

*Response to RFP for*

# Information Technology Audit, Assessments, Recommendations, and Strategic Plan

*January 11, 2018*



**CITY** OF **SAN PABLO**

*City of New Directions*

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

*Practice Locations*  
**California**  
**Illinois**  
**Minnesota**  
**North Carolina**

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Optimal Technology Guidance

**CLIENT****FIRST**  
TECHNOLOGY CONSULTING

January 11, 2018

Mr. Kelly Sessions  
Finance Director/Interim Information Technology Manager  
City of San Pablo  
13831 an Pablo Ave.  
San Pablo, CA 94806

**RE: Response to RFP for Information Technology Audit, Assessments, Recommendations, and Strategic Plan**

Dear Mr. Sessions:

CLIENTFIRST appreciates the opportunity to present the City of San Pablo with our *Response to RFP for Information Technology Audit, Assessments, Recommendations, and Strategic Plan*, which includes developing and articulating a vision for the effective use of technology to support the work of the City, to identify strategies for developing and implementing technology initiatives, and the cost benefits of doing so.

CLIENTFIRST Technology Consulting will work with you to transform the way your organization approaches and makes decisions regarding information technology. We are adept at educating and building consensus among City staff, departmental leadership, management, and City officials. Our approach is to assess the current environment, develop gap analysis, review alternative solutions to the identified gaps, and provide specific recommendations and supporting documentation regarding strategy and tactical implementation.

**Methodology and Approach** – CLIENTFIRST customizes industry best practices for strategic technology planning in a practical way to meet the unique needs of each client. We provide:

- Needs assessments for business department applications and technology utilization
- IT infrastructure, operations, and staffing needs assessments
- Gap analysis of IT applications, infrastructure, staffing, and organization, and other key areas
- Development of strategies, goals, objectives, and recommendations
- Comprehensive IT initiative recommendations with budgets, timelines, and resource assignments
- Strategic Planning workshops with the Project Manager, IT personnel, IT Planning Committee, and executive management
- Strategic Planning Report 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 that our analysis will be biased in any way towards certain solutions.

**Local Government and Municipal Focus** – Our management team's career experience includes over 2,000 projects for more than 500 government agencies and special districts.

If you have any questions, feel free to contact us at 951.739.7989 or via email at [tjakobsen@clientfirstcg.com](mailto:tjakobsen@clientfirstcg.com) or [dkrout@clientfirstcg.com](mailto:dkrout@clientfirstcg.com) for additional information. We look forward to the opportunity of serving City of San Pablo as one of our many satisfied clients.

Sincerely,



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



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

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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.

# Key Personnel

**Project Role:** Project Director  
**ClientFirst Title:** Managing Partner, Management Consulting Practice Leader

David Krout

**Project Role:** Project Manager  
**ClientFirst Title:** Senior Partner, IT Infrastructure and Support Practice Leader

Tom Jakobsen

**Project Role:** Network Engineer  
**ClientFirst Title:** Network Engineer

Aaron Ayala

**Project Role:** Senior Consultant  
**ClientFirst Title:** Management Consultant

Alexis Mercado

**Project Role:** Telecommunications Consultant  
**ClientFirst Title:** Practice Leader, Enterprise Communications Consulting

Craig Williams

**Project Role:** Network Engineer  
**ClientFirst Title:** IT Support Operations Manager

Sean Gallagher

**Project Role:** Network Engineer  
**ClientFirst Title:** Network Engineer

Adam Korman

**It has been absolutely key to this project that *CLIENTFIRST* knows the governmental environment, its limitations and its opportunities.**

—Director of Administrative Services  
 CA Municipality



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

### Managing Partner – Management Consulting Practice Leader



David Krout has nearly 20 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 customer and the vendor.

Mr. Krout'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 IT utilization.

Having worked for a leading local government enterprise software provider, Mr. Krout brings a unique understanding of consulting, client representation, and vendor relationships to the collaboration between customers 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) and Municipal Information Systems Association of California (MISAC)
- Project lead with dozens of public-sector agencies throughout the United States

**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

### Specialties

- Business Process Reviews
- Application Requirements Definition
- Current System Needs Analysis & Improvement
- New Software Selection Assistance
- Strategic Master Technology Planning
- Project Management & Oversight
- Conversion Assistance & Planning
- Contract Reviews & Negotiations



### Credentials, Degrees, and Affiliations

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

### Agency Experience

City of Batavia  
City of Bloomington  
City of Brentwood  
City of Burbank  
City of Burlington  
City of Chino  
City of Colton  
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 Nigel  
City of Lake Forest  
City of Lomita  
City of Montclair  
City of Murrieta  
City of Palmdale  
City of Rancho Mirage  
City of Redlands  
City of Rialto

City of Riviera Beach  
City of Rosemead  
City of Salisbury  
City of San Gabriel  
City of San Jacinto  
City of Sierra Madre  
City of Simi Valley  
City of South Gate  
Danville  
Groton  
Pahrump  
Truckee  
Glencoe

Lincolnwood  
Northfield  
Eastern Band of Cherokee Indians  
Mechoopda Indian Tribe  
Buncombe County  
Davie County  
County of Nye  
Orange County  
Riverside County  
San Bernardino County

## Tom Jakobsen

### Senior Partner – IT Infrastructure and Operations Practice Leader



Tom Jakobsen has over 30 years of experience in the information technology arena. His interdisciplinary experience has given him a unique understanding of the interrelationship between network infrastructures and the applications they support. It has also afforded him firsthand experience demonstrating the benefits of project management and system development life cycles for infrastructure-related projects. Mr. Jakobsen's dual roles as an IT Director/CIO and Consultant provide clients with a resource of tremendous experience who understands interdepartmental and vendor relationships and their management.

### Highlights

- Former National Network Infrastructure Consulting Practice Leader for RSM McGladrey, the nation's fifth-largest CPA and consulting firm
- Ongoing Contract CIO for multiple municipalities
- Former CIO at Frame Relay Corporation
- Interim CIO at AAA Colorado
- Interim CIO at AAA Arizona
- Two-time Interim CIO at Illinois Action for Children

**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

- Managed hundreds of IT consulting projects with dozens of municipalities and local governments

### Specialty Areas

- Network Design, Procurement, Implementation, and Oversight
- IT Security
- Disaster Recovery
- IT Operations Management
- Interim CIO/IT Management
- Project Management
- Assessments, Strategy, and Planning

**It is such a wonderful experience being a part of a group of people who do whatever they need to in order to make things happen.**

—Assistant Village Manager  
IL Municipality

### Education, Credentials, and Affiliations

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



### Agency Experience

City of Bloomington  
City of Brentwood  
City of Burbank  
City of Calabasas  
City of Camarillo  
City of Chino  
City of Colton  
City of Corona  
City of Downey  
City of Dublin  
City of Foster City  
City of Healdsburg  
City of Highland Park  
City of Joliet  
City of La Habra  
City of La Puente

City of Laguna Niguel  
City of Lake Forest  
City of Menlo Park  
City of Mount Airy  
City of Murrieta  
City of Naperville  
City of Oakbrook Terrace  
City of Pacific Grove  
City of Palm Desert  
City of Palmdale  
City of Piedmont  
City of Rancho Cucamonga  
City of Rancho Mirage  
City of Redlands  
City of Rialto

City of Riviera Beach  
City of Rockford  
City of Rohnert Park  
City of Salisbury  
City of San Gabriel  
City of Seal Beach  
City of Sierra Madre  
City of Simi Valley  
City of South San Francisco  
City of St. Charles  
City of West Covina  
City of Yucca Valley  
Danville  
Arlington Heights  
Bloomington

Cary  
Glencoe  
Homewood  
Kenilworth  
Libertyville  
Lincolnwood  
Northbrook  
Northfield  
Oak Brook  
Oak Park  
Palos Park  
River Forest  
Riverside  
Davie County  
Tuolumne County

## Aaron Ayala

### Senior Consultant



Aaron Ayala has over 20 years in Information Technology and more than five years working solely on high-level local-government projects. Mr. Ayala is an expert in providing IT support, project management, and vendor relations. He is accustomed to high-value, fast-paced, high-pressure roles, with the ability to prioritize multiple tasks, meet deadlines, while providing a superior level of customer service.

### Highlights

- Project Manager and Network Engineer
- Management of IT support teams, implementation teams for major multi-site clients and projects, including:
 

**I appreciate your efforts and the great work done by CLIENTFIRST to date in all areas.**

—Chief Financial Officer  
IL Library

  - ♦ \$4.5MM deployment of Cisco and ShoreTel voice and data infrastructure for client with 35 locations
  - ♦ Data Center Relocation
  - ♦ IT Implementation project management for Mother Lode Regional Juvenile Detention Center, Tuolumne County, California
  - ♦ Data migration for new application systems
- Wireless systems, Networks, Network security, Backup systems, Infrastructure, Applications

### Specialties

- Project Management
- Staff Management
- Vendor Relationships
- Systems Administration
- Data Center Operations
- IT SOX Compliance

### Credentials, Degrees, and Affiliations

- Bachelor of Science, Information Systems, University of Phoenix

### Agency Experience

City of Corona  
City of La Puente  
City of Laguna Niguel  
City of Pacific Grove  
City of Rancho Cucamonga  
City of Rancho Cucamonga  
City of Rancho Mirage  
City of Rialto  
City of West Covina  
City of Yucca Valley

Tuolumne County  
Butler SD 53  
Consolidated SD 158  
DeKalb CUSD 428  
Durand CUSD #322  
East Aurora SD 131  
Elgin SD U-46  
Geneva Community SD 304  
Harlem SD 122  
Hononegah SD 207

Indian Prairie CUSD 204  
Indian Prairie CUSD 204  
Livermore Area RPD  
Naperville CUSD 203  
Orland Park D230  
St. Charles CUSD  
West Aurora SD 129  
Winfield SD 34  
Wheaton-Warrenville SD 200

## Alexis Mercado, CCBA, CAPM, ITIL Foundation

### ERP Consultant



Alex specializes in business process reviews and ERP application consulting. His experience includes assessment, planning, implementation, configuration, integration, upgrades, customization, testing, documentation, and project management assistance related to enterprise applications. In addition to his ERP implementation experience, Alex also has experience as a business analyst in assisting public sector clients with their

needs assessment and software selection and applications requirements.

