

City of Piedmont
COUNCIL AGENDA REPORT

DATE: June 15, 2026

TO: Mayor and Councilmembers

FROM: Rosanna Bayon Moore, City Administrator

SUBJECT: Consideration of Amendment to Consulting Services Agreement with ClientFirst Technology Consulting with Revised Exhibits A & B in an Amount Not to Exceed \$254,500 and Authorization of the City Administrator to Execute the Amendment

RECOMMENDATION

Authorize an amendment to the attached consulting services agreement with ClientFirst Technology Consulting for ongoing delivery of strategic IT services in FY 2026-27 in an amount not to exceed \$254,500, with revised Exhibits A & B, and authorize the City Administrator to execute a contract amendment as described.

DISCUSSION

ClientFirst Technology Consulting has a track record of working with small and medium-sized cities in several states, including California. In the Bay Area, the Cities of Albany, Newark, San Pablo, Hillsborough, Larkspur, San Leandro, and Woodside are counted among their clients.

Since 2015, ClientFirst has provided the City of Piedmont with technical assistance and advice on information technology strategy and management. ClientFirst authored the City of Piedmont's Information Technology Strategic Plan and has provided IT guidance to subsequent City policies, programs, and projects. ClientFirst continues to play a pivotal role in advancing City priorities by identifying IT best practices, performing IT project management (including procurement and vendor coordination), supporting IT strategy development, and facilitating management communication. Accomplishments for FY 2025-26 include Police Department Dispatch Remodel Assistance, door access control bid documents, document management system selection and implementation assistance, Council Chambers Audio Visual improvement technical advice, and several cybersecurity improvements.

The City is in the process of modernizing efforts that improve public access, organizational efficiency, and the quality of services delivered. Accomplishing these objectives requires ongoing strategic IT support. A number of identified activities are associated with the recommended authorization, including but not limited to data management improvements in preparation for AI, AI toolset cyber security risk analysis, online permitting improvements, website replacement assistance, Disaster Recovery tabletop exercise, door access control expansion, pool video camera procurement, and Technology Master Plan deliverables. Ongoing assistance with GIS mapping, technology strategy, cybersecurity improvement, and vendor management will continue as a part of this agreement.

The proposed amendment will specifically address the scope of work identified for the upcoming fiscal year, ensure that the 2025-26 hourly rate schedule is observed, outline the estimated budget by project area, and establish the not-to-exceed fee of \$254,500.

FISCAL IMPACT

The FY 2026-27 Proposed Administration Budget includes \$254,500 to fund this Information Services, IT Consulting services contract.

ATTACHMENTS

- A. Statement of Qualifications
- B. Exhibit A: Scope of Work
- C. Exhibit B: Hourly Rate Schedule and Estimated Project Budget

Statement of Qualifications for

IT Assistance Services

June 5, 2026



Client Locations
Coast-to-Coast

Practice Locations
California
Illinois
North Carolina
Texas

800.806.3080
www.clientfirstcg.com



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Qualifications

Our consultants have assisted local governments with innovative technology solutions with ClientFirst for 22 years, bringing many more years of experience in this field. Our risk-averse technology planning and the quality of service we provide our clients have resulted in numerous long-term business relationships. We are confident that no other consulting firm focusing on local governments offers the wide range of IT services that we do.

Government Technology



Focusing on local governments means we understand the unique needs, processes, protocols, and political nuances of the industry. This **understanding and experience** ensures that our strategies and recommendations are practical. Our management team's career experience includes over 3,500 projects for more than 500 local government agencies.

Local Presence and Practice Locations

We have a local presence with extensive experience in California, and **thousands of projects with hundreds of agencies nationwide**.

Over 150 California Agencies Served

Business Management Approach

Not all government executives are aware of the latest technological issues and opportunities. Therefore, our approach and deliverables provide a business-management perspective that enables **laypeople to understand the technology issues, strategies, and potential solutions required to make more informed business decisions**.

Practical Recommendations

We believe in using technology to meet the agency's business objectives; we do not apply technology just for technology's sake. We are serious in our quest to provide clients with practical solutions that meet their requirements. Sometimes, the proper solution includes cutting-edge technology. However, a cost-effective and practical solution using proven technology is often the most beneficial.



True Independence

ClientFirst believes in practicing **true independence**. We do not resell products or maintain relationships that would result in add-on profit margins or referral fees. Our focus is on **putting the client first** by finding optimal solutions (i.e., the greatest value at the lowest competitive cost) to meet their needs.



National Recognition

Many of the industry's leading vendors recognize our consultants nationally for their work. They appreciate the fairness and objectivity we demonstrate when dealing with their organizations.

Industry Recognition

CIO Review

ClientFirst has been featured in *CIO Review* as one of the "20 Most Promising Government Technology Solution Providers".



National Speakers

ClientFirst personnel have conducted educational sessions at national and local conferences, including CSMFO, MISAC, GFOA, and more.





Diversified Experience

We have **extensive experience with various organizations and technology and processing environments**. In addition, we have significant market knowledge of software and hardware providers and are well-informed about vendor and industry developments.

Integrated Technology Solutions Groups

Whatever the agency's technology needs are, we offer a unique combination of experts in their respective disciplines who can guide technology decisions, planning, implementation, and management, chosen to meet the specific needs of each project, working as an integrated team to **provide end-to-end consulting and support services**.

ClientFirst Integrated Technology Solutions Groups

Management Consulting Technology Planning Mentoring/Advisory Interim CIO Contract Negotiations Project Management Technology Governance		IT Infrastructure Networking Servers Data Centers Procurement Mgmt. Contract Negotiations Project Management	
Applications Consulting Business Process Review Software Selection Implementation Project Mgmt.	Cybersecurity Assessment & Planning Incident Response Plans Disaster Recovery Procurement Management Contract Negotiations Project Management	Telecom Bill Audits Assessment & Planning Design RFP/Procurements Carrier Services Agreements Call Centers	
GIS Assessment & Planning Design Data Management Development Mapping	Community Development Public Portals System Administration Gap Analysis Software Selection Implementation Project Management	Structured Cabling Assessment and Certification CADD Design & Layout Vendor Selection Project Management Documentation	



Integrated Technology Services

Management Consulting

- Technology Strategic/Master Planning
- IT Assessment
- IT Staffing Assessment
- Process Improvement
- Procurement Assistance
- Contract Negotiation
- Project Management
- IT Governance Seminars

Applications Consulting

Business Process Review

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

Software Selection

- Feature / Function Requirements Definition
- Implementation Risk Assessment
- Change Management
- RFP Development
- Vendor Analysis and Evaluation
- Demonstration Facilitation
- Contract Review and Negotiation
- Implementation Project Management
- Ad Hoc Report-Writing Assistance

ECMS

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

Telecommunications Consulting

- VoIP Readiness Review
- Systems Evaluation, Design, Specification, and RFP Development
- Bill Audits (Cost Analysis and Negotiation)
- Telecom Expense Management (TEM)
- Credit / Refund Requests
- Strategic Planning
- Project Management
- Carrier Services Cost Analysis
- Operational and Workflow Review
- System Selection and Contract Negotiation

GIS

- Assessment and Planning
- Design
- Data Management
- Development
- Mapping

IT Infrastructure

Networking and Servers

- Assessment, Design, and Installation
- Replication and Redundancy Strategy
- Virtualization
- Cloud Computing
- Wireless
- Data Center Design

Disaster Recovery

- Risk Assessment and Business Impact Analysis
- Disaster Recovery Planning
- Hot-Site and Recovery Service Evaluation
- Storage Area Networking
- Backup Strategies and Design

Cybersecurity

- Assessment and Planning
- Applications and Hardware Security
- Cybersecurity Review
- Security Policy and Control Development
- Intrusion Testing
- Workshops and Training
- Compliance: NIST, NCCoE, PCI, CJIS, NEA/FERC

Structured Cabling System Design

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

IT Staffing/Augmentation

- IT Staffing Assessment and Operational Review
- Interim IT Management
- Virtual CIO Service
- Supplemental IT Management Staffing

Community Development

- Public Portals
- System Administration
- Gap Analysis
- Software Selection
- Implementation Project Management



Areas of Expertise

The consultants assigned to this engagement have direct experience in a broad range of products and services.

