

City of Fayetteville Staff Review Form

2014-0279

Legistar File ID

7/15/2014

City Council Meeting Date - Agenda Item Only
 N/A for Non-Agenda Item

Don Marr

6/23/2014

Chief of Staff

Submitted By

Submitted Date

Division / Department

Action Recommendation:

A request to approve a resolution amendment between the City of Fayetteville and Plante & Moran for IT Program & Management Contract services previously approved by the Fayetteville City Council (Resolution 2014-012) and approve a budget adjustment for the cost of the amended request.

Budget Impact:

4470.9470.5315.00	4470 - Sales Tax Capital Improvements
Account Number	Fund
14001.1	Project Management Services (IT)
Project Number	Project Title
Budgeted Item? <u>Yes</u>	Current Budget \$ 150,000.00
	Funds Obligated \$ 101,400.00
	Current Balance \$ 48,600.00
Does item have a cost? <u>Yes</u>	Item Cost \$ 106,470.00
Budget Adjustment Attached? <u>Yes</u>	Budget Adjustment \$ 57,870.00
	Remaining Budget \$ -

V20140610

Previous Ordinance or Resolution # 2014-012

Original Contract Number: _____

Approval Date: _____

Comments:

[Signature] 7/1/14

Paul A. Bender - 7-2-2014
 Don Marr 7-2-14

[Signature]




CITY COUNCIL AGENDA MEMO

MEETING OF JULY 15TH, 2014

TO: Mayor and City Council

THRU: Mayor Jordan

FROM: Don Marr, Chief of Staff 

DATE: June 27, 2014

SUBJECT: Plante Moran Contract Amendment & Budget Adjustment

RECOMMENDATION:

The request is for the City to amend a previously approved agreement with Plante & Moran to provide project management and IT department management services to the City of Fayetteville. As was previously discussed during the original contract approval, the IT Director has been out with a significant health issue and thus created a gap in day to day management needs for the IT Division. We have several significant IT initiatives taking place and it is imperative that we have contract division management services to share the work load through the end of 2014. If at that time regular full time staff is unable to return, the City will then fill the position permanently with a regular hire rather than contracting with an outside agency.

BACKGROUND:

The City of Fayetteville entered into an agreement with Plante Moran for services ½ time through 2014. We have used the contract to supplement day to day management of the IT Division with an on-site manager every other week since the beginning of the year with the exception of weekly services through the Capital Planning Process in May. The City still have significant IT projects moving forward, most importantly the ERP System Selection and Implementation, as well as regular daily IT management needs. It is anticipated that a final decision will be made as to the return possibility & date of our IT Director by year end. And we would like to extend this contract through December 31st 2014 to cover the management needs until the final disposition of this situation has been determined.

Additionally, there remains several key projects that still exist on the IT Project Portfolio that need to be significantly completed prior to the ERP project starting in earnest. Some examples of some of these key projects and services that are still needed are: The Content Management System project will soon be kicking off and will need to be managed, as well as the continued development of processes and procedures for the City's IT department. Additionally, there are critical projects such as the Database Cluster Replacement, Disaster Recovery Plan re-development, ERP readiness, GIS Database upgrade, and continued development of metrics and procedures within the department.

BUDGET/STAFF IMPACT:

The contract amendment will utilize approximately \$48,600 of unused funds within the IT division and a budget adjustment for the balance of the contract amount needed – which will be used through use of reserves for a total cost of \$106,470.

The contract rates remains at the “all inclusive” (travel, housing, payroll, etc.) rate as originally quoted and selected by the City of Fayetteville Selection Committee and previously approved by the City Council January 7th, 2013.

Attachments:

Current Plante & Moran Contract Amendment for July 2014 through December 2014.

Resolution 16-14 approved by the City Council, previous staff memo, contract, Plante & Moran original proposal

RESOLUTION NO. _____

A RESOLUTION TO APPROVE AN EXTENSION TO THE CONTRACT WITH PLANTE AND MORAN, PLLC FOR INFORMATION TECHNOLOGY SERVICES THROUGH THE END OF 2014 IN THE AMOUNT OF \$106,470.00, AND TO APPROVE A BUDGET ADJUSTMENT

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF FAYETTEVILLE, ARKANSAS:

Section 1. That the City Council of the City of Fayetteville, Arkansas hereby approves an extension of the City's contract with Plante and Moran, PLLC for information technology services through the end of 2014 in the amount of \$106,470.00 and authorizes Mayor Jordan to sign all documents necessary to effectuate that agreement.

Section 2. That the City Council of the City of Fayetteville, Arkansas hereby approves a budget adjustment, a copy of which is attached as Exhibit "A".

PASSED and APPROVED this 15th day of July, 2014.

APPROVED:

ATTEST:

By: _____
LIONELD JORDAN, Mayor

By: _____
SONDRA E. SMITH, City Clerk/Treasurer

Fayetteville Hours Additional Hours Expansion Proposal

June 10, 2014

Background: In 2013, Plante Moran responded to an RFP to conduct IT Project and Departmental IT Management work on site for a period of approximately 6 months. The original intent of the proposal was to cover approximately 520 hours.

Work at the City began the week of January 20th, 2014 and has evolved into being on site nearly every other week, with some weeks being every week for the months of February through June of 2014 with limited amounts of work being performed on the off weeks. During that time the on-site resource, Dale Vanderford, has begun to implement a project management methodology and has started to evolve the IT department into a culture of service and professionalism. It is during this on site time, that the department sees the most momentum, so it is the wish of Fayetteville City management that the hours be increased for a period of time in order to prolong the oversight in the department.

Proposal: During the months of July through December, 2014 additional oversight of the department, as well as further development of business processes and policies/procedures are necessary due to the effort required to establish these items in a limited time frame in the contractual time allotted. An increase in scheduled hours is needed because the bank of 520 hours will be exhausted by the end of June, 2014

Below is current and proposed schedule of hours to illustrate the difference in the scheduling.

Week	Proposed Hours	
23-Jun	42	est
7-Jul	42	est
28-Jul	42	est
11-Aug	42	est
25-Aug	42	est
8-Sep	42	est
22-Sep	42	est
6-Oct	42	est
20-Oct	42	est

3-Nov	42	est
17-Nov	42	est

1-Dec	42	est
15-Dec	42	est

Cumulative Hours	546	est
Estimated Additional Budget Required	\$ 106,470	

Our fees for providing assistance to the City of Fayetteville will not exceed \$104, 470, comprised of 184 additional hours @\$195.00 per hour for all of the staff time spent on services related to IT Project Management engagement, inclusive of any expenses incurred.

Fees associated with any potential changes to our scope of services and/or other optional assistance as deemed necessary by the City, or future phases to be determined, can be provided at your request at a later date and will not be billed until formally approved, separately, by the City of Fayetteville.

We appreciate the opportunity to be of continued service to the City. If you agree with the terms of this engagement as described in this letter, please sign the enclosed copy and return it to us via fax to 248.603.5516. If you have any questions regarding this proposal, please do not hesitate to contact Dale Vanderford or Adam Rujan at 800.544.0203.

RESOLUTION NO. 16-14

A RESOLUTION TO APPROVE A CONTRACT WITH PLANTE AND MORAN, PLLC FOR INFORMATION TECHNOLOGY SERVICES IN THE AMOUNT OF \$101,400.00

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF FAYETTEVILLE, ARKANSAS:

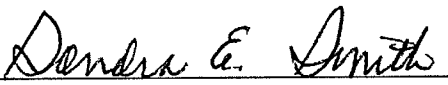
Section 1: That the City Council of the City of Fayetteville, Arkansas hereby approves the attached Contract with Plante and Moran, PLLC for information technology services in the amount of \$101,400.00 and authorizes Mayor Jordan to sign this contract.

PASSED and APPROVED this 7th day of January 2014.

APPROVED:

ATTEST:

By: 
LIONELD JORDAN, Mayor

By: 
SONDRA E. SMITH, City Clerk/Treasurer



City of Fayetteville Item Review Form

2013-0242

Legistar File Number

1/7/2014

City Council Meeting Date - Agenda Item Only
N/A for Non-Agenda Item

Paul Becker

Submitted By

Finance

Department

Action Required:

Approval of an information technology project and management services contract with Plante & Moran, PLLC.

Does this item have a cost?

\$101,400.00

Cost of this request

\$150,000.00

Category or Project Budget

Program or Project Name

4470.9470.5315.00

Account Number

Funds Used to Date

Program or Project Category

14001-1

Project Number

\$48,600.00

Remaining Balance

Fund Name

Budgeted Item? Yes

Budget Adjustment Attached?

V20130812

Previous Ordinance or Resolution # _____

Original Contract Number: _____

Comments:



12-13-13 10:22 AM

dmw

K. [Signature] 12-19-13

Paul A. Becker 12-19-2013

Am. Man 12-19-13

[Signature] 12/20/13

NON-AGENDA ITEM MEMO

To: Mayor Jordan

Thru: Don Marr, Chief of Staff

From: Paul A Becker

Date: December 18, 2013

Subject: Information Technology Project Implementation & Management Services Contract

PROPOSAL:

This request is for the City to enter into an agreement with Plante & Moran to provide Project Management Services to the City. During the 2014 Budget discussions this project was discussed with the Council. As was discussed during the budget, the IT staff has been very short staffed this year and those staffing issues will continue into 2014. In addition the division is in the process of a major project that changes the City's e-mail platform from Novell GroupWise to Microsoft Outlook. The project also includes the implementation of Microsoft 365 and upgrading of Microsoft Office to the latest version. In addition to that project, a telecommunication project which changed the communication carrier from AT & T to Cox Communications was implemented but work on that project remains. We also have other projects planned in the future such as a new ERP system.

This project will support the IT division in the implementation of projects and provide management advise on future projects.

RECOMMENDATION:

Staff recommends that the proposed contract with Plante & Moran, PLC to provide Project Implementation & Management Services be approved.

BUDGET IMPACT

Funds for this project was approved in the 2014 budget. The cost of this request is \$101,400 of the total budget approved which was \$150,000.

RESOLUTION NO. _____

A RESOLUTION TO APPROVE A CONTRACT WITH PLANTE AND MORAN, PLLC FOR INFORMATION TECHNOLOGY SERVICES IN THE AMOUNT OF \$101,400.00

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF FAYETTEVILLE, ARKANSAS:

Section 1: That the City Council of the City of Fayetteville, Arkansas hereby approves the attached Contract with Plante and Moran, PLLC for information technology services in the amount of \$101,400.00 and authorizes Mayor Jordan to sign this contract.

PASSED and APPROVED this 7th day of January 2014.

APPROVED:

ATTEST:

By: _____
LIONELD JORDAN, Mayor

By: _____
SONDRA E. SMITH, City Clerk/Treasurer



THE CITY OF FAYETTEVILLE, ARKANSAS

www.accessfayetteville.org

CONTRACT

Reference Bid: RFP 13-16, Information Technology Project Implementation & Management Services

Contractor: Plante & Moran, PLLC

Term: 1 year

This contract executed this 7th day of January, ~~2013~~ 2014, between the City of Fayetteville, Arkansas, and *Plante & Moran, PLLC*. In consideration of the mutual covenants contained herein, the parties agree as follows.

WITNESSETH:

WHEREAS, City has previously determined that it has a need for Information Technology Project Implementation & Management Services

WHEREAS, City, after soliciting competitive proposals for such services pursuant to City of Fayetteville RFP 13-16 (herein after referred to as Request for Proposal or RFP), City has awarded this contract to *Plante & Moran, PLLC*; and

WHEREAS, *Plante & Moran, PLLC* has represented that it is able to satisfactorily provide these services according to the terms and conditions of the RFP, which are incorporated herein by reference, and the terms and conditions are contained herein; and

NOW THEREFORE, in consideration of the above and mutual covenants contained herein, the parties agree as follows:

1. IT Support Services , as requested and more specifically outlined in the RFP, this agreement, and all subsequent official documents that form the Contract Documents for this Agreement.
2. Time of Service: Services shall be performed in a timely manner, as specified in the RFP and attached in Appendix A.

