

**ADAMS COUNTY PURCHASE OF SERVICE AGREEMENT  
FOR A STAFFING REQUIREMENTS ANALYSIS OF THE INFORMATION  
TECHNOLOGY DEPARTMENT (2016.014)**

THIS AGREEMENT ("Agreement") is made this 10<sup>th</sup> day of November 2016, by and between the Adams County Board of County Commissioners, located at 4430 South Adams County Parkway, Brighton, Colorado 80601, hereinafter referred to as the "County," and Plante & Moran, PLLC, located at 27400 Northwestern Highway, Southfield, Michigan 48034, hereinafter referred to as the "Contractor." The County and the Contractor may be collectively referred to herein as the "Parties".

The County and the Contractor, for the consideration herein set forth, agree as follows:

**1. SERVICES OF THE CONTRACTOR:**

1.1. All work shall be in accordance with the attached RFP 2016.014 Staffing Requirements Analysis of the Information Technology Department and the Contractor's response to the RFP 2016.014 attached hereto as Exhibit A, and incorporated herein by reference. Should there be any discrepancy between Exhibit A and this Agreement the terms and conditions of this Agreement shall prevail.

1.2. Emergency Services: In the event the Adams County Board of County Commissioners declares an emergency, the County may request additional services (of the type described in this Agreement or otherwise within the expertise of the Contractor) to be performed by the Contractor. If the County requests such additional services, the Contractor shall provide such services in a timely fashion given the nature of the emergency, pursuant to the terms of this Agreement. Unless otherwise agreed to in writing by the parties, the Contractor shall bill for such services at the rates provided for in this Agreement.

**2. RESPONSIBILITIES OF THE COUNTY:** The County shall provide information as necessary or requested by the Contractor to enable the Contractor's performance under this Agreement.

**3. TERM:**

3.1. Term of Agreement: The Term of this Agreement shall be for one-year from the date of this Agreement.

3.2. Renewal Option: The County, at its sole option, may offer to renew this Agreement as necessary for up to two, one year renewals providing satisfactory service is given and all terms and conditions of this Agreement have been fulfilled. Such renewals must be mutually agreed upon in writing by the County and the Contractor.

**4. PAYMENT AND FEE SCHEDULE:** The County shall pay the Contractor for services furnished under this Agreement, and the Contractor shall accept as full payment for those services, the sum of sixty-seven thousand, five hundred dollars (\$67,500).

4.1. Payment pursuant to this Agreement, whether in full or in part, is subject to and contingent upon the continuing availability of County funds for the purposes hereof. In

the event that funds become unavailable, as determined by the County, the County may immediately terminate this Agreement or amend it accordingly.

5. **INDEPENDENT CONTRACTOR:** In providing services under this Agreement, the Contractor acts as an independent contractor and not as an employee of the County. The Contractor shall be solely and entirely responsible for his/her acts and the acts of his/her employees, agents, servants, and subcontractors during the term and performance of this Agreement. No employee, agent, servant, or subcontractor of the Contractor shall be deemed to be an employee, agent, or servant of the County because of the performance of any services or work under this Agreement. The Contractor, at its expense, shall procure and maintain workers' compensation insurance as required by law. **Pursuant to the Workers' Compensation Act § 8-40-202(2)(b)(IV), C.R.S., as amended, the Contractor understands that it and its employees and servants are not entitled to workers' compensation benefits from the County. The Contractor further understands that it is solely obligated for the payment of federal and state income tax on any moneys earned pursuant to this Agreement.**

6. **NONDISCRIMINATION:**

6.1. **The Contractor shall not discriminate against any employee or qualified applicant for employment because of age, race, color, religion, marital status, disability, sex, or national origin. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices provided by the local public agency setting forth the provisions of this nondiscrimination clause. Adams County is an equal opportunity employer.**

6.1.1. The Contractor will cause the foregoing provisions to be inserted in all subcontracts for any work covered by this Agreement so that such provisions will be binding upon each subcontractor, provided that the foregoing provisions shall not apply to contracts or subcontracts for standard commercial supplies or raw materials.

7. **INDEMNIFICATION:** The Contractor agrees to indemnify and hold harmless the County, its officers, agents, and employees for, from, and against any and all claims, suits, expenses, damages, or other liabilities, including reasonable attorney fees and court costs, arising out of damage or injury to persons, entities, or property, caused or sustained by any person(s) as a result of the Contractor's performance or failure to perform pursuant to the terms of this Agreement or as a result of any subcontractors' performance or failure to perform pursuant to the terms of this Agreement.

8. **INSURANCE:** The Contractor agrees to maintain insurance of the following types and amounts:

8.1. **Commercial General Liability Insurance:** to include products liability, completed operations, contractual, broad form property damage and personal injury.

8.1.1. Each Occurrence: \$1,000,000

8.1.2. General Aggregate: \$2,000,000

8.2. **Comprehensive Automobile Liability Insurance:** to include all motor vehicles owned, hired, leased, or borrowed.

8.2.1. Bodily Injury/Property Damage: \$1,000,000 (each accident)

8.2.2. Personal Injury Protection: Per Colorado Statutes

8.3. Workers' Compensation Insurance: Per Colorado Statutes

8.4. Professional Liability Insurance: to include coverage for damages or claims for damages arising out of the rendering, or failure to render, any professional services, as applicable.

8.4.1. Each Occurrence: \$1,000,000

8.4.2. This insurance requirement applies only to the Contractors who are performing services under this Agreement as professionals licensed under the laws of the State of Colorado, such as physicians, lawyers, engineers, nurses, mental health providers, and any other licensed professionals.

8.5. Adams County as "Additional Insured": The Contractor's commercial general liability, and comprehensive automobile liability, insurance policies and/or certificates of insurance shall be issued to include Adams County as an "additional insured" and shall include the following provisions:

8.5.1. Underwriters shall have no right of recovery or subrogation against the County, it being the intent of the parties that the insurance policies so affected shall protect both parties and be primary coverage for any and all losses resulting from the actions or negligence of the Contractor.

8.5.2. The insurance companies issuing the policy or policies shall have no recourse against the County for payment of any premiums due or for any assessments under any form of any policy.

8.5.3. Any and all deductibles contained in any insurance policy shall be assumed by and at the sole risk of the Contractor.

8.6. Licensed Insurers: All insurers of the Contractor must be licensed or approved to do business in the State of Colorado. Upon failure of the Contractor to furnish, deliver and/or maintain such insurance as provided herein, this Agreement, at the election of the County, may be immediately declared suspended, discontinued, or terminated. Failure of the Contractor in obtaining and/or maintaining any required insurance shall not relieve the Contractor from any liability under this Agreement, nor shall the insurance requirements be construed to conflict with the obligations of the Contractor concerning indemnification.

8.7. Endorsement: Each insurance policy herein required shall be endorsed to state that coverage shall not be suspended, voided, or canceled without thirty (30) days prior written notice by certified mail, return receipt requested, to the County.

8.8. Proof of Insurance: At any time during the term of this Agreement, the County may require the Contractor to provide proof of the insurance coverage or policies required under this Agreement.

## 9. WARRANTY:

9.1. The Contractor warrants and guarantees to the County that all work, equipment, and materials furnished under the Agreement are free from defects in workmanship and materials for a period of one year after final acceptance by the County. The Contractor further warrants and guarantees that the plans and specifications incorporated herein are free of fault and defect sufficient for Contractor to warrant the finished product after

completion date. Should the Contractor fail to proceed promptly in accordance with this guarantee, the County may have such work performed at the expense of the Contractor. ~~This section does not relieve the Contractor from liability for defects that become known after one year.~~

## **10. TERMINATION:**

- 10.1. For Cause: If, through any cause, the Contractor fails to fulfill its obligations under this Agreement in a timely and proper manner, or if the Contractor violates any of the covenants, conditions, or stipulations of this Agreement, the County shall thereupon have the right to immediately terminate this Agreement, upon giving written notice to the Contractor of such termination and specifying the effective date thereof.
- 10.2. For Convenience: The County may terminate this Agreement at any time by giving written notice as specified herein to the other party, which notice shall be given at least thirty (30) days prior to the effective date of the termination. If this Agreement is terminated by the County, the Contractor will be paid an amount that bears the same ratio to the total compensation as the services actually performed bear to the total services the Contractor was to perform under this Agreement, less payments previously made to the Contractor under this Agreement.

## **11. MUTUAL UNDERSTANDINGS:**

- 11.1. Jurisdiction and Venue: The laws of the State of Colorado shall govern as to the interpretation, validity, and effect of this Agreement. The parties agree that jurisdiction and venue for any disputes arising under this Agreement shall be with Adams County, Colorado.
- 11.2. Compliance with Laws: During the performance of this Agreement, the Contractor agrees to strictly adhere to all applicable federal, state, and local laws, rules and regulations, including all licensing and permit requirements. The parties hereto aver that they are familiar with § 18-8-301, et seq., C.R.S. (Bribery and Corrupt Influences), as amended, and § 18-8-401, et seq., C.R.S. (Abuse of Public Office), as amended, , the Clean Air Act (42 U.S.C. 7401-7671q), and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended, and that no violation of such provisions are present. The Contractor warrants that it is in compliance with the residency requirements in §§ 8-17.5-101, et seq., C.R.S. Without limiting the generality of the foregoing, the Contractor expressly agrees to comply with the privacy and security requirements of the Health Insurance Portability and Accountability Act of 1996 (HIPAA).
- 11.3. OSHA: The Contractor shall comply with the requirements of the Occupational Safety and Health Act (OSHA) and shall review and comply with the County's safety regulations while on any County property. Failure to comply with any applicable federal, state or local law, rule, or regulation shall give the County the right to terminate this agreement for cause.
- 11.4. Record Retention: The Contractor shall maintain records and documentation of the services provided under this Agreement, including fiscal records, and shall retain the records for a period of three (3) years from the date this Agreement is terminated. Said records and documents shall be subject at all reasonable times to inspection, review, or

audit by authorized Federal, State, or County personnel.

~~11.5. Assignability: Neither this Agreement, nor any rights hereunder, in whole or in part, shall be assignable or otherwise transferable by the Contractor without the prior written consent of the County.~~

11.6. Waiver: Waiver of strict performance or the breach of any provision of this Agreement shall not be deemed a waiver, nor shall it prejudice the waiving party's right to require strict performance of the same provision, or any other provision in the future, unless such waiver has rendered future performance commercially impossible.

11.7. Force Majeure: Neither party shall be liable for any delay or failure to perform its obligations hereunder to the extent that such delay or failure is caused by a force or event beyond the control of such party including, without limitation, war, embargoes, strikes, governmental restrictions, riots, fires, floods, earthquakes, or other acts of God.

11.8. Notice: Any notices given under this Agreement are deemed to have been received and to be effective: 1) Three (3) days after the same shall have been mailed by certified mail, return receipt requested; 2) Immediately upon hand delivery; or 3) Immediately upon receipt of confirmation that an E-mail was received. For the purposes of this Agreement, any and all notices shall be addressed to the contacts listed below:

Department: Adams County Information Technology  
Contact: Kevin Beach  
Address: 4430 South Adams County Parkway  
City, State, Zip: Brighton, Colorado 80601  
Phone: 720-523-6156  
E-mail: [kbeach@adcogov.org](mailto:kbeach@adcogov.org)

Department: Adams County Purchasing  
Contact: Anna Forristall  
Address: 4430 South Adams County Parkway  
City, State, Zip: Brighton, Colorado 80601  
Phone: 720-523-6297  
E-mail: [aforristall@adcogov.org](mailto:aforristall@adcogov.org)

Department: Adams County Attorney's Office  
Address: 4430 South Adams County Parkway  
City, State, Zip: Brighton, Colorado 80601  
Phone: 720.523.6116

Contractor: Plante & Moran, PLLC  
Contact: Adam Rujan  
Address: 27400 Northwestern Highway  
City, State, Zip: Southfield, Michigan 48034  
Phone: 800-544-0203  
E-mail: [adam.rujan@plantemoran.com](mailto:adam.rujan@plantemoran.com)

- 11.9. Integration of Understanding: This Agreement contains the entire understanding of the parties hereto and neither it, nor the rights and obligations hereunder, may be changed, modified, or waived except by an instrument in writing that is signed by the parties hereto.
- 11.10. Severability: If any provision of this Agreement is determined to be unenforceable or invalid for any reason, the remainder of this Agreement shall remain in effect, unless otherwise terminated in accordance with the terms contained herein.
- 11.11. Authorization: Each party represents and warrants that it has the power and ability to enter into this Agreement, to grant the rights granted herein, and to perform the duties and obligations herein described.
- 11.12. Confidentiality: All documentation related to this Agreement will become the property of Adams County. All documentation maintained or kept by Adams County shall be subject to the Colorado Open Records Act, C.R.S. 24-72-201 *et seq.* ("CORA"). The County does not guarantee the confidentiality of any records.