ClientFirst has such a broad and well-rounded experience with cities that they already have a good idea of what will or won't work. Other vendors we have worked with don't have this depth of experience and suggest solutions that are unrealistic in a city government environment. — IT Director CA Municipality			Application Area Experience	
IT Infrastructure & Operations Experience - Data Center Management - Cable Infrastructure - Wireless Systems - Routers and Switches - Server Installation, Configuration and Troubleshooting - Network Troubleshooting and Configuration - Security Systems Support - Network Management - Event Monitoring - Patch Management - Inventory Management - Licensing Management - Software Distribution - Remote Network and Desktop Monitoring		Cybersecurity - NIST / CIS Assessments - PCI, CJIS, HIPAA Compliance - Security Roadmap Development - Cybersecurity Insurance Requirements - Policy Development - Disaster Recovery / Incident Response - Tabletops Exercises - Vulnerability Scanning - DR / IR Plan Development - Network Security Review - Cybersecurity Tool Selection - Cybersecurity Audit Remediation - Cloud Security Review - Cybersecurity Project Management - Microsoft Data Loss Prevention / Purview Assistance - Microsoft 365 Security Assistance	Department Area Experience - Council - Administration - Building and Safety - City Clerk - Finance - Fire - Library - Utility Billing - Customer Service/Call Centers - Payroll - Human Resources - Planning - Police - Purchasing - Public Works - Parks and Recreation - Engineering - Geographic Information System (GIS) - Water - Waste Water - Sanitation - Field Operations - Laboratories - Environmental Services - Facilities - Treatment Plants - Fleet Management - Engineering - Warehousing - SCADA - Information Systems	- General Ledger - Budgeting - Project Accounting - Grant Accounting - Cash Receipts - Purchasing and Receiving - Bids Management - Contract Management - Accounts Payable - Fixed Assets - Loans - Special Assessments - Financial Reporting - Business Licensing - Applicant Tracking - Human Resources - Employee Self-Service - Benefits Tracking - Time and Attendance - Payroll - CIS and Utility Billing - Customer Service / Call Centers - Backflow - Service Orders - Work Orders / Preventative Maintenance - Inventory and Fleet Management - Planning, Permitting, Inspection and Code Enforcement - Land/Parcel/Address Management - Computer-Aided Dispatch (CAD) - Records Management - Mobile Computing - Citizen Request Management (CRM) - Geographic Information System (GIS) - Adjudication - Citation Management - Database Management



Consultants' Collective Experience

We understand that the experience of the individual consultants is a significant factor in hiring a firm to conduct the project on your behalf. Our consultants have extensive public-sector experience in their respective careers, including projects with the following agencies:

California

City of Albany
City of Azusa
City of Benicia
City of Big Bear Lake
City of Brentwood
City of Brisbane
City of Burbank
City of Calabasas
City of Camarillo
City of Carlsbad
City of Cathedral City
City of Cerritos
City of Chico
City of Chino
City of Clovis
City of Colton
City of Corona
City of Coronado
City of Covina
City of Dana Point
City of Downey
City of Dublin
City of Emeryville
City of Escondido
City of Fairfield
City of Foster City
City of Fountain Valley
City of Glendale
City of Glendora
City of Healdsburg
City of Hemet
City of La Habra
City of La Mesa
City of La Puente
City of Laguna Niguel
City of Larkspur
City of Lathrop
City of Lomita
City of Loomis
City of Marina
City of Menlo Park
City of Mission Viejo
City of Montclair
City of Moreno Valley
City of Mountain View
City of Murrieta
City of Newark
City of Norco
City of Novato
City of Pacific Grove
City of Pacifica
City of Palm Desert
City of Palmdale
City of Patterson
City of Petaluma
City of Piedmont
City of Pinole
City of Pismo Beach
City of Port Hueneme
City of Rancho Cucamonga
City of Rancho Mirage
City of Redlands
City of Rialto
City of Rohnert Park
City of Rosemead
City of Sacramento
City of Salinas
City of San Bernardino
City of San Clemente
City of San Gabriel
City of San Jacinto
City of San Leandro
City of San Pablo

City of San Rafael
City of Seal Beach
City of Sierra Madre
City of Simi Valley
City of South Gate
City of South Pasadena
City of South San Francisco
City of St. Helena
City of Sunnyvale
City of Temecula
City of Tracy
City of Tulare
City of Tustin
City of Upland
City of Vacaville
City of West Covina
City of West Sacramento
City of Whittier
City of Woodland
Town of Danville
Town of Hillsborough
Town of San Anselmo
Town of Truckee
Town of Windsor
Town of Woodside
Town of Yucca Valley
County of Butte
County of Lassen
County of Mariposa
County of Mendocino
County of Plumas
County of Riverside
County of San Bernardino
County of Tuolumne
County of Yolo
Riverside County Sheriff
Central County Fire
Hemet Library
Los Angeles County
Development Authority
Moraga-Orinda Fire District
Transportation Agency of
Monterey County
CA-NV American Water
Works Association
Castaic Lake Water Agency
Castro Valley Sanitary District
Coachella Valley Mosquito
Vector Control District
Cucamonga Valley Water
District
East Bay Regional Park
District
El Toro Water District
Fresno Irrigation District
Glendale Water and Power
Hayward Area Recreation
and Park District
Jurupa Community Services
District
Las Virgenes Water District
Livermore Area Recreation
and Park District
Mesa Water District
Midpeninsula Regional Open
Space District
Newhall County Water District
Novato Sanitary District
Palmdale Water District
Ramona Municipal Water
District
Rincon del Diablo Municipal
Water District

Rosamond Community
Services District
San Bernardino Municipal
Water
San Mateo Consolidated Fire
District
Southern California Coastal
Water Research
Sweetwater Authority
Tahoe City Public Utility
Union Sanitary District
Walnut Valley Water District
West County Wastewater
District
Western Municipal Water
District
Colton Joint Unified School
District
Fontana Unified School
District
Irvine Unified School District
Lake Elsinore Unified School
District
Menifee Unified School
District
Mountain View School District
Ohlone Community College
Palm Springs School District
Romoland School District
San Jose Community College
San Marino Unified School
District
University of California
Berkeley
University of California San
Francisco
West Covina Unified School
District
Mechoopda Indian Tribe
Stanislaus Council of
Governments
UCSF Medical Center

Alabama

City of Pelham
Arizona
City of Prescott
County of Maricopa

Connecticut

City of Bristol
City of New Haven
Groton Police and
Communications Dispatch
Town of Groton

Florida

City of Cape Coral
City of Deerfield Beach
City of Dunedin
City of Fort Lauderdale
City of Pompano Beach
City of Port St. Lucie
City of Riviera Beach
City of Wilton Manors

Idaho

City of Sandpoint

Illinois

City of Bloomington
City of Champaign
City of Countryside
City of Crystal Lake
City of Highland Park
City of Joliet
City of Lake Forest
City of Moline

City of Morton Grove
City of Naperville
City of Oakbrook Terrace
City of Orland Park
City of Prospect Heights
City of Rock Island
City of Rockford
City of St. Charles
City of Waukegan
City of Wood Dale
Village of Arlington Heights
Village of Barrington Hills
Village of Bloomingdale
Village of Cary
Village of Glencoe
Village of Homewood
Village of Itasca
Village of Kenilworth
Village of Lake Barrington
Village of Libertyville
Village of Lincolnwood
Village of Lisle
Village of Matteson
Village of Morton Grove
Village of Norridge
Village of Northbrook
Village of Northfield
Village of Oak Brook
Village of Oak Park
Village of Orland Park
Village of Oswego
Village of Palos Park
Village of Park Forest
Village of River Forest
Village of Riverside
Village of South Barrington
Village of Westmont
Village of Wheeling
Town of Normal
County of Du Page
County of Peoria
County of Sangamon
County of Winnebago

Indiana

The University of Notre Dame
Indianapolis Public Library
Indianapolis Public Schools

Iowa

City of Ankeny
City of Bettendorf
City of Burlington
City of Cedar Rapids
City of Des Moines
City of New Hampton
City of West Des Moines
Collier County Board of
Commissioners
County of Johnson
County of Linn

Kansas

City of Emporia
City of Shawnee

Michigan

University of Michigan
Lake Superior State
University

Minnesota

County of Anoka

Nevada

County of Douglas
County of Nye
Town of Pahrump

New York

City of Batavia
Village of Ossining

North Carolina

City of Burlington
City of Gastonia
City of High Point
City of Kinston
City of Mount Airy
City of Salisbury
Town of Southern Pines
Arc of Stanley County
County of Buncombe
County of Cabarrus
County of Davie
County of Orange
St. Augustine College
Wake Forest University
Eastern Band of Cherokee
Indians
Salisbury Rowan Utilities

Ohio

County of Cuyahoga
County of Montgomery

South Dakota

Rapid City Area Schools

Texas

City of Cedar Hill
City of Dallas
City of Farmers Branch
City of Hutto
City of Pflugerville
City of Sherman
City of University Park
County of Atascosa
County of Denton
Corpus Christi Fire
Highland Park Police and Fire
International Bank of
Commerce
Jacobs Project Management
Company
North Texas Emergency
Communications Center
(NTECC)
River Oaks Country Club
State Bank of Texas
University of Texas Health
Science Center
Westwood Country Club

Utah

Washington County School
District

Virginia

City of Manassas Park

Wisconsin

City of Appleton
City of Brookfield
City of Eau Claire
City of Hales Corner
City of Wauwatosa
City of West Allis
County of Brown
County of Kenosha
County of Milwaukee
County of Waukesha
HIDTA Milwaukee
Madison School District
Shorewood School District
Whitnall School District
West Allis School District



Technical Certifications

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





Project Team

The personnel selected for this engagement are experts in their given disciplines, chosen according to the specific needs of this project, working as an integrated team to provide end-to-end consulting and support services. Detailed profiles for each Project Team member are found in this section.





David W. Krout, CPA *(Inactive)*

Partner – Enterprise Applications Consulting Practice Leader

David Krout brings nearly 30 years of experience partnering with more than 150 local governments with a wide range of information technology needs. He specializes in working with organizations to identify strategic, organizational, application, and functional requirements to determine which systems and applications are a proper fit for both the agency and the vendor.

Mr. Krout's unique and diverse background in business management, accounting, and management consulting has enabled him to collaborate with C-level executives and department staff from a practical business-management perspective to maximize their technology utilization.

