



Council Agenda Report

To: Mayor Uhring and the Honorable Members of the City Council

Prepared by: Joseph D. Toney, Assistant City Manager

Approved by: Steve McClary, City Manager

Date prepared: April 25, 2024 Meeting date: June 10, 2024

Subject: Amendment to Professional Services Agreement with SDI Presence
(Continued from May 28, 2024)

RECOMMENDED ACTION: Authorize the Mayor to execute Amendment No. 3 to the Professional Services Agreement with SDI Presence LLC.

FISCAL IMPACT: No additional appropriation is required. Funding for this agreement is included in the Adopted Budget for FY 2023-24 in Account No. 602-7060-5100 (Information Systems – Professional Services) and the FY 2024-25 Proposed Budget in Account No. 310-9124-5100 (Land Management System-Professional Services).

STRATEGIC PRIORITY: This item supports the Development Services Updated Software priority identified in the Adopted FY 2023-24 Strategic Priority Project List.

DISCUSSION: On August 27, 2018, the City Council authorized the City Manager to execute a Professional Services Agreement with SDI Presence LLC for information technology administrative services to develop the City's IT Assessment and Strategic Plan. The project was launched in October 2018 but was put on hold in the aftermath of the Woolsey Fire and the COVID-19 pandemic. Due to the clear need for permitting software, staff reengaged SDI and modified the scope of work with Amendment 2 in May 2022 to assist with pursuing the procurement of permitting software, also referred to as a land management system (LMS).

The consultant coordinated with staff to identify clear specifications of a new system, conduct a Request for Proposals (RFP), and interview potential vendors. This was a detailed and arduous process that narrowed down the best options for a LMS provider for the City. The City momentarily paused the project before negotiating acquisition and committing to a system in order to give consideration to operational and staffing needs for the huge undertaking that would commence with proceeding to the next step.

In the meantime, staff worked through recommendations received from the Comprehensive Development Services Review (CDSR). Staff have been able to improve operations and implement an interim solution for application submittal and review through online portal improvements. These improvements have provided the City team with revamped workflows and processes, as well as some operational buffer, to be in a better position to begin working on a full LMS. A full LMS is a significant project that could take up to two years to implement.

In order to facilitate a LMS project, one of the significant recommendations of the CDSR (Recommendation #22) is to hire a consultant project manager with experience implementing the selected LMS to expedite implementation. SDI is the best and most appropriate consultant project manager for this effort. Having worked through the RFP process and supported the City with other engagements, there is no other consultant project manager that will have the knowledge and understanding of the City as well as SDI. Their services are specialized and essential to this effort.

Malibu Municipal Code 2.56.130(b).3 creates an exception to the City's competitive bidding process for certain services: "[w]here the contract is for specialized or professional services such as, but not limited to, services rendered by architects, engineers, attorneys, appraisers, geologists, and other specialized consultants." It would be impractical and unreasonable to find these specialized services from a better consultant to lead this effort than SDI. SDI has a demonstrated history and project knowledge that cannot be found by another bidder. Further, another bidder would require many hours to get up to speed on the status of the project and this would come at a substantial cost to the City. Thus, staff is recommending that we proceed with this Amendment 3 to retain SDI as the LMS Project Consultant.

As outlined in the proposal, SDI will lead two distinct phases. Phase 1-Initiate, is the broad overview and laying the roadmap for the project. Phase 2-Implement, will be the major lifting of the project that will require significant project team staff time, development, and testing. These types of systems require that the organization build out the system based on workflows and organizational needs, so it is not as simple as plug and play. Building out a LMS requires significant support and guidance from an expert consultant project manager, SDI, as identified by the recommendation in the CDSR.

The proposal is estimating 1,040 hours of project management consulting at a rate of \$185 per hour, for an estimated total of \$192,400, and estimated incidentals of \$14,000, for a total not-to-exceed of \$206,400.