**Alex has been a tremendous help on this project and I would hate to lose his help and expertise.**

—IT Manager  
CA Municipality

### Specialties

- Understanding of public sector departmental operations and application systems
- Process reviews and improvements to streamline operations
- Workflow analysis and mapping
- Gathering and analyzing functional business requirements
- Prepared project implementation plans for initial and recurring project phases
- Planned for items required prior to and post system go-live
- Implementation assistance experience includes analysis workshops, change control, conversions, setup and configurations, testing, reporting, and troubleshooting

**The visits with Alex were extremely helpful, and we have made huge progress.**

—CIO  
CA Municipality

### Credentials, Degrees, and Affiliations

- California State University, Fullerton, CA - Bachelor of Arts in Business Administration
- Concentrations: Accounting and Information Systems & Decisions Sciences
- Project Management Institute Member - California Inland Empire Chapter
- Certified Associate in Project Management (CAPM)®
- Certified ITIL Foundation V3
- Certification of Competency in Business Analysis (CCBA)



### Agency Experience

City of Batavia  
City of Bloomington  
City of Burbank  
City of Colton  
City of Corona  
City of Coronado  
City of Dublin  
City of Foster City  
City of Healdsburg  
City of La Puente  
City of Lake Forest  
City of Menlo Park

City of Pacific Grove  
City of Palm Desert  
City of Palmdale  
City of Piedmont  
City of Rancho Cucamonga  
City of Rancho Mirage  
City of Redlands  
City of Rialto  
City of Riviera Beach  
City of Rohnert Park  
City of San Gabriel

City of Seal Beach  
City of Sierra Madre  
City of Simi Valley  
City of West Covina  
City of West Des Moines  
City of Yucca Valley  
Groton  
Truckee  
Oswego  
Buncombe County  
Davie County

Consolidated High School District 230, Orland Park  
Indianapolis Public Library  
Midpeninsula Regional Open Space District  
Orange County  
Castro Valley Sanitary District  
Rincon del Diablo  
Municipal Water District



## Craig Williams, RCDD, NTS

### Director, Infrastructure Consulting Services



Craig Williams has 25 years of experience in the IT profession, focused primarily on providing visionary consulting and support for public-sector organizations. Craig emphasizes a balanced perspective of improvement in all areas of IT, from internal infrastructure to public-facing technologies. He is an articulate consensus-builder with executives, departments, staff, and the public, leveraging his extensive master planning, infrastructure design, and project management experience to provide clients with effective, lasting results in utilizing technology to fulfill their mission of service to their constituents.

### Highlights

- Interim Director of IT, City of West Des Moines, Iowa
- Complete cabling replacement for California city
- Fiber Feasibility Study for City of Joliet, Illinois
- Selected as one of 16 technology directors nationally for HP and Intel Profiles in Leadership through *Tech and Learning Magazine*
- Directed technology support and operations at Illinois' second-largest public-school district, serving 40,000 students
- Led technical staff of 71, including application support, network engineering, building tech support and Help Desk services
- Increased customer satisfaction from 87.7% to 95.2% rate
- National award from the Help Desk Institute as one of Elite 50 organizations for customer support across all industries

**Craig, you were instrumental in the successful completion of this project all along the way, but especially as we ... needed a push in "crossing the last beachhead".**

—Superintendent of Schools  
IL School District

### Specialty Areas

- Infrastructure
- Data Center/Networking
- Wireless
- Project Management
- Business and Human Resources Systems
- Data Analytics
- Public-Facing Web Technology
- Staff Support/Customer Service

**I appreciated Craig's knowledge of IT issues, as well as his ability to convey them in a manner that made sense to me.**

—Library Director  
IL School District

### Education, Credentials, and Affiliations

- BICSI Registered Communication Distribution Designer (RCDD)
- BICSI Network Technology Systems (NTS) Designer
- MBA, North Central College (concentration in Management Information Systems)
- BS in Architecture, University of Illinois

**Bicsi**  
RCDD

**Bicsi**  
NTS  
Network Technology  
Systems Designer

### Agency Experience

City of Joliet  
City of Glendora  
City of Pacific Grove  
City of Rancho Mirage  
City of Riviera Beach  
City of West Covina  
City of West Des Moines

Davie County  
Town of Groton  
Tuolumne County  
Village of Lincolnwood  
Village of Wheeling  
Northbrook Public Library  
Rockford Public Library

Forest Preserve District of  
Lake County  
J. Sterling Morton HSD 201  
Mt. Prospect School District  
Naperville School District 203  
Salt Creek School District 48  
Steppenwolf Theater

## Sean Gallagher, PMP

### Network Engineer



Sean Gallagher is a highly focused and experienced network engineer with a strong background in project management, software, and hardware support, with an emphasis on customer satisfaction. Sean's 20 years of experience in the IT field has sharpened his skills in leadership, analysis, and problem solving. As a project manager, Sean has a proven track record working and thriving in many challenging and complex environments.

### Highlights

- IT budgeting, project planning, and implementation
- Design, migration, and implementation of network solutions
- Enterprise level projects upgrading Fiber, Ethernet, Switches, and POE Switches
- Administration of small-to-medium size networks
- National Support for mobile workforce
- Active Directory Migration Scripting for global organization
- New construction coordination with contractors and architects (floor plans, wiring, electrical, and overall IT requirements) for IT-related projects
- Software: Microsoft Windows Desktop and Server, Active Directory, Group Policy's, Login Scripts, Backup Exec, Arcserve, Google Drive, LANDesk, Altiris, Ghost, Laserfiche, Springbrook, RecTrac, eGov System
- Network Hardware: Network Switches – Cisco/HP/Dell
- Network Appliances: Email Mail Archiver, SPAM Filter, Web Filter, Backup Device replicating to the Cloud, Tripp-lite, and APC UPS
- Desktop Hardware: Dell/HP/Mac/Lenovo/IBM/Acer/Gateway/Clones
- Wireless Solutions with Meraki, Aruba Networks

**Thank you all for the hard work and diligence in making this day happen. I know that everyone has worked tirelessly to meet this deadline. It is such a wonderful experience being a part of a group of people who do whatever they need to in order to make things happen.**

—Assistant Village Manager  
IL Municipality

### Specialty Areas

- Information Technology Management
- Staff and Budget Management
- Strategic Planning
- Project Management
- Disaster Recovery Planning
- Virtualization Implementations
- Systems Integration
- Network Design and Configuration
- IT Infrastructure Oversight, Design, Procurement, and Implementation
- Wireless Network Deployment
- Desktop and Server Management
- IT Security
- Vendor Negotiations and Management
- Process Improvements
- Cloud Computing

### Education, Credentials, and Affiliations

- Microsoft Certified Professional
- Certified Novell Administrator
- Dell Certified: Server, Desktop, Laptop
- Nimble Installation and Operation Professional (NIOP)
- HP Certified: Server, Desktop, Laptop
- Recipient of the Kaplan Wayve Award "Recognition for Outstanding Achievement" October 2013



### Agency Experience

City of Lake Forest  
City of Rancho  
Mirage  
City of St. Charles  
Bloomingdale  
Homewood

Lincolnwood  
Northfield  
Oak Brook  
River Forest  
Riverside

Elgin School District  
U-46  
Forest Preserve  
District  
Lincolnwood Public  
Library

Norridge Park  
District  
Northbrook Public  
Library  
Salt Creek SD 48

## Adam Korman

### Network Engineer



Adam has a strong background in server and datacenter technologies, with over five years of experience in server hardware and over 15 years in desktop hardware and software support. His proficiency in enterprise networking, datacenter virtualization, imaging and deployment, and a wide range of client and server operating systems is combined with his broad experience in providing IT Help Desk and technical services to clients in the US and abroad, from public-sector agencies to educational institutions at all levels.

### Highlights

- Systems Administration, including:
  - ♦ Windows server environment installation, configuration, and management
  - ♦ VMware and Hyper-V planning, building, deployment, and optimization
  - ♦ Workstation automated imaging and deployment
  - ♦ Network infrastructure design, installation, and management
  - ♦ Active Directory domain implementation and administration
  - ♦ SAN design and implementation
  - ♦ Diagnostics and troubleshooting
- IT Help Desk Support, local and remote, for Windows workstations for US and international clients
- Network storage and printing configuration
- Configuration of AV equipment, including projectors, smartboards, wall-mount touchscreens
- Customization of input methods, including multilingual, speech recognition, and handwriting input
- Educational IT environment configuration and application support, from kindergarten to higher education institutions

**Thank you all for the hard work and diligence in making this day happen. I know that everyone has worked tirelessly to meet this deadline. It is such a wonderful experience being a part of a group of people who do whatever they need to in order to make things happen.**

—Assistant Village Manager  
IL Municipality

**I appreciate your coming in last night to resolve this problem, Adam. You are a dedicated professional.**

—Assistant Village Manager  
IL Municipality

### Specialties

- Server Hardware
- Server Role Configuration/Administration
- System Center/Remote Administration
- Scripting/Automation
- Networking Hardware
- Virtualization
- Deployment
- Operating Systems

### Credentials, Degrees, and Associations

- Cisco CCNA
- Microsoft MCP
- CompTIA Server+, Network+, A+, Security+
- Linux Professional Institute training

### Agency Experience

City of Lake Forest  
Illinois Action for Children  
International Union of  
Operating Engineers Local  
399

Painters District Council 14  
Chicago Federation of Labor  
Northbrook Public Library  
CFL Workers Assistance  
Committee

Village of Lincolnwood  
Village of Northfield  
Village of River Forest



## Reference-Related Work

### National Speakers

*CLIENTFIRST* has a long history of advocating IT Assessment and Planning as a key component of IT Best Practices. We stand out as a key contributor to the discussion of the benefits and methodologies of IT Assessment and Planning. We often speak in partnership with our client and peers in the industry. Speaking engagements related to IT Assessment and Planning include the following organizations:



In addition to advocating specifically for IT Assessment and Planning Best Practices, we have held classes and spoken on topics including:

- IT Assessment and Planning
- IT Benchmarking and Metrics – What's Relevant
- Application System Selection Best Practices
- Disaster Recovery Planning
- IT Trends
- Smart Cities (upcoming event)