With experience working at a leading local government enterprise software provider, Mr. Krout offers a unique understanding of consulting, client advocacy, and vendor relationships to the collaboration between the agency and solution providers.

Highlights

- ▶ Served on the National Committee for Information Technology for the Institute of Management Accountants
- ▶ Former President, Institute of Management Accountants, Inland Empire Chapter
- ▶ Former Government IT Consulting Manager for RSM McGladrey, the nation's fifth-largest CPA and consulting firm
- ▶ Featured speaker for the Texas Association of IT Managers (TAGITM), Municipal Information Systems Association of California (MISAC), and California Society of Municipal Finance Officers (CSMFO), among others
- ▶ Project lead with public-sector agencies throughout the United States

Agency Experience

City of Albany
City of Batavia
City of Bloomington
City of Brentwood
City of Brisbane
City of Burbank
City of Burlington
City of Camarillo
City of Carlsbad
City of Cathedral City
City of Cedar Hill
City of Chico
City of Chino
City of Clovis
City of Colton
City of Corona
City of Coronado
City of Dana Point
City of Dublin
City of Emporia
City of Farmers Branch
City of Foster City
City of Gastonia
City of Healdsburg
City of Hemet
City of High Point
City of Highland Park
City of Hutto
City of Indio
City of La Habra
City of La Puente
City of Laguna Niguel
City of Lake Forest
City of Larkspur
City of Lomita
City of Manassas Park
City of Menlo Park
City of Mission Viejo
City of Mountain View

City of Murrieta
City of Newark
City of Novato
City of Pacifica
City of Palm Desert
City of Palmdale
City of Pelham
City of Petaluma
City of Piedmont
City of Rancho Mirage
City of Redlands
City of Rialto
City of Riviera Beach
City of Rosemead
City of St. Helena
City of Salisbury
City of San Bernardino
City of San Gabriel
City of San Jacinto
City of San Leandro
City of Sandpoint
City of Shawnee
City of Sierra Madre
City of Simi Valley
City of South Gate
City of Tracy
City of Tustin
City of West Covina
City of West Des Moines
City of West Sacramento
City of Whittier
City of Wilton Manors
City of Windsor
County of Buncombe
County of Butte
County of Denton
County of Douglas
County of Lassen
County of Mendocino

County of Orange
County of Plumas
County of Riverside
County of San Bernardino
Town of Danville
Town of Groton
Town of Hillsborough
Town of Truckee
Town of Windsor
Town of Woodside
Village of Glencoe
Village of Lincolnwood
Village of Northfield
Village of Oswego
Village of Park Forest
Village of River Forest
Coachella Valley MVCD
East Bay Regional Park District
El Toro Water District
Four Rivers Sanitation Authority
Jurupa Community Services District
Los Angeles Community Development Authority
Las Virgenes Municipal Water District
Mesa Water District
Midpeninsula Regional Open Space District

Ramona Municipal Water District
Rincon del Diablo Water District
Riverside County Sheriff's Office
Rosamond Community Services District
Salisbury-Rowan Utilities
San Bernardino Municipal Water
Walnut Valley Water District
West County Wastewater District
Western Municipal Water District
Castaic Lake Water Agency
Castro Valley Sanitary District
Cucamonga Valley Water District
Gastonia Water & Power
Glendale Water and Power
TrueNorth Educational Cooperative



Certified Public Accountant
(Inactive)

It has been absolutely key to this project that ClientFirst, especially Dave, knows the governmental environment, its limitations and its opportunities.

—Director of Administrative Services
CA Municipality



Tom Jakobsen

Partner – IT Infrastructure and Operations Consulting Practice Leader

Tom Jakobsen brings over 40 years of experience in the information technology arena, with expertise spanning local government IT infrastructure, applications, cybersecurity, day-to-day IT operations, and resource management. His interdisciplinary background provides him with a deep understanding of how these elements interconnect and the best practices required to operate them effectively.

Mr. Jakobsen has extensive experience leveraging project management principles and system development lifecycles to deliver successful infrastructure and cybersecurity-related initiatives. His dual roles as a Virtual CIO and Consultant offer clients unparalleled expertise, bridging interdepartmental collaboration and vendor relationship management to drive organizational success.

Highlights

- ▶ Former National IT Infrastructure Consulting Practice Leader for RSM McGladrey, the nation's fifth-largest CPA and consulting firm
- ▶ Ongoing Contract CIO for multiple agencies
- ▶ Managed hundreds of IT consulting projects with local governments throughout the United States
- ▶ Featured speaker for numerous technology conferences, including Texas Association of Governmental Information Technology Managers (TAGITM) and Municipal Information Systems Association of California (MISAC)

Agency Experience

City of Azusa
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City of Carlsbad
City of Cedar Hill
City of Chino
City of Corona
City of Downey
City of Dublin
City of Emeryville
City of Farmers Branch
City of Foster City
City of Glendora
City of Hayward
City of Healdsburg
City of Hemet
City of Highland Park
City of Hutto
City of Albany
City of Joliet
City of La Habra
City of La Puente
City of Laguna Niguel
City of Lake Forest
City of Larkspur
City of Manassas Park
City of Menlo Park
City of Mission Viejo
City of Mountain View
City of Murrieta
City of Newark
City of Norco
City of Oakbrook Terrace
City of Pacific Grove
City of Palm Desert
City of Palmdale
City of Petaluma
City of Pluggerville
City of Piedmont
City of Pismo Beach
City of Port Hueneme
City of Rancho Cucamonga
City of Rancho Mirage
City of Redlands
City of Rialto
City of Riviera Beach
City of Rockford
City of Rohnert Park
City of Salinas

City of San Bernardino
City of San Leandro
City of San Pablo
City of Sandpoint
City of Seal Beach
City of Sierra Madre
City of Simi Valley
City of South Gate
City of South San Francisco
City of St. Charles
City of Trace
City of University Park
City of Vacaville
City of West Covina
City of West Des Moines
City of West Sacramento
City of Whittier
City of Wilton Manors
County of Atascosa
County of Davie
County of Denton
County of Lassen
County of Mariposa
County of Mendocino
County of Plumas
County of Tuolumne
Town of Danville
Town of Groton
Town of Windsor
Town of Woodside
Town of Yucca Valley
Village of Arlington Heights
Village of Barrington Hills
Village of Bloomingdale
Village of Cary
Village of Glencoe
Village of Homewood
Village of Lake Barrington
Village of Libertyville
Village of Lincolnwood
Village of Northbrook
Village of Northfield
Village of Oak Brook
Village of Oak Park
Village of Ossining
Village of Palos Park
Village of Park Forest
Village of River Forest
Village of Riverside
Village of South Barrington
Village of Wheeling
Castaic Lake Water Agency
Castro Valley Sanitary District

Coachella Valley Mosquito Vector Control District
El Toro Water District
Four Rivers Sanitation Authority
Jurupa Community Services District
Las Virgenes Municipal Water District
Ramona Municipal Water District
San Bernardino Municipal Water Sweetwater Authority
Western Municipal Water District
Forest Preserve District of Will County
Naperville Park District
Norridge Park District
Park District of Highland Park
Illinois Action for Children
Jurupa Community Service District
Los Angeles County Development Authority
Midpeninsula Regional Open Space District
Steppenwolf Theatre
Indianapolis Public Library
Oak Park Library
Oswego Public Library District
Rockford Library
Stanislaus Council of Governments
Moraga-Orinda Fire District
Riverside County Sheriff's Department
Arie Crown Hebrew Day School
Batavia UCSD 101
Carpentersville UCSD 300
Central Burlington SD 301
Orland Park CHSD 230
Chicago International Charter Schools
CUSD 300
DeKalb CUSD 428
Durand CUSD 322
East Aurora SD 131
Elmhurst SD 205
Geneva CUSD 304
Glenview SD 34
Harlem SD 122
Harvard SD 50
Indian Prairie CUSD 204
Morton HSD 201
Mount Prospect SD 57
Naperville CUSD 203
Niles Township HSD 219
Orland Park D230

Oswego CUSD 308
Park Ridge-Niles SD
Salt Creek SD 48
San Marino USD
St. Charles CUSD 303
Township HSD 214
West Covina USD
Wheaton SD 200



CREDENTIALS, DEGREES, AND AFFILIATIONS

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

SPECIALTIES

- ▶ Assessments, Strategy, and Planning
- ▶ IT Operations Management
- ▶ Interim CIO/IT Management
- ▶ Network Design, Procurement, and Implementation
- ▶ Cybersecurity
- ▶ Disaster Recovery
- ▶ Project Management
- ▶ Network Design, Procurement, Implementation, and Oversight
- ▶ IT Governance
- ▶ Policies Development



Tom, I've been meaning to thank you for your expertise and guidance... assisting us in moving forward on all fronts.

—City Manager
IL Municipality



James Smith

Senior Director, IT Infrastructure Consulting

James Smith is a seasoned technology executive with over 25 years of experience in the Information Technology sector, distinguished by leadership roles that span strategic planning, operations, and consulting. Using a visionary approach, James excels in guiding organizations through complex IT challenges while driving innovative, results-oriented solutions.

James's expertise includes service engagement processes, systems design, project management, and managed services. He specializes in crafting and executing IT strategies, developing comprehensive technology plans, and providing expert guidance in cloud services, cybersecurity, business continuity, disaster recovery, and deep storage solutions.