3. Term of Agreement: Services performed pursuant to this Contract shall commence upon execution of this agreement and continue until project is complete, unless canceled or terminated within thirty (30) days written notice by either party.
4. Amendment of Contract: This Contract may be amended only by mutual agreement of the parties.
5. Assignment and Subcontracting: *Plante & Moran, PLLC* shall perform this contract. No assignment or subcontracting shall be allowed without the prior written consent of the City. In the event of a corporate acquisition and/or merger, *Plante & Moran, PLLC* shall provide written notice to the City within thirty (30) business days of such notice of action or upon the occurrence of said action, whichever occurs first. The right to terminate this contract, which shall not be unreasonably exercised by the City, shall include, but not be limited to, instances in which a corporate acquisition and/or merger represent a conflict of interest or are contrary to any local, state, or federal laws. Action by the City awarding a proposal to a Proposer, which has disclosed its intent to assign or subcontract in its response to the RFP, without exception shall constitute approval for purposes of this Agreement.
6. Cancellation: The City of Fayetteville reserves the right to cancel this Contract, without cause, by giving thirty (30) days notice to *Plante & Moran, PLLC* of the intent to cancel, or with cause if at any time *Plante & Moran, PLLC* fails to fulfill or abide by any of the terms or conditions specified.
Failure of the *Plante & Moran, PLLC* to comply with any of the provisions of this contract shall be considered a material breach of contract and shall be cause for immediate termination of the contract at the discretion of the City of Fayetteville.
In addition to all other legal remedies available to the City of Fayetteville, the City reserves the right to cancel and obtain from another source any services which have not been provided within the period of time stated in the proposal, or if no such time is stated, within a reasonable period of time from the date of order or request, as determined by the City.
In the event that sufficient budgeted funds are not available for a fiscal period, the City shall notify *Plante & Moran, PLLC* of such occurrence and the Contract shall terminate on the last day of the then current fiscal period without penalty or expense to the City. The City reserves the right to terminate within the thirty (30) day notice because of budgetary issues.

7. Compensation: As compensation for *Plante & Moran, PLLC* providing services to the City as described herein, the City shall pay *Plante & Moran, PLLC* in arrears, based on the submission of invoices for work completed and properly authorized. City shall pay *Plante & Moran, PLLC* in an amount not to exceed \$101,400.00, based on a blended consulting rate of \$195 per hour, inclusive of all travel expenses, at an estimated 520 hours. In the event services are provided which do not require travel, the rate shall be less than \$195 per hour as negotiated.

8. Permits & Licenses: *Plante & Moran, PLLC* shall secure and maintain any and all permits and licenses required to complete this contract.

9. Minimum Insurance Requirements: *Plante & Moran, PLLC* shall maintain insurance in at least the amounts required in the RFP throughout the term of this contract. *Plante & Moran, PLLC* must provide a Certificate of Insurance in accordance with the insurance requirements listed within the RFP, evidencing such coverage prior to issuance of a purchase order or commencement of any work under this contract. *Plante & Moran, PLLC* shall ensure that any subcontractors or persons hired by subcontractors maintain the same level of insurance coverage as *Plante & Moran, PLLC*.

10. Indemnification: *Plante & Moran, PLLC* shall indemnify, pay the cost of defense, including but not limited to attorneys' fees, and hold harmless the City from all suits, actions or claims of any character brought on account of any injuries or damages received or sustained by any person, persons, or property by or from the said *Plante & Moran, PLLC*; or by, or in consequence of any neglect in safeguarding the work; or on account of any act or omission, neglect or misconduct of *Plante & Moran, PLLC*; or by, or on account of, any claim or amounts recovered under the Workers' Compensation Law or of any other laws, by-laws, ordinances, order of decree, except only such injury or damage as shall have been occasioned by the sole negligence of the City of Fayetteville. The first ten dollars (\$10.00) of compensation received by *Plante & Moran, PLLC* represents specific consideration for this indemnification obligation.

11. Governing Law & Jurisdiction: Legal jurisdiction to resolve any disputes shall be Washington County, Arkansas with Arkansas law applying to the case.

12. Severability: The terms and conditions of this agreement shall be deemed to be severable. Consequently, if any clause, term, or condition hereof shall be held to be illegal or void, such determination shall not affect the validity of legality of the remaining terms and conditions, and notwithstanding any such determination, this agreement shall continue in full force and effect unless the particular clause, term, or condition held to be illegal or void renders the balance of the agreement impossible to perform.

13. Scope of Work: Scope is further defined in detail with Appendix A of this contract:

Services required include assistance to the staff in the evaluation and resolution of problems on current projects. Services would also include new projects assigned by the Chief of Staff and/or the Finance and Internal Services Director of the City. Essentially the services required will require an on-site contract project manager. The contract project manager would both assist staff in problem evaluation and solution as well as assist in the implementation of new projects. The contract manager would be the working manager. Services would also include assisting the Chief of Staff and the Finance and Internal Services Director in the evaluation and solution of new problems encountered as well as advice on long range planning for the Information Technology (IT) Department.

14. Changes in Scope or Price: Changes, modifications, or amendments in scope, price, or fees to this contract shall not be allowed without a prior formal contract amendment approved by the Mayor and the City Council in advance of the change in scope, cost or fees.

15. Freedom of Information Act: Documents prepared while performing city contractual work are subject to the Arkansas Freedom of Information Act. If a Freedom of Information Act request is presented to the City of Fayetteville, *Plante & Moran, PLLC* will do everything possible to provide the documents in a prompt and timely manner as prescribed in the Arkansas Freedom of Information Act (A.C.A. §25-19-101 et. seq.) Only legally authorized photocopying costs pursuant to the FOIA may be assessed for this compliance.

16. Documents Comprising Contract: The contract shall include this Agreement for Information Technology Project Implementation & Management Services and attached Appendix A, as well as the following documents, which are incorporated herein by reference:

- 1) City of Fayetteville's Request for Proposal and all of its addenda and attachments issued in reference to RFP 13-16;
- 2) *Plante & Moran, PLLC* 's Certificate of Insurance as required, listing the City as an additional insured;
- 3) *Plante & Moran, PLLC*'s Proposal.

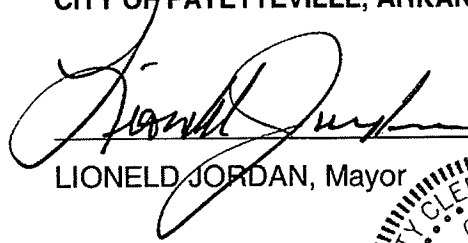
If there is a conflict between the terms of this Agreement and the above referenced documents, the conflict shall be resolved as follows: the terms of this Agreement shall prevail over the other documents, and the terms of the remaining documents shall be given preference in their above listed order.

WITNESS OUR HANDS THIS 7 DAY OF January, 2014


PLANTE & MORAN, PLLC

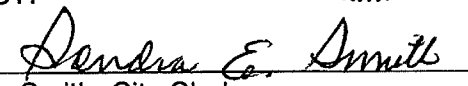
CITY OF FAYETTEVILLE, ARKANSAS

By: _____


LIONELD JORDAN, Mayor


Adam Rujan, Partner

ATTEST: 
Company Secretary

ATTEST: 
Sondra Smith, City Clerk

27400 Northwestern Hwy
Business Address

Date Signed: 01-09-13

Southfield, MI. 48037
City, State & Zip Code

Date Signed: 12-18-13

of which the Proposer may undertake and request an opinion to the City as to whether the association, interest or circumstance would, in the opinion of the City, constitute a conflict of interest if entered into by the Proposer. The City agrees to communicate with the Proposer its opinion via e-mail or first-class mail within thirty days of receipt of notification.

8. WITHDRAWAL OF PROPOSAL:

- a. A proposal may be withdrawn at any time.

9. LATE PROPOSAL OR MODIFICATIONS:

- a. Proposal and modifications received after the time set for the proposal submittal shall not be considered. Modifications in writing received prior to the deadline will be accepted. The City will not be responsible for misdirected bids. Proposers should call the Purchasing Division at (479) 575-8220 to insure receipt of their submittal documents prior to opening time and date listed.
- b. The time set for the deadline shall be local time for Fayetteville, AR on the date listed. All proposals shall be received in the Purchasing Division BEFORE the deadline stated. The official clock to determine local time shall be the atomic clock located in the Purchasing Division, Room 306 of City Hall, 113 W. Mountain, Fayetteville, AR.

10. LOCAL, STATE, AND FEDERAL COMPLIANCE REQUIREMENTS:

- a. The laws of the State of Arkansas apply to any purchase made under this request for proposal. Proposers shall comply with all local, state, and federal directives, orders and laws as applicable to this proposal and subsequent contract(s) including but not limited to Equal Employment Opportunity (EEO), Disadvantaged Business Enterprises (DBE), & OSHA as applicable to this contract.
- b. Pursuant to Arkansas Code Annotated §22-9-203 The City of Fayetteville encourages all *qualified* small, minority and women business enterprises to bid on and receive contracts for goods, services, and construction. Also, City of Fayetteville encourages all general contractors to subcontract portions of their contract to *qualified* small, minority and women business enterprises.

11. COLLUSION:

The Proposer, by affixing his or her signature to this proposal, agrees to the following: "Proposer certifies that his proposal is made without previous understanding, agreement, or connection with any person, firm or corporation making a proposal for the same item(s) and/or services and is in all respects fair, without outside control, collusion, fraud, or otherwise illegal action."

12. RIGHT TO AUDIT, FOIA, AND JURISDICITON:

- a. The City of Fayetteville reserves the privilege of auditing a vendor's records as such records relate to purchases between the City and said vendor.
- b. Freedom of Information Act: City contracts and documents prepared while performing City contractual work are subject to the Arkansas Freedom of Information Act. If a Freedom of Information Act request is presented to the City of Fayetteville, the (Contractor) will do everything possible to provide the documents in a prompt and timely manner as prescribed in the Arkansas Freedom of Information Act (A.C.A. §25-19-101 et. seq.). Only legally authorized photocopying costs pursuant to the FOIA may be assessed for this compliance.
- c. Legal jurisdiction to resolve any disputes shall be Arkansas with Arkansas law applying to the case.

13. CITY INDEMNIFICATION:

The successful Proposer(s) agrees to indemnify the City and hold it harmless from and against all claims, liability, loss, damage or expense, including but not limited to counsel fees, arising from or by reason of any actual or claimed

trademark, patent or copyright infringement or litigation based thereon, with respect to the services or any part thereof covered by this order, and such obligation shall survive acceptance of the services and payment thereof by the City.

14. VARIANCE FROM STANDARD TERMS & CONDITIONS:

All standard terms and conditions stated in this request for proposal apply to this contract except as specifically stated in the subsequent sections of this document, which take precedence, and should be fully understood by Proposers prior to submitting a proposal on this requirement.

15. ADA REQUIREMENT FOR PUBLIC NOTICES & TRANSLATION:

Persons with disabilities requiring reasonable accommodation to participate in this proceeding/event, should call 479.521.1316 (telecommunications device for the deaf), not later than seven days prior to the deadline. Persons needing translation of this document shall contact the City of Fayetteville, Purchasing Division, immediately.

16. PAYMENTS AND INVOICING:

The Proposer must specify in their proposal the exact company name and address which must be the same as invoices submitted for payment as a result of award of this RFP. Further, the successful Proposer is responsible for immediately notifying the Purchasing Division of any company name change, which would cause invoicing to change from the name used at the time of the original RFP. Payment will be made within thirty days of invoice received. The City of Fayetteville is very credit worthy and will not pay any interest or penalty for untimely payments. **Payments can be processed through Proposer's acceptance of Visa at no additional costs to the City for expedited payment processing.** The City will not agree to allow any increase in hourly rates by the contract without PRIOR Fayetteville City Council approval.

17. CANCELLATION:

- a. The City reserves the right to cancel this contract without cause by giving sixty (60) days prior notice to the Contractor in writing of the intention to cancel or with cause if at any time the Contractor fails to fulfill or abide by any of the terms or conditions specified.
- b. Failure of the contractor to comply with any of the provisions of the contract shall be considered a material breach of contract and shall be cause for immediate termination of the contract at the discretion of the City of Fayetteville.
- c. In addition to all other legal remedies available to the City of Fayetteville, the City reserves the right to cancel and obtain from another source, any items and/or services which have not been delivered within the period of time from the date of order as determined by the City of Fayetteville.
- d. In the event sufficient budgeted funds are not available for a new fiscal period, the City shall notify the vendor of such occurrence and contract shall terminate of the last day of the current fiscal period without penalty or expense to the City.

18. ASSIGNMENT, SUBCONTRACTING, CORPORATE ACQUISITIONS AND/OR MERGERS:

- a. The Contractor shall perform this contract. No assignment of subcontracting shall be allowed without prior written consent of the City. If a Proposer intends to subcontract a portion of this work, the Proposer shall disclose such intent in the proposal submitted as a result of this RFP.
- b. In the event of a corporate acquisition and/or merger, the Contractor shall provide written notice to the City within thirty (30) calendar days of Contractor's notice of such action or upon the occurrence of said action, whichever occurs first. The right to terminate this contract, which shall not be unreasonably exercised by the City, shall include, but not be limited to, instances in which a corporate acquisition and/or merger represent a conflict of interest or are contrary to any local, state, or federal laws. Action by the City awarding a proposal to a firm that has disclosed its intent to assign or subcontract in its response to the RFP, without exception shall constitute approval for purpose of this Agreement.