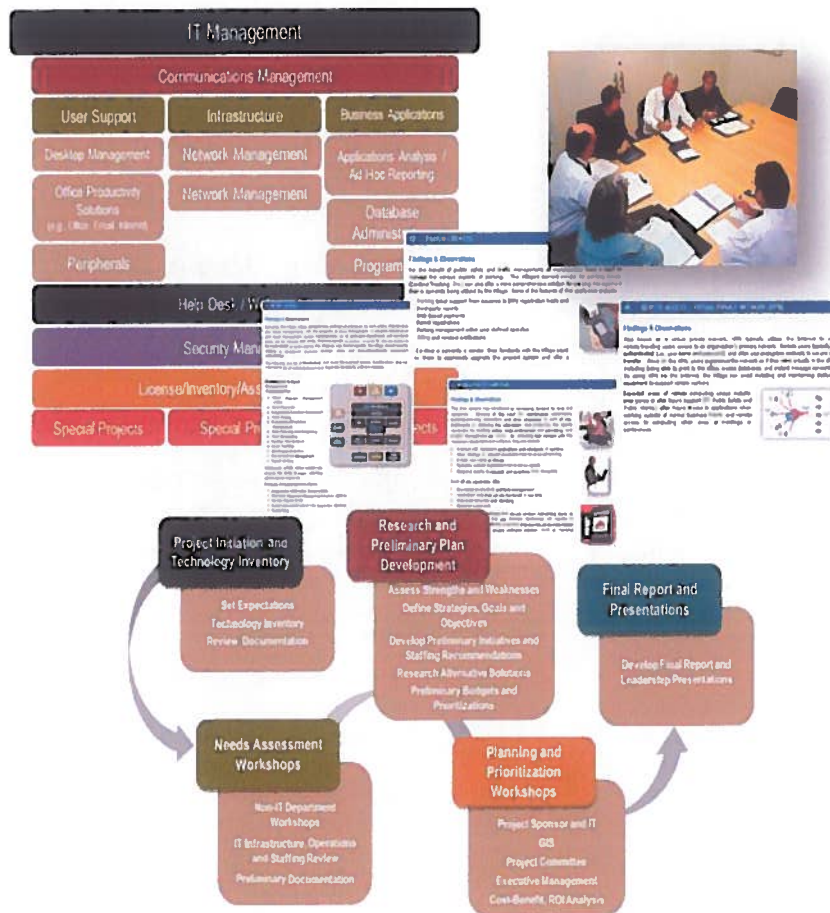


## Other Similar Engagements

The list below includes the list of clients for whom we have completed IT Master/Strategic Plans and IT Assessments projects. More information related to these projects can be provided, upon request.

Brentwood, CA	Rosamond Community Services District, CA	Harrison School District 36, IL
Burbank, CA	San Bernardino Municipal Water Department, CA	Indian Prairie Community Unit School District 204, IL
Camarillo, CA	Southern California Coastal Water Research, CA	J. Sterling Morton High School District, IL
Chino, CA	West Covina Unified School District, CA	Lincolnwood Public Library, IL
Colton, CA	Western Municipal Water District, CA	Naperville Community Unit School District 203, IL
Corona, CA	San Jose Community College, CA	Naperville Park District, IL
Coronado, CA	Maricopa County, AZ	Norridge Park District, IL
Danville, CA	Nye County, AZ	Northern Illinois University, IL
Downey, CA	Pinal County District Attorney's Office, AZ	Oswego School District 308, IL
Dublin, CA	Groton, CT	Park Ridge Schools, IL
Escondido, CA	Riviera Beach, FL	Riverside Public School District 96, IL
Foster City, CA	Cary, IL	Dubuque Community School District, IA
Healdsburg, CA	Countryside, IL	Illinois Action for Children, IL
Hemet, CA	DuPage County, IL	Illinois Municipal Retirement Fund, IL
La Habra, CA	Glencoe, IL	Oswego Library District, IL
La Puente, CA	Highland Park, IL	Park District of Highland Park, IL
Laguna Niguel, CA	Kenilworth, IL	Ankeny, IA
Menlo Park, CA	Lake Forest, IL	North Scott School District, IA
Murrieta, CA	Libertyville, IL	West Des Moines, IA
Pacific Grove, CA	Lincolnwood, IL	Whiteside County ETSB, IA
Palm Desert, CA	Matteson, IL	West St. Paul, MN
Palmdale, CA	Morton Grove, IL	University of Michigan, MI
Piedmont, CA	Naperville, IL	Gastonia, NC
Port Hueneme, CA	Norridge, IL	Mount Airy, NC
Rancho Cucamonga, CA	Northbrook, IL	Salisbury, NC
Rancho Mirage, CA	Northfield, IL	Sioux Falls, SD
Redlands, CA	Oak Brook, IL	Missouri Basin Municipal Power, SD
Rialto, CA	Oak Park, IL	Washington County School District, UT
San Gabriel, CA	Oakbrook Terrace, IL	Appleton, WI
Seal Beach, CA	Palos Park, IL	Milwaukee County, WI
Sierra Madre, CA	River Forest, IL	Waukesha County, WI
Simi Valley, CA	Riverside, IL	
South Gate, CA	Rockford, IL	
Truckee, CA	St. Charles, IL	
West Covina, CA	Civitas Schools, IL	
Yucca Valley, CA	Consolidated High School District 230, IL	
CA-NV American Water Works Association, CA	East Aurora CUSD 129, IL	
Castro Valley Sanitary District, CA	Elgin School District U-46, IL	
Cucamonga Valley Water District, CA		
Jurupa Community Services District, CA		
Midpeninsula Regional Open Space District, CA		
Ramona Water, CA		

*CLIENTFIRST* has developed a logical, proven, multi-phased project methodology for IT assessments that guides our clients to decision-making points for each phase. We have performed hundreds of of these projects for clients throughout the country with exceptional results.



## Technology Audit and Assessments

The objective of this Technology Audit and Assessment includes developing and articulating a vision for the effective use of technology to support the work of the City, identifying strategies for developing and implementing technology initiatives, and highlighting the cost benefits of doing so. The audit and assessment will also aid in identify existing equipment and software and assess the utility of the City's current information technology systems and exposure to risk. We will focus our planning efforts on assessing and recommending improvements in the City's business applications to make those applications more effective in supporting the Departments.

**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

We will create a well-documented IT Assessment Report to guide the City over the next five years in planning, procuring, implementing, and managing current and future investments and resources related to Information Technology Services provided to the City. The Assessment should be the result of a thorough analysis of the following:

- Interviews and workshops involving all levels of the City's staff, including the Management Team, end-users, and other stakeholders, recognizing limited staff availability
- Evaluation and inventory of existing hardware and network infrastructure, 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 that the IT staff should undertake over the next five years
- Identification of needs to accommodate current and future technology requirements, such as data storage and management, legal requirements, security requirements, etc.
- Assistance in defining proper IT governance and decision-making processes for the City.
- Identification of any necessary policies and procedures to improve the City's technology capabilities and reduce risk.

**Experience with Municipalities** – We have extensive experience in working with municipalities across the country, with a strong presence throughout the State of California. This has provided our staff with the subject-matter expertise to quickly understand operational demands and opportunities, and then equate them to beneficial IT improvements and recommendations.

## Expected Deliverables

The Technology Audit and Assessments should include, but is not limited to:

- Project Purpose and Background
- Methodology for implementation and maintenance of Strategic Plan
- Current Assessment of Information Technology
  - ♦ Inventory of existing technology
  - ♦ Review and findings for existing infrastructure
  - ♦ Identify gaps in existing systems and processes
  - ♦ Summarize perceived risk to the City's IT operations and critical business functions
  - ♦ Documentation of Risk associated with current IT infrastructure and practices
  - ♦ Policies and Procedures review and findings
- IT Vision and Principles
- Strategies, Goals, and Objectives
- IT Initiatives (Projects) by priority, including:
  - ♦ Infrastructure improvements
  - ♦ Applications and Infrastructure Risk Assessment Analysis
  - ♦ Resiliency and Disaster Recovery Strategies
  - ♦ Best practices recommendations
  - ♦ E-Government suggestions
  - ♦ IT Operations and Productivity improvements
- High-Impact Initiatives
- Required Next Steps
- Timelines
- Budgets (for CIP Budget Process)
- Cost Saving and Efficiencies Considerations



## Approach to IT Assessment and Strategic Planning

IT Strategic Planning is the process by which information technology supports the needs of the organization. This process is done by aligning IT strategies and objectives with key business processes and drivers.

### Why do our IT Assessments and Strategic Plans provide greater value to your organization than our competitors?

**More than Strategic Analysis** - Like other firms, we perform strategic analysis. However, we take it several steps further:

- Collaborative Needs Assessment
  - ♦ Departments
  - ♦ IT Operations
  - ♦ IT Infrastructure
  - ♦ Telecommunications
  - ♦ IT Staffing
- Education and Prioritization Workshops
- Step-by-Step Roadmap
- Resource Assignments
- Project Budgets
- Project Timelines

**... all designed to guide the way to successful implementation of IT goals and objectives.**

**Tactical** - Our emphasis is on providing the City with a Master IT Plan, *because our approach is more tactical* in nature than most other firms.

**Business Perspective** - We approach IT Strategic Planning from a business perspective and create deliverables that are understandable to everyone in the organization—from the technicians in the IT Department to upper-level management and elected officials.

**Collaborative and More Comprehensive** - Our process is intended to create an interactive, collaborative environment conducive to the sharing of 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 by the City as a fluid, "living" set of documents. We will train your staff on the adopted IT 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**, you can be assured that 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 along with our own experience and best practices as building blocks for completing IT Assessments and System Selections. Governance is an essential component to overseeing 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)



## IT Planning Process Methodology

We have developed a five-phase methodology which we base our IT Strategic 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 your unique specifications. We desire to work in partnership with you to improve the City's information technology environments, so it can better meet the needs of your staff and constituents.



**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

**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

## Phase 1: 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 will provide information requests and questionnaires or surveys for completion by the departments and other stakeholder groups.

After obtaining and reviewing the background information provided by the City, we will meet with the City's Project Manager and IT Planning Committee to discuss our work plan, establish overall responsibilities and communications for the project, schedule meetings, and finalize the project plan. We prefer to review as much of the City's available documentation as possible before our initial workshops, so that we will be familiar with the information technology environment, business applications, and business processes upon our arrival on-site.

## Phase 2: Needs Assessment

### Business Department Reviews

The focus of the business department review is to understand current and future use of technology, primarily via software applications. The best source of information regarding gaps and issues with the technology are the individuals who work with it daily. We conduct workshops with representatives from each department. This provides an opportunity for users to voice concerns, share gaps in IT services, and identify strengths and weaknesses of the current software and business processes. To help facilitate the process, we will prepare and distribute Needs Assessment Surveys and Questionnaires to serve as interview guides before conducting the workshops.