A proven leader and strategic thinker, James has consistently delivered success across different types of government agencies, helping them maximize the value of their technology investments.

Highlights

- ▶ Leveraged over 25 years of proven experience in high-level positions within the Information Technology field
- ▶ Demonstrated leadership as an accomplished leader, manager, and technology strategist with a track record of success in developing and designing IT solutions
- ▶ Proficient in communicating and implementing IT strategies, managing high-visibility initiatives, and providing technology consulting to Director and C-level executives throughout the United States

Agency Experience

City of Albany
City of Azusa
City of Benecia
City of Calabasas
City of Cedar Hill
City of Cerritos
City of Farmers Branch
City of Menlo Park
City of Mountain View
City of Newark
City of Oakland Park
City of Petaluma
City of Piedmont
City of San Leandro
City of Sandpoint
City of Simi Valley
City of South Gate
City of Whittier
Town of Windsor
Village of Lake Barrington

Village of Lincolnwood
Village of Northfield
Village of River Forest
Village of Riverside
Village Orland Park
County of Kings
County of Travis
Alamo Community College
Bloomington School District
Byron School District
DeKalb School District
Des Plaines School District
El Toro Water District
Aurora Public Library
DeVry University
Elmhurst School District
Hoover Schrum District
Joliet School District 86
Jurupa School District
Kishwaukee College

Moraine Valley Community College
Oak Lawn School District
Oakton Community College
Rock Valley College
Roosevelt University
Salt Creek School District
Sycamore School District
Township High School District
Jurupa Community Service District
Las Virgenes Municipal Water District
Mesa Water District
Norridge Park District
DuPage County Sheriff
ESQ Region 20
Harris County Toll Authority
Placer County Sheriff
Riverside County Sheriff's Department
Wight Co.



SPECIALTIES

- ▶ IT strategy and technology plan development
- ▶ End-to-end systems architecture
- ▶ Cybersecurity
- ▶ Business continuity and disaster recovery
- ▶ Engagement Management
- ▶ Systems design consulting
- ▶ IT Support Services
- ▶ Contract Negotiations
- ▶ Staff Augmentation
- ▶ Cloud services
- ▶ IT Cost Optimization
- ▶ Deep data management expertise
- ▶ Distributed end-user technologies



Tom Weiman

Practice Leader, Enterprise Communications Consulting

Tom Weiman has provided IT and telecommunications consulting for over 30 years. He has experience consulting in telecommunications, data networks (LAN/WAN), and cable infrastructure.



Tom's unique combination of voice, data, and infrastructure experience provides our clients with years of design, selection, and implementation experience with all facets of IT and telecommunications. Tom has direct experience in the detailed design of contact centers, IVR operations, and the integration of voice and data services for multi-location clients.

Highlights

- ▶ Lead Project Manager, State of Wisconsin, saving the state over \$90 million in telecommunications service costs
- ▶ Former Partner and National Telecom Consulting Project Leader for RSM McGladrey, the nation's fifth-largest CPA and consulting firm
- ▶ Call Center Campus Instructor at Purdue University, Center for Customer-Driven Quality
- ▶ Provided telecommunications consulting services to nearly 300 public agencies throughout the United States, including government agencies, non-profit organizations, healthcare and financial institutions, and educational institutions at the K-12 and higher education levels

Agency Experience

City of Bettendorf
City of Bloomington
City of Brentwood
City of Burbank
City of Calabasas
City of Camarillo
City of Cape Coral
City of Chino
City of Corona
City of Countryside
City of Deerfield Beach
City of Downey
City of Dunedin
City of Eau Claire
City of Escondido
City of Fort Lauderdale
City of Foster City
City of Kingston
City of La Habra
City of La Puente
City of Laguna Niguel
City of Lake Forest
City of Mason City
City of Matteson
City of Miami Springs
City of Moline
City of Mount Airy
City of Mount Dora
City of Murrieta
City of Naperville
City of New Hampton
City of New Haven
City of Oakbrook Terrace
City of Orland Park
City of Palm Desert
City of Palmdale
City of Piedmont
City of Pompano Beach
City of Port St. Lucie
City of Prospect Heights
City of Rancho Cucamonga
City of Rancho Mirage
City of Redlands
City of Rock Island
City of Rockford
City of Sacramento
City of Salisbury
City of San Clemente
City of San Gabriel
City of San Rafael
City of Sierra Madre
City of Sioux Falls
City of South Pasadena
City of South San Francisco
City of St. Charles

City of Upland
City of Waukegan
City of Wauwatosa
City of West Allis
City of West Covina
City of West Des Moines
City of West St. Paul
County of Buncombe
County of Cabarrus
County of DuPage
County of Milwaukee
County of Montgomery
County of Orange
County of Peoria
County of San Bernardino
County of Sangamon
County of Tazewell
County of Tuolumne
County of Will
County of Winnebago
County of Yolo
Town of Danville
Town of Truckee
Village of Arlington Heights
Village of Cary
Village of Lincolnwood
Village of Northfield
Village of Oak Brook
Village of Oak Park
Village of Palos Park
Village of River Forest
Village of Riverside
Civitas Schools
Consolidated SD 158
Algonquin CUSD 300
Arlington Heights Township HSD 214
Assumption Catholic High School,
Davenport
Batavia SD 101
Burlington Central CUSD 301
Castaic Lake Water Agency
Cedar Rapids Community School District
Davenport Community Schools
Davenport School District
DeKalb CUSD 428
Diocese of Davenport Catholic Schools
Diocese of Madison Catholic Schools
Dubuque Community School District
Eastern IL University
Elgin School District
Forest Preserve District of Will County
Geneva Community Unit SD 304
Glenview Schools
Gower School District 62
Hampton SD 29

Harlem SD 122
Harrison SD 36
Harvard CUSD 50
IL Action for Children
Illinois State University
Indian Prairie CUSD 204
Irvine School District
Knoxville Community School District
Livermore Area RFD
Madison School District
Mason City School District
Mount Prospect SD 57
Naperville CUSD 203
Newhall County Water District
Norridge Park District
North Scott School District
Oak Park Public Library
Ohlone Community College
Omaha Public Power District (OPPD)
Orland Park CHSD 230
Oswego CUSD 308
Oswego Public Library District
PACE Suburban Bus Division RTA
Park District of Highland Park
Park Ridge-Niles CCSD 64
Port Byron Central School Districts
Rapid City Area Schools
Riverdale CUSD 100
Riverside SD 96
Rockford Public Library
El Toro Water District
Las Virgenes Water District
Salisbury-Rowan Utilities (SRU)
San Bernardino Municipal Water
Department
San Jose/Evergreen Community College
Schaumburg Township District Library
Sherrad Community Schools
Shorewood School District
South Florida Water
Management
St. Ambrose University
St. Charles CUSD 303
Sunset Ridge SD 29
University of Chicago
University of Michigan
University of Notre Dame
Wahlert Catholic High
School
Washington County School
District
West Allis School District
West Aurora SD 129
Wheaton-Warrenville SD
200

Whitnall School District
Cedar Falls Utilities
Central Illinois Power
Church of Our Savior

CREDENTIALS, DEGREES, AND AFFILIATIONS

- ▶ Bachelor of Arts in Communications
— St. Ambrose University
- ▶ Ongoing training from Avaya/Cisco/ShoreTel/Nortel/Mitel/NEC, and others
- ▶ Past President and current member of the Iowa Telecommunications Users Group (ITUG)
- ▶ Member, All Major Vendor Consultant Programs
- ▶ Member, Association of Communications Technology Professionals in Higher Education (ACUTA)
- ▶ Member, Building Industry Consulting Services, International (BICSI)
- ▶ Member, Healthcare Information and Management Systems Society (HIMSS)
- ▶ Member, Society of Telecommunications Consultants (STC)
- ▶ Member, Institute of Electrical and Electronics Engineers (IEEE)

SPECIALTIES

- ▶ Billing Audits and Cost Reviews
- ▶ Carrier Services Cost Analysis
- ▶ Competitive Hardware and Services RFP Development and Evaluations
- ▶ Implementation Project Management
- ▶ Operational Assessment and Workflow
- ▶ Strategic Telecommunications Planning
- ▶ VoIP Readiness Assessments and Review



I would like to thank both of you, especially Tom, for all the hard work you did for us. We could not have done this RFP process successfully without your help.