19. NON-EXCLUSIVE CONTRACT:

Award of this RFP shall impose no obligation on the City to utilize the vendor for all work of this type, which may develop during the contract period. This is not an exclusive contract. The City specifically reserves the right to concurrently contract with other companies for similar work if it deems such an action to be in the City's best interest. In the case of multiple-phase contracts, this provision shall apply separately to each item.

20. ADDITIONAL REQUIREMENTS:

The City reserves the right to request additional services relating to this RFP from the Proposer. When approved by the City as an amendment to the contract and authorized in writing prior to work, the Contractor shall provide such additional requirements as may become necessary.

21. SERVICES AGREEMENT:

A written agreement, in substantially the form attached, incorporating the RFP and the successful proposal will be prepared by the City, signed by the successful Proposer and presented to the City of Fayetteville for approval and signature of the Mayor.

22. INTEGRITY OF REQUEST FOR PROPOSAL (RFP) DOCUMENTS:

Proposers shall use the original RFP form(s) provided by the Purchasing Division and enter information only in the spaces where a response is requested. Proposers may use an attachment as an addendum to the RFP form(s) if sufficient space is not available on the original form for the Proposer to enter a complete response. **Any modifications or alterations to the original RFP documents by the Proposer, whether intentional or otherwise, will constitute grounds for rejection of such RFP response.** Any such modifications or alterations a Proposer wishes to propose shall be clearly stated in the Proposer's RFP response and presented in the form of an addendum to the original RFP documents.

23. OTHER GENERAL CONDITIONS:

- a. Proposers must provide the City with their proposals signed by an employee having legal authority to submit proposals on behalf of the Proposer. The entire cost of preparing and providing responses shall be borne by the Proposer.
- b. The City reserves the right to request any additional information it deems necessary from any or all Proposers after the submission deadline.
- c. The request for statement of qualification is not to be construed as an offer, a contract, or a commitment of any kind; nor does it commit the city to pay for any costs incurred by Proposer in preparation. It shall be clearly understood that any costs incurred by the Proposer in responding to this request for proposal is at the Proposer's own risk and expense as a cost of doing business. The City of Fayetteville shall not be liable for reimbursement to the Proposer for any expense so incurred, regardless of whether or not the proposal is accepted.
- d. If products, components, or services other than those described in this bid document are proposed, the Proposer must include complete descriptive literature for each. All requests for additional information must be received within five working days following the request.
- e. **Any uncertainties shall be brought to the attention to Andrea Foren immediately via telephone (479.575.8220) or e-mail (aforen@ci.fayetteville.ar.us).** It is the intent and goal of the City of Fayetteville Purchasing Division to provide documents providing a clear and accurate understanding of the scope of work to be completed and/or goods to be provided. We encourage all interested parties to ask questions to enable all Proposers to be on equal terms.
- f. Any inquiries or requests for explanation in regard to the City's requirements should be made promptly to Andrea Foren, City of Fayetteville, Purchasing Agent via e-mail (aforen@ci.fayetteville.ar.us) or telephone (479.575.8220). No oral interpretation or clarifications will be given as to the meaning of any part of this request for proposal. All questions, clarifications, and requests, together with answers, if any, will be

provided to all firms via written addendum. Names of firms submitting any questions, clarifications, or requests will not be disclosed until after a contract is in place.

- g. At the discretion of the City, one or more firms may be asked for more detailed information before final ranking of the firms, which may also include oral interviews.
- h. Any information provided herein is intended to assist the Proposer in the preparation of proposals necessary to properly respond to this RFP. The RFP is designed to provide qualified Proposers with sufficient basic information to submit proposals meeting minimum specifications and/or test requirements, but is not intended to limit a RFP's content or to exclude any relevant or essential data.
- i. Proposers irrevocably consent that any legal action or proceeding against it under, arising out of or in any manner relating to this Contract shall be controlled by Arkansas law. Proposer hereby expressly and irrevocably waives any claim or defense in any said action or proceeding based on any alleged lack of jurisdiction or improper venue or any similar basis.
- j. The successful Proposer shall not assign the whole or any part of this Contract or any monies due or to become due hereunder without written consent of City of Fayetteville. In case the successful Proposer assigns all or any part of any monies due or to become due under this Contract, the Instrument of assignment shall contain a clause substantially to the effect that is agreed that the right of the assignee in and to any monies due or to become due to the successful Proposer shall be subject to prior liens of all persons, firms, and corporations for services rendered or materials supplied for the performance of the services called for in this contract.
- k. The successful Proposer's attention is directed to the fact that all applicable Federal and State laws, municipal ordinances, and the rules and regulations of all authorities having jurisdiction over the services shall apply to the contract throughout, and they will be deemed to be included in the contract as though written out in full herein. The successful Proposer shall keep himself/herself fully informed of all laws, ordinances and regulations of the Federal, State, and municipal governments or authorities in any manner affecting those engaged or employed in providing these services or in any way affecting the conduct of the services and of all orders and decrees of bodies or tribunals having any jurisdiction or authority over same. If any discrepancy or inconsistency should be discovered in these Contract Documents or in the specifications herein referred to, in relation to any such law, ordinance, regulation, order or decree, s/he shall herewith report the same in writing to City of Fayetteville.

1. The following documents are included with this solicitation: N/A

City of Fayetteville
RFP 13-16, IT Support Services
SECTION B: Scope of Services and General Information

1.) OVERVIEW: The City of Fayetteville is seeking proposals to provide support services to the City's IT function. Services required include assistance to the staff in the evaluation and resolution of problems on current projects. Services would also include new projects assigned by the Chief of Staff and/or the Finance and Internal Services Director of the City. Essentially the services required will require an on-site contract project manager. The contract project manager would both assist staff in problem evaluation and solution as well as assist in the implementation of new projects. The contract manager would be the working manager. Services would also include assisting the Chief of Staff and the Finance and Internal Services Director in the evaluation and solution of new problems encountered as well as advice on long range planning for the Information Technology (IT) Department.

The services requested will require previous hands on experience with hardware and software currently being used by the City of Fayetteville. Proposals should contain an all-inclusive hourly rate.

2.) INTENT:

- a. The City intends to select a primary contract manager for an initial six (6) month term with renewable options in additional six (6) month increments.
- b. The City desires to contract with experienced personnel to optimize the City's operation needs in a timely, highly skilled, and productive manner.

3.) CURRENT TECHNOLOGY INFRASTRUCTURE:

- a. AS400 for central processing
- b. 28 sites exist on the City's network
 - i. Eight (8) are connected through a fiber network
 - ii. Nineteen (19) are on a leased TELCO connections
 - iii. One (1) is connected using site-to-site VPN across the internet

4.) CURRENT TECHNOLOGY APPLICATIONS:

- a. New World System (ERP): The City is running New World System on an AS400 platform which was initially installed in the 1990's. It is the City's intent to purchase and implement a .net solution in the near future; however, a new system has not been procured at this time.
- b. Electronic Data Management System: used for document imaging and management
- c. Hansen Asset Management: Used for several different purposes including generation of work orders, permitting, and in some cases inventory tracking. Currently, the City is using version 7.77 which is being run on a Microsoft SQL server.
- d. The City maintains a website using WEB 1.0 technology.
- e. The City is currently in the process of migrating email platforms from Novell GroupWise to Microsoft Office 365 including upgrading all users to Office 2013. (Current major project).
- f. The City uses NovaTime for time and attendance both to schedule and monitor work hours.

5.) SCOPE OF WORK: In serving this contract, the selected entity will be expected to perform said scope of services as assigned:

- a. Proposer will provide the City with hands on consulting and related professional services for any and all projects specified by the City during the contract period. Proposer shall provide written or oral progress reports as requested by the City.
- b. Awarded Proposer shall be on site as needed within the work week. Amount of time on-site is flexible as long as contract needs are being properly taken care of.
- c. The City estimates approximately 520 hours over the first six (6) month term.

- d. Current major project includes assisting and helping the IT Department manage the e-mail conversion from GroupWise to Outlook.
- e. Provide good customer service to both internal and external customers.
- f. Respond to common inquiries or complaints from users.
- g. Assist in the development of IT applications and business processes in view of evolving technology.
- h. Provide regular weekly and monthly updates to the Chief of Staff and Chief Financial Officer as to the progress of projects, resolution & work plans for problem resolution of issues that arise from the daily operations of the City business & outlines of IT Division priorities outlined for the immediate work period.

6.) **PROPOSAL SUBMITTAL:** In responding to this request, firms should include the following information in addition to other requested information and pertinent company information related to the selection criteria:

- a. Proposals should be prepared simply and economically, providing a straight forward, concise description its ability to meet the requirements for the project. Fancy bindings, colored displays, and promotional material are not required. Emphasis should be on completeness and clarity of content. All documents should be typewritten on standard 8 ½" x 11" white papers and bound in one volume. Exceptions would be schematics, exhibits, or other information necessary to facilitate the City of Fayetteville's ability to accurately evaluate the proposal. Limit proposal to twenty-five (25) pages or less, excluding one-page
- b. **References:** A client reference list for which similar work has been performed within the past five (5) years.
- c. **Experience:** Provide a general description of the firm, its history, primary types of work, organizational structure, etc.
- d. **Fees:**
 - i. State **hourly fee** to be charged for services. Fee shall be all inclusive and include all travel, relocation, services, etc. The City shall not pay additional travel expenses. See also fees discussed in the Signature Submittal section.
- e. **Company:**
 - i. **Experience:** Proposer shall provide a detailed description of similar city and/or county projects or contracts that currently use the proposed system, completed and/or presently provided during the past five (5) years. Provide complete contact information, name, address, phone and emails for all references.
 - ii. **Company Principals:** Provide a brief biographic overview of the Company's key principals.
 - iii. **Capabilities:** Proposer shall provide a description of limitations relative to facilities, staff personnel, on-going projects/ contracts, etc. Specifically, provide in RFP response what priority will be placed on this project.
 - iv. **Company Organization:**
 1. **Primary Business:** Proposers shall describe company's primary business interest and/or operations including organization and affiliations. Include the magnitude of your operation as it relates to this project.
 2. **Company History:** Provide pertinent company historical information that will demonstrate your capability to successfully accomplish this project.
- f. **Personnel:**

Staff: The Proposer shall provide a description of how work will be assigned to effectively facilitate the requirements of this project.

 - i. **Resumes:** The Proposer shall provide maximum one-page resumes of key personnel/person intended to be utilized for this project. One-page resumes do not count towards page restrictions outlined in this RFP. Resumes shall include, at a minimum:
 - Position Title
 - Tenure with Proposer

- Experience
- Other related information

7.) CONTRACT FORMATION:

- a. If the negotiation produces mutual agreement, the draft contract as a part of this package will be constructed and forwarded to the Fayetteville City Council for approval. If negotiations with the highest ranking Proposer fail, negotiations shall be initiated with the next highest ranking Proposer until an agreement is reached. The City reserves the right to reject all offers and end the process without executing a contract.

8.) PROPOSAL CONTENT:

- a. Proposals should be prepared simply and economically, providing a straight forward, concise description its ability to meet the requirements for the project. Fancy bindings, colored displays, and promotional material are not required. Emphasis should be on completeness and clarity of content. All documents should be typewritten on standard 8 ½" x 11" white papers and bound in one volume. Exceptions would be schematics, exhibits, or other information necessary to facilitate the City of Fayetteville's ability to accurately evaluate the proposal. Limit proposal to twenty-five (25) pages or less, excluding one-page team resumes.

9.) TERM OF CONTRACT:

- a. The initial term of the contract shall be for a six (6) month period. The contract shall be renewable by mutual consent, on a mutually agreed basis. The contract may be terminated by either party by giving the other party written notice of such intent not less than thirty (30) days prior to the effective date of the termination. In the event of termination, claims for compensation owed the consultant by the City shall be limited to verifiable services rendered. The City reserves the right not to use the "primary" contract solely. The City reserves the right to contract with any firm responding to this request, based on specific project needs and experience needed.

10.) DEMONSTRATION & ORAL PRESENTATION:

- a. Following the evaluation of the proposals, the Selection Committee may request that the top ranking firms make an oral presentation or be interviewed. If presentations are necessary, they will take place in Fayetteville, Arkansas. Notices will be sent by the Purchasing Division.

11.) ANTICIPATED PROJECT TIMELINE: *subject to change*

Date	Time	Description
Tuesday, October 15, 2013	N/A	Advertisement for RFQ
Friday, November 01, 2013	Before 2:00 PM	Deadline to submit a Proposal
Tuesday, November 12, 2013	N/A	Contract negotiations finalized and contract signed by Vendor
Friday, November 15, 2013	4:00 PM	Internal deadline for packet to be turned into City Clerk's Office for 12/03/13 City Council Meeting
Tuesday, November 26, 2013	4:30 PM	Agenda Session for 12/03/13 City Council Meeting
Tuesday, December 03, 2013	6:00 PM	City Council Meeting to consider contract

12.) SELECTION CRITERIA: SELECTION CRITERIA: The following criteria will be used by the City to evaluate and score responsive proposals. Proposers shall include sufficient information to allow the City to thoroughly evaluate and score their proposal. Each proposal submitted is not required to be ranked by the selection committee; however, all proposals will be evaluated. The contract may be awarded to the most qualified firm, per the evaluation criteria listed below, based on the evaluation of the selection committee.