## **12. CHANGE ORDERS OR EXTENSIONS:**

- 12.1. Change Orders: The County may, from time to time, require changes in the scope of the services of the Contractor to be performed herein including, but not limited to, additional instructions, additional work, and the omission of work previously ordered. The Contractor shall be compensated for all authorized changes in services, pursuant to the applicable provision in the Invitation to Bid, or, if no provision exists, pursuant to the terms of the Change Order.
- 12.2. Extensions: The County may, upon mutual written agreement by the parties, extend the time of completion of services to be performed by the Contractor.

## **13. COMPLIANCE WITH C.R.S. § 8-17.5-101, ET. SEQ. AS AMENDED 5/13/08:** Pursuant to Colorado Revised Statute (C.R.S.), § 8-17.5-101, *et. seq.*, as amended May 13, 2008, the Contractor shall meet the following requirements prior to signing this Agreement (public contract for service) and for the duration thereof:

- 13.1. The Contractor shall certify participation in the E-Verify Program (the electronic employment verification program that is authorized in 8 U.S.C. § 1324a and jointly administered by the United States Department of Homeland Security and the Social Security Administration, or its successor program) or the Department Program (the employment verification program established by the Colorado Department of Labor and Employment pursuant to C.R.S. § 8-17.5-102(5)) on the attached certification.
- 13.2. The Contractor shall not knowingly employ or contract with an illegal alien to perform work under this public contract for services.
- 13.3. The Contractor shall not enter into a contract with a subcontractor that fails to certify to the Contractor that the subcontractor shall not knowingly employ or contract with an illegal alien to perform work under this public contract for services.
- 13.4. At the time of signing this public contract for services, the Contractor has confirmed the employment eligibility of all employees who are newly hired for employment to

perform work under this public contract for services through participation in either the E-Verify Program or the Department Program.

- 13.5. The Contractor shall not use either the E-Verify Program or the Department Program procedures to undertake pre-employment screening of job applicants while this public contract for services is being performed.
- 13.6. If the Contractor obtains actual knowledge that a subcontractor performing work under this public contract for services knowingly employs or contracts with an illegal alien, the Contractor shall: notify the subcontractor and the County within three (3) days that the Contractor has actual knowledge that the subcontractor is employing or contracting with an illegal alien; and terminate the subcontract with the subcontractor if within three days of receiving the notice required pursuant to the previous paragraph, the subcontractor does not stop employing or contracting with the illegal alien; except that the Contractor shall not terminate the contract with the subcontractor if during such three (3) days the subcontractor provides information to establish that the subcontractor has not knowingly employed or contracted with an illegal alien.
- 13.7. Contractor shall comply with any reasonable requests by the Department of Labor and Employment (the Department) made in the course of an investigation that the Department is undertaking pursuant to the authority established in C.R.S. § 8-17.5-102(5).
- 13.8. If Contractor violates this Section, of this Agreement, the County may terminate this Agreement for breach of contract. If the Agreement is so terminated, the Contractor shall be liable for actual and consequential damages to the County.

The remainder of this page is left blank intentionally.

IN WITNESS WHEREOF, the Parties have caused their names to be affixed hereto:

**ADAMS COUNTY MANAGER**

*Fodd Leopold*  
Fodd Leopold

11/10/16  
Date

**PLANTE & MORAN, PLLC**

*Ad R.*  
Signature

11-2-16  
Date

Adam Rujan  
Printed Name

PARTNER  
Title

**Attest:**  
Stan Martin, Clerk and Recorder

*Phannar*  
Deputy Clerk

Approved as to Form:

*D. Coet*  
Adams County Attorney's Office

**NOTARIZATION OF CONTRACTOR'S SIGNATURE:**

COUNTY OF Oakland

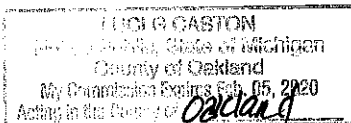
STATE OF Michigan )SS.

Signed and sworn to before me this 2nd day of NOVEMBER, 2016,

by Adam Rujan

*Lucie Gaston*  
Notary Public

My commission expires on: 02/05/20





## CONTRACTOR'S CERTIFICATION OF COMPLIANCE

Pursuant to Colorado Revised Statute, § 8-17.5-101, *et seq.*, as amended 5/13/08, as a prerequisite to entering into a contract for services with Adams County, Colorado, the undersigned Contractor hereby certifies that at the time of this certification, Contractor does not knowingly employ or contract with an illegal alien who will perform work under the attached contract for services and that the Contractor will participate in the E-Verify Program or Department program, as those terms are defined in C.R.S. § 8-17.5-101, *et seq.* in order to confirm the employment eligibility of all employees who are newly hired for employment to perform work under the attached contract for services.

### CONTRACTOR:

PLANTE MORAN  
Company Name

11-2-16  
Date

Ad R  
Signature

ADAM RUSAN  
Name (Print or Type)

PARTNER  
Title

Note: Registration for the E-Verify Program can be completed at: <https://www.vis-dhs.com/employerregistration>. It is recommended that employers review the sample "memorandum of understanding" available at the website prior to registering

**ADAMS COUNTY FORMAL REQUEST FOR PROPOSAL  
2016.014**

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**Addendum #2  
STAFFING REQUIREMENTS ANALYSIS OF THE  
INFORMATION TECHNOLOGY DEPARTMENT**

**All documents and Addenda related to this RFP  
will be posted on the Rocky Mountain Bid System at:  
<http://www.rockymountainbidsystem.com/Bids/ViewOpenSolicitations.asp>**

**Proposal issue date: May 19, 2016**

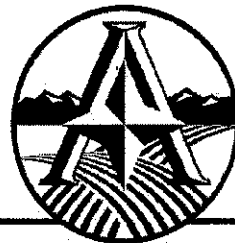
**Written questions regarding this RFP will be accepted through May 31, 2016**

**An Addendum to answer vendor submitted questions will be issued  
no later than June 9, 2016**

**Proposal Opening Date: June 20, 2016**

**Time: 2:00 pm**

**Location: Adams County Government Center  
4430 South Adams County Parkway  
Central Entrance Reception Desk  
Brighton, CO 80601**



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**ADAMS COUNTY**

**COLORADO**

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## **ADDENDUM #2**

**The purpose of this addendum is to answer vendor submitted questions for RFP 2016.014 Staffing Requirements Analysis of the Information Technology Department.**

1. What is the primary driver(s) or challenge(s) for this assessment?  
Large project list and long wait times for items on list.
2. What known gaps currently exist within your IT department?  
Current 5 year Strategic plan  
Project Management  
Development standard
3. Do you have an IT strategic plan?  
No  
Has this been aligned to the County's strategic plan?  
See above.  
Do you track/report on performance against this plan?  
See above.  
Is this information available for distribution?  
See above.
4. For those IT services provided by non-IT entities, will these people/groups be included in scope for the staffing assessment?  
No  
If so, will access to these resources be the same as IT staff?  
See above.
5. How many end users do you support today?  
1,400
6. How many IT leaders are within the organization today?  
Six:  
Their titles?  
IT Director, Applications Mgr, GIS Mgr, LAN/WAN/Telecom Mgr, Technical Services Mgr, Security Mgr.
7. How many contractors on average are you using in a given year?  
Four, not including vendors by department specific SoS.  
How many do you currently have?  
One
8. Are there any past customer/stakeholder surveys on satisfaction/gaps, etc.?  
Yes

9. What performance metrics exist today for each team?

IT's current performance metrics:

Application Services	Goal 2-High performing, fiscally sustainable government	Percentage availability of key IT applications and services, up-time (excludes planned maintenance)
Application Services	Goal 2-High performing, fiscally sustainable government	IT training average customer ratings (5 being highest)
Application Services	Goal 2-High performing, fiscally sustainable government	Tier II application calls
IT	Goal 2-High performing, fiscally sustainable government	IT customer satisfaction survey ratings (scale TBD)
Technical Services	Goal 2-High performing, fiscally sustainable government	Percentage of servers running in a virtualized environment
Technical Services	Goal 2-High performing, fiscally sustainable government	Total calls and emails to the Help Desk
Technical Services	Goal 2-High performing, fiscally sustainable government	Tier 1 Help Desk Ticket Time
Technical Services	Goal 2-High performing, fiscally sustainable government	Tier 2 Help Desk Ticket Time
Technical Services	Goal 2-High performing, fiscally sustainable government	Tier 3 Help Desk Ticket Time
Technical Services	Goal 2-High performing, fiscally sustainable government	Percentage of network uptime

10. Any part of the IT organization outsourced today? If so, what areas?

No, N/A

11. How many non IT like people exist, how many departments/areas of have them – what are they primarily doing and is talking to them in scope for this project?

Roughly six, in two departments, some doing GIS, some doing Business Analyst work. We will not include them in this study.

12. Who will the recommendations need to be approved/reviewed by?

The recommendations will be reviewed by a team across multiple management levels. If the recommendation has any financial impact, the County Commissioners will need to approve.

13. What existing methodologies are used today and how mature area they (service management, project management, development (waterfall/agile), etc.?)

Most of IT staff trained on ITIL, minimal project mgmt although we are filling the new position, development is minimal so process is young.

14. How many projects are you normally running, is there a backlog and if so, how many?

The average number of projects each month is approx. 125

Total projects that are open and in progress: 99

Backlog: 14 haven't started but have start dates

Backlog: 11 are On Hold with no start dates assigned

15. Who within the IT department tracks time, within what system and how are their hours allocated (% today is support vs. strategic and or project work)?  
We use TrackIt for time spent on Help Desk and projects.
16. How many outstanding help desk tickets?  
115 (as of 05-30-16).  
Can you provide any stats?  
Yes
17. Are there SLAs in place today? If so, what is the main scope of the SLAs?  
No
18. Total applications supported? How many in-house developed, packages, SaaS as an estimated %?  
All applications are listed in the RFP, three are developed in-house.
19. Has any application rationalization been completed?  
No
20. Are you performing training for any applications listed or specific applications only?  
MS Office applications are trained monthly, all other apps are upon request.
21. Do you have formal release and/or change management process in place?  
Yes
22. What databases are you primarily using? (i.e. SQL, Oracle, DB2, etc.)  
All three that are listed, only one on DB2, three on Oracle, all others SQL.
23. Do you have any general database guidelines/best practices you follow?  
Best practices, yes.
24. How tight do you follow compliance on patches, etc. 1 rev back, 2, etc.? What % does your current infrastructure and applications fall into?  
The IT department monitors several external sources for security patch notifications and information. As vendors release security updates, the updates are reviewed and to affected systems based on criticality. Some business applications may require older versions of software and security updates or other compensating controls are applied to these systems to maintain compatibility. Approximately 90% of systems are within 2 revisions of latest code.
25. Do you have an Enterprise Architectural design and strategic plan in place?  
No
26. What type of facility support do you handle today?  
Need further clarification on the question. If referring to a local server rooms, we do have two. If referring to the Facilities dept, they do have an app we support.
27. Do you currently support your external website for constituents?  
No

28. Can the County please provide additional context for this RFP?

- a. Is the County trying to determine the staffing required only for the functions currently performed by State staff?  
No
- b. Is the County re-evaluating its current outsourcing agreement and trying to determine what IT responsibilities should be in-sourced vs. outsourced?  
All of the IT function is in-sourced.
- c. Is the County trying to determine the number of staff required to deliver potentially in-sourced responsibilities?  
See above.

29. Because the level of effort for staff assessment will vary depending on the level of detail that the County wants, can the County provide a budget range for this project so that we can better convey the level of detail we will be able to deliver?

The County asks that you respond appropriately to the Scope of Work contained in the RFP.