—IS Manager
CA Municipality



Craig Williams, RCDD, NTS

Director, Infrastructure Consulting Services

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

Highlights

- Full Wireless replacement RFPs for school districts
- Building security replacement for Illinois school district
- Numerous E-Rate network equipment RFPs
- E-Rate WAN RFPs
- Point-to-point WAN for Illinois school district
- Fiber replacement for mid-sized K-12 school district
- Selected as one of 16 technology directors nationally for HP and Intel Profiles in Leadership through Tech and Learning Magazine
- Directed technology support and operations at Illinois' second-largest public school district, serving 40,000 students. Led technical staff of 71. Increased customer satisfaction from 87.7% to 95.2% rate
- National award from the Help Desk Institute as one of Elite 50 organizations for customer support across all industries

Agency Experience

City of Azusa	Forest Preserve District of Lake County	Hinsdale HSD 86
City of Calabasas	Hayward Area Recreation and Park District	Hononegah SD 207
City of Cedar Hill	Norridge Park District	Huntley SD 158
City of Glendora	Four Rivers Sanitation Authority	Indian Prairie CUSD 204
City of Joliet	San Bernardino Municipal Water District	J. Sterling Morton HSD 201
City of Manassas Park	Joliet Public Library	Joliet PSD 86
City of Newark	Northbrook Public Library	Lake Zurich SD 95
City of Pacific Grove	Rancho Cucamonga Library	Maine Township HSD 207
City of Piedmont	Rockford Public Library	Marmion Academy
City of Pismo Beach	Steppenwolf Theatre	Mt. Prospect SD 57
City of Rancho Cucamonga	Algonquin SD 158	Naperville CUSD 203
City of Rancho Mirage	Arie Crown Hebrew Day School	Niles Township HSD 219
City of Riviera Beach	Batavia SD 101	Posen-Robbins SD 143.5
City of San Pablo	Bloomington SD 13	Prairie Grove SD 46
City of South San Francisco	Bunker Hill SD 8	Salt Creek SD 48
City of University Park	Butler SD 53	Sunset Ridge School District
City of Vacaville	Carpentersville CUSD 300	Thornton Fractional HSD 215
City of West Covina	Central CUSD 301	Township HSD 214
City of West Des Moines	Chicago International Charter Schools	TrueNorth Educational Cooperative
Town of Groton	Community High School District 99	West Aurora SD 129
Village of Lincolnwood	DeKalb CUSD 428	Wheaton Warrenville CUSD 200
Village of Northfield	Durand CUSD 322	Winnetka SD 39
Village of Orland Park	Elmhurst SD 205	Worth SD 127
Village of Park Forest	Forest Ridge SD 142	Yorkville SD 115
Village of River Forest	Geneva CSD 304	
Village of Riverside	Glen Ellyn SD 41	
Village of Wheeling	Harlem SD 122	
County of Davie	Harvard SD 50	
County of Mariposa	Harvey SD 152	
County of Mendocino		
County of Tuolumne		
Champaign County Forest Preserve District		



CREDENTIALS, DEGREES, AND AFFILIATIONS

- ▶ Bachelor of Science in Architecture – University of Illinois
- ▶ BICSI Registered Communication Distribution Design (RCDD)
- ▶ BICSI Network Technology Systems (NTS) Designer
- ▶ MBA, North Central College (Concentration in Management Information Systems)

SPECIALTY AREAS

- ▶ Infrastructure – Low Voltage Systems/Cabling
- ▶ Data Center/Networking
- ▶ Wireless
- ▶ Project Management
- ▶ Business and Human Resources Systems
- ▶ CIO Advisory
- ▶ Public-Facing Web Technology
- ▶ Staff Support/Customer Service



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

—Superintendent of Schools
IL School District

Craig, I just wanted to personally thank you for all your work on this. Your expertise is invaluable and much appreciated.

—Commander
California Police Department



Maria Perperidis

Enterprise Applications Management Consultant

Maria Perperidis is an accomplished and dependable business executive with over 20 years of experience designing and implementing HRIS systems, human resource management, operations, change management, and strategic planning. Highly adaptable and results-oriented, Maria is recognized for conducting HR audits that have driven significant cost savings. She excels in communicating a clear vision, setting expectations, monitoring progress, ensuring compliance, and delivering impactful results on a global scale.

HR Implementation Experience

Maria Perperidis has extensive experience leading HR system implementations. She has overseen the design, deployment, and ongoing maintenance of HCM and Finance systems. Her strategic leadership meets client requirements while balancing day-to-day system support with strategic enhancements. Maria leads cross-functional resource planning, manages feature releases, and maintains accountability for overall data governance, security, testing, and compliance. In this role, she has been instrumental in promoting continuous learning and ensuring seamless collaboration with departments such as IT, HR, Payroll, and Finance to identify opportunities for improvement and implement system optimizations effectively.

Before this, Maria served as a Change Management Specialist at K12 Stride, facilitating organizational change management activities during implementation. She conducted a comprehensive gap analysis and managed training and communication plans to ensure a smooth rollout. Her experience in strategic HR leadership and tactical implementation is further highlighted by her time at H2H Enrollments, where she supervised multiple HR system implementations with multiple payroll and HR systems. Maria's ability to integrate organizational change management processes using methodologies such as Prosci and SDLC has proven crucial in the success of these implementations.

Agency Experience

City of Carrollton
City of Coronado
City of High Point
City of La Mesa
City of Mission Viejo
City of Petaluma
City of Temecula
City of Tulare
Lassen County
Plumas County
New York Police Department



CREDENTIALS, DEGREES, AND AFFILIATIONS

- ▶ Strategic Human Resource Management, Certified Professional, SHRM-CP
- ▶ SAP (System Applications and Products in Data Processing) Certification
- ▶ Six Sigma Green Belt Certification
- ▶ Graduate Certificate in Operational Excellence
- ▶ Change Management Certification (CCMP)
- ▶ Workday Certifications Completed: Business Process Fund, Report Writer, Config Security Fund., Calculated Fields, WD Integration System Fund, Recruiting Transactions, Workday Adaptive Planning, Financials, and Time Tracking. Workday Pro Certifications in HCM Core, Adaptive Planning, Record to Report, and Learning
- ▶ Kronos/UKG Pro Certifications Completed: Admin Essentials: UDM,
- ▶ Administration Essentials, Accruals, HR Service Delivery, Recruiting, Talent,
- ▶ Compensation, and UKG Pro

EDUCATION

- ▶ Texas A&M Commerce | Master of Science in Business Analytics & Cybersecurity
- ▶ Texas A&M Commerce | Bachelor of Science in Organizational Leadership
- ▶ Rockland Community College | Associate of Science in Business Management



Marcia Struwing

Senior Telecommunications Consultant

Marcia Struwing specializes in bill auditing, inventory, call center operations and design, voice and data communications systems, operational needs assessments, and project management. Marcia has provided these services for hundreds of clients throughout the United States in both the public and private sectors. Her direct experience includes work for government agencies, not-for-profit organizations, healthcare, and educational institutions (at the K-12 and higher education levels).

Highlights

- ▶ System Implementation Project Leader for a large K-12 school district – provided coordination and planning for the implementation of a 1,500-station Cisco VoIP telecommunications system in a multi-location environment.
- ▶ Call Center Implementation and Call Center Management Services – assisted with designing and implementing a large multi-location telecommunications system and call center that included multiple sites and 100+ active agents.
- ▶ Contact Center Operational Assessment for a Large University Medical Group – performed an operational review and assessment of the methods used to make appointments, disseminate medical information, enable physician referrals, communicate the status of appointments, and confirm appointments.

Agency Experience

City of Azusa
City of Calabasas
City of Carlsbad
City of Cedar Hill
City of China
City of Fairfield
City of Foster City
City of La Habra
City of Laguna Niguel
City of Lake Forest
City of Murrieta
City of Newark
City of Palmdale
City of Petaluma
City of Piedmont
City of Rancho Cucamonga
City of Redlands
City of Rockford
City of Salinas
City of San Clemente
City of San Leandro
City of San Pablo
City of San Rafael
City of Seal Beach
City of South Gate
City of South San Francisco
City of St. Charles
City of West Covina
Village of Arlington Heights
Village of Cary
Village of Hales Corners
Village of Libertyville
Village of Lincolnwood
Village of Northfield
Village of Orland Park
Village of Park Forest
Village of River Forest
Village of Riverside
County of DuPage
County of Mendocino
County of Milwaukee
County of Tuolumne
County of Winnebago
County of Yolo

Algonquin SD 158
Batavia Public Library
Batavia Public SD 101
Bloomington SD 13
Bunker Hill SD 8
Butler SD 53
Calumet City SD 155
Carpentersville SD 300
Central Burlington CUSD 301
Chicago International Charter Schools
Community Unit SD 300
Consolidated HSD 230
Consolidated SD 158 Algonquin
DeKalb CUSD 428
DuPage County Health Department
Durand CUSD 322
East Aurora SD 131
Eastern Illinois University
East Moline SD 37
Elgin SD U-46
Four Rivers Sanitation Authority
Geneva CUSD 304
Glen Ellyn Public Library
Harlem SD 122
Harrison SD 36
Harvard CUSD 50
Harvey SD 152
Hinsdale HSD 86
Hononegah SD 207
Indian Prairie CUSD 204
Indianapolis Public Schools
Irvine USD
Joliet PSD 86
Joliet Public Library
Lake Elsinore Unified SD
Livermore Area Recreation Park District
Maine Township HSD 207
Marmion Academy
Milwaukee Transport Services
Moraga-Orinda Fire District
Mount Prospect SD 57
Naperville CUSD 203
Nippersink (Richmond-Burton) RB 2
Norridge Park District

Northern Illinois University
Oswego Public Library District
Park Ridge-Niles SD 64
Posen-Robbins SD 143.5
Prospect Heights SD 23
Rockford Public Library
Salt Creek SD 48
San Bernardino Municipal Water
St. Charles CUSD 303
Steppenwolf Theatre
Sunset Ridge SD 29
Township High SD 214
West Aurora SD 129
Wheaton-Warrenville SD 200
Worth SD 127
Winfield SD