- 1) 25% **Qualifications in Relation to Specific Project to be Performed:** Information reflecting qualifications of the firm. Indicated specialized experience and technical competence of the firm in connection with the type and complexity of the service required. Subcontractors, if used, must be listed with information on their organization.

- 2) 25% **Experience, Competence, and Capacity for Performance:** Information reflecting the names, titles, and qualifications (including experience and technical competence) of the major personnel assigned to this specific project. Provide detailed breakdown of subcontractor's staff to be used and how they are to be used to supplement your staff. This section of the evaluation criteria includes the amount of work presently underway for your firm; please present this in submittal.
- 3) 20% **Proposed Method of Doing Work:** A proposed work plan (description of how the project would be conducted as well as other facts concerning approach to scope you wish to present) indicating methods and schedules for accomplishing scope of work. Include with this the amount of work presently underway.
- 4) 15% **Past Performance:** Previous evaluations shall be considered a significant factor. If previous evaluations with the City are not available, the professional firm's past performance records with City and others will be used, including quality of work, timely performance, diligence, ability to meet past budgets, and any other pertinent information. Firm will provide a list of similar jobs performed and person whom the City can contact for information.
- 5) 15% **Price:** Complete hourly fee to the City for all services described herein including but not limited to fees for services, travel, lodging, re-location fees, etc.

City of Fayetteville
RFP 13-16, IT Support Services
SECTION E: Signature Submittal

1. Disclosure Information

Proposer must disclose any possible conflict of interest with the City of Fayetteville, including, but not limited to, any relationship with any City of Fayetteville employee. Proposer response must disclose if a known relationship exists between any principal or employee of your firm and any City of Fayetteville employee or elected City of Fayetteville official.

If, to your knowledge, no relationship exists, this should also be stated in your response. Failure to disclose such a relationship may result in cancellation of a purchase and/or contract as a result of your response. This form must be completed and returned in order for your bid/proposal to be eligible for consideration.

PLEASE CHECK ONE OF THE FOLLOWING TWO OPTIONS, AS IT APPROPRIATELY APPLIES TO YOUR FIRM:

_____ 1) NO KNOWN RELATIONSHIP EXISTS

_____ 2) RELATIONSHIP EXISTS (Please explain): _____

I certify that; as an officer of this organization, or per the attached letter of authorization, am duly authorized to certify the information provided herein are accurate and true; and my organization shall comply with all State and Federal Equal Opportunity and Non-Discrimination requirements and conditions of employment.

2. At the discretion of the City, one or more firms may be asked for more detailed information before final ranking of the firms, which may also include oral interviews. **NOTE: Each Proposer shall submit to the City a primary contact name, e-mail address, and phone number (preferably a cell phone number) where the City selection committee can call for clarification or interview via telephone.**

Name of Firm: _____

Name of Primary Contact: _____

Title of Primary Contact: _____

Phone#1 (cell preferred): _____ Phone#2: _____

E-Mail Address: _____

3. Please acknowledge receipt of addenda for this invitation to bid, request for proposal, or request for qualification by signing and dating below. All addendums are hereby made a part of the bid or RFP documents to the same extent as though it were originally included therein. Proposers/Bidders should indicate their receipt of same in the appropriate blank listed herein. Failure to do so may subject vendor to disqualification.

ADDENDUM NO.	SIGNATURE AND PRINTED NAME	DATE ACKNOWLEDGED

4. PRICE BID: Firm proposes the following all inclusive hourly rate. Rate includes all expenses to the city including but not limited to services, travel, overhead, re-location, etc. The City shall not pay additional fees outside of contracted hourly rate for the services listed in this RFP. In the event of contract extension or renewal, the number of hours will be increased.

Item	Description	Estimated Quantity (# hours in 6 months)	Proposed Hourly Rate	Total Fee for 6 months
1	IT Services as described	520	x \$ _____	= \$ _____

5. As an interested party on this project, you are required to provide debarment/suspension certification indicating in compliance with the below Federal Executive Order. Certification can be done by completing and signing this form.

Federal Executive Order (E.O.) 12549 "Debarment and Suspension" requires that all contractors receiving individual awards, using federal funds, and all sub-recipients certify that the organization and its principals are not debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency from doing business with the Federal Government.

6. Signature certifies that neither you nor your principal is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.

Questions regarding this form should be directed to the City of Fayetteville Purchasing Division.

NAME: _____

COMPANY: _____

PHYSICAL ADDRESS: _____

MAILING ADDRESS: _____

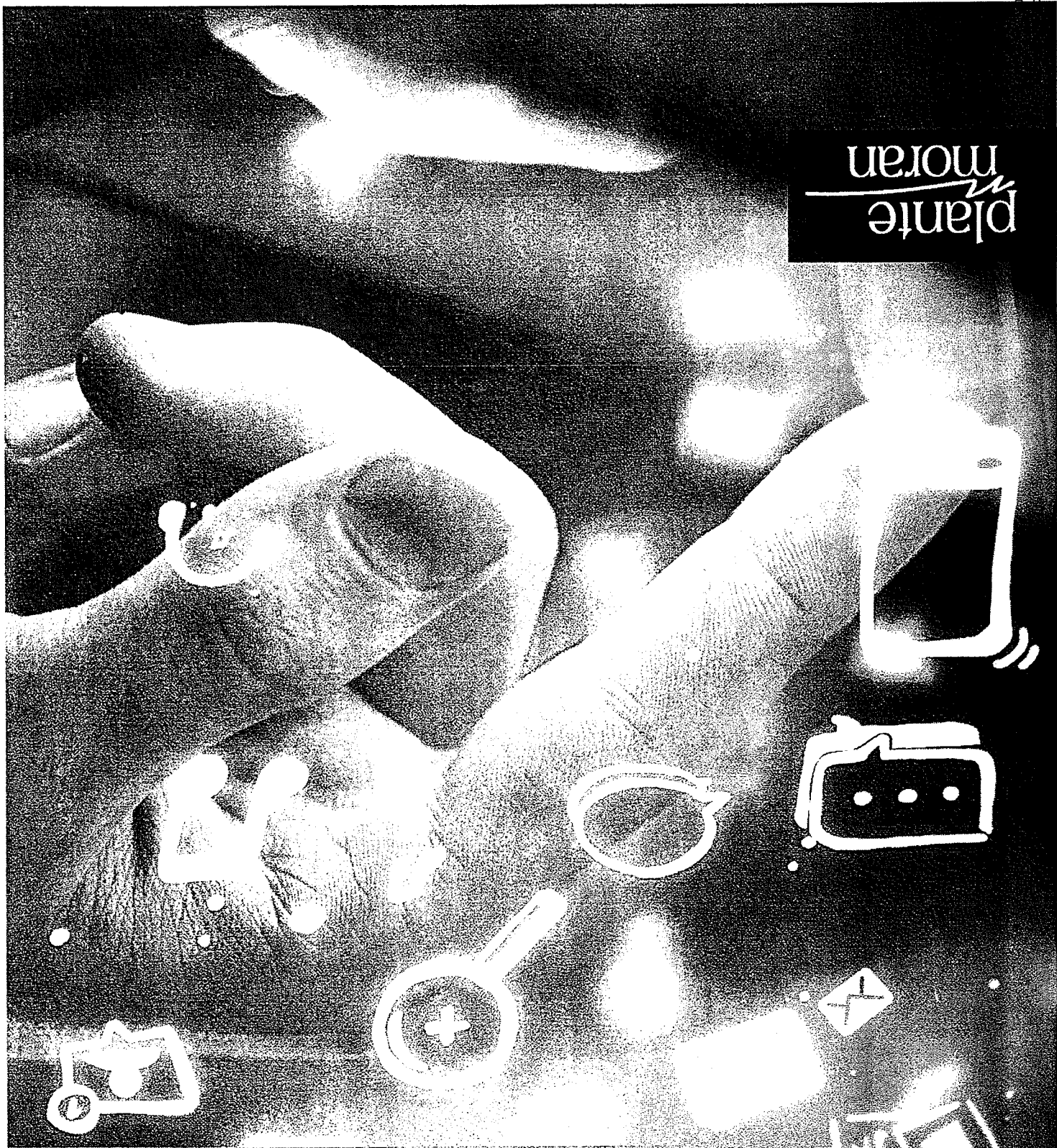
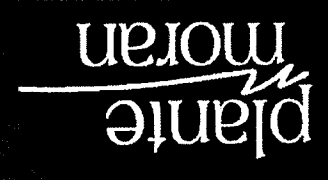
PHONE: _____ FAX: _____

E-MAIL: _____

SIGNATURE: _____

TITLE: _____

DATE: _____



OLYMPIA/EMERSON/ARL NOVEMBER 1, 2013

Proposal to Provide IT Support Services



November 1, 2013

Ms. Andrea Foren, CPPO, CPPB
City of Fayetteville, AR
113 W. Mountain – Room 306
Fayetteville, AR 72701

Dear Ms. Foren:

Plante & Moran, PLLC (Plante Moran) is pleased to respond to your Request for Proposal to provide IT Support Services to the City of Fayetteville, AR. We understand that the City is seeking proposals to provide support services to the City's IT function, including assistance to the staff in the evaluation and resolution of problems on current projects. We understand that the services requested will require previous hands on experience with hardware and software currently being used by the City. We are confident that we have a deep understanding of many of the City systems that would be impacted by this contract, including:

- New World Systems (ERP); reviewed as part of the 2010 IT Assessment
- Electronic Data Management System (EDMS); reviewed as part of the 2010 IT Assessment
- Hansen Asset Management; reviewed as part of the 2010 IT Assessment

In addition, Plante Moran assisted the City in soliciting and analyzing vendor proposals for the Microsoft Office 365 initiative. Overall, we feel that our past experience and knowledge of City operations, coupled with our deep project management experience and industry knowledge expertise would help the City effectively implement the important IT projects as defined in the City's project portfolio.

As part of our proposal, we are offering the City an experienced information technology leader, Mr. Dale Vanderford. Dale was Director of Technology and Operations for Washtenaw County, Michigan and spent his last two years prior to joining Plante Moran on implementing and managing the consolidation of the network infrastructure teams and data centers for Washtenaw County and the City of Ann Arbor, MI. Prior to that, Dale managed the operation and management of the County's IT department, a \$9 million, 30 person department. During Dale's tenure in the department, several infrastructure upgrades occurred, including the construction of a 90 mile fiber optic network, two data center moves, several new buildings were brought online, two Microsoft Exchange Upgrades, and the implementation of an Asset management system was completed. There were also several sizeable software selections and implementations, including an ERP System, document management, video surveillance software, and the changing of a Police Records Management system (New World Systems, running on an A/S 400) that coordinated the changing of Police records in 9 separate jurisdictions to one single package. During Dale's tenure, the department consistently received national accolades, including several consecutive year appearances on the Digital Counties Survey top 10 and two consecutive years on CIO Magazine's Top 100 IT departments list. Dale joined the Plante Moran staff in 2011.

PROPOSAL TO PROVIDE IT SERVICES

Plante Moran was founded as a professional services firm in 1924. We have been specializing in assisting municipalities with technology matters for over 30 years. Some highlights of our practice include:

- Significant and recent experience in conducting Project Management, Information Technology Assessments and related Technology Consulting for municipal clients including current and recent engagements for the following entities
 - City of Chandler, AZ
 - Ottawa County, MI
 - Town of Hempstead, NY
 - Johnson County, KS*
 - Waukesha County, WI*
 - Muskegon County, MI*
 - City of Carlsbad, CA
 - Washtenaw County, MI*
 - City of Mesa, AZ*
 - Oakland County, MI*

*** – denotes organizations that have been recognized by the Center for Digital Government as winners for their respective populations served*

- Within the public sector, we are independent from all hardware, software and communications products and solutions allowing us complete independence when recommending solutions for our public sector clients.
- Significant expertise in the area of IT Governance. In fact, our proposed Project Director, Adam Rujan, has recently contributed a chapter on the topic to a recent PTI published book.
- Active participation in numerous organizations serving the technology needs of our municipal clients including Public Technology Institute (PTI), Government Management Information Sciences (GMIS) and Governmental Finance Officers Association (GFOA)

Our proposed team blends the technology and municipal operations knowledge with seasoned, consultants to work on this important initiative. We believe that based upon these experiences and the quality of our proposed team, we are well qualified to provide objective and project management services to the City.