**The Proposal due date and time shall remain June 20, 2016 at 2:00 p.m.**

**To respond in person: Adams County Government Center, 4430 South Adams County Parkway, First Floor Central Entrance Reception Desk, Brighton, Colorado 80601.**

**To respond via mail: Adams County Government Center, 4430 South Adams County Parkway, 4<sup>th</sup> Floor, Suite C4000C, Brighton, Colorado 80601.**

**Please incorporate this information into your RFP response.**

**End of Addendum #2**

**ADAMS COUNTY FORMAL REQUEST FOR PROPOSAL  
2016.014**

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**Addendum #1  
STAFFING REQUIREMENTS ANALYSIS OF THE  
INFORMATION TECHNOLOGY DEPARTMENT**

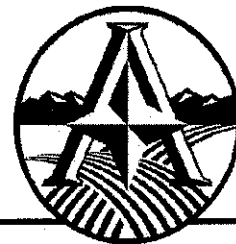
**All documents and Addenda related to this RFP  
will be posted on the Rocky Mountain Bid System at:  
<http://www.rockymountainbidsystem.com/Bids/ViewOpenSolicitations.asp>**

**Proposal issue date: May 19, 2016**

**Written questions regarding this RFP will be accepted through May 31, 2016**

**An Addendum to answer vendor submitted questions will be issued  
no later than June 6, 2016**

**Proposal Opening Date: ~~June 14, 2016~~  
Time: 2:00 pm  
Location: Adams County Government Center  
4430 South Adams County Parkway  
Central Entrance Reception Desk  
Brighton, CO 80601**



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**ADAMS COUNTY**  
**COLORADO**

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**ADDENDUM #1**

**The purpose of this addendum is to change the RFP due date for 2016.014 Staffing Requirements Analysis of the Information Technology Department.**

**The new Proposal opening due date and time shall be June 20, 2016 at 2:00 p.m. at the Adams County Government Center, 4430 South Adams County Parkway, First Floor Central Entrance Reception Desk, Brighton, Colorado 80601.**

**An addendum to answer vendor submitted questions will be released at a later date.**

**Please incorporate this information into your RFP response.**

**End of Addendum #1**



**ADAMS COUNTY FORMAL REQUEST FOR PROPOSAL**

**2016.014**

**STAFFING REQUIREMENTS ANALYSIS OF THE  
INFORMATION TECHNOLOGY DEPARTMENT**

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**An Addendum to answer vendor submitted questions will be issued  
no later than June 6, 2016**

**Proposal Opening Date: June 14, 2016**

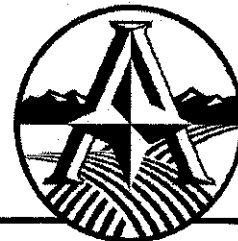
**Time: 2:00pm**

**Location: Adams County Government Center**

**4430 South Adams County Parkway**

**Central Entrance Reception Desk**

**Brighton, CO 80601**



**ADAMS COUNTY**

**COLORADO**

## **GENERAL INSTRUCTIONS**

1. The Adams County Board of Commissioners by and through its Purchasing Division of the Finance Department is accepting proposals for a Staffing Requirements Analysis of the Information Technology Department.
2. **All documents related to this RFP will be posted on the Rocky Mountain Bid System at: <http://www.rockymountainbidsystem.com/Bids/ViewOpenSolicitations.asp>**
  - 2.1. Interested parties must register with this service to receive these documents.
  - 2.2. This service is offered free or with an annual fee for automatic notification services.
3. Written questions may be submitted through May 31, 2016. All questions are to be submitted to Anna Forristall, Contract Administrator by email at [aforristall@adcgov.org](mailto:aforristall@adcgov.org).
4. An Addendum to answer all vendor submitted questions will be issued no later than June 6, 2016.
5. Proposals
  - 5.1. Sealed proposals **MUST** be received by 2:00 p.m. (MT) on June 14, 2016 at the Adams County Government Center. Late proposals will not be accepted nor will additional time be granted to a specific contractor.
  - 5.2. Pricing **MUST** be sealed separately with proposal submission. Please provide two copies of submitted pricing in a sealed envelope clearly marked with the Company Name and RFP #. Do not submit any pricing/costs directly into the Proposal.  
  
**Mail or Delivery Service Address;**  
Adams County Government Center  
Attn: Anna Forristall, Contract Administrator RFP-AF-2016.014  
4430 South Adams County Parkway, Ste. C4000A  
Brighton, CO 80601-8212  
  
**Hand Deliveries** are to be made to the address above, and submitted to the First Floor Lobby Receptionist.
  - 5.3. The proposal opening time shall be according to our clock.
  - 5.4. Proposals will be publicly opened and the names of the companies submitting proposals will be read aloud.
  - 5.5. Proposals may be mailed or delivered in person and **must be** in a sealed envelope clearly labeled with Company Name, Proposal Number and Project Title.

- ~~5.6. No proposals will be accepted after the due date and time established above except by written addendum.~~
- 5.7. Seven (7) hard copies: One (1) paper original, six (6) paper copies, and one (1) CD (PDF) of the proposal are required. The PDF must be one single file. Brochures or other supportive documents may be included with the proposal narrative. If brochures or other supportive documents are included, then it is requested that one (1) set be submitted with the proposal.
- 5.8. The proposal must be submitted on a CD or Thumb Drive in a single PDF file not to exceed 20 pages.
- 5.9. The two proposal signature pages "**CONTRACTOR'S CERTIFICATION OF COMPLIANCE**" pursuant to Colorado Revised Statute (C.R.S.), § 8-17.5-101, *et. seq.*, as amended 5/13/08, and the "**PROPOSAL FORM**" acknowledging the receipt of addendum(s) must be signed. These are the **last two pages of the RFP**.
- 5.10. Proposals may not be withdrawn after date and hour set for closing. Failure to enter contract or honor the purchase order will be cause for removal of supplier's name from the Vendor's List for a period of twelve (12) months from the date of this opening.
- 5.11. In submitting the proposal, the vendor agrees that acceptance of any or all proposals by the Purchasing Manager within a reasonable time or period constitutes a contract. No delivery shall become due or be accepted unless a purchase order shall first have been issued by the Purchasing Division.
- 5.12. The County assumes no responsibility for late deliveries of mail on behalf of the United States Post Office or any other delivery system.
- 5.13. The County assumes no responsibility for a proposal being either opened early or improperly routed if the envelope is not clearly marked on the outside with the following:

**STAFFING REQUIREMENTS ANALYSIS OF THE INFORMATION  
TECHNOLOGY DEPARTMENT RFP 2016.014**

- 5.14. In the event of a situation severe enough to cause the Adams County Board of Commissioners to close the County offices for any reason, the Purchasing Manager has the prerogative of rescheduling the proposal opening time and date. No proposal will be considered above all other proposals by having met the proposal opening time and date requirements to the exclusion of those who were unable to present their proposal due to a situation severe enough to cause the Board of Commissioners to close the County offices.

~~5.15. Proposal must be submitted in the format supplied and/or described by the County. Failure to submit in the format provided may be cause for rejection of the proposal. Proposals must be furnished exclusive of taxes.~~

5.16. No award will be made to any person, firm, or corporation, which is in arrears upon any obligation to the County.

5.17. If submitting a joint venture proposal or a proposal involving a partnership arrangement, articles of partnership stating each partner's responsibilities shall be furnished and submitted with the proposal.

5.18. The County reserves the right to waive any irregularities or informalities, and the right to accept or reject any and all proposals, including but not limited to:

5.18.1. Any Proposal which does not meet bonding requirements, or,

5.18.2. Proposals which do not furnish the quality, or,

5.18.3. Offer the availability of materials, equipment or services as required by the specifications, description or scope of services, or,

5.18.4. Proposals from offerors who lack experience or financial responsibility, or,

5.18.5. Proposals which are not made to form.

5.19. The Board of County Commissioners may rescind the award of any proposal within one week thereof or at its next regularly scheduled meeting; whichever is later, when the public interest will be served thereby.

5.20. Issuance of this solicitation does not commit the County to award any Agreement or to procure or Agreement for any equipment, materials or services.

5.21. If a formal Agreement is required, the Contractor agrees and understands that a Notice of Award does not constitute an Agreement or create a property interest of any nature until an Agreement is signed by the Awardee and the Board of County Commissioners and/or their authorized designee.

5.22. Only sealed proposals received by the Purchasing Division of the Finance Department will be accepted; proposals submitted telephone, email, or facsimile machines are not acceptable.

5.23. All documentation submitted in response to this solicitation will become the property of Adams County. All documentation maintained or kept by Adams County shall be subject to the Colorado Open Records Act, C.R.S. 24-72-201 *et. seq.* ("CORA"). Accordingly, respondents are discouraged from providing information that they consider confidential, privileged, and/or trade secrets as part of a response to this solicitation. Any portions of submissions that are reasonably considered confidential should be clearly marked. The County does not guarantee the confidentiality of any records.

6. Adams County is an equal opportunity employer.
7. The County ensures that disadvantaged business enterprises will be afforded full opportunity to submit bids in response to all invitations and will not be discriminated against on the grounds of race, color, national origin, age, gender, or disability in consideration for an award.
8. COOPERATIVE PURCHASING: Adams County encourages cooperative purchasing in an effort to assist other agencies to reduce their cost of bidding and to make better use of taxpayer dollars through volume purchasing. Contractor(s) may, at their discretion, agree to extend the prices and/or terms of the resulting award to other state or local government agencies, school districts, or political subdivisions in the event they would have a need for the same product/service. Usage by any entity shall not have a negative impact on Adams County in the current term or in any future terms.

The Contractor(s) must deal directly with any governmental agency concerning the placement of purchase orders/agreements, freight/delivery charges, contractual disputes, invoices, and payments. Adams County shall not be liable for any costs or damages incurred by any other entity.

9. **INSURANCE:** The Contractor agrees to maintain insurance of the following types and amounts:
  - 9.1. Commercial General Liability Insurance: to include products liability, completed operations, contractual, broad form property damage and personal injury.
 

9.1.1. Each Occurrence	\$1,000,000
9.1.2. General Aggregate	\$2,000,000
  - 9.2. Comprehensive Automobile Liability Insurance: to include all motor vehicles owned, hired, leased, or borrowed.
 

9.2.1. Bodily Injury/Property Damage	\$1,000,000 (each accident)
9.2.2. Personal Injury Protection	Per Colorado Statutes
  - 9.3. Workers' Compensation Insurance: Per Colorado Statutes
  - 9.4. Professional Liability Insurance: to include coverage for damages or claims for damages arising out of the rendering, or failure to render, any professional services.
 

9.4.1. Each Occurrence	\$1,000,000
9.4.2. This insurance requirement applies only to Contractors who are performing services under this Agreement as professionals licensed under the laws of the State of Colorado, such as physicians, lawyers, engineers, nurses, mental health providers, and any other licensed professionals.	
  - 9.5. The Contractor's commercial general liability, and comprehensive automobile liability insurance policies and/or certificates of insurance shall be issued to include Adams County as an "additional insured," and shall include the following provisions:

- ~~9.5.1. Underwriters shall have no right of recovery or subrogation against the County, it being the intent of the parties that the insurance policies so affected shall protect both parties and be primary coverage for any and all losses resulting from the actions or negligence of the Contractor.~~
- 9.5.2. The insurance companies issuing the policy or policies shall have no response against the County for payment of any premiums due or for any assessments under any form of any policy.
- 9.5.3. Any and all deductibles contained in any insurance policy shall be assumed by and at the sole risk of the Contractor.
- 9.6. All insurers of the Contractor must be licensed or approved to do business in the State of Colorado. Upon failure of the Contractor to furnish, deliver and/or maintain such insurance as provided herein, this Agreement, at the election of the County, may be immediately declared suspended, discontinued, or terminated. Failure of the Contractor in obtaining and/or maintaining any required insurance shall not relieve the Contractor from any liability under this Agreement, nor shall the insurance requirements be construed to conflict with the obligations of the Contractor concerning indemnification.
- 9.7. Each insurance policy herein required shall be endorsed to state that coverage shall not be suspended, voided, or canceled without thirty (30) days prior written notice by certified mail, return receipt requested, to the County.
- 9.8. At any time during the term of this Agreement, the County may require the Contractor to provide proof of the insurance coverage's or policies required under this Agreement.
- 9.9. The Contractor shall not commence work under this contract until they have submitted to the County and received approval thereof, certificates of insurance showing that they have complied with the foregoing insurance.
- 9.10. All referenced insurance policies and/or certificates of insurance shall be issued to include Adams County as an "additional insured." The name of the proposal or project must appear on the certificate of insurance.
- 9.11. Underwriters shall have no right of recovery or subrogation against the County; it being the intent of the parties that the insurance policies so affected shall protect both parties and be primary coverage for any and all losses covered by the described insurance.
- 9.12. The clause entitled "Other Insurance Provisions" contained in any policy including the County as an additional insured shall not apply to The County.
- 9.13. If any of the said policies shall be or at any time become unsatisfactory to the County as to form or substance, or if a company issuing any such policy shall be or at any time become unsatisfactory to the County, the Contractor shall promptly obtain a new policy, submit the same to the Purchasing Manager of Adams County for approval and thereafter submit a certificate of insurance as herein above provided. Upon failure of the Contractor to furnish, deliver and maintain such insurance as provided herein, this