ATTACHMENTS: Amendment No. 3 to the Professional Services Agreement with SDI Presence LLC

AMENDMENT NO. 3 TO AGREEMENT

THIS AMENDMENT NO. 3 TO AGREEMENT is made and entered in the City of Malibu on June 10, 2024, by and between the CITY OF MALIBU, hereinafter referred to as City, and SDI Presence LLC, hereinafter referred to as Consultant.

The City and the Consultant agree as follows:

RECITALS

- A. On August 27, 2018, the City entered into an Agreement with Consultant for consulting services for certain project relating to information technology administrative services (the "Agreement").
- B. On November 23, 2020, the City entered into Amendment No. 1 with Consultant to extend the term to December 1, 2022.
- C. On May 9, 2022, the City entered into Amendment No. 2 with Consultant to increase the scope, extend the term and increase the budget.
- D. The City desires to amend the Agreement to increase the scope, extend the term and increase the Compensation for Services, and Consultant has submitted a proposal for this purpose that is acceptable to the City.

NOW THEREFORE, in consideration of their mutual promises, obligations and covenants hereinafter contained, the parties hereto agree as follows:

- 1. Section 1.0 – Scope of the Consultant's Services, of the Agreement, is hereby amended as set forth in Exhibit A attached hereto.
- 2. Section 2.0 – Term of Agreement, of the Agreement, is hereby extended to June 30, 2026.
- 3. Section 4.0 – Compensation for Services, of the Agreement, is hereby amended as set forth in Exhibit A attached hereto. The cost of work described in Exhibit A to the Agreement shall not exceed \$206,400, for a total not to exceed amount for the entire Agreement of \$360,150.
- 4. The Parties agree that this Amendment will be considered signed when the signature of a party is delivered physically or by facsimile transmission or scanned and delivered via electronic mail. Such facsimile or electronic mail copies will be treated in all respects as having the same effect as an original signature.
- 5. All terms and conditions of the Agreement not amended by this Amendment No. 3 remain in full force and effect.

This Agreement is executed on _____, at Malibu, California, and effective as of June 10, 2024.

CITY OF MALIBU:

STEVE UHRING, Mayor

ATTEST:

KELSEY PETTIJOHN, City Clerk
(seal)

APPROVED AS TO FORM:

THIS DOCUMENT HAS BEEN REVIEWED
BY THE CITY ATTORNEY'S OFFICE

TREVOR RUSIN, Interim City Attorney

CONSULTANT:


By: SHAREE L. WOLFF
Title: CFO

January 24, 2024

Mr. Joseph Toney, Assistant City Manager
City of Malibu
23825 Stuart Ranch Road
Malibu, CA 90265

RE: Land Management & Permitting System Implementation Project Management Services

Dear Mr. Toney:

SDI Presence LLC is pleased to submit this proposal to the City of Malibu to provide professional consulting services to assist the City with the implementation of its recently selected enterprise land management and permitting system (LMS). We believe our proposal will clearly demonstrate that SDI offers the City an experienced, proven, and qualified consulting team to support the City's goal of implementing an enterprise LMS to meet the needs of the organization.

Our Company. SDI is a management consulting firm with a singular focus on helping public sector clients implement and use information technology. The company was founded on the belief that project success starts with effective planning. SDI has delivered planning, procurement, and project management services to more than 200 California public agencies.

Our Understanding. We understand that the City is interested in utilizing an SDI project management resource to oversee the successful implementation of the LMS application that was recently selected by the City. SDI is prepared to provide project management support to help ensure the new system is fully implemented and utilized by the City.

Our Approach. SDI will utilize established and recognized project management processes to ensure the successful launch of the land management system.