CREDENTIALS, DEGREES, AND AFFILIATIONS

- ▶ Bachelor's Degree – University of Illinois
- ▶ Member of consultant liaison programs for Alcatel, Cisco, Avaya, Nortel, Siemens, ShoreTel, Mitel, i3, and others

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

—CFO
IL Library



Aaron Ayala

Senior Systems Engineer

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



CREDENTIALS, DEGREES, AND AFFILIATIONS

- ▶ Bachelor of Science in Information Systems – University of Phoenix
- ▶ Certified Information Systems Security Professional
- ▶ Certified Cloud Security Professional

SPECIALTIES

- ▶ Infrastructure Project Management
- ▶ Staff Management
- ▶ Vendor Relationships
- ▶ Systems Administration
- ▶ IT Operations
- ▶ IT SOX Compliance

Highlights

- ▶ Infrastructure Project Manager and Network Design Engineer
- ▶ Manages large- and small-scale implementation teams. Examples include:
 - ♦ \$4.5MM deployment of Cisco and ShoreTel structured cabling, voice infrastructure, and data infrastructure for a municipality with 35 locations
 - ♦ \$2.5MM deployment of HPE and Mitel voice and data infrastructure for a county with 33 locations
 - ♦ IT Implementation project management for Mother Lode Regional Juvenile Detention Center, Tuolumne County, California
 - ♦ Data Center Relocation for a mid-sized California city
 - ♦ Contract administration for structured cabling system, door access control, and data center-related vendor implementations
- ▶ Design and procurement of Cisco, HPE, Palo Alto, and other major network solutions
- ▶ Wireless systems, Networks, Network security, Backup systems, Infrastructure
- ▶ Design and procurement of door access control, structured cabling, and video surveillance systems
- ▶ Implementation of network management tools, including network monitoring, Active Directory security, and others

Agency Experience

City of Albany
City of Azusa
City of Big Bear Lake
City of Carlsbad
City of Cedar Hill
City of Corona
City of Farmers Branch
City of Glendale
City of Hawaiian Gardens
City of Hemet
City of Hutto
City of La Puente
City of Laguna Niguel
City of Manassas Park
City of Mission Viejo
City of Murrieta
City of Newark
City of Pacific Grove
City of Palm Desert
City of Palmdale
City of Petaluma
City of Piedmont
City of Pinole
City of Pismo Beach
City of Port Hueneme
City of Rancho Cucamonga
City of Rancho Mirage
City of Rialto
City of Salinas
City of San Clemente
City of San Leandro

City of San Pablo
City of Sandpoint
City of South Gate
City of University Park
City of Vacaville
City of West Covina
City of West Sacramento
City of Wilton Manors
City of Woodside
City of Yucca Valley
County of Mendocino
County of Tuolumne
County of Yolo
Town of Windsor
Town of Woodside
Village of Barrington
Village of Barrington Hills
Village of Lincolnwood
Village of Lisle
Village of Northfield
Village of Oak Brook
Village of Orland Park
Village of Park Forest
Village of River Forest
Village of Riverside
Village of South Barrington
Champaign County Forest Preserve District
East Bay Regional Park District
Hayward Area Recreation and Park District

Livermore Area RPD
Norridge Park District
Moraga-Orinda Fire District
Riverside County Sheriff's Department
Castaic Lake Water Agency
Castro Valley Sanitary
Four Rivers Sanitation Authority
Fresno Irrigation District
San Bernardino Municipal Water
West County Wastewater
Zone 7 Water
Los Angeles Community Development Authority
Batavia Public Library
Hemet Public Library
Joliet Public Library
Rockford Public Library
Steppenwolf Theatre
Algonquin SD 158
Arie Crown Hebrew Day School
Batavia SD 101
Butler SD 53
Carpentersville SD 300
Central Burlington SD 301
Chicago International Charter School
DeKalb CUSD 428
Durand CUSD 322
East Aurora SD 131
Elgin SD U-46
Geneva Community SD

Glen Ellyn SD 41
Harlem SD 122
Harvard SD 50
Harvey SD 152
Hinsdale HSD 86
Hononegah SD 207
Huntley SD 158
Indian Prairie CUSD 204
Joliet PSD 86
Marmion Academy
Mt. Prospect SD 57
Naperville CUSD 203
Niles Township HSD 219
Orland Park D230
Posen-Robbins SD 143.5
St. Charles CUSD
Salt Creek SD 48
Thorton Fractional HSD 214
Township HSD 214
TrueNorth Educational Cooperative
804
West Aurora SD 129
Wheaton-Warrenville SD 200
Winfield SD 34
Worth SD 127



Certified Cloud Security Professional
ISC2 Certification

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

—Chief Financial Officer
IL Library



Keith Culp

Manager, IT Operations and Support

Keith Culp is a versatile IT professional with over 12 years of experience in IT system support and administration across a broad spectrum of infrastructure environments and client types. He handles project management and product support to provide our clients with efficient and secure IT environments. Keith's analytical, problem-solving, and communication skills, combined with his years of experience, formal training, and professional certifications, make him a valuable resource for our clients' needs.



Highlights

- ▶ Experienced in network design, firewall configuration, multifactor authentication, server design and implementation, and much more
- ▶ Project Management: Application Implementations, Hardware Upgrades, Infrastructure Build-Outs, and Office Relocations
- ▶ Hardware/software installation, maintenance, and upgrades
- ▶ Backup Design and Implementation, including Backups to Cloud
- ▶ Disaster Recovery Planning, Testing, and Maintenance
- ▶ Exchange server, Office 365, archiving solutions, and Document Management
- ▶ IT Assessments and Strategic Planning
- ▶ Cybersecurity framework implementation and management
- ▶ On-site training and user-friendly documentation
- ▶ Help Desk support

CREDENTIALS, DEGREES, AND AFFILIATIONS

- ▶ Bachelor of Science in Network Operations and Security – Western Governors University
- ▶ CompTIA A+
- ▶ Network +
- ▶ Security +
- ▶ Project +
- ▶ CCNA Routing & Switching

SPECIALTY AREAS

- ▶ Project Management
- ▶ Design and Specifications
- ▶ Documentation Specialist
- ▶ Office Relocations
- ▶ Disaster Recovery Planning
- ▶ Application Implementations

Agency Experience

City of Hawaiian Gardens
City of Norco
City of Pacific Grove
City of Piedmont
City of South Gate
Village of Barrington Hills
Village of Hales Corners
Village of Itasca
Village of Lake Barrington
Village of Lincolnwood
Village of Northfield
Village of Park Forest
Village of River Forest

Village of Riverside
Village of South Barrington
Amstadter Architects
DuPage Mayors and Managers Conference
Media Financial Management Association
Jurupa Community Services District
Four Rivers Sanitation Authority
Zone 7 Water District
Norridge Park District
Northbrook Public Library
Arie Crown Hebrew Day School
Salt Creek SD 48



Keith, I just wanted to thank you again for working on the WatchGuard project. The installation went smoothly, and you set everything up perfectly. Thanks again.

—Sergeant
IL Police Department



Peter Graziano

Senior Network Engineer

Peter Graziano specializes in configuring, installing, and troubleshooting network infrastructure. His technological experience of over 25 years includes design, specifications, configuration, maintenance, and administration; database administrations; and extensive experience in various departmental, spreadsheet, accounting, and graphics programs.

Pete has experience working with Microsoft, Cisco, Citrix, Novell, HP, Aruba, ArcServe, Symantec, IBM, and Dell hardware and software solutions.

Highlights

- ▶ Managed/conducted IT infrastructure designs and installations for dozens of public agencies
- ▶ Conducted several virtualization projects for hospitals, municipalities, libraries, and special districts
- ▶ Designed and implemented redundant systems providing two- to four-hour business continuity solutions
- ▶ Implemented VoIP solutions in many environments utilizing most major telecommunications systems
- ▶ Industry experience includes work for municipalities, water districts, school districts, medical facilities, and the private sector

Agency Experience

City of Azusa
City of Big Bear Lake
City of Brentwood
City of Corona
City of Dublin
City of Emeryville
City of Hayward
City of Hemet
City of La Puente
City of Laguna Niguel
City of Manassas Park
City of Mission Viejo
City of Norco
City of Pacific Grove
City of Piedmont
City of Rancho Mirage
City of Redlands
City of Rialto
City of Salinas
City of San Leandro
City of Sandpoint
City of Seal Beach
City of Simi Valley
City of South Gate
City of St. Charles
City of Bloomington
City of Lake Forest
City of University Park
City of Vacaville
City of West Des Moines
Town of Danville
Town of Southern Pines
Town of Truckee
Village of Barrington
Village of Libertyville

Village of Lincolnwood
Village of Northfield
Village of Oak Brook
Village of Oswego
Village of River Forest
Village of Riverside
Village of Westmont
County of Atascosa
County of Mariposa
County of Mendocino
County of Orange
Eastern Band of Cherokee Indians
Four Rivers Sanitation Authority
Indianapolis Public Libraries
Media Financial Management Association
Norridge Park District
Steppenwolf Theatre
Algonquin SD 158
Bloomington SD 13
High School District 219 Niles Township
Orland Park SD 230
Oswego SD 308
Elgin SD 46
Mt. Prospect SD 57
Park Ridge-Niles SD 64
Riverside SD 96
Salt Creek SD 48
West Aurora SD 129

CREDENTIALS, DEGREES, AND AFFILIATIONS

- ▶ Bachelor of Fine Arts – Syracuse University
- ▶ Microsoft Certified Professional
- ▶ Training as a Microsoft Certified Systems Engineer
- ▶ Citrix Certified Administrator
- ▶ A+ Security Certified

SPECIALTIES

- ▶ Network Design, Configuration, and Support
- ▶ IT Infrastructure Design, Procurement, Implementation, and Oversight
- ▶ IT Security
- ▶ IT Operations





Thomas Hasselbeck

Senior GIS Consultant

Thomas Hasselbeck is a seasoned GIS professional with extensive experience spanning the public and private sectors. Throughout his career, he has specialized in GIS application development, system architecture, geospatial data analysis, and field data collection. He has worked on many impactful projects—from creating real-time public health tracking apps and asset management systems for local governments and disaster response tools.