If you have any questions concerning this proposal, please contact:

Mr. Adam Rujan, Partner
27400 Northwestern Hwy.
Southfield, MI 48037-0307
Phone Number: 800.544.0203
adam.rujan@plantemoran.com

Mr. Rujan is authorized to contractually bind the Firm. Plante Moran has provided our standards terms and conditions for the City's review. Our proposal is valid for 90 days from the response date.

Very truly yours,
PLANTE & MORAN, PLLC



Adam Rujan, Partner

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1. References

City of Fayetteville, AR

Mr. Paul Becker
Finance Director
113 West Mountain Street
Fayetteville, AR 72701
479-575-8330
pbecker@ci.fayetteville.ar.us

Information Technology Assessment, Strategic Planning & Implementation

Conducted an Information Technology Assessment for the County that included a review of all aspects of organization, administration and use of technology within the County. As part of the engagement we conducted IT departmental interviews, interviews with all County staff departments, an end-user survey of all County staff and a benchmarking survey of peer County organizations from across the country. Specific areas of focus included IT governance, IT organization structure, enterprise resource planning (ERP), line of business applications (e.g., GIS, courts, etc.), cost allocation methodology, IT infrastructure, project management approach, project portfolio management and identifying opportunities for alternative delivery of services.

Muskegon County, MI

Mr. Eric Stevens
Circuit Court Administrator
141 E. Apple Avenue
Muskegon, MI 49442
(231)724-6293

StevensEr@co.muskegon.mi.us

ECM Software Selection

Assisted the County in the selection of a new Electronic Content Management Software solution. Activities included conducting of interviews, RFP development, proposal analysis and assistance to the County in the due diligence process of reviewing various solutions.

ECM Implementation Management Assistance

Currently assisting the County in the implementation of a new Electronic Content Management Software solution by providing project management assistance, including PMO support, project administration, and business analysis services.

Ottawa County, MI

Mr. Alan Vanderberg
County Administrator
Fillmore Street Complex
12220 Fillmore Street
Room 310
West Olive, MI 49469
616-738-4068

avanderberg@miottawa.org

IT Assessment

As a continuous improvement effort, conducted an Information Technology Assessment that included a review of all aspects of the organization, but specifically focused on creating a roadmap for readying the organization to adopt emerging technologies. Examined the current department technologies process and staffing and provided a 5-year technology plan that will enable the department to embrace the current trends in technology and those that are still evolving. The engagement also included an assessment of the current technologies in use as well as an analysis of the opportunities available for collaboration with other entities such as other cities, townships, villages, and school districts. Specific areas of focus included Organizational Support Structure, Infrastructure, IT Governance, and plan for adoption of new technologies.

PROPOSAL TO PROVIDE IT SERVICES

City of Carlsbad, CA

Ms. Cynthia Haas
Deputy City Manager
1200 Carlsbad Village Dr.
Carlsbad, CA 92008
760-434-2829

IT Assessment

Assisted the City with an information technology assessment and evaluation of IT sourcing options. Activities include conducting an assessment in the areas of organization, administration, infrastructure, and enterprise applications. Compiled interim issues and opportunities and cost savings opportunities and presented these to City management. Conducted comparative research of similar organizations. Prepared a cost of services analysis relative to IT services. Presented IT assessment results and plan to the City management.

City of Mesa, AZ

Ms. Diane Gardner
Chief Information Officer (CIO)
200 South Center Street
Building 2
P.O. Box 1466
Mesa, AZ 85211-1466
480-644-3449

ERP Implementation Management Assistance

Assisted the City in the implementation of the selected ERP solution as part of the city's project management office (PMO). Also had direct project management responsibility for a number of implementation teams.

City of Colorado Springs, CO

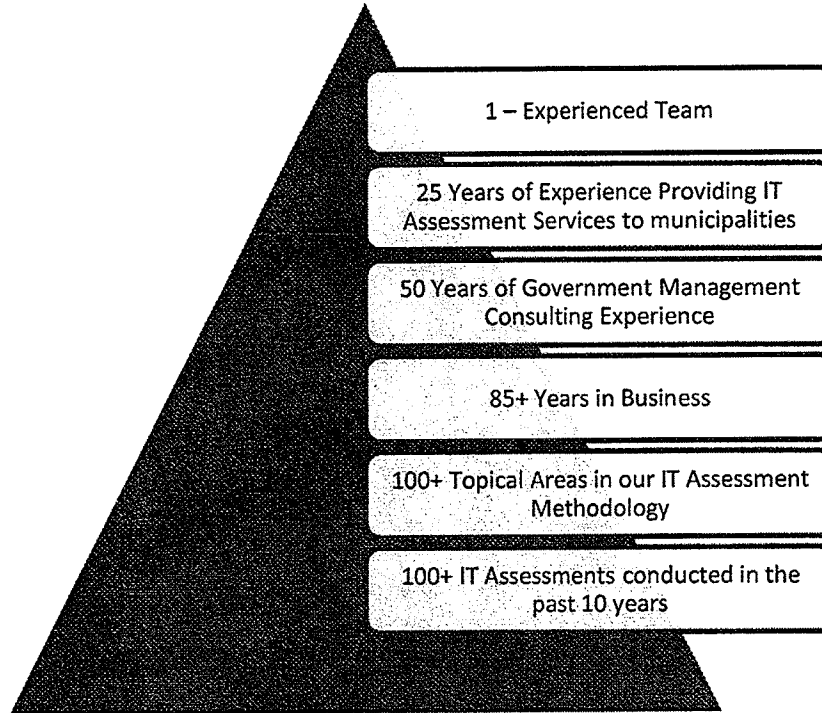
Mr. Jesse James
Interim CIO
30 S. Nevada Ave.
Colorado Springs, CO 80903
719-385-5767

IT Assessment

Assisted the City with an information technology assessment and evaluation of IT sourcing options. Activities include conducting an assessment in the areas of organization, administration, infrastructure, and enterprise applications. Compiled interim issues and opportunities and cost savings opportunities and presented these to City management. Conducted comparative research of similar organizations. Prepared a cost of services analysis relative to IT services. Presented IT assessment results and plan to the City management.

2. Experience

Summary



Plante Moran Background and Experience

Founded in 1924, Plante & Moran, PLLC (Plante Moran) is the twelfth largest management consulting and public accounting firm in the United States. Plante Moran operates as a partnership. Plante Moran's staff of over 1,600 persons is organized into four major service areas: Management Consulting, Accounting and Auditing, Tax Consulting, and Personal Financial Planning Services.

Over the past several years, Plante Moran has continually expanded the scope and experience of its Management Consulting Services Group. The firm is committed to continuing this growth by retaining and attracting qualified professionals to provide the broad range of management and technical services that are necessary to effectively serve the needs of our clients.

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.

PROPOSAL TO PROVIDE IT SERVICES

- The firm has been named to Fortune Magazine's "100 Best Companies to Work for in America" for the last 14 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 County and 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.

Government Consulting Services Overview

Plante Moran has assumed a leadership role in providing consulting services to governmental entities. The range of services we provide includes the following:

- Information Technology Consulting
- Communications & Networking Services
- Project Management and Oversight
- Operations Analysis
- Consolidation Studies
- Organizational Planning and Development
- Financial Management Services
- Human Capital Management and Development
- Market Research Services
- Business Planning and Feasibility Analysis
- Employee Benefits Analysis
- Assurance Services
- Real-estate, Design and Construction Consulting

Plante & Moran's management consultants have made a significant commitment to assist governmental clients develop and implement appropriate technology. The services we offer address virtually all aspects of information systems including:

- Information Technology Assessments including:
 - Organization
 - Administration
 - Technology
- Strategic Information Technology planning
- Communications and networking including:
 - WAN/LAN architecture and development
 - Network analysis and optimization
 - Telecommunications
 - Voice/data/video integration

PROPOSAL TO PROVIDE IT SERVICES

- Performance assessment
- Bandwidth utilization
- Security assurance including:
 - Information system reviews
 - System trust services
 - Network security reviews
 - SAS/70 reviews
- Solution delivery including:
 - Needs assessment
 - Cost benefit analysis
 - Requirements definition
 - Software selection
 - Contract negotiations
 - Process improvement
 - Implementation management
- Outsourcing analysis
- e-Government Strategy and development
- Technology management
- Project management

We have developed significant research capabilities to assist our clients in new and emerging technologies and issues. In addition, our consultants are very active in making presentations to a variety of governmental organizations on current issues. Our library of resource materials is readily available to our consultants to effectively satisfy our clients' unique needs.

Like many technology project management projects the firm has conducted, clients typically have particular areas of interest to be explored. Our qualifications and capabilities in areas of interest likely to be reviewed as part of the project with the City are as follows:

Area of Interest	Firm Qualifications
Infrastructure	Our Communications and Networking practice includes staff who have been involved on IT planning and assessment projects to conduct a full assessment of IT infrastructure including hardware, data, communications, networking, server, storage and data center environments.
Disaster Recovery	Our Security Assurance practice includes staff who are focused on the development and/or review of Disaster Recovery, Business Continuity and COOP plans.

Area of Interest	Firm Qualifications
Help Desk / ITIL	Our staff have significant experience in conducting help desk assessments and performance metric development. Additionally, we have staff who are ITIL V3 Foundation Certified.
Project and Task Management	Our staff have significant background in project management procedures, methods and tools. We use project management techniques and supporting tools on our technology planning initiatives that are covered in more detail in our project work plan. This includes the use of MS Project and MS SharePoint as a collaborative environment for managing client projects.
Industry Standards	Our Operations Improvement practice within the firm has significant experience in the development and deployment of Balanced Scorecard programs for our clients more specifically in the Manufacturing sector. Our governmental consulting staff have implemented a number of these concepts for our clients although not specifically under the mantra of Balanced Scorecard to include the establishment of metrics for measuring IT performance and the tools and methods for monitoring and reporting on these metrics.
Internet / Intranet	Our Web Services group has experience in developing e-government strategies and significant experience in deploying both Internet and Intranet sites for public sector clients. Additionally, our web assessment projects include the review of a City's overall approach towards Internet, Intranet, e-government, portals and Web 2.0 technologies. Through our involvement at PTI we have also been exposed to creative uses of web technologies by other governmental jurisdictions.
Policies and Service Level Agreement	Our staff have significant experience in the review of IT policies, procedures and service level agreements. Through numerous projects that we have conducted over the last several years we have developed a repository of IT policies and procedures used by other municipal jurisdictions.

Overall, our approach to each consulting engagement is structured to provide the services and level of professional support required to meet the individual needs of the client. Although we have developed well-defined methodologies for conducting consulting engagements, we do not attempt to impose a rigid structure onto each assignment. Rather, we attempt to understand the fundamental challenges and opportunities of our clients and develop an approach that addresses those particular conditions.

3. Fees

Our fee is based on our blended consulting rate of \$195 per hour. This hourly rate is all inclusive and will include all travel and other incidental expenses. At a total of 520 hours, this equates to a total cost for this effort of \$101,400.

These services are expected to commence about January 1, 2014 and continue for 6 months. We anticipate that Mr. Vanderford will be on site every other week, or some other mutually agreeable schedule.

Additional Plante Moran experts can be made available, on an, as needed, and requested basis at this same cost.

4. Company

Experience

Plante Moran has been providing software selection and implementation consulting services to governmental clients for the last thirty years. We provide the full-range of services related to the planning for, selection, contract negotiations and implementation of new technologies and processes for municipal governmental software.

The following matrix identifies desired consultant capabilities, skills and core competencies required as part of this engagement and how our firm matches up against these criteria:

Required Capabilities	Plante Moran Match
1) Experience with governmental systems and implementations with a scope similar to the City's size of project.	Our firm has been involved in assisting governmental clients in the selection and implementation of technology solutions for over 30 years including clients of comparable size and complexity to the City.
2) Strong written and oral communications skills that engage the entire team and maintain efficient communications and decision-making throughout the engagement. The City requires candidates with experience giving technical or executive presentations and practicing disciplined documentation throughout the entire process.	All of the senior staff assigned to the project regularly communicate with Councils, Commissions and Boards and senior management within governmental organizations either as part of the facilitation of projects for the client or in giving oral presentations presenting the results of a project.
3) Ability to form effective working relationships with management, supervisory, operational, and technical personnel from the City, other involved vendors, and any other stakeholders engaged in the success of this project.	Our selection process is a very participatory one that includes senior management, technical staff, operational staff, outside vendors and other relevant stakeholders. We are very adept at working with all of these constituencies.
4) Ability to take direction and then work without immediate supervision to stay focused on meeting the City's requirements with high satisfaction.	Our team includes staff that are experienced and self-motivated requiring little direction while able to lead the project or phases they are responsible for.
5) Demonstrate a willingness to implement innovative program and project management methodologies, approaches and tools.	We regularly look for innovative ways in which to deliver our services in a more efficient and effective manner through the use of newer technologies and methods. For example, as a standard part of all projects performed we provide a collaboration center (e.g. MS SharePoint) in which to manage all activities on the project that is accessed by the client and our team.