Discussion points will include:

- Existing Plans, such as GIS and the City's General Plan
- Enterprise / Departmental Application Needs
- Business Processes
- Improvements / Automation
- Application Interfaces and Data Sharing
- Reporting Issues
- User IT Support Satisfaction Levels and future Needs
- User Training Recommendations
- Departmental Application Analyst Needs
- Enterprise Communications
- Remote Access and Mobile Computing
- IT Governance
- Emerging Technology Considerations
- Regulatory Compliance Issues
- ROI / Cost-Benefit Considerations

## IT Infrastructure Audit and Assessment

Other IT planning consultants do not perform hands-on infrastructure reviews with systems engineers that design, implement, and maintain IT Infrastructure. They provide generic IT Infrastructure recommendations and unsupported cost estimates. *CLIENTFIRST* conducts the infrastructure review with highly qualified subject-matter experts.

Our infrastructure and IT operations workshops will focus on assessing the City's network hardware, topology, and security, as well as day-to-day IT support. We will also tour the City's existing IT facilities, computer rooms, and demarcation points.

Following our overview meetings, we propose a detailed discussion regarding the existing hardware platforms, systems architectures, risk management, disaster recovery, and processing environment. These interview(s) will assess the status and direction of the information processing function, including, but not limited to, the following:

- Hardware and Network
  - ♦ Website and Web server configuration
  - ♦ Audio-visual systems
  - ♦ Standard desktop and server configuration
  - ♦ Current Windows Domain and Active Directory designs
  - ♦ Software licensing
  - ♦ Disk storage and backup methodologies
  - ♦ Email and message archiving
  - ♦ Existing network management and IT measurement
    - Perceived performance issues
  - ♦ Existing remote-access methods
    - Hand-held and mobile devices
  - ♦ Printers
  - ♦ Any problem areas
- Systems software
  - ♦ Current software licensing methodology
  - ♦ Network management or automation software
  - ♦ Mobile device management
  - ♦ Systems security
  - ♦ Patch management
- Planned or anticipated equipment and software additions or upgrades
- Current IT staff and contracted support services capabilities
  - ♦ Perceived staff and user department training needs
- Help Desk requirements
- Disaster Recovery plans
- Information Technology-related policies and procedures
- Emerging and future technologies, such as:
  - ♦ Cloud computing
  - ♦ Cloud storage
  - ♦ Next generation security devices
  - ♦ Virtual networks



The purpose for this step is to gain a detailed understanding of current information systems utilization and capabilities. During this step, we will also work to identify infrastructure strengths and weaknesses and potential gaps that may require a more specific focus.

Following the infrastructure review and needs assessment, we will meet with IT management to examine the current budget, as well as existing and planned IT-related projects.

Our IT operations subject-matter experts currently design, procure, support, manage infrastructure, and support operations daily for numerous local government agencies. We will address potential areas for improvement, staff productivity, collaboration alternatives, policies and procedures, security, disaster recovery, etc.

We provide specific recommendations, including projects and approaches, often with actual product examples to consider. We do not resell any hardware or software, so our examples are not biased. We always suggest varying options depending on your staff's skill sets, knowledge, current environment, strategic direction, and budget realities.

**Their current and relevant experience with municipalities 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

**I have received a lot of feedback from the departments about how they can really see the positive changes that are ahead, and have a much-improved opinion of the city's IT department. And 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. All of the staff is 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.**

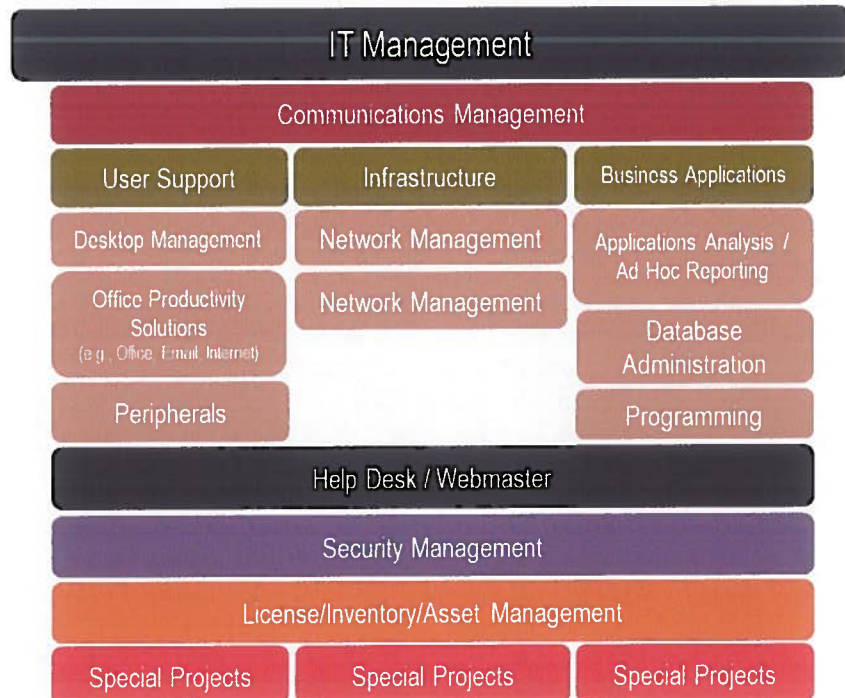
—Director of Finance and Administrative Services  
FL Municipality



## IT Staffing Review

Most IT Planning consultants have never managed or directed actual IT staff or IT operations themselves. *CLIENTFIRST*'s project team includes our IT Operations Practice Leader, who manages daily IT support operations for multiple local government agencies. This individual also provides ongoing contract IT Management / CIO services. This hands-on daily experience results in real-world, relevant recommendations regarding support for current and emerging technologies.

*CLIENTFIRST* will perform a needs review for IT staffing. We will look at the City's current and future resource requirements, the structure of the IT Department, and the current staff's capabilities and skill sets. Once we have identified strengths and weaknesses and any potential gaps in capabilities or organizational structure, we will discuss potential options. We do not base our staffing recommendations on academic benchmark surveys from organizations that are dissimilar. We provide benchmark metrics conducted by our firm that are based on agencies of similar size and couple that information with our own experience in managing similar IT environments.



## Phase 3: Develop Detailed Assessment Recommendations

We will assess the City's overall IT strengths and weaknesses and identify gaps. Leveraging this information, we will determine key strategies, goals, and objectives to address the issues identified. We will then summarize our findings and observations and determine preliminary IT initiatives. At a minimum, we will provide initiatives for the following categories:

- Best Practices
- IT Governance
- Applications and Departmental Systems
- Gov 2.0 (E-Government)
- IT Infrastructure
- IT Operations
- IT Security
- IT Staffing
- IT Initiative Development

After categorizing the City's IT initiatives, we will research implementation and support costs, and prioritize them based on their level of importance to the City's day-to-day services and operations. We will then consolidate them into a Preliminary IT Recommendations Report, used for our workshops. This Report will contain descriptions of our findings and observations, recommendations, next steps, preliminary budgets, implementation timelines, as well as any dependencies that were identified as part of the process. PMI, COBIT/ITIL, as noted earlier, are applied as methods of adopting and incorporating best practices into your operations. We expect to identify approximately 50-100 IT initiatives in the following categories:

- Application Enhancements
- Business Process Improvements and Training Needs
- Audio/Visual Systems Improvements
- Network Infrastructure
- Servers and Server-Based Applications
- Storage and Back-Ups
- Business Continuity/Disaster Recovery
- Network and Data Security
- Desktop Environment
- Software Licensing
- Printers
- Help Desk and Reporting
- Policies and Procedures
- Document Management and Retrieval (ECMS)
- Email and Message Archiving
- Emerging Technologies
- Information Technology Staffing and Training
- IT Governance

Additionally, we will include planning for hardware and software support, maintenance and support budgets, and the development of project durations for each major initiative.



## Phase 4: Planning and Prioritization Workshops

With our Preliminary IT Recommendations Report in hand, we will conduct planning and prioritization workshops. We will discuss our findings and recommendations with the Project Manager, IT Department, IT Planning Committee, and executive management.

The goal of these workshops is for the consulting team and City staff to develop consensus on the recommendations and objectives. The workshop format is conducive to a free-flowing discussion of opinions and ideas, while also providing an opportunity for City staff to question our assumptions, budgetary cost models, recommended priorities, and suggested solutions.

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

Typically, this workshop takes between two-to-four hours.

### Project Manager and IT Workshop

This workshop will focus primarily on findings and recommendations related to the City's digital media, IT infrastructure, governance, day-to-day operations, metrics, and staffing.

### Business Function Workshop

In contrast, the City IT Planning Committee business function workshop will focus mainly on non-IT-related needs, such as business processes, user productivity, software improvements, and user training.



**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 city to achieve their 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 City's situation.**

—IT Director  
CA Municipality



## Executive Management Workshop

We will conduct a City Management Workshop to educate and gain feedback from the City Manager and executive management. It is important to have a clear understanding before beginning the final prioritization, initiatives, and budgets with the IT Planning Committee.