Thomas has consistently demonstrated a strong ability to bridge technical development with practical, real-world applications, helping governmental and non-profit organizations make informed decisions through spatial analysis and customized GIS solutions.



CREDENTIALS, DEGREES, AND AFFILIATIONS

- ▶ Bachelor of Arts in Geography – State University of New York at Buffalo
- ▶ Certificate in Computer Cartography
- ▶ Certified UAS (Unmanned Aircraft Systems) Pilot

SPECIALTY AREAS

- ▶ GIS application development and system architecture
- ▶ Web GIS and ArcGIS Enterprise deployment
- ▶ Field data collection and mobile GIS workflows
- ▶ Spatial analysis and geospatial data visualization
- ▶ Technical training, documentation, and client support

Highlights

- ▶ Led the implementation an Enterprise Asset Management (EAM) system for local governments, including workflow optimization, system configuration, and staff training on ArcGIS Enterprise Portal.
- ▶ Created a reusable GIS workflow using Field Maps, Experience Builder, and ArcGIS Dashboards that improved field data collection accuracy and enabled real-time communication between field crews and management.
- ▶ Supported geospatial workflows for environmental and infrastructure projects, using spatial analysis and visualization to generate actionable insights and drive business development.
- ▶ Recognized for cross-functional leadership and technical mentoring, helping teams adopt and innovate with GIS technologies.
- ▶ Provided strategic GIS consulting, including the U.S. launch of geoCirrus, enhancing cloud-based system deployment using ArcGIS Server and Geocortex.
- ▶ Developed and deployed custom GIS applications to support humanitarian efforts, including water filter tracking and COVID-19 contact tracing, directly improving public health outcomes in underserved communities.
- ▶ Designed secure GIS system architectures for federal agencies, including a real-time fugitive tracking system and a hurricane response tool, improving emergency response capabilities.
- ▶ Played a lead role in developing military symbology runtime libraries for Esri platforms, ensuring cross-platform functionality and alignment with Department of Defense requirements.

Agency Experience

City of Cerritos
City of Covina
City of Piedmont
City of Pinole
City of Rochelle
City of Sandpoint
City of Woodland
Coachella Valley Water District
Tahoe Public Utilities
Village of Franklin
West County Wastewater District



Jamie T. Shell, PMP

Director, Enterprise Applications Consulting

Jamie Shell has over 25 years of public sector experience, including 10 years working in local government finance (Finance Director) and over 15 years assisting local governments with various information technology needs. He specializes in working with organizations to identify their strategic, organizational, application, and functional requirements, and to determine which systems and/or specific applications are a proper fit for both the agency and the vendor.

Jamie's background in local government finance, project management, and software implementation has enabled him to work collaboratively with C-level executives, agency/department heads, and staff to maximize technology utilization.

Having worked in government and as an enterprise software provider, Jamie brings a unique understanding of the perspectives of both the agency and software vendors.

Highlights

- ▶ Former municipal Finance Director
- ▶ Served as President of the Eastern Kansas Government Finance Officers Association (2005)
- ▶ Former manager of Client Services with one of the largest government ERP vendors
- ▶ Former manager of Professional Services with another major government ERP vendor
- ▶ Successfully managed onsite and remote projects for over 50 public-sector agencies throughout the United States

Agency Experience

City of Alpharetta	City of Minden	County of Douglas	State of Virginia Dept of Rail & Public Transportation
City of Atlanta	City of Naperville	County of Kauai	Ewing Marion Kauffman Foundation
City of Barrie	City of New Port Richey	County of Lassen	Casta Lake Water Agency
City of Batavia	City of Newark	County of Mendocino	Coachella Valley MVCD
City of Battle Ground	City of Norco	County of Nassau	Coachella Valley Water District
City of Bentonville	City of Novato	County of New Castle	Commodities Futures Trading Commission
City of Branson	City of Oviedo	County of Plumas	Cucamonga Valley Water District
City of Carlsbad	City of Pacifica	County of Ramsey	East Bay Regional Park District
City of Cathedral City	City of Palm Desert	County of San Juan	Four Rivers Sanitation Authority
City of Cedar Hill	City of Pearland	County of San Mateo	Los Angeles Community Development Authority
City of Chattanooga	City of Petaluma	Town of Cary	Las Virgenes Water District
City of Clovis	City of Piedmont	Town of New Canaan	Riverside County Sheriff's Department
City of Coronado	City of Pismo Beach	Town of Isle of Palms	TrueNorth Educational Cooperative
City of Dubuque	City of Port Angeles	Town of Prescott Valley	Union Sanitary District
City of East Point	City of Poulso	Town of Vail	West County Wastewater District
City of Edmonton	City of Prescott	Town of Windsor	Jurupa CSD
City of Elgin	City of Richmond	Village of Lincolnwood	
City of Elmhurst	City of Salinas	State of New Jersey	
City of Emporia	City of San Bernardino	State of New Mexico	
City of Evanston	City of Simi Valley	California State Auditor's Office	
City of Farmers Branch	City of St. Petersburg	California State Controller's Office	
City of Flagstaff	City of South Gate	California Office of Emergency Services	
City of Fort Collins	City of Stockton	Province of Nova Scotia	
City of Gallup	City of Tracy	State of Hawaii Campaign Spending Commission	
City of Glendora	City of Tulare	State of Massachusetts	
City of Grand Rapids	City of Tyler	Comptroller's Office	
City of Henderson	City of Vacaville	State of Maine Treasurer's Office	
City of High Point	City of West Covina	State of New Mexico	
City of Hoover	City of West Hollywood	Administrative Office of Courts	
City of Hutto	City of West Lafayette	State of Rhode Island	
City of Indianapolis/ Marion County	City of West Sacramento	Treasurer's Office	
City of Kansas City	City of Wilmington		
City of Medford	City of Wilton Manors		
City of Memphis	City of Woodside		
City of Mesa	County of Clermont		
City of Miami	County of Cook		
	County of Denton		



CREDENTIALS, DEGREES, AND AFFILIATIONS

- ▶ Project Management Professional (PMP)
- ▶ Bachelor of Science in Business Administration and Accounting – Missouri Western State University

SPECIALTIES

- ▶ Certified Prosci Change Management Practitioner
- ▶ Business Process Reviews
- ▶ Applications Requirements Definition
- ▶ Enterprise Applications Architecture
- ▶ Current System Needs Analysis and Improvement
- ▶ New Software Selection Assistance
- ▶ Technology Master Planning
- ▶ Project Management and Oversight
- ▶ Conversion Assistance and Planning
- ▶ Contract Reviews and Negotiations





Tatjana Meser

Director, Enterprise Applications Consulting

Tatjana Meser has over 14 years of experience with local government agency software implementations. Her in-depth experience with software configuration, business analysis, and user needs assessment allows Tatjana to oversee project implementations of standard and customized software successfully.

Skilled in all facets of the project life cycle for application software, she has experience with functional and technical requirements development, gap analysis, system analysis, design, specifications, unit and system testing, implementation planning, execution, lessons learned, and system documentation.

These business improvement and process consistency efforts have created significant cost savings through move-efficient business processes and have reduced overall implementation costs.

Having worked with numerous government agencies as a vendor, Tatjana also brings an understanding, perspective, and ability to manage all the parties necessary for delivering lasting operational success.

Highlights

- ▶ Project oversight and management services for multiple community development implementations with custom integration to financial, tax, and business licensing systems
- ▶ Industry experience includes work with City and County agencies

Agency Experience

City of Batavia
City of Beaumont
City of Carlsbad
City of Cedar Hill
City of Chico
City of Corona
City of Coronado
City of Dana Point
City of Escondido
City of Fairfield
City of Farmers Branch
City of Fontana
City of Glendora
City of Greenville
City of Hesperia
City of Idaho Falls
City of Keller
City of Key West
City of Lakeland
City of Larkspur
City of Mill Valley
City of Mission Viejo
City of Monrovia
City of Newark
City of Novato
City of Oceanside
City of Palm Desert
City of Palmdale
City of Petaluma
City of Piedmont
City of Pinole

City of Pismo Beach
City of Rancho Palos Verdes
City of Rocklin
City of Salinas
City of San Bernardino
City of San Clemente
City of South Gate
City of St. Cloud
City of St. Helena
City of St. Paul
City of Vacaville
City of Vallejo
City of West Covina
City of West Sacramento
City of Wood Dale
Town of Windsor
Town of Woodside
Village of Lincolnwood
Village of Oswego
Village of River Forest
Village of Westmont
County of Butte
County of Calaveras County
County of Mendocino
County of Shasta
County of Yuba
County of Hanover



CREDENTIALS, DEGREES, AND AFFILIATIONS

- ▶ Bachelor of Arts in International Studies – UC San Diego
- ▶ Project Management Institute Member – Inland Empire Chapter

SPECIALTIES

- ▶ Project Management
- ▶ Conversion, Interface Planning, and Implementation Support
- ▶ Understanding of public sector departmental operations and application systems
- ▶ Workflow analysis and mapping
- ▶ Business Process Redesign
- ▶ System Configuration and Training
- ▶ Test and Go Live Plan Creation



I just wanted to say that I thought the training sessions were very informative and clear, and I learned a lot from it. I appreciate your time spent to train us. Thank you so much!