~~contract, at the election of the County, may be immediately declared suspended, discontinued or terminated.~~

10. Contractor shall comply with the requirements of the Occupational Safety and Health Act (OSHA) and shall review and comply with the County's safety regulations while on any County property. Failure to comply with any applicable federal, state or local law, rule, or regulation shall give the County the right to terminate this agreement for cause.
11. COMPLIANCE WITH C.R.S. § 8-17.5-101, ET. SEQ. AS AMENDED 5/13/08: Pursuant to Colorado Revised Statute (C.R.S.), § 8-17.5-101, *et. seq.*, as amended 5/13/08, the Contractor shall meet the following requirements prior to signing this Agreement (public contract for service) and for the duration thereof:
  - 11.1. The Contractor shall certify participation in the E-Verify Program (the electronic employment verification program that is authorized in 8 U.S.C. § 1324a and jointly administered by the United States Department of Homeland Security and the Social Security Administration, or its successor program) or the Department Program (the employment verification program established by the Colorado Department of Labor and Employment pursuant to C.R.S. § 8-17.5-102(5)) on the attached certification.
  - 11.2. The Contractor shall not knowingly employ or contract with an illegal alien to perform work under this public contract for services.
  - 11.3. The Contractor shall not enter into a contract with a subcontractor that fails to certify to the Contractor that the subcontractor shall not knowingly employ or contract with an illegal alien to perform work under this public contract for services.
  - 11.4. At the time of signing this public contract for services, the Contractor has confirmed the employment eligibility of all employees who are newly hired for employment to perform work under this public contract for services through participation in either the E-Verify Program or the Department Program.
  - 11.5. The Contractor shall not use either the E-Verify Program or the Department Program procedures to undertake pre-employment screening of job applicants while this public contract for services is being performed.
  - 11.6. If Contractor obtains actual knowledge that a subcontractor performing work under this public contract for services knowingly employs or contracts with an illegal alien, the Contractor shall: notify the subcontractor and the County within three days that the Contractor has actual knowledge that the subcontractor is employing or contracting with an illegal alien; and terminate the subcontract with the subcontractor if within three days of receiving the notice required pursuant to the previous paragraph, the subcontractor does not stop employing or contracting with the illegal alien; except that the Contractor shall not terminate the contract with the subcontractor if during such three days the subcontractor provides information to establish that the subcontractor has not knowingly employed or contracted with an illegal alien.

11.7. Contractor shall comply with any reasonable requests by the Department of Labor and Employment (the Department) made in the course of an investigation that the Department is undertaking pursuant to the authority established in C.R.S. § 8-17.5-102(5).

11.8. If Contractor violates this Section, of this Agreement, the County may terminate this Agreement for breach of contract. If the Agreement is so terminated, the Contractor shall be liable for actual and consequential damages to the County.

**End General Information**

The remainder of this page is left blank intentionally.



## SCOPE OF WORK

### ADAMS COUNTY REQUEST FOR PROPOSAL FOR A STAFFING REQUIREMENTS ANALYSIS OF THE INFORMATION TECHNOLOGY DEPARTMENT

Adams County, Colorado (the "County") is requesting proposals to conduct a staffing requirements analysis of the Adams County Information Technology Department. The Adams County Information Technology Department has approximately 39 authorized full-time equivalent employees. The County seeks recommendations on staffing levels for the Information Technology Department based on evaluations of workload requirements and best-practice approaches to effective and efficient service delivery. This project will include analysis of the physical and human resources used in the department's service delivery model for the purpose of making recommendations for efficient staffing operations of the following divisions:

1. Application Services;
2. Technical and Security Services;
3. Geographic Information Services; and
4. Network and Telecommunications.

Information Technology - Purpose Statement - Information Technology's (IT) purpose is to deliver exceptional value and quality of life through the deployment and support of innovative technologies. IT is organized into the following divisions:

- The *Application Services* division manages the procurement, installation, administration, maintenance, development, and the upgrades required of core County business software applications. In addition, Applications Services provides training and second tier help desk support.
  - Procurement - together with the Purchasing Division, Application Services works with vendors to acquire new application systems, software and hardware.
  - Systems Architecture - designs application infrastructure to meet vendor requirements for application systems and business specifications while adhering to the County standards of supported technology, performance, scalability, and sustainability.
  - Systems Installation and Upgrades - installs, upgrades, maintains, configures, and tests complex software applications.
  - Systems Administration and Maintenance - maintains user/security configurations adhering to security best practices, runtime monitoring, performance tuning, licensing, and system configuration adjustments. Performs maintenance through minor and major patches, system upgrades, platform migrations, and complete system conversions.
  - Database Administration - database installations and design; security configuration; backup and recovery tasks; performance tuning; and programming stored procedures and triggers.
  - Systems and Business Solutions Development - develops and implements systems and business solutions to meet County business needs; customization of

software systems using a wide array of scripting, programming languages, and reporting tools; integrating various internal and external applications and systems using application programming interfaces.

- Technical Consultation – consults with departments to provide technology solutions that meet County business needs while also aligning with the existing IT infrastructure.
- Project Management – initiates, plans, executes, monitors, and completes application related projects as defined in the core services listed above.
- Training – provides end user software training in a variety of formats including hands-on classroom instruction, documentation, and on-line tutorials.
- Help Desk Support – provides high level customer service through second tier help desk support.

Partial list of supported applications:

- |                                   |                          |   |
|-----------------------------------|--------------------------|---|
| ▪ Accela                          | ▪ Granicus               | ▪ CSE Contempt - Old                            |
| ▪ Articulate                      | ▪ GTS                    | ▪ CSE Tracking - Old                            |
| ▪ Aurigo                          | ▪ JD EDWARDS             | ▪ Financial Model - Old                         |
| ▪ MasterWorks                     | ▪ KOFAX                  | ▪ Investigation & Referrals - Old               |
| ▪ BusinessObjects                 | ▪ MainStar               | ▪ Knowledge Lake - Old                          |
| ▪ Enterprise                      | ▪ Mimix                  | ▪ Records Management - Old                      |
| ▪ Cartegraph                      | ▪ Misc. Access Databases | ▪ Scheduler - Old                               |
| ▪ Chameleon                       | ▪ MainStar               | ▪ SCOPE - Old                                   |
| ▪ Civic Plus / Neon               | ▪ Mimix                  | ▪ SharePoint - Old                              |
| ▪ Rain                            | ▪ Misc. Access Databases | ▪ State database synchronization programs - Old |
| ▪ CME                             | ▪ Assure - NEW           | ▪ Transform Filer - Old                         |
| ▪ Compliance Suite                | ▪ eDocs - New            | ▪ Websites - Old                                |
| ▪ Create!Form                     | ▪ Kofax - New            |   |
| ▪ Creditron                       | ▪ QMatic - New           |   |
| ▪ Crystal Reports                 | ▪ RightFax - New         |   |
| ▪ Custom Application Integrations | ▪ AppX - Old             |   |
| ▪ Custom Web Apps                 | ▪ CFC Dashboard - Old    |   |
| ▪ Event Pro                       | ▪ CFC Photo - Old        |   |
| ▪ FASTER                          | ▪ Chafee - Old           |   |
| ▪ GoAnywhere                      |                          |   |

- The ***Technical and Security Services*** division maintains a consistent, secure, and reliable computing infrastructure. This division functions to provide effective and timely customer service while maintaining the County's computers and servers. All County employees using a computer are valued customers of this division, and we understand that the work of the County's employees is of extreme value to the County's overall goals.

- Telecommunications Support and Infrastructure – supports and maintains the variety of telephone switches, voicemail systems, communications servers, and telephones throughout the County.
- Development and Support of Infrastructure – designs, plans, and installs new network and telecommunications infrastructure and equipment as required to accommodate new County facilities, and changes to existing facilities.
- Help Desk Support – provides customer service, for telecommunications related issues, and maintains the County telephone directories.

The Information Technology Department has a 2016 approved budget of \$6.57 million, consisting of:

- Personnel - \$2.96 million
- Charges for services - 2.46 million
- O&M - .37 million
- Capital - .78 million

The County seeks analysis and recommendations that will enable the County to make cost-effective use of organizational resources. This includes a comprehensive staffing requirement analysis, which will include a staff classification evaluation.

This project should begin with obtaining an understanding of Adams County's current service delivery expectations that impact staffing. The project team should achieve an understanding of applications, infrastructure, devices, technologies, organizational support requirements, other organizational IT support teams, current IT staffing levels and staffing mix, relevant operational policies and standards, staff training policies and procedures, organizational structure and reporting authorities, facilities, divisional budgets, County leave policies and departmental leave usage, and well as any other relevant information required for the project. Contractor shall utilize IT Department and customer end-user interviews, surveys, and other means to determine current organizational satisfaction, need, and future business requirements.

**Deliverables:**

The primary deliverable is an analysis and recommendations for staff utilization, including total staff deployment, staffing (position) mix, and divisional organizational structure in a manner that both will enable the IT Department to deliver outstanding service and support in an organizationally aligned, collaborative, and highly efficient manner.

Additional deliverables include recommendations regarding opportunities for strategy, service delivery, project management, performance measurement, applications, data storage, or technology improvement that were learned during the staffing analysis.

All recommendations will be geared towards increasing IT efficiency, effectiveness, alignment and maturity. Contractor will have sufficient experience with other IT enterprises, including governmental entities, to understand comparable workload, complexity and performance characteristics of an IT Department.

All recommendations for staffing, procedural or resource changes will include an estimate of financial impacts and alternatives.

**Additional Considerations:**

Currently, there are other departments that provide IT or IT-like services. As part of the project, the Contractor will consider whether some or all of these non-centralized IT Department service areas could be consolidated with other County IT service divisions to create operational and/or financial efficiencies. Contractor will provide recommendations of costs and benefits of the existing structure compared to consolidation alternatives.

**Submittals/Response Content and Format:**

1. Responses will address all of the content delineated in the Scope of Work.
2. Responses will present a project plan with specific deliverables and milestones and dates of delivery for each.
3. Responses will include project budgets for each of the three separate divisional analyses and a combined project budget including estimated project hours by phase.
4. Describe how the team will accomplish the work in an effective and timely manner. Include information regarding:
  - 4.1 Philosophy, approach and specific awareness of the issues, problems, and opportunities.
  - 4.2 Management approach to ensure effective coordination with the County.
  - 4.3 General organization of the Contractor for this project, including the responsibilities of key individuals.
  - 4.4 Scheduling for project's main tasks and activities.
  - 4.5 Technical expertise and quality control systems.
5. Describe the capacity of the consulting firm to do the work. Identify the percentage of time that the key individuals of the team are committed to the project.
6. Hourly Billing Rates of personnel.
7. Consultant shall submit the cost of services with the proposal. A total lump sum fee shall be submitted for the entire RFP, and shall be further broken out at a minimum by the tasks listed in this RFP.
8. The proposal submittal is not intended to be an expensive, elaborate document. It should be well composed for simplicity and ease of understanding.

**Evaluation Criteria:**

Responses will be evaluated on the following criteria:

1. Previous experience and success in developing Information Technology Department staffing models, organizational redesign and process improvement;
2. Staff assigned to the project, including experience and expertise in the project area;
3. Project plan;
4. Cost; and
5. Quality and content of proposal.

**End of Scope of Work**

The remainder of this page is left blank intentionally.

RFP 2016.014 PROPOSAL TO PROVIDE STAFFING REQUIREMENTS ANALYSIS OF THE IT DEPARTMENT

# EXHIBIT A

{Get there.}

Technical Proposal

plante moran

audit • tax • consulting • wealth management



Plante & Moran, PLLC  
27400 Northwestern Highway  
P.O. Box 307  
Southfield, MI 48037-0307  
Tel: 248.352.2500  
Fax: 248.352.0018  
plantemoran.com

June 17, 2016

Anna Forristall  
Contract Administrator  
Adams County Government Center  
4430 South Adams County Parkway, Ste. C4000A  
Central Entrance Reception Desk  
Brighton, CO 80601-8212

Dear Anna:

Plante & Moran, PLLC (Plante Moran) is pleased to respond to the County's Request for Proposals (RFP) to provide a staffing requirements analysis of the Information Technology Department. We are excited about the possibility of working with the County on this important initiative.