Our Success. SDI has been delivering successful IT planning, procurement, and project management services to California public sector clients since 1999. As project management professionals, SDI recognizes the need to apply project management processes and standards to our consulting engagements. To ensure the City's objectives are met, SDI's approach will include the following:

- ◆ Use of a structured, proven approach to ensure a comprehensive understanding of the City's requirements and needs
- ◆ Fully identifying and disclosing potential risks and realistic risk mitigation strategies
- ◆ Managing the expectations of users and stakeholders throughout the process to ensure a realistic level of expectation upon selection of the enterprise LMS system
- ◆ Minimizing disruption to daily City operations
- ◆ Establishing solid project management practices including schedule, time and resource management; communications management; issues management; risk management; and quality management

Our Experience. SDI has successfully completed numerous enterprise implementation projects for clients both large and small, and we provide a detailed list of past clients in this proposal. In terms of land management systems, SDI has successfully completed similar projects for the cities of Paso Robles, Newport Beach, Glendale, Indio, Chino Hills, and we are currently underway with implementations in West Hollywood and Yucaipa. Most indicative of our success is that our clients are willing to ask us back to perform additional work and refer us to other organizations without hesitation.

If you have any questions about this proposal, I can be reached at 714-975-4150 or via email at pgriffin@sdipresence.com. We appreciate the opportunity to submit a proposal and look forward to partnering with the City of Malibu.

Sincerely,



Patrick Griffin, Managing Director
Advisory & Consulting Practice

Company Background and Experience

Company Qualifications

SDI is a management consulting firm that helps public sector clients enhance their use of information technology. SDI has worked with more than 190 California state and local government agencies to complete Request for Proposal (RFP) development and Procurement Management efforts, IT Assessments, IT Strategic Plans, GIS Strategic Plans, Network Assessments, IT Service Level Assessments, Policy / Procedure Documentation development, Project Management Organization implementations, Feasibility Studies. Figure 1 illustrates SDI's full range of IT services.

CONSULTING	TECHNOLOGY DELIVERY			PRESENCE SM MANAGED SERVICES
	APPLICATIONS	INFRASTRUCTURE	SECURITY	
• New System Implementation Project Management • Organizational Change Management • Quality Assurance Services • IT Strategic Planning • IT/Project Assessments • IT Governance • Interim CIO/CTO • Digital Transformation Services	• Requirements Assessment • Selection and Procurement • Business Process Reengineering • QA/Testing • Project Management • Implementation and Integration	• Network Engineering • Data Center • Hybrid Cloud • Hyperconverged Infrastructure/ Software Defined Data Center (SDDC) • VoIP Services	• Organization Policies and Procedures • Enterprise Vulnerability Assessments • Cyber Awareness Training • Cyber Remediation Services • Disaster Recovery/ Business Continuity • Identity Management • Integrated Public Safety Systems	• ITSM Service Desk • IT Infrastructure Managed Services • Enterprise Application Managed Services • Managed Security Services • Public Safety Systems Managed Services • Real Estate Data Managed Services

Figure 1 - SDI Services

SDI is headquartered in Chicago IL with west coast offices in Los Angeles, Sacramento, and Dallas / Fort Worth. SDI employs over 300 full-time staff, including the California team of approximately 20 consultants. Our consultant team is open to working 100% remotely or a combination of remote and on-site, depending on the City's preference.

Company Experience

As shown in Table 1, SDI has a strong record of accomplishment in providing technology consulting services for California public sector clients. A significant number of our client projects are of similar scope and size to what the City of Malibu is seeking.