Required Capabilities	Plante Moran Match
6) Highly disciplined, focused leader, who can effectively assess project risk and take action to mitigate risks.	Staff assigned to the project are experienced in these types of projects and use project management methods including regular assessment of project risk. Furthermore, our significant experience in the selection and implementation of software solutions has resulted in our ability to identify risks common to these types of projects, early in the project.
7) Ability to consistently meet deadlines while exercising strong project and fiscal controls.	Our staff are committed to meeting deadlines that are established by the client for an engagement while meeting both quality and fiscal controls.
8) Professional behavior and appearance.	Plante Moran has a very rigorous hiring process to ensure that there is a fit between the individual and the core values of the firm that stress services to the client in a professional manner.
9) Ability to provide clear direction to multiple stakeholders and hold them accountable for producing the required results.	At the start of the project, we engage the various stakeholders on the project that will be required to provide input during the process to articulate what we will need from them and when. This information is captured in a Project Charter that is developed at the start of the project.
10) Passion for escalating issues appropriately to ensure quick problem resolution.	The process used on our projects ensures that any outstanding issues are quickly escalated such that delays in the project do not occur. This escalation process is defined during the early stages of the project. Furthermore, we will regularly conduct project reviews with client management to identify and discuss outstanding issues and risks.
11) Proven ability to organize large projects, structure the processes for change management, risk management and project controls.	Our staff is adept on the various aspects of managing and delivering large-scale information technology projects within the public sector. We are well aware of both the technical and organizational challenges in implementing a new system and regularly counsel our clients on various dimensions and related to the fact that implementing a new system will affect people, process and technology.

The following list provides a description of the municipal IT projects that our firm has performed over the last several years. Several of these past clients are provided as references in *Section 2* of this proposal response.

Client Name	Project Title	Project Date
City of Pueblo, CO	ERP Due Diligence and Implementation Management Assistance	Mar 2013 – Present
Cape Fear Public Utility Authority, NC	ERP Needs Assessment	Mar 2013 – Present
Village of Northbrook, IL	ERP Selection	Mar 2013 – Present
New Braunfels Utilities, TX	ERP Needs Assessment and Selection	Dec 2012 – Present
City of Grand Rapids, MI	ERP Needs Assessment and Selection	Nov 2012 – Present
County of Sumner, TN	ERP Needs Assessment and Selection	Aug 2012 – Present
City of Ann Arbor, MI	HR/Payroll Software Assessment	Jul 2012 – Dec 2012
City of Corpus Christi, TX	ERP Selection	Jul 2012 – June 2013
Town of Jupiter, FL	Utility Billing and Enterprise Assessment Management Software Selection	May 2012 – Nov 2012
City of Hallandale Beach, FL	ERP Selection	May 2012 – Present
City of Columbia, MO	ERP Needs Assessment and Selection	May 2012 – Present
Livingston County, MI	ERP Selection and Implementation Management Assistance	May 2012 – Present
Horry County, SC	ERP Needs Assessment and Selection	Feb 2012 – Present
City of Oakland Park, FL	ERP Selection	Feb 2012 – Jan 2013
City of Cooper City, FL	ERP Selection	Feb 2012 – Oct 2012
Marin County, CA	ERP Operations Review	Feb 2012 – Present
City of Greenville, NC	ERP Selection	Dec 2011 – Present
Hampton Roads Sanitation District, VA	ERP Needs Assessment and Selection	Jan 2012 – Present
City of East Lansing, MI	ERP Needs Assessment	Dec 2011 – Aug 2012
Broward County, FL	ERP Selection Assistance	July 2011 – Present
City of North Miami Beach, FL	ERP Needs Assessment and System Selection	Apr 2011 – Present
City of Chandler, AZ	Oracle Upgrade Project Management Services	Mar 2011 – Nov 2011
Town of Jupiter, FL	Financial Management System Selection and Implementation Management Assistance	Mar 2011 – Nov 2012
City of Flagstaff, AZ	ERP Due Diligence Assistance	Jan 2011 – Aug 2011
Muskegon County, MI	FMIS Software Selection and Implementation Management Assistance	Jan 2011 – Present
City of Owensboro, KY	ERP Selection	Nov 2010 – Dec 2011

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Client Name	Project Title	Project Date
City of Asheville, NC	Development Services Software Selection	Oct 2010 – Sep 2011
City of Casper, WY	Software System Assessment	Aug 2010 – Aug 2011
City of Alexandria, VA	ERP Needs Assessment and Selection	Aug 2010 – June 2011
Borough of State College, PA	ERP Selection, Contract Negotiations and Implementation Management Assistance	Jul 2010 – Present
City of Miramar, FL	ERP Selection and Implementation Management Assistance	May 2010 – Jul 2012
City of Roswell, GA	ERP Selection, Contract Negotiations and Implementation Management Assistance	Jan 2010 – Present
Town of Hempstead, NY	Tax System Selection and Implementation Mgt.	Jun 2009 – Present
City of Mesa, AZ	ERP Selection and Implementation Management Assistance	Apr 2009 – Aug 2012
Cook County Public Guardian, IL	System Assessment and Selection	Apr 2009 – Present
Village of Mt. Prospect, IL	ERP Selection and Contract Negotiations	May 2009 – Dec 2009
Mid-America Regional Council (MARC)	ERP Selection and Contract Negotiations	Mar 2009 – Dec 2009
City of St. Charles, MO	ERP Selection and Contract Negotiations	Jan 2009 – Dec 2009
Waukesha County, WI	Financial Applications Analysis Study and RFP Development	May 2008 – Mar 2011
City of Asheville, NC	ERP Selection and Implementation Management	Oct 2007 – Dec 2010
St. Louis County, MO	ERP Selection and Implementation Management	Apr 2007 – Feb 2010
City of Sheboygan, WI	ERP Selection and Implementation Management	Mar 2007 – Dec 2008
City of St. Clair Shores, MI	Time and Attendance Software Selection	2007
City of Elgin, IL	FMIS Software Selection Assistance	Jun 2006 – May 2007
City of Cleveland, OH	FMIS Selection and Implementation Management	Oct 2006 – Feb 2010
City of Livonia, MI	Financial System Upgrade Implementation Management Assistance	2006 - 2008
Shelby Township, MI	ERP Selection and Implementation Management Assistance	2006 - 2008
Hancock County, OH	ERP Selection and Contract Negotiations	Jan 2004 – Dec 2004
City of Kalamazoo, MI	ERP Software Selection	2004 - 2005
Dane County, WI	FMIS Software Selection	Sep 2003 – Jan 2004

Company Principals

Plante Moran is guided by our philosophy that is based on certain core values and perhaps best expressed in condensed form by the Golden Rule: "Do unto others as you would have others do unto you." It is symbolized by the Plante Moran gold ruler and implied in the Plante Moran motto: "We care." We care about our clients, we care about our work, we care about our families and our communities, and we care about each other.

Although the Plante Moran philosophy can be summarized by the Golden Rule, it is composed of many principles, such as those in our Statement of Principles, namely: service, ethics, recruitment, compensation, individual progress, advancement, teamwork, delegation, education, leadership, individual freedom, communication, decision making, the common good, and balance.

These important principles include fairness; doing everything reasonable for the individual up to the point of harming the team; helping the individual to become all that he or she is capable of becoming; optimizing, rather than maximizing, or financial success; and doing what is right for the right reasons, with major emphasis on the long-range consequences of our decisions.

Although we will continue to expand and refine the principles embodied in the Plante Moran philosophy, our emphasis will be on communicating, exemplifying, and living the Golden Rule day in and day out.

Capabilities

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. The following characteristics provided our credentials to deliver IT services to the City:

- **Longevity of Practice:** As a firm, we have over 30 years' experience in assisting clients in conducting IT projects for all areas of governmental operations including Financials, Human Resources / Payroll, Utility Billing, Community Services, Tax and Public Safety.
- **Experienced Project Team:** Our project team has significant and recent experience in performing similar work for other governmental clients. We generally have approximately 15 – 20 projects going on at any one time which allows our consultants to maintain currency related to all facets and phases of a variety of IT projects.
- **Involvement in Complex IT Projects:** We have significant experience in working with ERP solution providers whose solution set involves a complexity of software solutions to meet the entire needs of a large organization. This has translated to involvement in working with clients and the selected vendor in negotiating complex contracts and statements of work. More recently, this has included involvement with clients who are intending to have their entire ERP Solution provided via Managed Services in which Managed Services options have significant variability in what can be provided.
- **Completeness of IT Expertise:** As a full-service consulting and accounting firm, we have both depth and breadth in the types of IT services that we can provide within a single firm. We are able to provide the following set of complementary services that are frequently viewed by our clients as value-add:
 - Chart of Accounts development
 - Business process redesign

- Internal controls
- Security
- IT staff assessments to assist clients in understanding the degree to which their IT organizations have the needed skills and certifications to support a new ERP environment
- Organizational assessments to assist clients in restructuring their organization including staff roles and responsibilities
- Change management services to assist client staff in the transition from legacy technologies and business processes to more current technology and redesigned business processes
- Application controls reviews
- Disaster recovery planning
- **Vendor Marketplace Knowledge:** We have extensive knowledge of the ERP software vendor marketplace and system integrator marketplace for those vendors that will be likely providers of software and services to the City. This experience has been gained through a number of activities including work with other clients in selecting and implementing ERP solutions, participation in conferences in which ERP vendors are participating (e.g., GFOA annual conference) and proactive meetings with ERP vendors to understand their latest product and service offerings to governmental clients. For example, over the last several months we have had meetings and/or phone calls with the following vendors to discuss aspects of the current and future plans related to their ERP products and services including:
 - Sungard (on-site meeting in January 2013)
 - Oracle (on-site meeting in December 2012)
 - Microsoft (discussions related to their Dynamics AX product)
 - Workday (conference calls and participation in webinars)
 - Agresso (on-site meeting scheduled for February 2013)
 - Infor (on-site meeting scheduled for February/March 2013)
 - Springbrook (series of conference calls to discuss their current and future plans)
 - New World Systems (meeting at their location)
 - Tyler Technologies (on-going involvement with them related to recent selection initiatives)
- **Tools, Templates and Methods:** We have developed a vast repository of tools, templates and methods that provide significant value and stream-lining to IT projects while ensuring that the integrity and thoroughness of the process is maintained.
- **Independence:** We are completely independent from all providers of IT solutions and system integrators. As a result, we will be working with the City to select a Solution that provides the best overall value to the City and its stakeholders.
- **Best Practice Identification:** We have extensive knowledge of IT-related best practices through involvement in numerous software selection and implementation projects for other governmental clients. Through these projects and through our involvement in governmental operations reviews, we have developed a set of best practices related to execution of the various functional areas including Financial, Human Capital Management and Supply Chain.
- **Client Retention:** The biggest testament to our capabilities and project staff is the desire for our clients to continue using our services after an initial assessment/selection or other

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technology-related project. In our client references section, we highlight such clients including those that have used our services in multiple instances due to the high degree of satisfaction with the quality of our services and our staff.

Company Organization

Plante Moran, PLLC is a limited partnership, owned and operated by its partners. Plante Moran has over 2,000 staff firm-wide performing Management Consulting, Assurance and Tax services to clients throughout the U.S. with additional clients around the globe. Our Management Consulting practice area, which will perform the services requested by the City of Fayetteville consists of:

- Over 175 staff and partners
- 17 of which are dedicated to serving governmental clients across the U.S.

We have provided and are currently providing implementation management services to a number of municipal clients. All of our office locations are listed below.

Illinois

Chicago

225 W. Washington Street
Suite 2700
Chicago, IL 60606

Northwest Chicago

2155 Point Boulevard
Suite 200
Elgin, IL 60123

Michigan

Ann Arbor

1000 Oakbrook Dr.
Suite 400
Ann Arbor, MI 48104

Auburn Hills

2601 Cambridge Court
Suite 500
Auburn Hills MI 48326 ,

Detroit

7310 Woodward Ave.
Suite 740
Detroit, MI 48202

East Lansing

1111 Michigan Avenue
East Lansing, MI 48823

Flint

111 E. Court St
Suite 1A
Flint, MI 48502-1647

Grand Rapids

634 Front Avenue NW
Suite 400
Grand Rapids, MI 49504

Kalamazoo

750 Trade Centre Way
Portage, MI 49002

Macomb

19176 Hall Road
Suite 300
Clinton Township, MI 48038

St. Joseph

511 Renaissance Drive
Suite 120
St. Joseph, MI 49085

Southfield

27400 Northwestern Highway
Southfield, MI 48034

Southfield (East Office)

26300 Northwestern Highway
Suite 120
Southfield, MI 48076

Traverse City

600 E. Front Street
Suite 300
Traverse City, MI 49686

Ohio

Cincinnati

537 E. Pete Rose Way
Cincinnati, OH 45202

Cleveland

1111 Superior Ave
Suite 1250
Cleveland, OH 44114

Columbus

65 E. State Street
Suite 600
Columbus, OH 43215

Toledo

3434 Granite Circle
Toledo, OH 43617

5. Personnel

Our staffing approach is designed to assign personnel to areas of the project where their expertise is required. All of the proposed team members have worked together on a number of engagements for municipal clients. Communication, involvement and teamwork characterize our management philosophy and are extremely important on this project internally and with the City.