As one of the largest consulting and accounting firms nationally, we have extensive experience in serving local governments like Adams County. Over 200 current public sector clients have established Plante Moran as a leader in this industry. Our government consulting team brings specific knowledge and experience gained from working with our clients in conducting IT related assessments and developing associated organizational plans. We offer the following benefits:

- **Proven methodology and approach**, based on over 30 years' experience in providing technology services for municipal clients.
- **Complete independence** from all public sector software providers, which allows us to assist in objective assessments and plans that best meet the needs of the County.
- **A strong project team**, blending information technology governance, organization, operations, systems, and best practices expertise.
  - Trained professionals in **best practice technology management and service** frameworks, including Control Objectives for Information and Related Technology (COBIT), Information Technology Infrastructure Library (ITIL), International Organization for Standardization (ISO), and National Institute of Standards and Technology (NIST).
  - Certified experts in **information security**, including the following designations: Certified Information Systems Auditor (CISA), Certified Information Security Manager (CISM), Certified Information Systems Security Professional (CISSP), Qualified Security Assessor (QSA), Certified Ethical Hacker (CEH), and Certified Expert Penetration Tester (CEPT).
  - Recognized leaders in **technology governance**. Our proposed engagement partner, Adam Rujan, recently authored a chapter on IT Governance for the book CIO Leadership for Cities and Counties, published by the Public Technology Institute.
  - Certified **project management** professionals and members of national and local organizations dedicated to improving the technology and financial operations of local government including Public Technology Institute (PTI), Government Management Information Sciences (GMIS), Government Finance Officers Association (GFOA), and International City/County Management Association (ICMA).

• **Significant experience** performing IT organizational assessments and developing staffing plans for local government clients. Sample clients include:

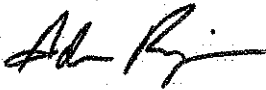
- Marin County, CA
- Coconino County, AZ
- Johnson County, KS
- Macomb County, MI
- Santa Barbara County, CA
- City of Long Beach, CA
- City of Des Moines, IA
- City of Corpus Christi, TX
- City of Arvada, CO
- City of Peoria, AZ
- City of Seattle, WA
- City of Tacoma, WA

- **A high level of client satisfaction** reflected by providing assessment services for local government clients who request subsequent strategic planning, solution selection, or implementation management assistance.

We believe that based upon these benefits and the quality of our team, we are well qualified to provide objective and comprehensive assessment services for the City. We encourage you to call our references as you perform your due diligence. You will find that they will attest to the quality of our work. If you have any questions concerning this proposal, please contact me at 1-800-544-0203.

Sincerely,

**PLANTE & MORAN, PLLC**



Adam Rujan, Partner



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# 1. About Us

## 1.1 OUR QUALIFICATIONS

Founded in 1924, Plante Moran is one of the largest management consulting and certified public accounting firm in the United States. We have been providing technology assessment and planning services to public sector clients for more than 30 years, which we believe is the greatest number of years of continuous consulting experience of any firm providing similar services to the public sector. The following summarizes our qualifications "by-the-numbers."

The following graphic summarizes our qualifications "by-the-numbers."

1	Experienced team
30+	Years of operations improvement and internal audit to governmental organizations
50+	Years of government management consulting experience
90+	Years in business
150+	Management consulting engagements in the past five years
200+	Recurring government clients
300+	Process improvement best practices organized around public sector process areas

Plante Moran is guided by our philosophy, which is based on certain core values and perhaps best expressed in the condensed form by our Golden Rule... "We care." We care about our clients, we care about our work, and we care about each other. We truly believe that this simple, sincere philosophy is what makes our firm unique and is the key to our success. A prime example of this philosophy being more than just words on paper is our firm's selection to FORTUNE magazine's list of "100 Best Companies To Work For" in America for the 18<sup>th</sup> straight year. As one of the top ranked consulting and accounting firms in the nation, we believe that satisfied staff leads to satisfied clients – and we take great pride in the quality of services we provide to our clients.

Just within the last five years, we have performed over 40 IT assessment and planning engagements for local governments. We encourage you to call our references as you perform your due diligence. You will find that they will attest to the quality of our work.

## 1.2 REFERENCES

Previous experience and success in developing Information Technology Department staffing models, organizational redesign and process improvement.

Just within the last five years, we have performed over 40 IT assessment and planning engagements for local governments. We encourage you to call our references as you perform your due diligence. You will find that they will attest to the quality of our work.

**City of Carlsbad, CA**

Mr. Gordon Peterson (retired)  
IT Director  
1200 Carlsbad Village Drive  
Carlsbad, CA 92008

Current City Manager  
Mr. Chuck McBride  
manager@carlsbadca.gov  
760-434-2821

**City of Seattle, WA**

Mr. Michael Mattmiller  
IT Director  
700 Fifth Ave, Suite 2700  
Seattle, WA 98124  
206.684.0600  
Michael.mattmiller@seattle.gov

**City of Chandler, AZ**

Mr. Steven Philbrick  
Chief Information Officer  
175 South Arizona Avenue  
Chandler, AZ 85225  
480-782-2441  
Steven.philbrick@chandleraz.gov

**Macomb County, MI**

Mark Delden  
Assistant County Executive  
1 S. Main Street  
Mt. Clemons, MI 48043  
586.469.7001  
deldin@macombgov.org

**IT Assessment**

Assisted the City in performing a comprehensive IT Assessment process. Targeted areas of focus include reviewing the City's IT organizational structure and IT Strategic Plan, performing benchmarking of the City's IT practices to other peers, reviewing various City's IT management processes and reviewing the City's technologies and making recommendations for improvement to: enterprise applications, data warehousing/business intelligence and cloud-based technologies.

**IT Organizational Assessment**

Conducted an organizational assessment for the City's Department of Information Technology. The Department has nearly 200 employees providing IT services to over 11,000 city employees. Our assessment included interviews with city department customers to evaluate customer interactions and service satisfaction. We evaluated and made specific recommendations for citywide IT governance structures and processes; IT services and performance measures; and department organizational structure and staffing. As a result of our recommendations, the City is now implementing a new, more strategic and collaborative governance structure; developing a formal IT service catalog; and reorganizing IT into a more scale-able, accountable, service-centric organization structure based on best IT service management principles and practices.

**Information Technology Assessment and Plan**

Conducted an independent review of the City's information technology (IT) services. The scope of the review included all aspects of the organization, administration, and use of technology resources within the City.

**IT Organizational Assessment**

Conducted an IT organizational assessment for the County including the development of strategies for organizational changes, tactical technology planning, IT governance, and management of the organization effects of the changes. The project included end user surveys, benchmarking of peer organizations, and the assessment of organizational, administrative and technical aspects of the overall County IT environment.

**IT Security Controls Review**

Evaluated the implemented security controls in place surrounding the technology and data and made recommendations for improvement. Activities included understanding the network infrastructure, reviewing the implemented controls, developing recommendations for

improvement and developing an IT Security Controls Review report.

**City of Detroit, MI**

Ms. Beth Niblock  
CIO  
2 Woodward Ave.  
Rm. 801  
Coleman Young Bldg.  
Detroit, MI 48226  
Beth Niblock  
niblockb@detroitmi.gov  
313.224.2900

**IT Assessment and Strategic Plan**

Conducted an Information Technology Assessment for the City that included a review of all aspects of organization, administration and use of technology within the City. As part of the engagement we conducted IT departmental interviews, interviews with select City departments, an end-user survey of all City staff and a benchmarking survey of peer organizations from across the country. Specific areas of focus included IT governance, IT organization structure and job position descriptions, IT infrastructure, project management approach, and project portfolio management

**City of Des Moines, IA**

Mr. Michael Matthes  
Former Des Moines Assistant City  
Manager/CIO  
Current City Manager City of  
Colombia, MO  
573.874.7214  
cityman@GoColumbiaMo.com

**IT Assessment and Strategic Technology Plan**

Conducted an information technology assessment and developed a Strategic technology plan for the city that included a review of all aspects of the organization, administration and use of technology within the city.

Specific areas of focus included organizational support structure, infrastructure, and IT Governance

**City of Arvada, CO**

Mr. Pete Adler  
Public Works Project Manager  
8101 Ralston Rd.  
P.O. Box 8101  
Arvada, CO 80001-8101  
720.898.7782  
padler@arvada.org

**Enterprise Asset Management System (EAMS) Needs Assessment and Selection (2014)**

Performed a needs assessment and selection for the City's first investment for an EAMS supporting the Utility and Public Works Departments. The project involved complete requirements gathering including integrations with the City's Oracle ERP financials and HR systems in addition to its Advanced CIS utility billing system. Project requirements also included dashboard performance metrics for the City's Managing for Results (MFR) program. System design requirements for the City's infrastructure management programs including water, sewer, streets, water treatment, facilities management, parks/recreation, and information technology programs were collected to support 100 staff.

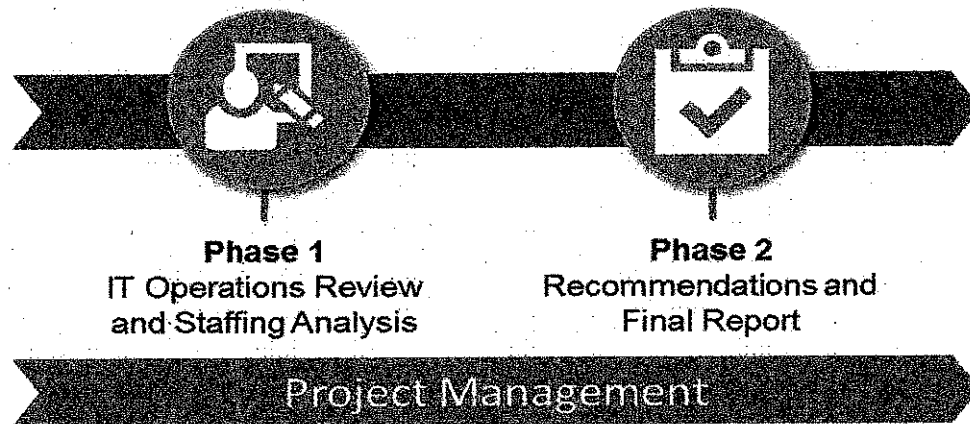
## 2. Project Methodology

Responses will present a project plan with specific deliverables and milestones and dates of delivery for each.

### 2.1 PROJECT WORK PLAN

Having performed similar assessment and planning projects for hundreds of small, mid-size, and large local units of government over the years, Plante Moran's seasoned project consultants have developed and refined a proven work approach and set of related tools to efficiently and effectively assess a County's current environment and facilitate the development of a comprehensive set of recommendations aimed at increasing efficiency, effectiveness, alignment, and maturity.

Our work plan, further detailed below, includes the following phases.



### Project Management

During project initiation we will work with the County to establish best practice project management practices that will remain for the duration of the project. The purpose of this ongoing phase is to conduct activities that are relevant to managing the project and enhancing its success for the County. The objective and specific deliverables of this phase include:

Measurable Objective	Deliverables/Milestones
Successful completion within budget and on schedule while meeting project goals and objectives	<ul style="list-style-type: none"> <li>• Project Charter</li> <li>• Project Plan and Schedule</li> <li>• Project Collaboration Center</li> <li>• Kickoff Meeting</li> <li>• Regular Status Updates</li> </ul>

### 1. Conduct Project Initiation Activities

We will conduct initial, project planning calls with the County's project manager and other selected stakeholders to finalize the project scope, deliverables, and timetables. We will discuss expectations for communications and county staff participation. We also will identify specific participants to support document requests, participate in interviews, and to be included in project surveys.

Also during this early stage of the project we suggest creating a project steering committee to provide project guidance and oversight. We find that this collaborative approach helps to keep the project on track and ensure it meets the County's objectives.

## **2. Develop Project Charter and Detailed Project Plan**

We will work jointly with the City's project manager to document our planning assumptions from the previous work step in a project charter, including:

- Project overview
- Project objectives
- Business drivers
- Scope (both in and out of scope items)
- Project governance and organization
- Key schedule milestones and deliverables
- Risks
- Project influences (e.g., assumptions, constraints and dependencies)

The project charter will be provided to the City for review and approval prior to significantly commencing project activities.

