



Midpeninsula Regional
Open Space District

R-15-86
Meeting 15-15
June 24, 2015

AGENDA ITEM 5

AGENDA ITEM

Award of Contract to ClientFirst for Development of an Information Systems and Technology Strategic Plan

GENERAL MANAGER'S RECOMMENDATION *KSW (for SEA)*

Authorize the General Manager to enter into a professional services contract with ClientFirst for \$53,452, plus a contingency of \$8,020, for a total amount not to exceed \$61,472, to prepare an Information Systems and Technology Strategic Plan (ISTSP).

SUMMARY

The Financial and Operational Sustainability Model Study (FOSM), prepared by Management Partners and approved by the Board of Directors (Board) on May 27, 2015 (R-15-82), recommended as one of its top priorities the development of an information systems and technology strategic plan to establish a roadmap for improving the District's business systems and technology infrastructure. A Request for Proposals was issued on April 22, 2015 and five proposals were received by the May 19, 2015 deadline. The General Manager recommends awarding a contract to ClientFirst for a total not-to-exceed amount of \$61,472, which includes a 15% contingency. The Fiscal Year (FY) 2015-16 Adopted Budget allocates \$50,000 for this project and the remaining \$11,472 will come from savings in other projects.

BACKGROUND

The FOSM quickly identified early in its research phase the need to focus on expanding and improving the District's Information Systems and Technology (IST) resources, in terms of staffing, systems and technology infrastructure. As a result, the FOSM includes the priority recommendation to develop an Information Systems and Technology Strategic Plan (ISTSP) to identify specific actions to address the District's short and long term IST needs. The Plan would focus heavily on core systems (cost accounting, human resources, work order systems, project management, GIS, and document management), including those on the critical path to support Measure AA, and establish the foundation for highly integrated systems with automated interfaces to streamline data processing and information sharing. The strategic plan will help improve the District's overall operational effectiveness by providing system solutions that will reduce many pain points throughout the agency, including redundant manual data entry and duplicate databases. Selecting the right systems, technology, and processes is critical to improving operational and staff efficiencies throughout the organization.

DISCUSSION

District staff worked closely with Management Partners to prepare the scope and technical specifications of the ISTSP Request for Proposals (RFP), which was released on April 22, 2015 via direct e-mail and posting on the District website. The RFP scope provides for two major deliverables: a needs assessment and a Strategic Plan that identifies and prioritizes systems, technology, and staffing recommendations with a focus on implementation in years one through five. The deadline for submission was May 19, 2015. A total of five proposals were received as shown below:

Firm	Location	Proposal Cost
Priest Consulting	Dublin, CA	\$28,500.00
MindBoard	Sterling, VA	\$39,902.50
ClientFirst <i>With Optional Expanded Assessment</i>	Corona, CA	\$48,906.00 \$53,452.00
NexLevel	Carmichael, CA	\$52,950.00
Moss Adams	Campbell, CA	\$132,900.00

The proposals were carefully evaluated by District staff and Management Partners to assess the qualifications of each proposer, and were rated based on the quality of the proposal, the implementation approach, and overall team expertise. All five firms were determined to be well qualified and were interviewed the week of May 25 to further evaluate each firm's experience, project methodology, and fit with the District.

Management Partners and District staff unanimously agreed that ClientFirst possesses the superior expertise and experience to prepare an ISTSP for the District and the ability to do so in a timely manner. Reference checks were conducted the week of June 1 and all references stated ClientFirst possesses exceptional expertise and were responsive and good to work with.

ClientFirst was the only firm that included an optional expanded IT assessment to provide an in-depth evaluation of the District's network and targeted servers. This would include: IT network and infrastructure; storage and back-ups; servers, server applications, and management; IT security; desktop environment; and current communications systems (e.g., telephone, cabling). The District has never had an in-depth systems analysis and staff recommends the selection of this optional assessment to optimize the District's network infrastructure and performance.

The General Manager recommends awarding the contract to ClientFirst for \$53,452 to provide the following scope of services:

- Evaluate the technology environment, including services provided, applications used, infrastructure tools, funding, product lifecycle, and service methodology;
- Meet with key staff in all departments as well as IST, to determine desired business systems, GIS, and technology needs;
- Assess the IST organizational structure and staffing levels to ensure that these best meet the District's business and technology needs;
- Prioritize application and infrastructure requirements based on current and proposed business needs and goals, and evaluate alternative approaches for meeting those needs;
- Estimate the budget requirements for each recommended application and infrastructure need for initial implementation and ongoing support;
- Develop recommendations for more effective technology use to support business needs;

- Conduct an in-depth evaluation of the network system and targeted servers;
- Document and present findings in a comprehensive 3-5 year strategic plan.

In addition to the base contract amount of \$53,452, the General Manager recommends a 15% contingency of \$8,020, for a total contract amount not-to-exceed \$61,472 given that there is a high likelihood of a desire by the District to request a greater in-depth assessment and more detailed recommendations of specific technology systems (separate from the IT assessment discussed previously). Given the large number of databases that the District currently maintains, and the lack of integration and centralization, we may find a strong need to request more detailed implementation steps to improve one or more of these systems. To avoid scheduling delays, the General Manager requests a 15% contingency to allow for such potential increases in the scope of work, if deemed important and beneficial.

FISCAL IMPACT

The cost of the IST Strategic Plan, including contingency, totals \$61,472. The FY2015-16 Adopted Budget includes \$50,000 for the IST Strategic Plan. The remaining \$11,472 will be covered by cost savings in other projects, including the new Document Management System, which is being delayed to allow the ISTSP to provide high level guidance on its implementation and integration with other business systems.

BOARD COMMITTEE REVIEW

This item was not previously reviewed by any Committee. However, the recommendation to proceed with an ISTSP was reviewed by the full Board as part of the FOSM report.

PUBLIC NOTICE

Public notice was provided as required by the Brown Act.

CEQA COMPLIANCE

This item is not a project subject to the California Environmental Quality Act.

NEXT STEPS

Upon Board authorization, the General Manager will execute a contract with ClientFirst for consulting services to develop an Information Systems and Technology Strategic Plan.

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