IT Initiative	Project	Priority	Estimated Project Duration (Mths)	Costs Estimate Low	Costs Estimate High	Comments	Dept(s)	2012	2013	2014	2015	2016	Source of Funding
<b>PD Technology Improvements</b>													
15 Next Generation 9-1-1	Next Generation 9-1-1	M	4	\$300,000	\$300,000		PD		\$ 200,000				PD
16 9-1-1 Voice Logger Replacement	9-1-1 Voice Logger Replacement	M	3	\$30,000	\$40,000	Capital replacement plan	PD		\$ 35,000				PD
17 Accident Reporting	Accident Reporting	H	3	\$5,000	\$5,000	Efficiency	PD		\$ 6,000	\$ 1,000	\$ 1,000	\$ 1,000	PD
18 Camera Monitoring	Open Video Surveillance Mgmt. Platform	H	3	\$18,500	\$18,500		All			\$ 18,500			CF
	PD Video Surveillance Upgrade	L	2	\$46,000	\$46,000		PD					\$ 46,000	PD
19 Parking Ticket Improvements	Parking Ticket Improvements	M	3	\$97,000	\$97,000	Customer Service	PD		\$ 97,000				PD
20 Squad Car Video Improvements	Squad Car Video Improvements	H	6	\$100,000	\$120,000	Efficiency. Some funding available from DUI Fund	PD	\$ 80,000	\$ 30,000				PD
21 Traffic Citation System	Traffic Citation System	M	6	\$50,000	\$50,000	Increased revenue potential. ROI. Courts encourage use of automated ticketing system and provide a surcharge refund to the City, providing a potential funding source for this initiative.	PD		\$ 50,000				PD
22 New World Improvements	New World Improvements	H	6	\$4,000	\$4,000		PD	\$ 4,000					PD
<b>OCM</b>													
23 CRM Improvements	CRM Improvements	M	12	\$0	\$15,000	In-process	All		\$ 5,000	\$ 10,000			CF
24 Council Chambers Audio/Visual	Council Chambers AV Implementation	L	3	\$40,000	\$40,000	Potential funding - cable franchise	OCM				\$ 40,000		CF
	Pre-session conference room	H	1	\$0,000	\$0,000		OCM	\$ 6,000					CF
<b>IT Infrastructure</b>													
26 Expanded Wireless Network	Wireless Management	L	3	\$14,500	\$14,500	Efficiency	IT	\$ 6,000	\$ 8,000				CF
	Hot Spots	M	3	\$10,000	\$10,000	Efficiency	FD		\$ 10,000				CF
	Remainder of Facilities	L	3	\$20,000	\$20,000	Efficiency	All			\$ 20,000			CF
27 Network Improvements	Internet Speed Improvement	H	6	\$93,300	\$93,300	Efficiency	All	\$ 21,300	\$ 18,000	\$ 18,000	\$ 18,000	\$ 18,000	CF
	Memory Upgrades (older PCs)	H	3	\$2,300	\$2,300	Efficiency	All	\$ 2,500					CF
	Internet Redundancy	M	6	\$12,000	\$12,000	Service Level Agreement	All				\$ 12,000		CF
28 Computer Room Improvements	Computer Room Improvements	H	6	\$20,000	\$20,000	Safety and reliability	IT	\$ 20,000					CF
29 Core Switch Replacements	Core Switch Replacements	H	3	\$18,500	\$18,500	Capital replacement	IT	\$ 18,500					CF
	10Gb Backbone City Hall/PO	H	3	\$0,000	\$0,000	Necessary for Disaster Recovery	IT	\$ 6,000					CF
30 Exchange Upgrades	Exchange 2010 Upgrade	H	6	\$50,000	\$50,000	Capital replacement	All	\$ 30,000	\$ 20,000				CF
	2008 Active Directory Upgrade	H	3	\$18,500	\$18,500	Capital replacement - required for Windows 7	All	\$ 18,500					CF
31 MDC Update Automation	Automate MDC Updates	H	3	\$0,000	\$0,000	Efficiency	FD/PO	\$ 6,000					CF
32 Secure File Transfer	Secure File Transfer	H	1	\$2,500	\$2,500	Legal requirement	All	\$ 2,500					CF
33 E-Fax	E-Fax	L	3	\$5,000	\$5,000	ROI	All	\$ 5,000					CF

## Prioritization Workshop

Once the entire project team is educated on the IT Initiatives for the five-year planning period, we will conduct this prioritization workshop in two parts. The first part of the workshop will be conducted without the Project Committee seeing the project cost estimates, and the second part of the workshop will make prioritization adjustments, taking into consideration budget and resource realities. At this point in the planning process, we consider required and available resources for the implementation of Plan recommendations

**CLIENTFIRST** was very good with their communications at all levels and put together a plan that has really brought all of the departments together to work towards improving IT throughout the city.

—Director of Finance and Administrative Services  
FL Municipality

We will complete our findings and recommendations, budgets, implementation timelines, and create the City's Information Technology Strategic Plan Report with supporting documentation.

[illegible]

—Director of Finance and Administrative Services  
FL Municipality

—Information Services Manager  
CA Municipality

## Reporting/Deliverables

All deliverables will be provided in hard copy and electronically in the Acrobat Reader (PDF), MS Word, MS Excel, and/or MS PowerPoint file formats.

Description
<b>Phases 1: Project Initiation</b>
Department Needs Assessment Surveys and Questionnaires
Project Kick-Off Meeting
IT Planning Committee setup, with roles and responsibilities
<b>Phase 2: Needs Assessment and Needs Assessment Workshops</b>
Data Collection, Questionnaires, and Surveys
Department/Function Discovery Interview Workshops
IT Infrastructure, Operations, and Staffing Reviews
Communications Systems Review
Needs Assessment Discovery Documentation
<b>Phase 3: Research and Preliminary Plan Development</b>
Preliminary Initiative Identifications
Application Evaluation and Gap Analysis
Infrastructure Evaluation and Gap Analysis
Assessment Inventories
Preliminary IT Recommendations (workshop materials)
<ul style="list-style-type: none"> <li>• Current Assessment:               <ul style="list-style-type: none"> <li>◆ Application inventory</li> <li>◆ IT organization</li> <li>◆ IT infrastructure and services inventory</li> <li>◆ Identified gaps</li> </ul> </li> <li>• IT strategies, including organization recommendations; descriptions of initiatives will provide prioritizations, dependencies, resource requirements, and next steps:               <ul style="list-style-type: none"> <li>◆ Department-specific needs and initiatives</li> <li>◆ Telecommunications</li> <li>◆ Business application strategies and recommendations</li> <li>◆ ECMS / Document Management (Enterprise Content Management System)</li> <li>◆ Email and Message archiving recommendations</li> <li>◆ Network infrastructure, including storage and backup standards / recommendations</li> <li>◆ End user device standards recommendations</li> <li>◆ Replacement strategies and planning</li> <li>◆ Printing Environment</li> <li>◆ IT staffing, training, and support recommendations</li> <li>◆ Security issues</li> <li>◆ Disaster recovery</li> <li>◆ Audio/Visual systems</li> <li>◆ Cloud Computing</li> <li>◆ Customer service improvements</li> <li>◆ Server and network performance summary</li> <li>◆ Future assessment, governance plan, and recommendation updates</li> <li>◆ Website assessment and recommendations, including all digital media</li> <li>◆ Internet / intranet and online services</li> </ul> </li> </ul>

Description
<ul style="list-style-type: none"> <li>◆ Improved citizen communications and interaction</li> <li>◆ Regional partnering</li> <li>◆ Emerging technology</li> <li>◆ Best practices, as applicable</li> <li>◆ Help Desk and Reporting</li> <li>◆ Return-on-Investment Considerations</li> <li>• Technology – Capital Investment Plan and Cost Schedules</li> <li>• Implementation Plan with timeline estimates</li> <li>• Staffing and Organizational Requirements needed to support recommended strategies</li> <li>• Policy and Procedure Recommendations</li> </ul>
<b>Phase 4: Planning and Prioritization Workshops</b>
Assessment Report with Initiatives
Project Manager and IT Workshop (Technical)
Business Function - Project Committee Workshop
Executive Management Workshop
Prioritization - Project Committee Workshop
<b>Phase 5: Final Report and Presentations</b>
<ul style="list-style-type: none"> <li>• Strategic Technology Strategic Plan Report               <ul style="list-style-type: none"> <li>◆ Project Purpose and Background</li> <li>◆ Methodology for implementation and maintenance of strategic plan.</li> <li>◆ Current Assessment of Information Technology and Gap Analysis</li> <li>◆ IT Vision and Principles</li> <li>◆ Strategies, Goals, and Objectives</li> <li>◆ IT Initiatives (Projects) by priority</li> <li>◆ High-Impact Initiatives                   <ul style="list-style-type: none"> <li>■ Training, Staffing, and Support Requirements</li> <li>■ Recommended changes to Standards</li> <li>■ Security, Business Continuity, and Risk Management</li> </ul> </li> </ul> </li> <li>◆ Governance Guidelines with Recommendations</li> <li>◆ Timelines</li> <li>◆ Budgets</li> <li>◆ Benchmarks</li> <li>◆ Approach to tracking and measuring the implementation of plan strategies and initiatives</li> </ul>

**There were a variety of levels of technical competence among the city's team, and no one ever felt that David or Tom was "talking over their heads". The CLIENTFIRST team was always very professional.**

—Director Administrative Services  
CA Municipality



The fee information for the project is summarized in the following 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 on the time spent on a project at our standard rates. Our standard billing rates for these types of services is \$105 - \$185 per hour, plus travel-related expenses, and is based on the type and level of the assigned consultants' skill sets. However, we have discounted our rates for this engagement. This quote shall be held firm for ninety (90) days, per RFP requirements.

## Recommended Work Plan

City of San Pablo, CA Information Technology Audit, Assessments, Recommendations, and Strategic Plan Work Plan		Total Billable Hours	David/ Craig	Tom/ Sean	Adam/ Aaron	Alex
Hours by Consultant	281.0	103.5	71.0	55.0	51.5	
Rate		\$185	\$195	\$150	\$130	
Fees	\$47,938					
Travel and Related (not-to-exceed)	\$1,995					
<b>Total Cost (Not-to-Exceed)</b>	<b>\$49,933</b>					



## 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 would 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.

We believe our clients are our best salespeople. The references listed are examples of clients with similar needs. As seen on the following pages, each of these clients has been happy with our performance and retained our services many times. We pride ourselves on client satisfaction and strive to maintain long-term relationships with our clients as partners.



# References



Beyond our advocacy for IT Best Practices for municipalities, our references and the results they have experienced are the best illustration of our qualifications for this engagement. Listed below are clients similar in size and scope to the City.