Based upon the key schedule milestones and deliverables in the project charter, we will develop a detailed project plan and schedule, incorporating the following:

- Major phases and milestones
- Work tasks, dependencies and their due dates with assigned responsibility
- Deliverables

Please note that our proposed timeline presented later in this proposal includes a preliminary project schedule.

## **3. Establish Project Collaboration Center**

Over the last few years, collaboration environments such as Microsoft SharePoint have become increasingly viable tools that can serve a variety of purposes, including acting as a repository for documentation developed during the course of a strategic plan. As a firm, we have significant expertise in the use SharePoint as an overall project repository for our engagements. We will work with the County in the establishment of a project collaboration environment using SharePoint that will last for the duration of the project. Should the County prefer to use an alternative document repository, we would be happy to accommodate.

## **4. Conduct Project Kickoff Meeting**

We will conduct a project kickoff meeting with selected stakeholders to review the objectives, timing, scope, anticipated county staff involvement and other items relevant to the project.

## **5. Provide Regular Project Status Updates**

Continuous feedback is the key to a successful project. In this way, problems can either be avoided entirely, or addressed early on, to minimize wasted effort and keep the project on schedule. We will schedule meetings and/or conference calls at least bi-weekly with the County to:

- Report on the status of the project work plan and timeline, including deliverables
- Update the project plan and timeline as necessary
- Discuss current findings and major open issues/risks and develop strategies to address them
- Review next steps

## **Phase 1: IT Operations Review and Staffing Analysis**

The purpose of this phase is to gain an understanding of the County's current IT environment and service delivery expectations that impact staffing to inform our recommendations in Phase 2. The objective and specific deliverables of this phase include:

Measurable Objective	Deliverables/Milestones
<p>Understanding of the County's current and future requirements for Application; Technical and Security; GIS; and Network and Telecommunications services and associated requirements for staffing</p>	<ul style="list-style-type: none"> <li>• Comprehensive Staffing Requirements Analysis, including:                             <ul style="list-style-type: none"> <li>○ Staff organization and staffing levels</li> <li>○ Staff allocation</li> <li>○ Staff skills</li> <li>○ Customer survey results</li> <li>○ Comparative benchmark survey results</li> <li>○ Opportunities for consolidation and/or strategic sourcing</li> </ul> </li> </ul>

**1. Collect and Review Documentation**

Plante Moran will review existing documentation to gain an understanding of the County's current IT environment before beginning significant onsite discovery. We will provide the County with an information request list upon project initiation. This list will include requests for detailed information pertaining to the current information technology environment (including applications and technology infrastructure), service delivery organization, staffing levels and allocation, management processes (including project management), standards, performance management, customer satisfaction, and future plans.

**2. Review and Assess Technical Environment**

Using a combination of technical questionnaires and interviews with IT staff, we will conduct an extensive review of the existing technical environment at the County including all aspects of hardware, software, networking, telecommunications and relevant security for all of the various components. We will specifically survey:

- Server and network administration
- Data center
- Voice system
- Remote office connectivity
- Backup systems
- Disaster recovery

**3. Conduct IT Staff Interviews**

We will interview IT staff to review their areas of service delivery and job role and skill set alignment. Additionally, we will likely conduct interviews with decentralized IT staff working throughout the County. These interviews may be group or individual interviews as deemed appropriate. We will augment our interviews with an IT staff survey to include:

- Job duties and responsibilities
- Job skills
- Work volume
- Organization structure
- Communication / working relationship
- Other comments / suggestions

This survey is intended to be completed and submitted to our staff in confidence so as to obtain the best possible information. Typically, we achieve near 100% compliance in having IT staff complete the survey.

#### **4. Conduct Online Customer Survey**

We will distribute an online survey to identify satisfaction with IT services and technologies. This survey can be made available to all county staff and will include questions in the following topic areas:

- Application services
- Technical and security services
- GIS services
- Network and telecommunication services
- Current county technologies
- Future business needs
- General communication
- Training

A comprehensive analysis of the information will be provided to the County as part of our Staffing Requirements Analysis. From the survey results, we can identify gaps between current levels of service and desired levels of service as well as gaps where current technology is not meeting the needs of a particular department, area, or the County as a whole.

#### **5. Conduct Stakeholder Interviews**

We will schedule and conduct meetings with staff within selected county departments (including management and end-users) to discuss:

- Current and future business requirements of the department and how IT can assist in meeting these requirements
- IT service performance and performance management
- IT project request process
- IT project management
- Overall satisfaction with IT services and county technology

We will also discuss the customers' perceptions as to how IT can improve, especially as it relates to how well the IT Department is positioned to meet the customer's current and future business and management requirements.

#### **6. Conduct Comparative Research**

Plante Moran maintains a rich database of staffing information for currently situated local government organizations. Should the County choose to, we can supplement this data with new benchmark data for peers specifically designated by the County, based on similar demographics or other criteria.

We will use this benchmark data to provide the County comparative data in the following areas:

- IT departmental structure, staffing levels, and allocation
- Alternate service delivery models (e.g., centralized, decentralized, strategic outsourcing)
- IT funding and allocation
- Technology and application portfolio
- Other areas to be defined in collaboration with the County

The results of this comparative research will be provided to the County as part of our Staffing Requirements Analysis.



**7: Compile Staffing Requirements Analysis**

We will develop a presentation for the County's project steering committee and other selected stakeholders that summarize our findings and analysis from the previous tasks. Our Staffing Requirements Analysis will likely include:

- Analysis methodology
- Current IT staffing requirements (business drivers for IT services)
- Gap analysis
  - Staff organization and staffing levels
  - Staff allocation
  - Staff skills
- Other opportunities for efficiencies
  - Service management
  - Project management
  - Performance management
  - Applications
  - Technology infrastructure
  - IT strategy and governance
  - Alternate service delivery models (e.g., centralized, strategic sourcing)
- Customer survey results
- Comparative benchmark survey results

The Staffing Requirements Analysis will include a summary of findings and opportunities for improvement in each of the areas reviewed along with an associated maturity rating (i.e., Gap Analysis). It will include:

**Phase 2: Recommendations and Final Report**

The purpose of this phase is to deliver specific recommendations for IT staff organization and allocation to increase efficiencies and effectiveness, and enhance alignment between IT service delivery and the County's overall business priorities. The objective and specific deliverables of this phase include:

Measurable Objective	Deliverables/Milestones
Specific, actionable recommendations to increase efficiencies and effectiveness	<ul style="list-style-type: none"> <li>• Final Staffing Requirements Report, including recommendations surrounding:                             <ul style="list-style-type: none"> <li>○ Staff organization and staffing levels</li> <li>○ Staff allocation</li> <li>○ Staff skills</li> <li>○ Alternative service delivery models (e.g., consolidation and/or strategic sourcing)</li> <li>○ Project management</li> <li>○ Performance management</li> <li>○ Applications</li> <li>○ Technology infrastructure</li> <li>○ IT strategy and governance</li> </ul> </li> </ul>

### **1. Develop Recommendations**

Based on our analysis in Phase 1, we will identify specific, actionable recommendations for improvement. These will include recommendations to:

- Most efficiently allocate and leverage IT staffing resources
- Increase operational effectiveness
- Address technology vulnerabilities or risks
- Prepare for future business requirements
- Leverage emerging technology

### **2. Develop Draft Report**

Based on the validated findings from our Staffing Requirements Analysis in Phase 1 and our preliminary recommendations developed in the previous work task, we will develop a draft report that will provide our comprehensive assessment of the City's current IT staffing with associated recommendations. We anticipate the draft report to include:

- Executive summary
- Analysis methodology
- Gap analysis
- Recommendations
- Customer survey results
- Comparative benchmark survey results.

### **3. Develop Final Report**

We will conduct a page-by-page walk through of the draft assessment report and a set of consolidated review comments from the County. Based upon this review, we will finalize the Staffing Requirements Analysis report.

### **4. Present Final Staffing Requirements Analysis and Recommendations**

We will develop and present a summary of our analysis and recommendations to an audience of the County's selection. This may be the project steering committee, the County's leadership team, or a broader stakeholder group.

## 2.2 PROJECT SCHEDULE

Task Name	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
<b>Phase 0: Project Management</b>						
1. Conduct Project Initiation Activities	█					
2. Develop Project Charter and Detailed Plan	█					
3. Establish Project Collaboration Center	█					
4. Conduct Project Kickoff Meeting	█	█				
5. Provide Regular Status Updates	█	█	█	█	█	█
<b>Phase 1: Staffing Requirements Analysis</b>						
1. Collect and Review Documentation	█	█				
2. Review and Assess Technical Environment	█	█				
3. Conduct IT Staff Interviews	█	█	█			
4. Conduct Online Customer Survey	█	█	█			
5. Conduct Stakeholder Interviews	█	█	█			
6. Conduct Comparative Research			█	█		
7. Compile Staffing Requirements Analysis			█	█		
<b>Phase 2: Recommendations and Final Report</b>						
1. Develop Recommendations				█	█	
2. Develop Draft Report				█	█	
3. Develop Final Report					█	█
4. Present Final Staffing Requirements Analysis and Recommendations						█

## **3. Team Qualifications**

### **3.1 OUR UNDERSTANDING**

Philosophy, approach and specific awareness of the issues, problems, and opportunities.

Adams County has had the 10<sup>th</sup> highest growth rate in the State of Colorado from 2000 to 2010. The County currently provides services to a population of nearly 470,000. The County – and in turn the internal Information Technology Department that supports the County's core government services – is feeling this increase in demand for services and expectations for how those services are delivered. We understand that the County seeks to balance the amount of work and resources necessary to “keep the lights on” and the amount of work and resources necessary to deliver on new projects. As a result, seeks to conduct an IT staffing requirements analysis to identify opportunities to increase IT efficiency and effectiveness through improvements to IT organization, staffing levels and allocation, service delivery, project management, performance management, technology infrastructure, and IT governance and strategy.

### **3.2 MANAGEMENT APPROACH**

Management approach to ensure effective coordination with the County.

Our firm has extensive experience in using a project management methodology based on the principles in the Project Management Body of Knowledge (PMBOK). PMBOK, a theory and set of principles developed by the Project Management Institute (PMI), provides a project management framework that can be used on projects of any size, type, complexity, and industry to enhance the ability to complete projects on time, within budget, within scope, and to ensure effective coordination.

Our consultants have received extensive project management training, have conducted seminars and training in project management theory and practical application and have developed an extensive toolset of project management templates, tools, and lessons learned for managing projects. In fact, many of these tools and templates have been adopted by our clients to manage their own internal projects. Elements of our approach to managing projects are as follows:

- Assign personnel to areas of the project where their expertise is required
- Ensure that project expectations and scope are clearly defined up front through development of a project charter
- Ensure frequent communications with the client
- Identify and anticipate potential project risks to minimize their occurrence and impact
- Closely monitor project timelines and budgets

### **3.3 TEAM ORGANIZATION AND KEY RESPONSIBILITIES**

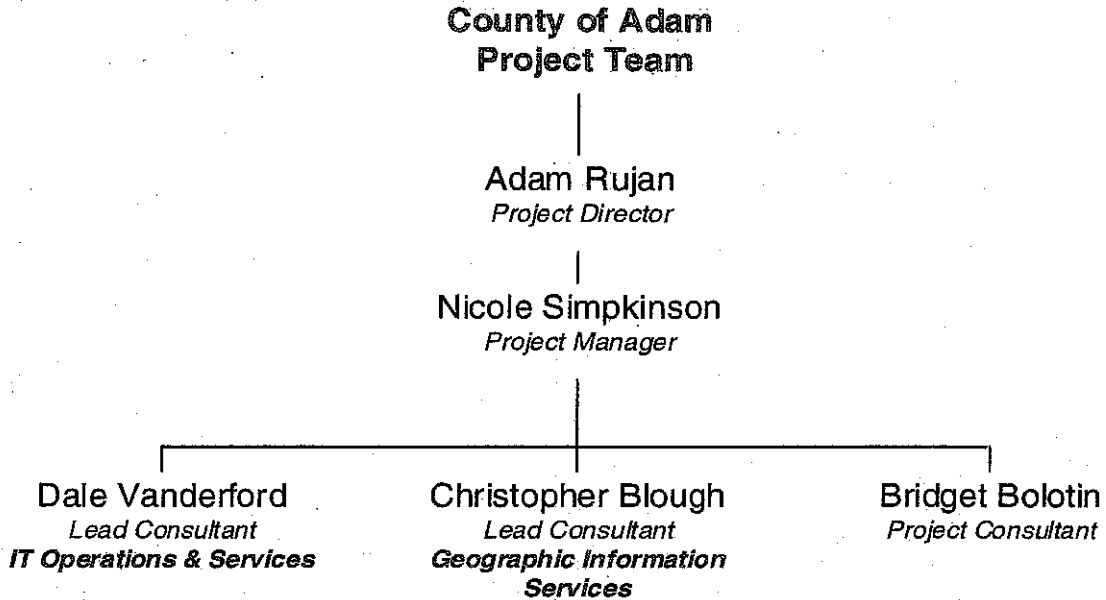
General organization of the Contractor for this project, including the responsibilities of key individuals. Describe the capacity of the consulting firm to do the work. Identify the percentage of time that the key individuals of the team are committed to the project.