Table 1 - SDI Local Government Experience

	IT Strategic Plans	IT Assessments	IT Policies & Procedures	Project Management	IT Governance	Disaster Recovery Planning	System Selection & Procurements	Other Management Consulting
Municipalities								
Alameda, CA		✓					✓	✓
Anaheim, CA	✓						✓	✓
Belmont, CA	✓							
Beverly Hills, CA	✓	✓						✓
Branson, MO	✓	✓						✓
Burbank, CA	✓	✓						
Burlingame, CA				✓			✓	
Carson, CA				✓				
Carson City, NV	✓	✓					✓	✓
Chino Hills, CA				✓			✓	✓
Concord, CA				✓				✓
Coronado, CA			✓	✓			✓	✓
Costa Mesa, CA								✓
Cupertino, CA	✓	✓						
Davis, CA							✓	✓
El Segundo, CA	✓	✓						
Fairfield, CA	✓	✓	✓		✓	✓	✓	✓
Fremont, CA				✓			✓	✓
Fresno, CA	✓	✓					✓	✓
Galt, CA	✓	✓	✓	✓	✓	✓	✓	✓
Gilroy, CA	✓	✓		✓			✓	✓
Glendale, CA	✓	✓		✓			✓	✓
Half Moon Bay, CA				✓			✓	
Huntington Beach, CA	✓	✓			✓			✓
Indio, CA							✓	
Industry, CA				✓				
Irvine, CA		✓		✓	✓	✓		✓
La Quinta, CA				✓			✓	✓
Laguna Beach, CA	✓	✓						
Long Beach, CA				✓			✓	✓
Los Angeles, CA				✓				✓
Los Banos, CA	✓	✓						
Manhattan Beach, CA	✓	✓			✓		✓	✓
Merced, CA			✓				✓	✓
Millbrae, CA							✓	
Napa, CA	✓	✓			✓			✓
Newport Beach, CA					✓		✓	✓

	IT Strategic Plans	IT Assessments	IT Policies & Procedures	Project Management	IT Governance	Disaster Recovery Planning	System Selection & Procurements	Other Management Consulting
Novato, CA	✓	✓			✓			✓
Ontario, CA		✓						
Orange, CA	✓	✓			✓		✓	✓
Oxnard, CA	✓	✓						
Pasadena, CA							✓	✓
Paso Robles, CA				✓			✓	✓
Petaluma, CA							✓	
Pismo Beach, CA	✓	✓					✓	
Pleasant Hill, CA							✓	
Rancho Cordova, CA	✓	✓						✓
Rancho Palos Verdes, CA	✓	✓					✓	✓
Redlands, CA							✓	
Redwood City, CA	✓	✓		✓			✓	
Rohnert Park, CA	✓			✓			✓	✓
San Luis Obispo, CA	✓	✓					✓	✓
San Rafael, CA	✓	✓		✓	✓		✓	✓
San Ramon, CA				✓			✓	
Santa Clara, CA	✓	✓	✓	✓	✓		✓	✓
Santa Cruz, CA	✓	✓	✓		✓			✓
Stockton, CA	✓	✓		✓	✓			✓
Suisun City, CA				✓			✓	
Sunnyvale, CA							✓	
Vacaville, CA							✓	
Ventura, CA	✓	✓			✓			✓
Visalia, CA	✓	✓			✓			
Walnut Creek, CA	✓	✓			✓			✓
Watsonville, CA	✓	✓		✓				✓
Counties								
Douglas County, Nevada		✓						✓
El Paso County, Texas	✓	✓						
Lane County, Oregon	✓	✓						
Placer County, CA							✓	✓
Riverside County, CA								✓
San Benito County, CA				✓				✓
San Diego County, CA				✓				✓
Santa Clara County, CA				✓				✓
Sonoma County, CA				✓				✓
Special Districts								
Central Contra Costa Sanitation District	✓	✓	✓	✓	✓		✓	✓
Chino Valley Independent Fire District				✓			✓	✓
Cosumnes Community Services District				✓			✓	
Cucamonga Valley Water District							✓	
Delta Diablo Sanitation District	✓	✓						✓
East Valley Water District	✓	✓						
Lake Arrowhead Community Services							✓	

	IT Strategic Plans	IT Assessments	IT Policies & Procedures	Project Management	IT Governance	Disaster Recovery Planning	System Selection & Procurements	Other Management Consulting
Las Virgenes Municipal Water District	✓	✓				✓	✓	
Monterey Regional Water P.C.A.	✓	✓						
Moulton Niguel Water District	✓	✓	✓	✓	✓		✓	✓
North Tahoe Public Utilities District	✓	✓						
Port of Los Angeles	✓	✓						
Rancho California Water District	✓	✓			✓			✓
Riverside Co. Trans. Commission				✓				
Sacramento Area Sewer District								✓
Sacramento Metropolitan Fire District		✓					✓	
Sacramento Municipal Utility District								✓
San Joaquin Council of Governments							✓	
San Bernardino County Fire								✓
Santa Clara County Fire Department		✓						✓
Santa Clara County Housing Authority	✓	✓						
Santa Clara Valley Water District							✓	
Silicon Valley Clean Water							✓	
Silicon Valley Power	✓			✓			✓	✓
South Tahoe Public Utility District	✓	✓			✓	✓	✓	
West Basin Municipal Water District	✓	✓			✓			
Zone 7 Water Agency	✓	✓						
State of California								
Assoc. of Regional Center Agencies				✓			✓	
CA Correctional Health Care Services				✓				✓
California Highway Patrol	✓	✓	✓	✓	✓	✓	✓	✓

