIP Housing  
Lake Elsinore Unified School District  
Menifee Unified School District  
Mesa Water District  
Midpeninsula Regional Open Space District  
Ramona Municipal Water District  
Rincon del Diablo Municipal Water District  
Rock River Reclamation District

Rosamond Community Services District  
Salisbury-Rowan Utilities  
San Bernardino Municipal Water  
Southern California Coastal Water Research (SCCWRP)  
Walnut Valley Water District  
West County Wastewater District  
Western Municipal Water District  
Mechoopda Indian Tribe  
Eastern Band of Cherokee Indian



### 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

Our consultants have been assisting local governments with innovative technology solutions with ClientFirst for 19 years, bringing with them many more years of experience in this field. 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 a wide range of technology services that our clients often leverage to resolve specific issues.



**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

## Enterprise Applications Consulting Practice Profile

ClientFirst's enterprise applications consulting team has been conducting these specific types of 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, which 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 are the best fit for both 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, giving your organization the chance 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 in all respects. Our management team's career experience includes over 3,500 projects for more than 500 local government agencies.

## Local Presence and Practice Locations

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 are versed in 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 individual 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 nor maintain relationships that would result in any 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

Our consultants are recognized nationally for their work by many of the industry's leading vendors. 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 has conducted educational sessions at national and local conferences such as CSMFO, MISAC, and GFOA, among others.



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

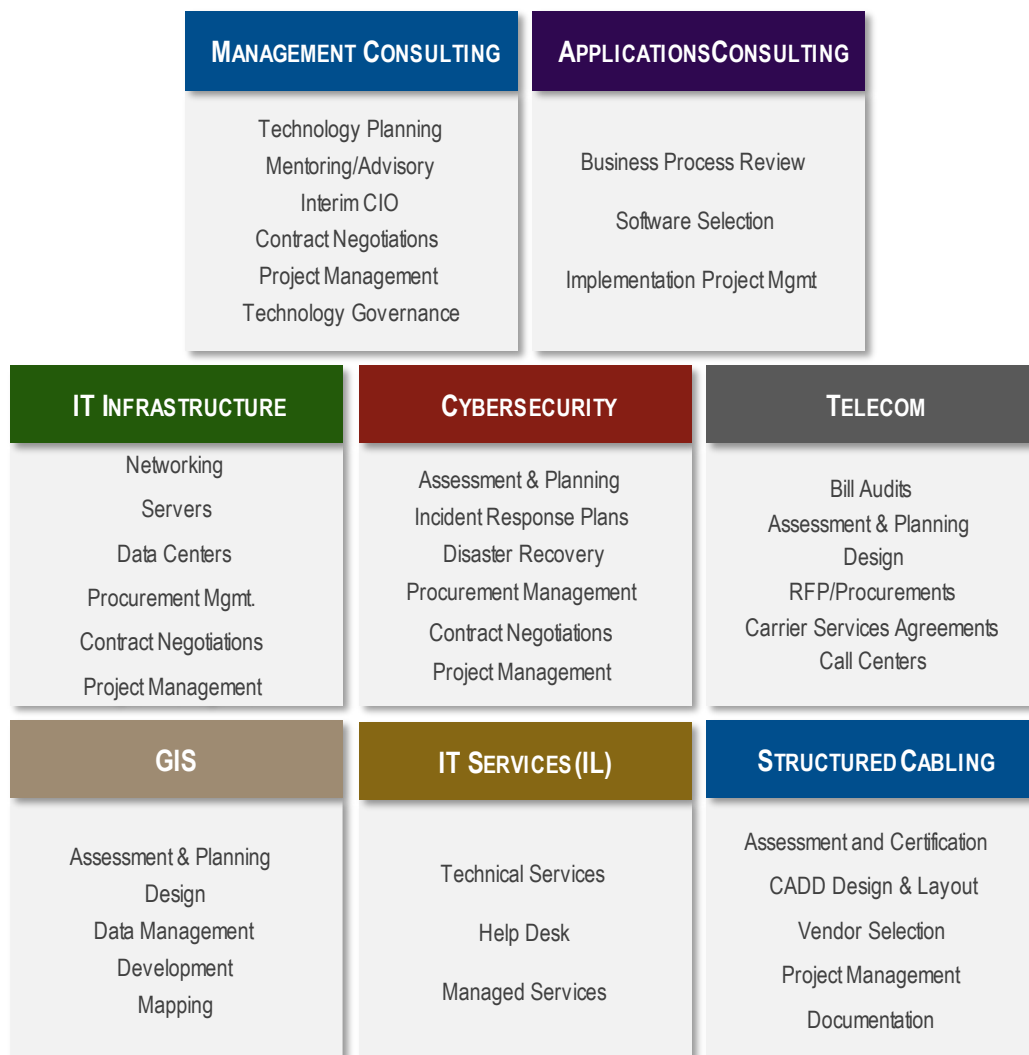
## Diversified Experience

We have **extensive experience with a wide variety of organizations and technology and processing environments** and have worked with over 500 agencies on over 3,500 projects. 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