The core Plante Moran project team members proposed for this engagement have been selected for their significant experience in conducting IT related assessments for local government, and for their expertise in key IT functions, including technology infrastructure, information security, operations, service management, and technology governance. All of the proposed team members have worked together on a number of previous, similar assessment engagements.

Plante Moran will supplement the defined project team with other Plante Moran team members as required. As a firm with over 2,200 staff members, we have deep resources to bring to support the

County's project. Our staffing approach is designed to assign personnel to areas of the project where their expertise is needed, bringing in subject matter experts and additional analysts as needed.

The following provides an organization chart for the core project team proposed for this project.



The following table below summarizes our proposed project team, the role that each individual will perform on the project, their specific responsibilities, and percentage of time that they will be committed to the project.

Team Member	Project Role and Responsibilities	% Commitment
<b>Adam Rujan</b> Partner	<b>Engagement Partner</b> Has overall responsibility for ensuring that all Plante Moran services are completed within schedule and budget. Provides project quality control over Plante Moran deliverables and services. Also reviews analysis findings and associated recommendations.	<b>15%</b>
<b>Nicole Simpkinson</b> Senior Manager	<b>Project Manager</b> Has responsibility for managing the work plan and day-to-day project activities. Works to ensure all project tasks are completed on schedule, within budget and meet appropriate quality standards. Responsible for risk and issue management and regular project communications with the City.  Leads stakeholder interviews and the assessment of the County's IT strategy, governance, project management, and performance management. Develops associated recommendations.	<b>30%</b>

Team Member	Project Role and Responsibilities	% Commitment
<b>Dale Vanderford</b> Manager	<b>Lead Consultant – IT Operations &amp; Services</b> Leads the assessment of the County's Application, Technical and Security, and Network and Telecommunications. Develops associated recommendations. Contributes to the development of the IT assessment report.	25%
<b>Christopher Blough</b> Senior Manager	<b>Lead Consultant – Geographic Information Services</b> Leads the assessment of the County's Geographic Information Services and develops associated recommendations. Contributes to the development of the IT assessment report.	25%
<b>Bridget Bolotin</b> Consultant	<b>Project Consultant</b> Leads the administration and analysis of the customer and peer benchmark surveys. Supports documentation collection, review, and analysis, and stakeholder interviews. Supports the development of the IT Staffing Analysis draft and final reports.	15%

Appendix B provides resumes for each of our proposed project team members identified above.

### 3.4 PROJECT SCHEDULE

Scheduling for project's main tasks and activities.

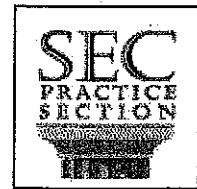
Our proposed project timeline is presented in Section 1.2.

### 3.5 QUALITY CONTROL

Technical expertise and quality control systems.

In furtherance of our commitment to remain on the cutting edge of technical issues and our desire to provide superior client service, we are members of the Public Company Accounting Oversight Board (PCAOB) and are also members of the American Institute of Certified Public Accountants Employee Benefit Plan Audit Quality Center and the Governmental Audit Quality Center.

Plante & Moran, PLLC are members of the Center for Public Company Audit Firms of the American Institute of Certified Public Accountants ("AICPA") and, as such, adheres to the quality control standards established by the AICPA and submits to peer reviews of the Firm's accounting and audit practice every three years. We are proud to report that we have continuously received unqualified opinions from those peer reviews.



Additionally, we also maintain a rigorous internal quality control process. Each and every engagement is subject to different levels of supervisory and partner review as well as an independent quality control review. This process helps us to ensure proper application of Financial Accounting Standards Board pronouncements, as well as the propriety and accuracy of the reports.

## 4. Cost of Services

Responses will include project budgets for each of the three separate divisional analysis and a combined project budget including the estimated hours by phase. Consultant shall submit the cost of services with the proposal. A total lump sum fee shall be submitted for the entire RFP, and shall be further broken out at a minimum by the tasks listed in this RFP. Include Hourly Billing Rates of personnel.

The Cost Proposal has been included in a separate document labelled "Cost Proposal".

# Cost of Services

Responses will include project budgets for each of the three separate divisional analysis and a combined project budget including the estimated hours by phase. Consultant shall submit the cost of services with the proposal. A total lump sum fee shall be submitted for the entire RFP, and shall be further broken out at a minimum by the tasks listed in this RFP. Include Hourly Billing Rates of personnel.

We propose a total fixed fee of \$67,500 for the scope of services outlined in the County's RFP and further detailed in our technical proposal. The following table breaks out this total fixed by phase (major task). Each of these phases encompasses all of our divisional analysis.

Our fee is inclusive of all travel and incidental expenses.

Task	Hours	Total Fees
Project Management	30	\$7,500
Operational Assessment and Staffing Analysis	140	\$35,000
Recommendations Development and Final Report	100	\$25,000
<b>Total</b>	<b>270</b>	<b>\$67,500</b>

This total fixed fee is based upon our blended hourly rate of \$250, as illustrated below.

Task	Hourly Rate
Adam Rujan, Engagement Partner	\$250
Nicole Simpkinson, Project Manager	\$250
Dale Vanderford, Lead Consultant - IT Operations	\$250
Christopher Blough, Lead Consultant - GIS	\$250
Bridget Bolotin, Project Consultant	\$250



## 5. Forms

### 5.1 CONTRACTOR'S CERTIFICATION OF COMPLIANCE

#### CONTRACTOR'S CERTIFICATION OF COMPLIANCE


Pursuant to Colorado Revised Statute, § 8-17.5-101, *et seq.*, as amended 5/13/08, as a prerequisite to entering into a contract for services with Adams County, Colorado, the undersigned Contractor hereby certifies that at the time of this certification, Contractor does not knowingly employ or contract with an illegal alien who will perform work under the attached contract for services and that the Contractor will participate in the E-Verify Program or Department program, as those terms are defined in C.R.S. § 8-17.5-101, *et seq.* in order to confirm the employment eligibility of all employees who are newly hired for employment to perform work under the attached contract for services.

CONTRACTOR:

Plante & Moran, PLLC  
Company Name

June 17, 2016  
Date

Adam Rujan  
Name (Print or Type)

  
Signature

Partner  
Title

Note: Registration for the E-Verify Program can be completed at: <https://www.vis-dhs.com/employerregistration>. It is recommended that employers review the sample "memorandum of understanding" available at the website prior to registering

**5.2 PROPOSAL FORM**



**PROPOSAL FORM  
STAFFING REQUIREMENTS ANALYSIS OF THE  
INFORMATION TECHNOLOGY DEPARTMENT 2016.014**

**CONTRACTOR'S STATEMENT**

I have read and fully understand all the special conditions herein set forth in the foregoing paragraphs, and by my signature set forth hereunder, I hereby agree to comply with all said special conditions as stated or implied. In consideration of the above statement, the following proposal is hereby submitted.

Please refer to Cost Proposal \_\_\_\_\_ \$ \_\_\_\_\_  
Written Amount Amount

**WE, THE UNDERSIGNED, HEREBY ACKNOWLEDGE RECEIPT OF**

Addendum # 1 Addendum # 2

If None, Please write NONE.

Plante & Moran, PLLC	June 17, 2016
Company Name	Date
27400 Northwestern Hwy	
Address	Signature
Southfield, MI 48034	Adam Rujan
City, State, Zip Code	Printed Name
Wayne County	Partner
County	Title
800.544.0203	248.233.8587
Telephone	Fax
adam.rujan@plantemoran.com	
Email Address	

## 6. Appendices

### APPENDIX A: PLANTE MORAN BACKGROUND AND EXPERIENCE

Plante Moran takes great pride in the quality of services it provides to its clients. We have a rigorous set of quality controls designed to provide assurance that professional standards are followed and our clients receive a high quality product. Plante Moran takes equal pride in our people and our professional work environment. Some of the facts about our firm that we are proud of include:

- Our partnership group is comprised of 19% women, which is the highest percentage of female equity partners among the nation's largest public accounting firms, according to CPA Personnel Report, a national public accounting trade publication.
- Staff turnover rate below 15% which is significantly lower than that of other national public accounting firms.
- The firm has been named to Fortune Magazine's "100 Best Companies to Work for in America" for the last eighteen years.
- The firm is ranked 55th on list of Training magazine's "Top 100 Training Organizations"
- Plante Moran's Management Consulting Group, consisting of over 125 dedicated consultants, is a versatile, full service consulting organization with a proven track record for providing quality professional services.

Our emphasis and commitment to management consulting has resulted in the extension of the consulting practice into all major aspects of government and education addressing our clients' unique needs related to information technology, security, compliance, and policy.

Plante Moran has become a leader in providing services to governmental organizations. At present, we work with well over 200 local governments. Our professionals have made substantial commitments to working with local, county and state government agencies. Our extensive experience with governmental clients has enabled us to assemble a project team that we believe is uniquely qualified to perform the proposed project.

### Operations Analysis & Staffing

Operations Analysis and Staffing can generally be described as a comprehensive and systematic review of an organization, department, or function to derive the necessary, value added functions and associated staffing levels. This analysis is designed to identify cost and service enhancement opportunities within the operation and devise methods for improving overall cost effectiveness. The analysis focuses on optimizing the use of resources and emphasizes improved operational performance, not operational efficiency. Resources in this context include personnel, facilities, technology, materials, and equipment.

Our Firm's management consultants have significant experience in analyzing the operations and determining staffing levels for many functional areas of governmental service provision. These areas include:

- Municipal services
- Public safety services
- Public works
- Overall administration and management
- Community development functions
- Purchasing and inventory practices
- Economic development
- Financial services
- Information systems services
- Justice systems
- Water and sewer operations
- Vehicle and equipment maintenance
- Health and social services
- Transportation

Additionally, our consultants have assisted governmental clients in evaluating the potential benefits of contracting for services. Our approach to privatization analysis is designed to identify and assess both

the advantages and disadvantages of this service option, including the full range of relevant cost, service, and management issues.

### **Organizational Planning and Development**

Our organizational planning and development consulting services focus on assisting governmental clients in realizing their full organizational potential. As part of this process, our consultants perform a comprehensive analysis of:

- Goals and objectives of the organization
- Operating environment
- Deployment and staffing levels
- Organizational structure
- Comparison to similar organizations and best practices

Included in these activities is the development of organization charts, definition of reporting relationships, and determination of authority and responsibility levels. Additionally, organization planning and development includes the evaluation of communication channels and working relationships among all levels of administrative staff. Toward this end, particular emphasis is placed on defining information requirements essential for the effective performance of all organizational positions.

### **Human Capital Management and Development**

Plante Moran's professional consulting staff has been extensively involved in providing governmental clients with assistance in all phases of human resources administration. Plante Moran's management consultants have received national recognition for their human resources administration systems. Our continuing involvement with the professional community assures that our clients are aware of new and significant developments within the human resources field.

Major consulting activities have included:

- Position description development and analysis
- Comprehensive position evaluation studies
- Formal position classification structure development
- Human resources administration systems development
- Equal Employment Opportunity compliance systems
- Executive search
- Wage and salary administration system
- Personnel policy and procedure analysis
- Employee performance evaluation plans
- Employee training programs

Plante Moran also provides a broad range of personnel services. This service area is staffed by clinical/industrial psychologists, as well as a number of administrative and projects assistants. The services rendered by our staff include:

- Personnel recruiting, evaluation and selection
- Personnel testing and evaluation
- Vocational counseling
- Career counseling
- Personnel evaluation audits

### **Employee Benefits Consulting**

The Plante & Moran Employee Benefits Consulting Group assists our governmental clients in optimizing the use of their precious benefit dollars through customized creative plans and cost-effective administration programs. With our in-depth technical knowledge of federal regulations and our flexibility in developing and administering employee benefit plans in a manner that best meets client needs, we ensure the integrity of our clients' retirement and welfare plans while enhancing the savings that can be realized through well-designed and administered benefit programs.