Overall, we are offering the City an experienced project management and information technology director, Mr. Dale Vanderford. Mr. Vanderford has served as IT Director for Washtenaw County, a county of about 300,000 people during a time of tremendous growth and change and as the Infrastructure Manager in the City of Ann Arbor during the New World Systems ERP Implementation. In addition, we will make available an additional pool of IT professionals to assist in related technical matters, such as security, infrastructure, communications, etc, on an as needed basis at the discretion of your management team. With this management orientation, we believe that all project tasks can be effectively achieved and any issues or problems can be resolved effectively and expediently, resulting in the successful accomplishment of the project objectives. In addition, we assure that all team members will be available for the duration of the project, as need be. All of the consultants identified in this proposal are employees of Plante Moran.

Team Member	Project Role and Responsibility	Relevant References
Adam Rujan Partner Plante & Moran, PLLC Services Exp: 25 yrs	Project Director Overall responsibilities for ensuring that engagement with City remains within schedule and budget and that all project deliverables meet the required quality standards.	City of Cleveland, OH City of Alexandria, VA St. Louis County, MO City of Asheville, NC City of Round Rock, TX County of Chester, PA City of Fayetteville, AR
Dale Vanderford Manager Plante & Moran, PLLC	Project Manager Responsible for leading City technology initiatives and providing professional services for any projects specified by the City during the contract period. Dale will act as the primary day to day contract manager for the City.	Muskegon, MI Ottawa County , MI Broward County, FL Horry County, SC City of Carlsbad, CA Colorado Springs, CO

Dale Vanderford

Manager
Technology Consulting & Solutions



EXPERIENCES INCLUDE:

Mid-size IT Department Management: Served as Director at Washtenaw County, MI, where he directed the work of 30 IT Professionals and managed the needs of 26 disparate County departments. He coordinated a shared services initiative where sharing of services, including outsourced desktop support to other local units of government,, a shared Electronic Content Management System, surveillance camera system, and data center with the City of Ann Arbor, MI were all enacted. Improved the Governance process for IT, so that all technology projects were submitted to a governance board for approval and prioritization, and all projects had a complete Return on Investment/Total Costs of Ownership evaluation performed on them.

IT Organizational Assessment and Strategic Planning: Experience in analyzing IT organizational staffing, process and technology relationships. Knowledge of best in class public sector transaction detail and staffing levels. Expertise in identifying opportunities to enhance current policy and procedure to maximize existing staff expertise or technology infrastructure. Performed Technology reviews in several cities and counties, including Colorado Springs, Colorado, Horry County, SC, Macomb County, MI, and Carlsbad, CA.

IT Governance Review: Expertise in analyzing and designing organizational IT governance, specifically post implementation system support structures.

Business Process Documentation and Reengineering: Experience in documenting as-is business processes and identifying areas for business process improvement. Specialization in implementing a results based budget methodology. Experience in implementing change management techniques to ensure user acceptance of new business processes and/or technology.

New Construction Technology Engineering and Implementation: Oversaw the technology design and implementation of 9 new facilities, ranging from office buildings to detention facilities to data centers. Planned the initial IT and Telecom needs for the new building with users and architects. Worked with construction personnel to design building wiring systems and to design IT closet locations throughout the building. Planned and implemented technology equipment installation and coordinated facility move in.

Software Needs Assessment: Specialization in analyzing the business case for enterprise system improvement or replacement. Experience in facilitating functional area process discussions and identifying opportunities for technology to enable business process improvement. Extensive knowledge of the public sector enterprise system marketplace and intimate knowledge in regard to viable enterprise solutions.

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System Selection: Experience in the process of selecting and deploying enterprise systems. Developed technology specifications for inclusion in public sector request for proposal for enterprise systems. Extensive experience in vendor proposal analysis and demonstration script development. Has participated in the system selection process of multiple ERP, ECM, cloud-based security and email, Access Control, SAN, and consulting services.

Technology Implementation Management: Provided implementation management services associated with deployment of newly selected systems. Activities have included, project planning, review of project deliverables, management of the project issues, facilitation of project status review, review and approval of project invoicing and others as dictated by the project. Specifically, managed the technical implementation of New World .NET product, as well as the installation and expansion of the Hyland OnBase Document management system and several Email upgrades of Microsoft Exchange.

Cross Boundary Collaboration: Architected and implemented partnership of multiple local units of governments in regards to Information Technology staffing, resources, and infrastructure utilization cooperation agreements.

EDUCATION:

Eastern Michigan University — Bachelor of Science, Communications Technology

PROFESSIONAL AFFILIATIONS AND CERTIFICATIONS:

- 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.
- Board of Directors, Washtenaw County/EMU Legal Resource Center, Ann Arbor, MI
- Member, Metropolitan Information Exchange

PRIOR ORGANIZATIONAL AFFILIATIONS:

Washtenaw County, MI – Director of Technology and Operations

Directed the operations of the Technology Department to support efficient and effective service delivery for a county government with 1,300 employees and a \$200 million annual budget, serving 340,000 residents. Developed and implemented the 5-year Technology Plan which supported the County's strategic direction by providing technical knowledge, skills, and resources to enhance the ability of internal and external customers to create a positive impact in the community. Hired, trained, and led a team of 34 employees (management, technical, and administrative staff), with an \$9 million annual operating budget, to effectively implement the Plan. Key areas of focus included:

- Employee Help Desk and System Support
- Application and Database Support
- Network Administration
- Voice and Data Communications
- Geographic Information Systems
- IT Services to Local Governments and Community Residents

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KEY CLIENTS:

- City of Colorado Springs, CO
- Borough of State College, PA
- City of Carlsbad, CA
- County of Ottawa, MI
- County of Muskegon, MI
- City of Hallandale Beach, FL
- County of Macomb, MI
- County of Broward, FL
- County of Horry, SC
- City of Columbia, MO
- City of Colorado Springs, CO
- Numerous projects as IT Director for Washtenaw County

NOTABLE PROJECTS:

- **City of Colorado Springs, CO:** Dale served as a lead project consultant to assist the City during the process of performing a complete IT Assessment and staffing plan for the city. The result of the work that Dale did was a staffing plan that provided for a realignment of resources to be able to provide better service with the same amount of staff. The other focus of the IT Assessment was on the IT service portfolio, cost of IT services, benchmarking with other governmental and private sector organizations and a determination of strategic sourcing options.
- **Muskegon County, MI:** Dale performed a needs analysis with the County's departments to determine the County's approach and process to transition from a legacy Document Management system. He worked with the County to determine present and future needs and to assist with the procurement process through a steering committee. Subsequently, he is working with the County to finalize project plans and to assist in contract negotiation.
- **City of Carlsbad, CA:** Dale served as a lead project consultant to assist the City in a complete IT assessment of the services that was offering the organization and its citizens and worked with the team to develop a cost of IT services for the city to help in determining what multiple services actually cost the City to deliver.
- **Macomb County, MI:** Dale served as the Project Manager and Lead consultant on an IT assessment that assessed the skill levels of staff, the services that IT was delivering to the county, the state of the infrastructure that was deployed in the county after the departure of the IT Director. The result was a streamlined department that is able to server the staff and constituents in a more productive and effective way.
- **Ottawa County, MI:** Dale served as the Project Manager on this IT Assessment and Strategic Plan development project that examined the current department technologies process and staffing and provided a 5-year technology plan that will enable the department to embrace the current trends in technology and those that are still evolving. The engagement also included an assessment of the current technologies in use as well as an analysis of the opportunities available for collaboration with other entities such as other cities, townships, villages, and school districts.

6. Appendix A – Terms and Conditions

Professional Services Agreement – Consulting Services Addendum to Plante & Moran, PLLC Engagement Agreement Dated <Date>

This Professional Services Agreement is part of the engagement agreement for our consulting services dated <Date> between Plante & Moran, PLLC (referred to herein as “P&M”, “we”, “our” or “us”) and City of Fayetteville (referred to herein as “the City”, “you” and “your”).

1. **Management Responsibilities** – The consulting services we will provide are inherently advisory in nature. We have no responsibility for any management decisions or management functions in connection with our engagement to provide these services. Further, you acknowledge that the City is responsible for all such management decisions and management functions; for evaluating the adequacy and results of the services we will provide and accepting responsibility for the results of those services; and for establishing and maintaining internal controls, including monitoring ongoing activities, in connection with our engagement. You have designated <Designated Project Supervisor, Title> to oversee the services we will provide.
2. **Nature of Services** – Our project activities will be based on information and records provided to us by the City. We will rely on such underlying information and records and our project activities will not include audit or verification of the information and records provided to us in connection with our project activities.

The project activities we will perform will not constitute an examination or audit of any the City financial statements or any other items, including the City's internal controls. This engagement also will not include preparation or review of any tax returns or consulting regarding tax matters. If you require financial statements or other financial information for third-party use, or if you require tax preparation or consulting services, a separate engagement letter will be required. Accordingly, you agree not to associate or make reference to P&M in connection with any financial statements or other financial information of the City. In addition, our engagement is not designed and cannot be relied upon to disclose errors, fraud or illegal acts that may exist. However, we will inform you of any such matters that come to our attention.

3. **Use of Report** – At the conclusion of our project activities, we will provide you with a written report as described in the engagement agreement. Our report will be restricted solely to use by management of the City and you agree that our report will not be distributed to any outside parties for any purpose other than to carry out legal responsibilities of the City. We will have no responsibility to update our report for any events or circumstances that occur or become known subsequent to the date of that report.
4. **Confidentiality, Ownership and Retention of Workpapers** – During the course of this engagement, P&M and P&M staff may have access to proprietary information of the City, including, but not limited to, information regarding trade secrets, business methods, plans, or projects. We acknowledge that such information, regardless of its form, is confidential and proprietary to the City, and we will not use such information for any purpose other than our consulting engagement or disclose such information to any other person or entity without the prior written consent of the City.

In some circumstances, we may use local or international third-party service providers or P&M affiliates to assist us with our engagement. In order to enable these service providers to assist us in this capacity, we must disclose information to these service providers that is relevant to the services they provide. Disclosure of such information shall not constitute a breach of the provisions of this agreement.

In the interest of facilitating our services to you, we may communicate or exchange data by internet, e-mail, facsimile transmission or other methods. While we use our best efforts to keep such communications and transmissions secure in accordance with our obligations under applicable laws and professional standards, you recognize and accept that we have no control over the unauthorized interception of these communications or transmissions once they have been sent, and consent to our use of these electronic devices during this engagement.

Professional standards require that we create and retain certain workpapers for engagements of this nature. All workpapers created in the course of this engagement are and shall remain the property of P&M. We will maintain the confidentiality of all such workpapers as long as they remain in our possession.

Both the City and P&M acknowledge, however, that we may be required to make our workpapers available to regulatory authorities or by court order or subpoena. Disclosure of confidential information in accordance with requirements of regulatory authorities or pursuant to court order or subpoena shall not constitute a breach of the provisions of this agreement. In the event that a request for any confidential information or workpapers covered by this agreement is made by regulatory authorities or pursuant to a court order or subpoena, we agree to inform the City in a timely manner of such request and to cooperate with the City should you attempt, at your cost, to limit such access. This provision will survive the termination of this agreement.

We reserve the right to destroy, and it is understood that we will destroy, workpapers created in the course of this engagement in accordance with our record retention and destruction policies, which are designed to meet all relevant regulatory requirements for retention of workpapers. P&M has no obligation to maintain workpapers other than for its own purposes or to meet those regulatory requirements.

Upon the City's written request, we may, at our sole discretion, allow others to view any workpapers remaining in our possession if there is a specific business purpose for such a review. We will evaluate each written request independently. You acknowledge and agree that we will have no obligation to provide such access or to provide copies of our workpapers, without regard to whether access had been granted with respect to any prior requests.