Project Approach

SDI's implementation project management framework includes two major Milestones: **Initiate** and **Implement**. The milestones, tasks associated with each milestone, and deliverables coming out of each task, are described in detail below.

PHASES	TASKS	DELIVERABLES
PHASE 1 INITIATE	1.1 – Project Scope Review 1.2 – Kickoff Meeting 1.3 – Project Scope and Baseline Schedule Update	• Project Kickoff Presentation • Project Scope and Baseline Plan
PHASE 2 IMPLEMENT	2.1 – Update Project Plan 2.2 – Monitor Project Execution and Control 2.3 – Assist with Business Process and Change Management Activities 2.4 – Support Establishment of Optimal Software and Hardware Configuration 2.5 – Assist with System Setup and Configuration 2.6 – Define System Data Conversion and Testing Requirements 2.7 – Assist with Development of Required Integrations Between Software Systems 2.8 – Support User Acceptance Testing 2.9 – Coordinate Training for Users and System Administrators 2.10 – Complete Readiness Assessment and Ensure Operational Readiness 2.11 – Monitor Phased Implementation and Cutover 2.12 – Prepare Post Implementation Evaluation Report	• Updated Project Plan • Project Status Reports, Risk/Issue Tracking Log • Vendor Deliverables Tracking Log/Punch List • Software and Hardware Acquisition & Installation Oversight • System Setup and Configuration Oversight • Data Conversion Requirements and System Testing • System Integrations Support • Independent Verification and Validation • Training Requirements and Schedule • Readiness Assessment Checklist • Oversight of Phased Implementation and Cutover Into Production • Post Implementation Evaluation Report

Figure 2 – Implementation Methodology

In the tables below, SDI has identified the activities and deliverables to be completed as part of this stage of the project. It should be noted that many of the tasks in **Phase 2 – Implement** will be repeated for the individual implementation of specific modules within the software suite (i.e. – permits, customer portal, plan review, etc.).

Phase 1 – Initiate

As project management professionals, SDI recognizes the importance of applying a formal project management framework to ensure that the project meets objectives and is delivered on-time and on-budget. The purpose of the Initiate phase is to prepare for, and initiate, the project under a well-defined project plan. This phase includes confirming our understanding, as well as the understanding of the stakeholders, regarding the scope of work and the process for accomplishing the overall objectives of the project. The following table presents the specific tasks, activities, and deliverables that will be undertaken during the Initiate stage.

Table 2 – Phase 1 Initiate Activities and Deliverables

PHASE	TASKS	DELIVERABLES
PHASE 1 INITIATE	1.1 – Project Scope Review 1.2 – Kickoff Meeting 1.3 – Project Scope and Baseline Schedule Update	• Project Kickoff Presentation • Project Scope and Baseline Plan
Task 1.1 Project Scope Review		
TASK DESCRIPTION: SDI will meet with the City's Project Sponsor to review the scope of work, project timeline, deliverables, and other procurement documentation to confirm project details before formal kickoff.		

Task 1.2 Kickoff Meeting

TASK DESCRIPTION: SDI will develop a Microsoft PowerPoint presentation that will describe the project. SDI will lead a Project Kickoff Meeting which will be scheduled by the City to include all anticipated project participants. The primary goal of the Project Kickoff Meeting is to ensure that all project participants have a common understanding of the process and project objectives.