## 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:

### North Carolina

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

### Alabama

City of Pelham

### Arizona

County of Maricopa

### California

City of Albany  
City of Azusa  
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 Chico  
City of Chino  
City of Clovis  
City of Colton  
City of Corona  
City of Coronado  
City of Downey  
City of Dublin  
City of Escondido  
City of Foster City  
City of Glendora  
City of Healdsburg  
City of Hemet  
City of La Habra  
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 Murrieta  
City of Pacifica  
City of Pacific Grove  
City of Palm Desert  
City of Palmdale  
City of Piedmont  
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 San Clemente  
City of San Gabriel  
City of San Jacinto  
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 Tustin  
City of Upland  
City of Vacaville  
City of West Covina  
County of Butte  
County of Lassen  
County of Mariposa  
County of Mendocino  
County of Riverside  
County of San Bernardino  
County of Tuolumne  
County of Yolo  
Town of Danville  
Town of Hillsborough  
Town of Truckee  
Town of Yucca Valley  
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

### Connecticut

City of Bristol  
City of New Haven  
Groton Police and Communications Dispatch  
Town of Groton

### Florida

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

### Idaho

City of Sandpoint

### Illinois

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  
Hinsdale Township High School District 86  
Indian Prairie Community Unit School District 204  
J. Sterling Morton High School District 201  
Lake Zurich Community Unit School District 95  
Mount Prospect School District 57  
Naperville Community Unit School District 203  
Naperville Park District  
Norridge Park District  
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  
Township High School District 214  
Wheaton-Warrenville School District 200  
Winnetka Public Schools District 36  
Lake Forest College  
Lincolnwood Public Library  
Oak Park Library  
Oswego Library District  
Park District of Highland Park

### Indiana

The University of Notre Dame  
Indianapolis Public Library  
Indianapolis Public Schools

### Iowa

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  
Dubuque Community School District  
Knoxville Community School District  
Mason City School District  
North Scott School District  
Des Moines Area Community College  
Cedar Falls Utilities

### Kansas

City of Shawnee

### Michigan

University of Michigan  
Lake Superior State University

### Minnesota

County of Anoka

### Nevada

County of Nye  
Town of Pahrump

### New York

City of Batavia  
Village of Ossining

### Ohio

County of Cuyahoga  
County of Montgomery

### South Dakota

Rapid City Area Schools

### Texas

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

### Utah

Washington County School District

### Virginia

Commonwealth of Virginia  
City of Manassas Park

### Wisconsin

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  
HIDA Milwaukee  
Diocese of Madison Catholic Schools  
Madison School District  
Shorewood School District  
Whitnall School District  
West Allis School District



# Government Agency Case Studies

The following case studies are California agencies that ClientFirst has worked with to digitally transform their technology environments. These case studies began with Technology Master Planning. The cities' technology governance and commitment at all levels, including their 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 provided separately is a sample Information Technology Plan recently completed for another California municipality.



## 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 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 of those high-risk items. ClientFirst provided oversight and project management services for the implementation of 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 is also managing 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 a wide range of 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.



### **City of Piedmont**

### ***Project Background***

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

- Technology Plan development and successful funding
- Technology Plan management, annual plan updates, and Council updates on status of 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
- ERP software selection and business process improvements 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 Council. ClientFirst continues to oversee implementation of the plan as the City's technology advisor, presenting ongoing updates to Council.

ClientFirst is also the primary technology consultant for the City, assisting with the implementation of 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.



### **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 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 City's desire to integrate and automate business applications in a secure manner. This project included working with ongoing City Council sub-committee. ClientFirst presented the Plan to Council, and Council approved funding of the plan in its entirety. 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 an increase in 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 the selection of 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 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 digitally transform the City and its operations. The following article was published by the City to showcase these digital transformation improvements. ClientFirst also jointly presented these transformation efforts at the annual California Society of Municipal Finance Officers (CSMFO) conference.