### City of Piedmont

120 Vista Avenue, Piedmont, CA 94611

**Paul Benoit, City Administrator**

**510.420.3042**

pbenoit@ci.piedmont.ca.us

**John O. Tulloch, City Clerk / IS Manager**

**510.420.3041**

jtulloch@ci.piedmont.ca.us

- IT Strategic Planning
- IT Contract/Support Services Procurement
- Network Design



### City of Pacific Grove

1600 West Beverly Blvd., Pacific Grove, CA 90640

**Steven Silveria, Director Library Services and Information Technology**

**831.648.5765**

ssilveria@cityofpacificgrove.org

- IT Assessment
- IT Support RFP
- Police Windows Server Upgrade



### City of Palm Desert

73-510 Fred Waring Drive, Palm Desert, CA 92260-2578

**Clay Von Helf, Manager of Information Technology**

**760.346.0611**

clay@ci.palm-desert.ca.us

**Lori Carney, Human Resources Director, Project Manager**

**760.346.0611**

lcarney@cityofpalmdesert.org

- IT Strategic Plan
- VoIP needs assessment, alternative system analysis, selection, and contract negotiations
- Wide area network design
- Data network IP address planning and organizational development
- VoIP ShoreTel system and data network implementation, including recabling of sites
- Telecommunications billing audit
- Configuration specifications related to network design and security
- Network security configuration and documentation
- Network migration and installation oversight; post-implementation network assessment



## Tuolumne County

2 South Green Street, Sonora, CA 95370

Daniel Richardson, Deputy County Administrator

209.533.5511

[drichardson@co.tuolumne.ca.us](mailto:drichardson@co.tuolumne.ca.us)

- Telecommunications and Network Implementation Project Management
- VoIP Telecom System Selection
- Network Design and Installation Services
- Fiber-Optic Cable and IT Consulting (Mother Lode Juvenile Detention Center)



## City of Redlands

35 Cajon Street, Redlands, CA 92373

Danielle Garcia, Director of Innovation and Technology

909.798.7507

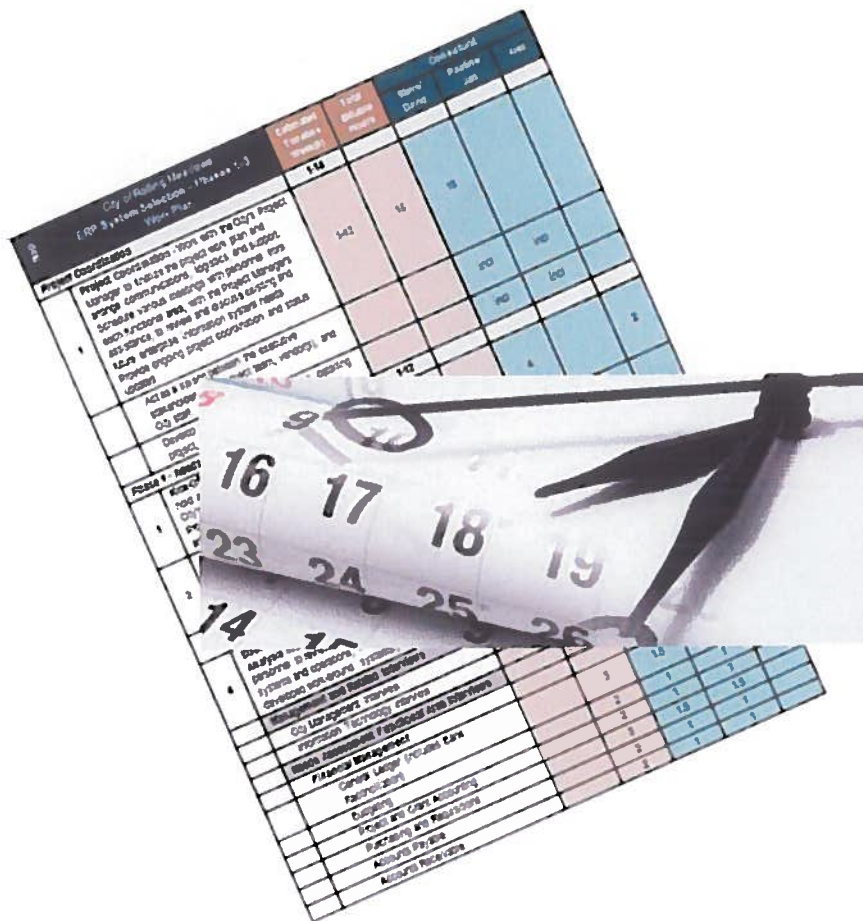
[dgarcia@cityofredlands.org](mailto:dgarcia@cityofredlands.org)

- IT Strategic Plan
- Data Center Design
- Development Services Applications Assessment
- Exchange Upgrade
- Help Desk Design and Metrics
- Interim IT Director Services
- IT Inventory Management
- IT Strategic Plan Implementation Project Management
- Point-to-Point Wireless and Wireless LAN Design
- Police Scheduling System RFP Development
- Project Management
- Strategic Advisory Services
- Supplemental IT Support
- Telecommunications Audit
- VoIP Phone System Selection
- WAN Design
- Wireless Network Installation

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

—City Manager  
CA Municipality

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.



# Schedule and Work Plan

## Work Plan

Below, we outline our detailed project work steps and expected timeline for this important project.

### Work Plan

Step	City of San Pablo, CA Information Technology Audit, Assessments, Recommendations, and Strategic Plan Work Plan	Scheduled Week	Total Billable Hours	David/ Craig	Tom/ Sean	Adam/ Aaron	Alex
<b>Project Coordination</b>		1-12					
1	Overall Project Coordination		6	2	4		
<b>Phase 1: Project Initiation</b>		1-3					
2	Develop Questionnaires/Surveys for Needs Assessment		3	1			2
3	Kick-Off Meeting with the City Project Manager and Key Personnel		6	4			2
4	Obtain and Review Background Information and Preparation		3	2	1		
<b>Phase 2: Technology Audit and Needs Assessment</b>		4-6					
5	General Data Collection/Gathering, Distribution of Questionnaire, and Collection of Completed Questionnaires/Surveys		7	2	1		4
6	<b>Management and Functional</b>	4-5					
	City Manager and/or Executive Team		2	1			1
	City Manager's Office (includes Clerk)		3	1.5			1.5
	Human Resources and Risk		4	2			2
	Economic Development		2	1			1
	Community Services		4	2			2
	Development Services (Planning and Building)		4	2			2
	Finance		4	2			2
	Public Works/Engineering		4	2			2
	Police		4	2			2
7	<b>IT Infrastructure, Operations, and Staffing Reviews</b>	4-5					
	IT Manager/Supervisor and Staff Interviews		4		4		
	IT Information Gathering Activities, including:		28		4	24	
	Tour IT Facilities						
	Assessment and Information Gathering, including:						
	IT Policies and Procedures						
	Inventory Information Gathering						
	Website Review						
	IT Network and Infrastructure						





Step	City of San Pablo, CA Information Technology Audit, Assessments, Recommendations, and Strategic Plan Work Plan	Scheduled Week	Total Billable Hours	David/ Craig	Tom/ Sean	Adam/ Aaron	Alex
	Storage and Back-Ups						
	Audiovisual Systems						
	Public Information and TV Channel						
	Servers, Server Applications, and Management						
	IT Security						
	Disaster Recovery						
	Email and Message Archiving						
	Document Management						
	Help Desk						
	Desktop Environment						
	Printers						
	Software Licensing						
	Third-Party Contracts						
	Review IT Projects and Budgets						
	Radio Systems						
	Telecommunications						
	Services, Lines, and Equipment						
	Operations, including Support/Service Agreements						
	GIS Integration						
8	<b>Current Assessment</b>	6-7					
	Summary - Current State		18	8	2	6	2
9	<b>Documentation</b>	6-7					
	Summarize Findings and Observations		22	8	2	4	8
<b>Phase 3: Research and Recommendations</b>		8-9					
10	Develop Key Strategies		2	1	1		
11	Define Goals and Objectives		2	1	1		
12	Develop Preliminary Initiatives, Findings, Alternatives, and Recommendations		32	12	8	8	4
	Current IT Environment Summary and Condition		Included Above				
	All Applications/Systems, including ERP, Enterprise Content Management, GIS, all department-based solutions, etc.		Included Above				
	Application 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				



Step	City of San Pablo, CA Information Technology Audit, Assessments, Recommendations, and Strategic Plan Work Plan	Scheduled Week	Total Billable Hours	David/ Craig	Tom/ Sean	Adam/ Aaron	Alex
	Inventory Summaries		Included				
	Network		Included				
	Servers		Included				
	Storage and Back-Ups		Included				
	Handhelds/Mobile		Included				
	IT Operations		Included				
	Service Levels		Included				
	Desktops		Included				
	Software Licensing		Included				
	Printers		Included				
	Help Desk and Report		Included				
	Email and Message Archiving		Included				
	Management and Productivity Tools		Included				
	IT Governance		Included				
	Steering Committee		Included				
	Project Identification and Budgeting		Included				
	IT Policies and Procedures		Included				
	IT Staffing - Roles and responsibilities, training, staffing levels		Included				
	IT Security		Included				
	Business Continuity / Disaster Recover		Included				
	Cloud Computing / Cloud Storage		Included				
	Interagency Collaboration		Included				
	IT Technology Plan Implementation Methodology		Included				
13	IT Cost Analysis		6	2	1	1	2
	Benchmarking versus Similar Agencies						
14	Preliminary Budgets		20	8	8	2	2
15	Preliminary Prioritizations		3	1	2		
<b>Phase 4: Planning and Recommendation Workshops</b>		10-11					
16	Develop Recommendations Report with Initiatives		28	8	8	8	4
17	Develop Workshop Materials		10	2	2	2	4
18	Workshop - IT Infrastructure and Operations		4		4		
19	Workshop - Departments / Project Committee		4	4			
20	Prioritization Workshops - Project Committee		4	4			
21	Workshop - Executive Management		4	2	2		
22	Revisions		4	2	2		



Step	City of San Pablo, CA Information Technology Audit, Assessments, Recommendations, and Strategic Plan Work Plan	Scheduled Week	Total Billable Hours	David/ Craig	Tom/ Sean	Adam/ Aaron	Alex
<b>Phase 5: Final Report and Presentations</b>		10-12					
23	Develop Final Report and Supporting Documentation		18	8	8		2
24	Develop Presentation Materials		4	2	2		
25	Final Report Presentation - Executive Team		4	2	2		
26	Final Report Presentation to City Council		4	2	2		
<b>Hours by Consultant</b>			281.0	103.5	71.0	55.0	51.5



The following page contains statements required by the City's RFP.





## Exceptions

*CLIENTFIRST* has no exceptions, changes, revisions, or comments to any element of the standard agreement or insurance requirements

## Firm Neutrality and Independence (Vendor Neutrality)

*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. *CLIENTFIRST* does not have any interests in other lines of business, nor has any relationships which could be construed as a conflict of interest. Therefore, there is no risk that our analysis will be biased in any way towards certain solutions.

*CLIENTFIRST* is a member of the Society of Telecommunications Consultants whose by-laws require vendor independence for membership.

Our consultants have been assisting local governments with innovative technology solutions with *CLIENTFIRST* for over 13 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. We are confident that no other consulting firm focusing on local governments offers the wide range of IT services that we do.

# Qualifications



## CIO Government Technology Consulting

20 Most Promising Government Technology Consulting Companies



## 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.

## 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, North Carolina, Illinois, and Minnesota.



Corona, CA



Schaumburg, IL



Minneapolis, MN



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

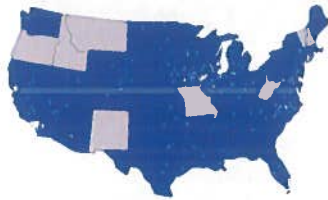
**We believe in using technology as a tool to meet your business objectives; we do not apply technology just for technology's sake.** We are serious in our quest to provide clients with practical solutions that meet their individual requirements. Sometimes the proper solution includes cutting-edge technology. 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 lowest competitive cost) to meet their needs.