DELIVERABLE: Project Kickoff Presentation

Task 1.3 Project Scope and Baseline Schedule Update

TASK DESCRIPTION: SDI will finalize and deliver the project scope and plan, along with communication and status reporting plans and a baseline schedule, as agreed with by the City's Project Sponsor.

DELIVERABLE: Project Scope and Baseline Plan

Phase 2 – Implement

The cornerstone of success for the system implementation portion of the project will be how well it is managed. This will include thorough planning, execution, and monitoring of the plan, corrective action when required, and final close-out of the project. SDI's project management services will enable the City to manage the big picture, keep stakeholders informed, and ensure successful planning, oversight, and completion of the project while mitigating project risk.

In the table below, SDI has identified the activities and deliverables to be completed as part of this phase of the project. It should be noted that many of the tasks in Phase 2 will be repeated for the individual implementation of specific modules within the software suite (i.e. – permits, customer portal, plan review, etc.).

Table 3 – Phase 2 Implement Activities and Deliverables

PHASE	TASKS	DELIVERABLES
PHASE 2 IMPLEMENT	2.1 – Update Project Plan 2.2 – Monitor Project Execution and Control 2.3 – Assist with Business Process and Change Management Activities 2.4 – Support Establishment of Optimal Software and Hardware Configuration 2.5 – Assist with System Setup and Configuration 2.6 – Define System Data Conversion and Testing Requirements 2.7 – Assist with Development of Required Integrations Between Software Systems 2.8 – Support User Acceptance Testing 2.9 – Coordinate Training for Users and System Administrators 2.10 – Complete Readiness Assessment and Ensure Operational Readiness 2.11 – Monitor Phased Implementation and Cutover 2.12 – Prepare Post Implementation Evaluation Report	• Updated Project Plan • Project Status Reports, Risk/Issue Tracking Log • Vendor Deliverables Tracking Log/Punch List • Software and Hardware Acquisition & Installation Oversight • System Setup and Configuration Oversight • Data Conversion Requirements and System Testing • System Integrations Support • Independent Verification and Validation • Training Requirements and Schedule • Readiness Assessment Checklist • Oversight of Phased Implementation and Cutover Into Production • Post Implementation Evaluation Report
Task 2.1 Update Project Plan		
TASK DESCRIPTION: SDI will work with the software vendor's Project Manager to update the Project Plan, including the following basic elements that will be defined for the system implementation activities: • Tasks and Subtasks • Milestones and Deliverables • Detailed Project Schedule DELIVERABLE: Updated Project Plan		

Task 2.2 Monitor Project Execution and Control

TASK DESCRIPTION: Working with the software vendor's Project Manager, SDI will monitor the project execution using all the plans, schedules, procedures, and standards prepared for the project. This will include ensuring that regular status reports are provided and discussed at project review meetings with the Project Sponsor and appropriate participants. These reviews will include performance measures for the completion of tasks and activities in accordance with the project plan, communication plan, risk management plan, and quality assurance plan.

DELIVERABLES: Project Status Reports, Risk/Issue Tracking Log, Vendor Deliverables Tracking Log / Punch List

Task 2.3 Assist with Business Process and Change Management Activities

TASK DESCRIPTION: SDI will assist the City with identification of areas where a business process change may result in improved efficiencies. SDI will provide suggestions and recommendations for business process improvements in conjunction with the City's project team and utilizing the best practices recommendations documented previously.

Task 2.4 Support Establishment of Optimal Software and Hardware Configuration

TASK DESCRIPTION: SDI will assist the City in defining the technical system software and hardware environments required for the new system's operation including licenses for development, testing/training, and production environments. SDI will provide oversight for identifying, procuring, and installing the software and hardware configurations to ensure the system is properly sized to meet the City's requirements. This activity will also include coordinating the installation of required application, database, and web servers as well as necessary network architecture and infrastructure components.