- 5. Fee Estimates** – In any circumstance where we have provided estimated fees, fixed fees or not to exceed fees, these estimated, fixed or not-to-exceed fees are based on the City personnel providing P&M staff the assistance necessary to satisfy the City responsibilities under the scope of services. This assistance includes availability and cooperation of those the City personnel relevant to our project activities and providing needed information to us in a timely and orderly manner. In the event that undisclosed or unforeseeable facts regarding these matters causes the actual work required for this engagement to vary from our estimates, our estimated fees will be adjusted for the additional time we incur as a result.

In any circumstance where our work is rescheduled, we offer no guarantee, express or implied, that we will be able to meet any previously established deadline related to the completion of our work. Because rescheduling our work imposes additional costs on us, in any circumstance where we have provided estimated fees, those estimated fees may be adjusted for additional time we incur as a result of rescheduling our work.

Any fee adjustments will be determined in accordance with the Fee Adjustments provision of this agreement.

- 6. Payment Terms** – Our invoices for professional services are due upon receipt unless otherwise specified in our engagement letter. In the event any of our invoices are not paid in accordance with the terms of this agreement, we may elect, at our sole discretion, to suspend work until we receive payment in full for all amounts due or terminate this engagement. In the event that work is suspended, for nonpayment or other reasons, and subsequently resumed, we offer no guarantee, express or implied, that we will be able to meet any previously established deadlines related to the

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completion of our consulting work or issuance of our consulting report upon resumption of our work.

7. **Fee Adjustments** – Any fee adjustments for reasons described in this agreement will be determined based on the actual time that P&M staff expends at the hourly rates stated in this agreement, plus all reasonable and necessary travel and out-of-pocket costs incurred, and included as an adjustment to our invoices related to this engagement. You acknowledge and agree that payment for all such fee adjustments will be made in accordance with the payment terms provided in this agreement.
8. **Termination of Engagement** – This agreement may be terminated by either party upon written notice. Upon notification of termination, our services will cease and our engagement will be deemed to have been completed. You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket expenditures through the date of termination of this engagement.
9. **Hold Harmless and Indemnification** - As a condition of this engagement, City of Fayetteville agrees to hold P&M, and all of its partners and staff, harmless against any losses, claims, damages, or liabilities, to which P&M may become subject in connection with services performed in the engagement, unless a court having jurisdiction shall have determined in a final judgment that such loss, claim, damage, or liability resulted primarily from the willful misconduct or gross negligence of P&M, or one of its partners or staff. This hold harmless includes the agreement to reimburse P&M for any legal or other expenses incurred by P&M, as incurred, in connection with investigating or defending any such losses, claims, damages, or liabilities. This provision shall survive any termination of this engagement.
10. **Conflicts of Interest** - Our engagement acceptance procedures include a check as to whether any conflicts of interest exists that would prevent our acceptance of this engagement. No such conflicts have been identified. You understand and acknowledge that P&M may be engaged to provide professional services, now or in the future, unrelated to this engagement to parties whose interests may not be consistent with yours.
11. **Agreement Not to Influence** – the City and P&M each agree that each respective organization and its employees will not endeavor to influence the other's employees to seek any employment or other contractual arrangement with it, during this engagement or for a period of one year after termination of the engagement. the City agrees that P&M employees are not "contract for hire." P&M may release the City from these restrictions if the City agrees to reimburse P&M for its recruiting, training, and administrative investment in the applicable employee. In such event, the reimbursement amount shall be equal to two hundred hours of billings at the hourly rate stated in this agreement for the P&M employee.
12. **Governing Law** – This agreement shall be governed by and construed in accordance with the laws of the State of Michigan.

End of Professional Services Agreement – Consulting Services

7. Appendix B – Forms



City of Fayetteville, Arkansas
Purchasing Division – Room 306
113 W. Mountain
Fayetteville, AR 72701
Phone: 479.575.8220
TDD (Telecommunication Device for the Deaf): 479.521.1316

RFP (REQUEST FOR PROPOSAL)

REQUEST FOR PROPOSAL: RFP 13-16, IT Support Services

DEADLINE: Friday, November 01, 2013 before 2:00:00 PM, local time

RFP DELIVERY LOCATION: Room 306 – 113 W. Mountain, Fayetteville, AR 72701

PURCHASING AGENT: Andrea Foren, CPPO, CPPB, aforen@ci.fayetteville.ar.us

DATE OF ISSUE AND ADVERTISEMENT: Tuesday, October 15, 2013

**REQUEST FOR PROPOSAL
RFP 13-16, IT Support Services**

No late proposals shall be accepted. RFP's shall be submitted in sealed envelopes labeled with the project number and name as well as the name and address of the firm.

All proposals shall be submitted in accordance with the attached City of Fayetteville specifications and bid documents attached hereto. Each Proposer is required to fill in every blank and shall supply all information requested; failure to do so may be used as basis of rejection. Any bid, proposal, or statements of qualification will be rejected that violates or conflicts with state, local, or federal laws, ordinances, or policies.

The undersigned hereby offers to furnish & deliver the articles or services as specified, at the prices & terms stated herein, and in strict accordance with the specifications and general conditions of submitting, all of which are made a part of this offer. This offer is not subject to withdrawal unless upon mutual written agreement by the Proposer/Bidder and City Purchasing Agent.

Name of Firm: Plante & Moran, PLLC

Contact Person: Adam Rujan Title: Partner

E-Mail: adam.rujan@plantemoran.com Phone: 800.544.0203

Business Address: 27400 Northwestern Hwy

City: Southfield State: MI Zip: 48034

Signature: *Adam Rujan* Date: October 31, 2013

PROPOSAL TO PROVIDE IT SERVICES

City of Fayetteville
 RFP 13-16, IT Support Services
 SECTION E: Signature Submittal

1. Disclosure Information

Proposer must disclose any possible conflict of interest with the City of Fayetteville, including, but not limited to, any relationship with any City of Fayetteville employee. Proposer response must disclose if a known relationship exists between any principal or employee of your firm and any City of Fayetteville employee or elected City of Fayetteville official.

If, to your knowledge, no relationship exists, this should also be stated in your response. Failure to disclose such a relationship may result in cancellation of a purchase and/or contract as a result of your response. This form must be completed and returned in order for your bid/proposal to be eligible for consideration.

PLEASE CHECK ONE OF THE FOLLOWING TWO OPTIONS, AS IT APPROPRIATELY APPLIES TO YOUR FIRM:

- 1) NO KNOWN RELATIONSHIP EXISTS
 2) RELATIONSHIP EXISTS (Please explain): _____

I certify that, as an officer of this organization, or per the attached letter of authorization, am duly authorized to certify the information provided herein are accurate and true; and my organization shall comply with all State and Federal Equal Opportunity and Non-Discrimination requirements and conditions of employment.

2. At the discretion of the City, one or more firms may be asked for more detailed information before final ranking of the firms, which may also include oral interviews. NOTE: Each Proposer shall submit to the City a primary contact name, e-mail address, and phone number (preferably a cell phone number) where the City selection committee can call for clarification or interview via telephone.

Name of Firm: Plante & Moran, PLLC
 Name of Primary Contact: Adam Rujan
 Title of Primary Contact: Partner
 Phone#1 (cell preferred): 248.891.0430 Phone#2: 248.223.3328
 E-Mail Address: adam.rujan@plantemor.com

3. Please acknowledge receipt of addenda for this invitation to bid, request for proposal, or request for qualification by signing and dating below. All addendums are hereby made a part of the bid or RFP documents to the same extent as though it were originally included therein. Proposers/Bidders should indicate their receipt of same in the appropriate blank listed herein. Failure to do so may subject vendor to disqualification.

ADDENDUM NO.	SIGNATURE AND PRINTED NAME	DATE ACKNOWLEDGED

PROPOSAL TO PROVIDE IT SERVICES

4. PRICE BID: Firm proposes the following all inclusive hourly rate. Rate includes all expenses to the city including but not limited to services, travel, overhead, re-location, etc. The City shall not pay additional fees outside of contracted hourly rate for the services listed in this RFP. In the event of contract extension or renewal, the number of hours will be increased.

Item	Description	Estimated Quantity (# hours in 6 months)	Proposed Hourly Rate	Total Fee for 6 months
1	IT Services as described	520	x \$ <u>195.00</u>	= \$ <u>101,400.00</u>

5. As an interested party on this project, you are required to provide debarment/suspension certification indicating in compliance with the below Federal Executive Order. Certification can be done by completing and signing this form.

Federal Executive Order (E.O.) 12549 "Debarment and Suspension" requires that all contractors receiving individual awards, using federal funds, and all sub-recipients certify that the organization and its principals are not debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency from doing business with the Federal Government.

6. Signature certifies that neither you nor your principal is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.

Questions regarding this form should be directed to the City of Fayetteville Purchasing Division.

NAME: Adam Rujan

COMPANY: Plante & Moran, PLLC

PHYSICAL ADDRESS: 27400 Northwestern Hwy., Southfield, MI 48034

MAILING ADDRESS: 27400 Northwestern Hwy., Southfield, MI 48034

PHONE: 800.544.0203 FAX: 248.233.8587

E-MAIL: adam.rujan@plantemorran.com

SIGNATURE: 

TITLE: Partner

DATE: October 31, 2013

{Thank You!}



For more information contact:

Adam Rujan, Partner

800.544.0203

Adam.rujan@plantemoran.com

plantemoran.com



RECEIVED

JUL 1 2014

CITY OF FAYETTEVILLE
MAYOR'S OFFICE

A. 8
Plante and Moran, PLLC
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 30, 2014

Don Marr
Chief of Staff, City of Fayetteville, AR
113 West Mountain Street
Fayetteville, AR 72701

Dear Don:

Thank you for the opportunity to allowing us to discuss with you the proposed changes in scope to our engagement for Project Management and Program Support. We are pleased to present our proposal amendment to assist the City of Fayetteville or the "City" in filling the staffing need to assist you in getting through the planning/budget process and to further implementing IT projects and additional organizational changes.

PROJECT BACKGROUND

In October of 2013, Plante Moran responded to and was subsequently awarded the bid for RFP 13-16, "Proposal to Provide IT Services". The contract was executed on January 7, 2014 as City Council resolution number 2013-0242 and IT services commenced at the end of January. Since the engagement initiation, Plante Moran staff have worked with the City to initiate and/or complete many projects for the city, including the conversion from GroupWise email to Office 365, replacement of the AS/400, the filling of a DBA vacancy to continue critical project work, authoring of several new IT policies and procedures, development of a Request for Proposal to replace the City's content management system, as well as the awarding of that contract and subsequent negotiations.

However, there still remains much to do. The Content Management System project will soon be beginning and needs project oversight, as well as the Database Cluster Replacement, Disaster Recovery Plan Re-Redevelopment, ERP readiness, GIS Database Upgrade, and the institution of additional processes and procedures to help instil a management structure for the department based on metrics and data. In addition to the project work there is a need for the continued development of processes and procedures for the City's IT operations.

PROJECT SCOPE AND PROPOSED WORK PLAN

Scope of Services:

Project Management staffing

Plante Moran will furnish one consultant for an additional amount of 546 hours from the last part of June through December 2014. The breakdown in hours is as estimated as follows:

Week	Estimated Hours
23-Jun	42
7-Jul	42
28-Jul	42
11-Aug	42
25-Aug	42
8-Sep	42
22-Sep	42
6-Oct	42
20-Oct	42
3-Nov	42
17-Nov	42
1-Dec	42
15-Dec	42
Cumulative Hours	546
Estimated Additional Budget Required	\$ 106,470

The majority of this time will be spent on-site with the City, with ancillary hours spent off-site as needed to monitor operations and project progress.

PROFESSIONAL SERVICES FEES

Our fees for providing assistance to the City of Fayetteville, AR will not exceed \$106,470 for all of the staff time spent on services related to the Project Management project, inclusive of any expenses incurred.

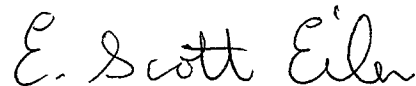
Fees associated with any potential changes to our scope of services and/or other optional assistance as deemed necessary by the City, or future phases to be determined, can be provided at your request at a later date and will not be billed until formally approved, separately, by the City of Fayetteville.

Don Marr, Chief of Staff
City of Fayetteville

We appreciate the opportunity to be of continued service to the City. If you agree with the terms of this engagement as described in this letter, please sign the enclosed copy and return it to us via email at dale.vanderford@plantemoran.com. If you have any questions regarding this proposal, please do not hesitate to contact Dale Vanderford or Scott Eiler at 800.544.0203.

All terms and conditions agreed to in the contract executed January 7, 2014 and are specifically related to the duties and obligations set forth in RFP 13-16.

Very truly yours,
Plante & Moran, PLLC



Scott Eiler

ACCEPTED:

LIONELD JORDAN, Mayor

ATTEST:

Sondra E. Smith,
City Clerk/Treasurer