Our services include:

- Design and implementation of employee benefit plans
- Employee benefits review
- Compliance review
- Plan administration
- Other benefit services:
  - COBRA compliance
  - Section 457 and other non-qualified deferred compensation arrangements
  - Health insurance

### **Information Technology Consulting**

Plante Moran's management consultants have made a significant commitment to assist governmental clients develop and implement appropriate technology. We are among the few accounting and consulting firms that are completely vendor independent with respect to the offering of hardware or application software for our governmental clients. This enables our consultants to select the most appropriate solution for our clients based on the client's current situation and future goals and objectives. The services we offer address virtually all aspects of information systems including the following with those services relevant and proposed on this project highlighted:

- ERP Needs Assessment
- Project Budgeting and Return on Investment (ROI) Analysis
- Preparation of ERP System Requirements
- Request for Proposal Development
- System Selection Assistance
- Contract Review and Negotiations
- Systems Implementation Planning
- Systems Implementation Assistance
- User Procedure Development and Documentation
- Quality Assurance
- Project Management
- Strategic Information Technology Planning
- Information Technology Assessments
- e-Government Strategy and Development
- Conversion Planning Assistance
- Systems Development
- Technology Management
- Systems Control Review
- Information Security

## APPENDIX B: TEAM RESUMES



### Adam Rujan

Partner, Management Consulting

#### SUMMARY OF EXPERIENCE

Adam has nearly 30 years of experience consulting to government and public sector organizations. His experience includes assisting governmental units with organizational and operational analyses, IT Assessment, and system selection reviews. He has developed specific expertise in assisting organizations understand and implement new technology, including issues of IT governance and change management. Adam's clients have included a wide range of local municipalities, counties, agencies and authorities, and state government. He is a frequent presenter and has authored numerous articles on improving operational efficiency and effectiveness. He recently authored a chapter on IT Governance for the book CIO Leadership for Cities and Counties, published by the Public Technology Institute. Adam was/is the Partner responsible for all of the referenced public sector client engagements.

#### EDUCATION

Master of Business  
Administration University of  
Michigan

Bachelor of Science Engineering,  
Wayne State University

#### SELECTED PRESENTATIONS/ PUBLICATIONS

Cost Savings in Information  
Technology: ICMA webinar 2012

Outsourcing IT: ICMA Annual  
Conference 2011

Improving Performance through  
IT Governance: Public  
Technology Institute 2009, 2010

Effectively Capturing Business  
Intelligence: ICMA Annual  
Conference 2013

#### SELECTED KEY CLIENTS

- City of Alexandria, VA
- City of Asheville, NC
- City of Augusta, GA
- City of Cleveland, OH
- City of Colorado Springs, CO
- City of Corpus Christi, TX
- City of Detroit, MI
- City of Flagstaff, AZ
- City of Mesa, AZ
- City of Seattle, WA
- Broward County, FL
- Cook County, IL
- Johnson County, KS
- Marin County, CA
- St. Louis County, MO
- Town of Hempstead, NY



## Nicole Simpkinson, PMP, ITIL

Senior Manager, Management Consulting

### SUMMARY OF EXPERIENCE

Nicole has more than 20 years of experience consulting to government and other public sector organizations. She specializes in assisting organizations assess, plan for, select and implement enabling technologies. Her areas of expertise include system needs assessment and feasibility studies, organizational and operational analysis, strategic technology planning, system selection, implementation oversight and IT governance based on best practices and industry frameworks such as Control Objectives for IT (COBIT), Val IT and Carnegie Mellon Capability Maturity Model Integration (CCMI). Nicole's clients have included a wide range of local municipalities, counties, utility agencies and state government. Nicole is a certified Project Management Professional (PMP) and experienced facilitator. She has facilitated a number of workshops and training seminars on topics including strategic technology planning, public sector project management, and government technology trends. Nicole graduated Magna Cum Laude from Claremont McKenna College with a Bachelor of Arts degree in Policy and Organizational Studies and received her MBA from UCLA Anderson School of Management where she graduated with honors.

### EDUCATION

Master of Business Administration,  
UCLA

Bachelor of Arts, Policy Studies,  
Claremont McKenna College

### SELECTED PRESENTATIONS/PUBLICATIONS

Cybersecurity Trends: 2015 National  
ICMA Conference

Public Sector Project Management: The  
Project-Centered Organization for Public  
Sector Executives sponsored by The  
Anderson School at UCLA

Successful Project Management:  
National Association of State  
Telecommunications Directors (NASTD)  
National Conference

Strategic Systems Planning: Association  
of Public-Safety Communications  
Officials (APCO) Western Regional  
Conferences

Top 10 Trends in Government  
Technology: Justice and Public Safety  
Regional Conference

Findings from a Study of Emergency  
Management at the Local Program  
Level: Washington State Emergency  
Management Association Annual  
Conference

### CERTIFICATIONS AND AFFILIATIONS

*Certified*, Project Management  
Professional (PMP), Project  
Management Institute

*Certified*, Information Technology  
Infrastructure Library (ITIL) Foundations

*Member*, Project Management Institute

*Member*, 2015 National Conference  
Planning Committee, ICMA

### SELECTED KEY CLIENTS

- City of Bend, OR
- City of Boise, ID
- City of Bothell, WA
- City of Carlsbad, OR
- City of Kent, WA
- City of Mountain View, CA
- City of Palo Alto, CA
- City of Redmond, WA
- City of Seattle, WA
- City of Stockton, CA
- City of Tacoma, WA
- City of Vancouver, WA
- City of Wheaton, IL
- City/Borough of Juneau, AK
- eCityGov Alliance, WA
- King County, WA
- Los Angeles County, CA
- Mesa County, AZ
- Orange County, CA
- Ramsey County, MN
- Alaska Railroad Corporation
- Commonwealth of Kentucky
- State of Alaska
- State of Washington
- Emerald Coast Utilities Authority, FL
- Escambia County Housing Finance Authority, FL
- Irvine Ranch Water District, CA
- Metropolitan Water District of Southern California, CA
- Port of Los Angeles, CA
- Santa Clara Valley Water District, CA
- Santa Margarita Water District, CA
- West Basin Water District, CA



## Dale Vanderford

Manager, Management Consulting

### SUMMARY OF EXPERIENCE

Dale has over 15 years of experience assisting public sector clients with various technology related needs. He has extensive experience in providing numerous technology services for government including technology assessment, technology planning, needs assessment, selective sourcing, system selection, IT organizational evaluations, infrastructure design, and implementation management. He was Director of Technology and Operations for Washtenaw County, Michigan and spent two years implementing and managing the consolidation of the network infrastructure teams and data centers for Washtenaw County and the City of Ann Arbor. During Dale's tenure in the department, it consistently received national accolades, including several consecutive year appearances on the Digital Counties Survey and two consecutive years on CIO Magazine's Top 100 IT departments list. Recently, Dale spent a year on assignment with the City of Fayetteville, AR, serving as their interim CIO and implementing systems, departmental procedures, controls, and dashboards resulting in exceptionally high customer satisfaction.

### EDUCATION

Bachelor of Science in  
Communications Technology  
Eastern Michigan University

### PROFESSIONAL TRAINING & AFFILIATIONS

Specialized Training: Effective  
Communications and Human  
Relations, Dale Carnegie, Ann  
Arbor, MI, 2006

Former Board Member, Washtenaw  
County Homeland Security Local  
Response Team

Member, CIO Council, Public  
Technology Institute, Washington,  
D.C.

Former Member of Board of  
Directors, Washtenaw County/EMU  
Legal Resource Center, Ann Arbor,  
MI

### SELECTED KEY CLIENTS

- Borough of State College, PA
- City of Carlsbad, CA
- City of Colorado Springs, CO
- City of Fayetteville, AR
- City of Madison Heights, MI
- City of Ogden, UT
- City of Peoria, AR
- County of Broward, FL
- County of Macomb, MI
- County of Muskegon, MI
- County of Oakland, MI
- County of Ottawa, MI
- Circuit Court of Macomb County, MI





## Christopher Blough, PMP

Manager, Management Consulting

### SUMMARY OF EXPERIENCE

Chris has 16 years of technology management expertise working in county and municipal government as both a public sector professional and consultant. His technology experiences include enterprise business requirements evaluation, system assessments, software selections, and implementation services. He has public service experience supporting public works, utilities, community development, and public safety service areas. His experiences integrating asset management with GIS solutions provides a unique combination of executive and service delivery expertise.

Within Plante Moran's Government Technology and Operations Team, he specializes in Geographic Information Systems (GIS), enterprise asset management (EAM) / computerized maintenance management (CMMS) solutions, and enterprise resource planning (ERP) systems.

Prior to joining Plante Moran, Chris served as a consulting advisor within a community planning consulting practice responsible leading the development of land use master plans and serving as a contract zoning administrator conducting site plan reviews and field enforcement activities. In municipal practice, he served as both a GIS Manager and Public Works - IT liaison responsible for approving record drawing submissions in coordination with the City's development engineering plan review team. He also led the assessment and selection of the City's first EAM system and served as an administrator supporting water, sewer, street maintenance, traffic controls, lighting, and urban forestry assets throughout the Department of Public Services. He also served as an advisor on the City's street naming and addressing authority, assuming responsibility for the City's master address database used by the planning and building inspection system in conjunction with eight other service areas. He also supported the City's public safety mission by managing a reverse E-911 addressing database serving 80,000 people in three jurisdictions on behalf of a joint, emergency services dispatch center.

As a GIS practitioner, he currently advises clients on the use of Esri's Desktop, Server, and ArcGIS Online solutions to identify and define key integration points with enterprise systems. He is currently leading EAM assessments and selections involving integrations with GIS technology on behalf of his clients.

### SELECTED KEY CLIENTS

- City of Arvada, CO – EAM Assessment - Selection
- City of Bismarck, ND – EAM Assessment - Selection
- City of Columbia, MO – ERP Implementation
- City of N. Las Vegas, NV – ERP Assessment - ROI Analysis
- City of Palo Alto, CA – EAM Assessment - Selection / ERP Assessment
- City of Philadelphia, PA – Assessing System Assessment - Selection
- Santa Margarita Water District, CA – GIS Implementation / EAM Assessment / Capital Program Management Solution Selection

### EDUCATION

Master of Public Administration,  
*Eastern Michigan University*

Bachelor of Science in  
Geography/  
Earth Science,  
*Central Michigan University*

### SELECTED PUBLICATIONS

*The GIS Guide for Elected  
Officials, City of Novi, MI –  
Moving Novi's Online Mapping  
Services to the Cloud, Esri  
Press, 2014*

### PROFESSIONAL TRAINING & AFFILIATIONS

Project Management  
Professional (PMP), Project  
Management Institute  
(Certificate #1373368)

IT Service Management, ITIL v3  
Foundation, APM Group Ltd.  
(2012)

Project Management Institute,  
Great Lakes Chapter

American Public Works  
Association

American Water Works  
Association

The Institute of Asset  
Management

Esri International User  
Conference 2006, 08, 10, 12\*,  
and 2015 (\*Special  
Achievement in GIS Award on  
behalf of Novi, Michigan)



## **Bridget Bolotin**

Senior Consultant

### **SUMMARY OF EXPERIENCE**

Bridget has over three years of experience in technology within the financial and banking sector. She has worked on various platform selections, implementations, and migrations, testing and supporting applications and systems, and standardizing and maintaining IT security. In addition to her technical experience, she has experience in IT procurement, financial management, and licensing.

### **EDUCATION**

Bachelor of Science in  
Information Technology and  
Operations and Supply Chain  
Management  
Marquette University

ESG Paris School of Business,  
Paris, France; International  
Exchange Program

### **PROJECT ROLE**

#### **Project Consultant**

Responsibilities include; gathering functional and technical requirements, developing business process and conducting various types of cost analysis impacting system selection projects.

### **SELECTED KEY CLIENTS**

- Central Ohio Transit Authority, OH
- Hampton Roads Transit, VA
- Landauer, IL
- Milwaukee County, WI
- Montgomery County, TX
- Three Rivers Park District, MN
- Town of Nantucket, MA

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