DELIVERABLE: Software and Hardware Acquisition and Installation Oversight

Task 2.5 Assist with System Setup and Configuration

TASK DESCRIPTION: SDI will assist the City to ensure that the new system is set up to support the City's unique operating requirements. This activity will include establishing security protocols for users along with specific workflow processes for the new system and setting configuration options and customizing parameters for system upload/download processes to Microsoft products such as Excel, Word, Access, and Outlook, and to other third-party products.

DELIVERABLE: System Setup and Configuration Oversight

Task 2.6 Define System Data Conversion and Testing Requirements

TASK DESCRIPTION: SDI will assist in defining conversion and testing requirements for items that must be converted into the new system, including financial data from the existing system and in-house developed applications. SDI will work directly with the software vendor's conversion team to ensure that data extracted from the City's existing system is properly mapped to the new system.

DELIVERABLE: Data Conversion Requirements and System Testing

Task 2.7 Assist with Development of Required Integrations Between Software Systems

TASK DESCRIPTION: SDI will work with the various software entities to develop integration points between the various systems. SDI will oversee development of the desired data integration points and will ensure testing is completed to validate the integrations are operating properly and accurately.

DELIVERABLE: System Integrations Support

Task 2.8 Support User Acceptance Testing

TASK DESCRIPTION: SDI will verify and validate acceptance test results for implementation of the new system that will include:

- System documentation
- Stress tests
- Access control capabilities
- User acceptance test results
- Functional tests
- Security tests
- Backup, restore and restart tests

DELIVERABLE: Independent Verification and Validation

Task 2.9 Coordinate Training for Users and System Administrators

TASK DESCRIPTION: SDI will assist the City in identifying training requirements and creating schedules for both users and technical personnel. Training should be sufficiently detailed and comprehensive to ensure that City staff will be able to effectively use the system and support the system after implementation.

DELIVERABLE: Training Requirements and Schedule

Task 2.10 Complete Readiness Assessment and Ensure Operational Readiness

TASK DESCRIPTION: SDI will develop a checklist to be used to assess the City's operational readiness for the new system implementation, including:

- Staffing plan
- Operational procedures
- Change requests
- Refresher training
- Technology refreshment
- Preventive maintenance
- System maintenance procedures
- Disaster backup recovery plan
- Modifications or enhancements
- Software license renewal
- Hardware replacement

DELIVERABLE: Readiness Assessment Checklist

Task 2.11 Monitor Phased Implementation and Cutover

TASK DESCRIPTION: SDI will oversee a phased cut-over where different modules are implemented and moved into production on a staggered schedule. As each module is placed into production, the software vendor will be required to provide assistance for system administration, helpdesk, and on-site user support for each major implementation phase or module.

DELIVERABLE: Oversight of Phased Implementation and Cutover into Production

Task 2.12 Prepare Post Implementation Evaluation Report

TASK DESCRIPTION: SDI will conduct a post-implementation evaluation review (PIER) after system implementation to provide the City with information to help it evaluate the contribution and measure the value gained by implementing the new system. The PIER will provide for organizational learning by documenting the success of the project and the reasons for that success. It will also identify areas the City may wish to revisit in terms of full implementation of all modules, related features, and functionality.

DELIVERABLE: Post Implementation Evaluation Report

Project Costs

Based on our experience with past implementation projects, we recommend the City consider project management support services for a minimum of 20 hours per week over the course of the implementation timeline. Assuming a 12-month timeline for implementation, this would equate to 1,040 hours. SDI's 2024 rates are \$185 per hour for Project Manager. Applying this rate to the recommended level of effort yields a budget of \$192,400. Additionally, during project management activities, we anticipate our resource being onsite for up to six days per month, resulting in travel expenses for mileage, meals, and hotel. We estimate a travel budget of approximately \$14,000, bringing the total cost estimate for project management services during implementation to \$206,400 based on the hours estimates above.

SDI will bill the City monthly for actual labor and travel costs incurred in the prior month. Invoices will include detail regarding the number of hours worked by date, along with a description of the activities performed by our consultant team. For travel expenses, SDI will provide receipts substantiating travel costs incurred.