## National Recognition

Our consultants are nationally recognized 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 was featured in CIO Review as one of the "20 Most Promising Government Technology Solution Providers 2016".



### National Speakers

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





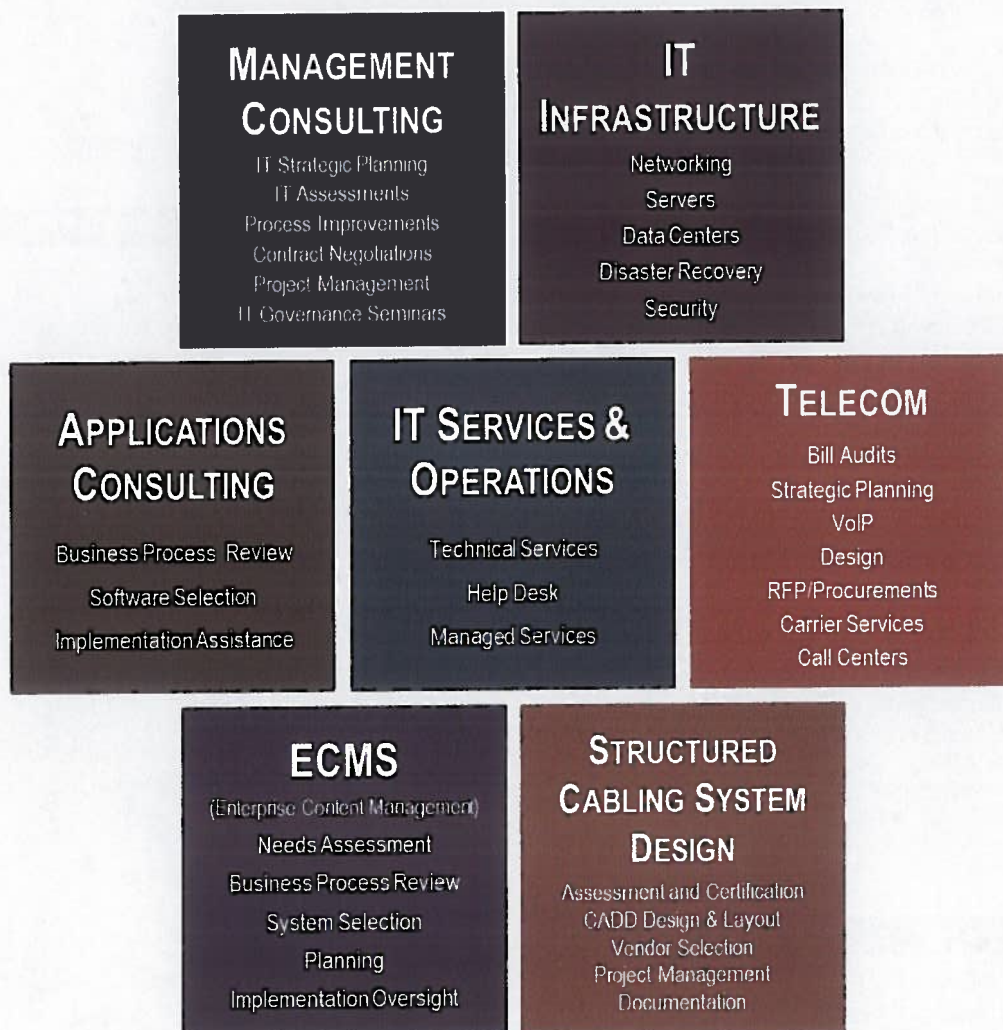
## Diversified Experience

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 your IT needs are, we offer a unique combination of experts in their given disciplines who can guide your 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

- Strategic Planning
- IT Strategic Planning
- IT Assessments
- IT Staffing Assessments
- Process Improvements
- Procurement Assistance
- Contract Negotiations
- Project Management
- IT Governance Seminars

### IT Services and Operations

#### IT Technical and Managed Services

- 24/7 On-Call
- PC Break-Fix Services
- Routers and Switches
- Server Installation, Configuration, and Troubleshooting
- On-Site or Remote
- Network and Server Troubleshooting and Configuration
- Security Systems Support
- Network and Server Management
- Patch Management
- Inventory and Licensing Management
- Remote Network, Server, and Desktop Monitoring

#### IT Staffing

- 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

### ECMS

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

### 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

#### Security

- Internet and Firewall Security Reviews
- IT Security Reviews
- Security Policy and Controls Development
- Intrusion Testing

### Structured Cabling System Design

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

### Applications Consulting

#### Business Process Review

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

#### Software Selection

- Feature / Function Requirements Definitions
- Implementation Risk Assessments
- Change Management
- RFP Development
- Vendor Analysis and Evaluations
- Demonstration Facilitation
- Contract Review and Negotiations

#### Implementation Assistance

- Implementation Project Management
- Conversion Assistance
- Integration / Interface Assistance
- Ad Hoc Report Writing Assistance



## 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 OPERATIONS / TECHNICAL SERVICES EXPERIENCE

- Technical Services
- 24/7 On-Call
- PC Break-Fix Services
- Routers and Switches
- Server Installation, Configuration and Troubleshooting
- On-Site or Remote Services
- Network Troubleshooting and Configuration
- Security Systems Support
- Managed Services
- Network Management
- Event Monitoring
- Patch Management
- Inventory Management
- Licensing Management
- Software Distribution
- Remote Network and Desktop Monitoring

Desktop Monitoring  
• Remote Network and  
• Remote Desktop

### TELECOM EXPERIENCE

- Law Enforcement Records Management
- 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
- Waste Water
- Sanitation
- Field Operations
- Laboratories
- Environmental Services
- Facilities
- Treatment Plants
- Fleet Management
- Engineering
- Warehousing
- SCADA
- Information Systems

Information Systems

### 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



## 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:

### California

City of Brentwood  
City of Burbank  
City of Calabasas  
City of Camarillo  
City of Chico  
City of Chino  
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 Laguna Niguel  
City of La Habra  
City of La Puente  
City of Lathrop  
City of Lomita  
City of Menlo Park  
City of Murrieta  
City of Pacific Grove  
City of Palmdale  
City of Palm Desert  
City of Piedmont  
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 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 West Covina  
Town of Danville  
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  
Jurupa Community Services District  
Livermore Area Recreation and Park District  
Mesa Water District  
Midpeninsula Regional Open Space District  
Newhall County Water District  
Ramona Municipal Water District  
Rincon del Diablo Municipal Water District  
Rosamond Community Services District  
San Bernardino Municipal Water Department  
Southern California Coastal Water Research  
Western Municipal Water District

Walnut Valley Water District  
Riverside County  
San Bernardino County  
Tuolumne County  
Yolo County  
Colton Joint Unified School District  
Lake Elsinore Unified School District  
Menifee Unified School District  
Mountain View School District  
Romoland School District  
West Covina Unified School District  
Ohlone Community College  
San Jose Community College  
San Marino Unified School District  
University of California Berkeley  
University of California San Francisco  
Mechoopda Indian Tribe

### Arizona

Maricopa County

### Connecticut

City of Bristol  
City of New Haven  
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

### Illinois

City of Bloomington  
City of Champaign  
City of Countryside  
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  
Village of Arlington Heights  
Village of Cary  
Village of Glencoe  
Village of Kenilworth  
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 Wheeling  
DuPage County  
DuPage County Health Dept.  
Peoria County  
Sangamon County  
Winnebago County  
Batavia Public School District  
Central Community Unit School District 301  
Civitas Schools

Community Unit School District 300  
Community Unit School District 308  
Consolidated High School District 230  
Consolidated School District 158  
DeKalb Community Unit School District 428  
Geneva Community Unit School District 304  
Glenview Schools  
Gower School District  
Hampton School District 29  
Harlem School District 122  
Harrison School District 36  
Harvard Community Unit School District  
Indian Prairie Community Unit School District 204  
J. Sterling Morton High School District 201

Marmion Academy  
Mount Prospect School District 57  
Naperville Community Unit School District 203  
Naperville Park District  
Norridge Park District  
Oswego School District 308  
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  
Sherrard Community Schools  
St. Charles School District  
Sunset Ridge School District  
Township High School District 214  
Wheaton-Warrenville School District 200  
Illinois State University  
Lake Forest College  
Northern Illinois University  
The University of Chicago  
Lincolnwood Public Library  
Oak Park Library  
Oswego Library District  
Park District of Highland Park  
American Association of Diabetes Educator  
Chicago Theological Seminary  
Illinois Action for Children  
Illinois Municipal Retirement Fund  
Jensen IT

### Indiana

The University of Notre Dame  
Indianapolis Public Library

### Iowa

City of Ankeny  
City of Bettendorf  
City of Burlington  
City of Cedar Rapids  
City of New Hampton  
City of West Des Moines  
Johnson County  
Linn County  
State of Iowa  
Assumption Catholic High School  
Archdiocese of Dubuque Catholic Schools  
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  
Wahlert Catholic High School  
Des Moines Area Community College  
Loras College  
St. Ambrose University  
Cedar Falls Utilities

### Maryland

State of Maryland

### Michigan

Lake Superior State University  
University of Michigan

### Minnesota

Anoka County

### Nevada

County of Nye  
Town of Pahrum

### New York

City of Batavia  
State of New York  
Hudson Valley Community College

### North Carolina

City of Burlington  
City of Gastonia  
City of Kinston  
City of Mount Airy  
City of Salisbury  
Arc of Stanley County (Monarch)  
Buncombe County  
Cabarrus County  
Davie County  
Orange County  
St. Augustine College  
Wake Forest University  
Eastern Band of Cherokee Indians  
Salisbury Rowan Utilities

### Ohio

Cuyahoga County  
Montgomery County

### South Dakota

Rapid City Area Schools

### Utah

Washington County School District

### Virginia

Commonwealth of Virginia

### Wisconsin

City of Appleton  
City of Brookfield  
City of Eau Claire  
City of Wauwatosa  
City of West Allis  
Brown County  
Kenosha County  
Milwaukee County  
Waukesha County  
HIDTA Milwaukee  
Diocese of Madison Catholic Schools  
Madison School District  
Shorewood School District  
Whitnall School District  
West Allis School District  
Southwest Technical Institute  
St. Beloit College  
St. Norbert College  
University of Wisconsin  
State of Wisconsin

### Wyoming

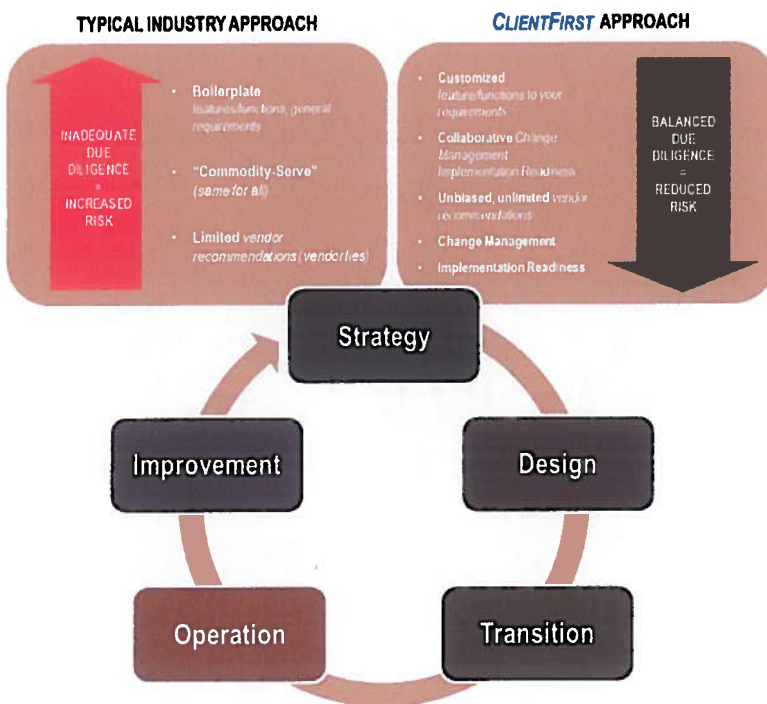
State of Wyoming



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



The following section highlights other distinguishing characteristics of *CLIENTFIRST* that are not required by the RFP, but which may be helpful in making a well-informed decision regarding this important project.



# Other Unique Qualifications and Attributes

We believe *CLIENTFIRST* offers the greatest overall diversity and breadth of knowledge for mid-sized local government and special district IT Strategic Planning. We are not just an IT Strategic Planning consulting firm. Our City project team is involved daily in in-depth projects and services including:

- Day-to-day IT Support operations to over a dozen municipalities
- Application Software Selection consulting for all major municipal application systems
- IT infrastructure design, procurement, and implementation
- IT Security
- Disaster Recovery Planning
- Telecommunications design, procurement, and auditing
- IT Project Management assistance



Additional information on our practice areas are included below.

## Business Processing and Applications Practice

We approach enterprise application projects from a **business standpoint**, with the goal of **implementing technology that is practical, sustainable, and affordable** for the City.

We are focused on helping improve the overall operational effectiveness of the City. We utilize our proven, structured **methodologies to identify the City's key business processes** by properly defining business objectives and priorities. By applying our knowledge of the software market and experience with industry best practices, we can help **find the overall solution that best meets the City's needs**.

Selecting the right system and technology is more critical today than ever before. The **efficiency and effectiveness** of the City is **directly dependent** on its use of **technology** and information systems.

### SERVICES

#### PROCESS REVIEW

Business Case Analysis  
Preliminary Needs Assessment and Recommendations  
Process Analysis and Documentation

#### SOFTWARE SELECTION

Feature/Function Requirements Definition  
Implementation Risk Assessment  
Change Management  
RFI/RFP Development  
Vendor Analysis and Evaluations  
Demonstration Facilitation  
Contract Negotiations

#### IMPLEMENTATION ASSISTANCE

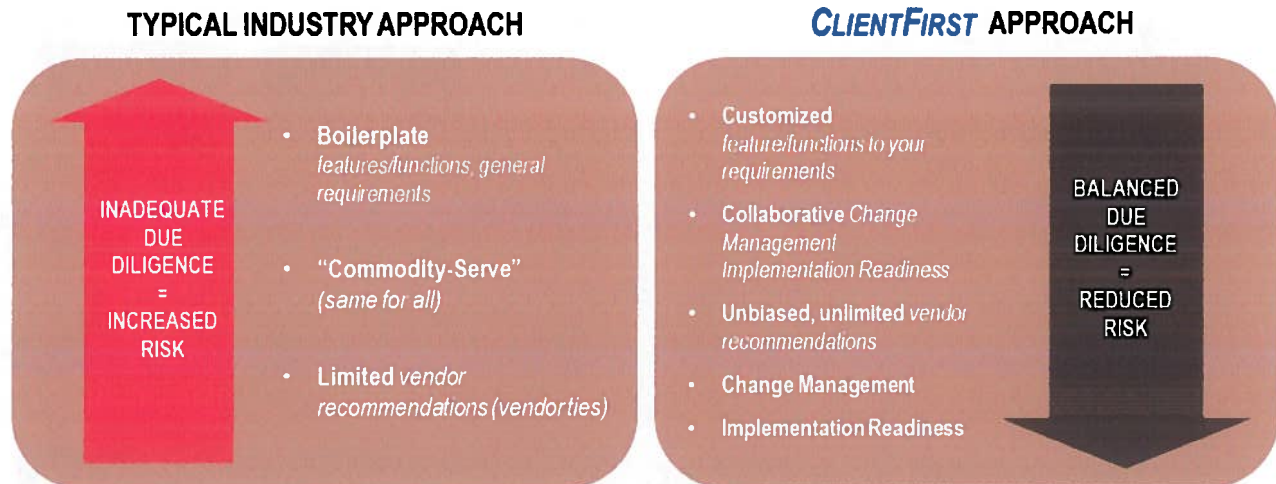
Project Oversight  
Implementation Project Management  
Conversion Assistance  
Ad Hoc Report Writing Assistance  
Integration/Interface Assistance

#### APPLICATION IMPROVEMENT

Assessment of Current Needs and Gaps  
Assessment of Features, Training, Support and Reporting Issues  
RFI Documentation  
Vendor Proposal Review and Demonstration Management  
Contract Negotiations  
Change Management  
Risk Assessments  
Implementation Assistance



Illustrated by the graphic below, level of risk and the probability of achieving a successful implementation is directly related to the amount of proper due diligence exercised. The typical industry approach fails in this regard. At *CLIENTFIRST*, we take every possible step to decrease risk levels by ensuring proper due diligence.



We work with the City to safeguard finding the best overall solution to suit your unique requirements. We help you run your business as economically, efficiently, and transparently as we run ours. Above all else, we pride ourselves on providing quality services with honesty and integrity. Our goal is to help every user in the City gain an understanding of the selection and implementation process.

## IT Infrastructure Consulting

A core competency of ClientFirst is the design and implementation of IT infrastructure. We have ongoing projects that include pre-construction planning and network design, implementation, support, and maintenance. This includes design and implementation of the following elements:

- Local Area Networks
- Wide Area Networks
- Virtual Server Environments
- Cloud Computing
- Microsoft, Linux, and other Server-Based Implementations
- Wireless Networks (LAN and Point-To-Point)
- Disaster Recovery and Redundant Systems
- Internet Access and Redundancy
- Secure Networks for Public Safety Applications
- Dedicated Cellular Network Connectivity for Public Safety
- Voice-over-IP, Video-over-IP, and other Quality-Of-Service Networks
- SCADA Networks

In addition to design and implementation services, we regularly work with our clients to procure cost-effective solutions through formal RFP processes.



## Project Management Services

One of our key differentiators is that, in addition to providing highly skilled technicians, we provide our clients with tremendously experienced Project Managers. These individuals work with public agencies over 75% of their time and have extensive knowledge of industry best practices. This combination of knowledge and experience has resulted in success stories from IT departments across the country.

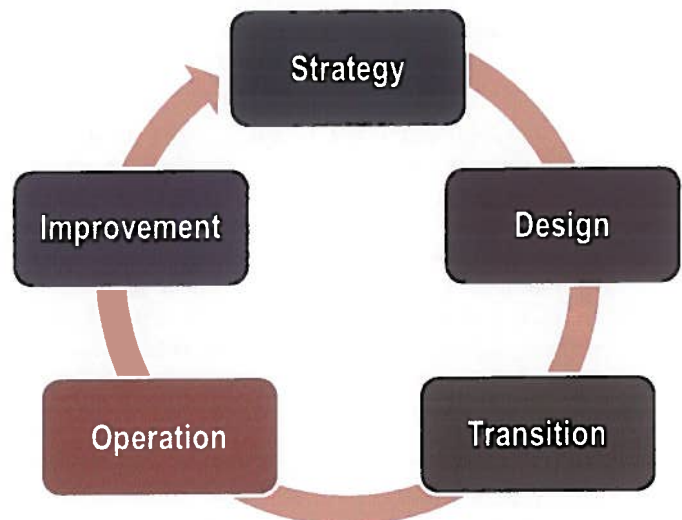
Our IT management practice area works with clients to improve the quality of their IT management and service delivery. We apply our knowledge in this area to each of our clients' situations, and customize our management style to fit their specific needs.

We provide our clients with a complete project management methodology that improves communication and delivery of services and lays the groundwork for high-quality, low-cost solutions that will 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 on budget
- **Budgeting** – Working with our client to maintain their IT budget and meet budgetary goals
- **Regular Communications** – Communicating upcoming goals, objectives, and the 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



## Telecommunications Consulting

Our telecommunications consulting practice originated as a national practice group within a large public accounting firm more than 25 years ago. Our practice separated from the accounting firm to maintain our product independence and control hourly rates.

This “audit trail” of *CLIENTFIRST*’s origin is an important distinction, because it demonstrates that we are a 25-year-old consulting practice with a new name. The stability, continuity, and connection of our staff are unique in the telecommunications consulting industry and provide our clients with a focused and experienced team of professionals.

We provide a wide breadth of professional services that include:

- Systems Evaluation and Assessments
- Telecommunications System Management Projects
- 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 Projects



We emphasize that we are a firm, because the telecommunications consulting industry is relatively small and contains many single practitioners. *CLIENTFIRST* is considered well above average among telecommunications and IT consulting firms in the total number of employees and the number and quality of services offered. The diverse capabilities of our staff provide the resources necessary to address any of your telecommunications and information technology needs.

Many of the industry's leading vendors recognize us nationally for our work, because they appreciate the fairness and objectivity we demonstrate when dealing with their organizations. This high level of visibility results in the best competitive proposals in response to ClientFirst's RFP documents and provides the information our clients need to make informed decisions and realize the best value for their purchasing dollar.