—Account Clerk
CA Municipality



Alicia Burns, PMP, CSP-PO

Management Consultant

Alicia Burns has over 15 years of experience implementing ERP systems for private and public sectors. Her education and experience in implementation have enabled her to develop expertise in implementation planning, business process analysis and consulting, system analysis and design, user acceptance testing planning and assistance, end-user training planning, go-live planning, and technical and functional specifications.

Alicia's implementation career began as a payroll functional lead on the client side of an ERP implementation for a company with 6,000 employees spread across multiple states. She transitioned from full-time software implementation for a major private enterprise distributor to supporting the public sector thereafter.

As she is skilled in Agile project management methodologies, Alicia values client involvement and open communication about projects. She can navigate through the twists that a software implementation can bring.

Alicia's tenure at a major government enterprise software provider enables her to assess business needs, track project flow, and assist clients in developing best-practice solutions.

Alicia is committed to delivering high-quality work that meets or exceeds client expectations.

Highlights

- ▶ Multi-phased ERP application implementations
- ▶ In-depth knowledge of various payroll/HR platforms
- ▶ Well-versed in Agile project management methodologies

Agency Experience

City of Alameda	City of Plumas	Maricopa Association of Governments
City of Burlingame	City of Port Hueneme	San Diego Association of Governments
City of Carlsbad	City of Redlands	Desert Water Agency
City of Cathedral City	City of Richland	Helix Water District
City of Coronado	City of Richmond	Las Virgenes Water District
City of Diamond Bar	City of Rohnert Park	Santa Margarita Water District
City of Dublin	City of San Bernardino	San Bernardino Municipal Water District
City of Emporia	City of Simi Valley	Golden Gate Bridge, Highway, and Transportation District
City of Farmers Branch	City of South Gate	
City of Fontana	City of Tulare	
City of Fountain Valley	City of Yorba Linda	
City of Gilroy	Town of Windsor	
City of Great Falls	Village of Park Forest	
City of Hanford	County of Denton	
City of High Point	County of Douglas	
City of Independence	County of Lassen	
City of Lancaster	County of Mendocino	
City of Lemoore	County of Plumas	
City of Long Beach	East Side Union High School District	
City of Long Beach Harbor	Muskogee Creek Nation	
City of Nampa	Muskogee Creek Nation Tribal Health	
City of Oxnard		
City of Petaluma		
City of Piedmont		



CREDENTIALS, DEGREES, AND AFFILIATIONS

- ▶ Bachelor of Science Information Technology Management – Cal State East Bay
- ▶ Bachelor of Science Business Operations and Resource Management Cal State – East Bay
- ▶ Project Management Professional (PMP) – PMI
- ▶ Certified Scrum Professional – Product Owner (CPOSP) – Six Sigma
- ▶ Certified Scrum Master

SPECIALTIES

- ▶ Project Management
- ▶ Business Process Review
- ▶ Implementation planning
- ▶ Go-live planning
- ▶ Best Practice
- ▶ Creative Solutions



Just wanted to take a minute to send appreciation for all of Alicia's assistance during the payroll year-end close. I couldn't have done it without her help.

—Deputy Chief Executive Officer
CA Municipality

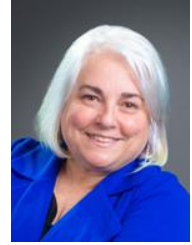


Cyndi Hoxie

Management Consultant

Cyndi Hoxie has over 34 years of Public Sector experience, including 15 years in municipal government Building and Code Enforcement. She has spent over 19 years assisting agencies with land management enterprise application systems, with her last position as a product owner of a mid-tier land management software representing the software needs of government agencies nationwide.

Cyndi's applications experience ranges from being a frontline, daily land management software user to extensive applications support and software implementor and project manager of software implementations. Her diverse experiences allowed her to represent clients' needs and drive the development of land management software with the end user in mind. Cyndi now utilizes her vast land management systems knowledge to provide agencies with hands-on applications support, maintenance, data management, reporting writing, training, and consulting advisory.



CREDENTIALS

- ▶ Certified Scrum Product Owner

SPECIALTIES

- ▶ Project Management
- ▶ Conversion, Interface Planning, and Implementation Support
- ▶ Understanding of public sector departmental operations and application systems
- ▶ Workflow analysis and mapping
- ▶ System Configuration and Training
- ▶ Test and Go Live Plan Creation

Highlights

- ▶ Experience with planning, permitting, inspections, code enforcement, and tax and licensing processes
- ▶ Project oversight and management services for multiple community development implementations
- ▶ Experience with custom integrations specifically for financial, tax, and business licensing systems
- ▶ Business process gap analysis and workflow documentation
- ▶ Extensive knowledge of business and technical processes pertaining to enterprise applications



Agency Experience

City of Aurora
City of Aventura
City of Bakersfield
City of Boynton Beach
City of Brentwood
City of Broken Arrow
City of Carlsbad
City of Cary
City of Champaign
City of College Station
City of Coral Springs
City of Crestview
City of Delray Beach
City of Folsom
City of Fresno
City of Grand Prairie
City of Greenville
City of Gresham
City of Las Vegas
City of Los Altos
City of Manchester
City of Marietta
City of Miami Springs
City of Mission Viejo
City of Newberg

City of Norfolk
City of North Port
City of Novato
City of Oswego
City of Pearland
City of Piedmont
City of Pinole
City of Plano
City of Pompano Beach
City of Rio Rancho
City of St. Cloud
City of St. Helena
City of St. Petersburg
City of Salinas
City of San Bernardino
City of San Clemente
City of Solana Beach
City of Tamarac
City of West Palm Beach
City of Winter Haven
Town of Davie

Town of Lady Lake
Town of Los Altos Hills
Town of Normal
Town of Windsor
Village of Lincolnwood
County of Butte
County of Hanover
County of Mendocino

Cyndi, Thank you so much for accomplishing this huge task in a short period of time! We would not have been able to do this without you.

—City Manager
CA Municipality



Janet Federico, MBA

Management Consultant

Janet Federico has over 25 years of information technology experience, including 15 years of experience with software implementations for local and federal government agencies. Her in-depth experience in software configuration, business analysis, and user needs assessment enables her to successfully oversee project implementations of both standard and customized software.

Skilled in all facets of the project life cycle for application software, she has experience in functional and technical requirements development, gap analysis, system analysis, design, specifications, unit and system testing, implementation planning and execution, lessons learned, and system documentation.

Janet also has over six years of experience working with organizations to identify their strategic, organizational, application, and functional requirements, and to determine which systems and/or specific applications are a proper fit for both the agency and the vendor.

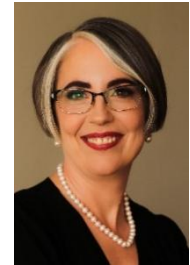
Additionally, having worked for a leading local government enterprise software provider, Janet brings a strong understanding of software implementation, consulting, process knowledge, and functional knowledge, along with an understanding of customers' needs and concerns throughout and post-implementation.

Highlights

- ▶ Multi-phased agency-wide software implementations
- ▶ Extensive knowledge of business and technical processes pertaining to enterprise applications

Agency Experience

City of Bartlesville	City of Norco	Village of Hinsdale	Las Virgenes Water District
City of Batavia	City of Pacifica	Village of Orland Park	County of Lassen
City of Bentonville	City of Patterson	County of Champaign	County of Mendocino
City of Carlsbad	City of Piedmont	County of Collin	Riverside Co Sheriff's Dept
City of Cathedral City	City of Salinas	County of Denton	State of Texas (DFPS)
City of Cedar Hill	City of San Bernardino	County of Douglas	
City of Clovis	City of Simi Valley	County of Lassen	
City of Coronado	City of South Gate	County of Mendocino	
City of Corvallis	City of Tracy	County of Minnehaha	
City of Decatur	City of Tulare	County of St. Joseph	
City of Emporia	City of Tulsa	Coachella Valley	
City of Farmers Branch	City of West Sacramento	Mosquito Vector Control District	
City of Fort Smith	City of Whittier	East Bay Regional Park District	
City of Glendora	City of Wichita	El Toro Water District	
City of High Point	City of Wilton Manors	Jurupa Community School District	
City of Highland Park	City of Windsor	Los Angeles County Development Authority	
City of Hutchinson	City of Wisconsin Springs		
City of Hutto	City of Wood Dale		
City of Menlo Park	Town of Whittier		
City of Mountain View	Town of Windsor		
City of Newark	Town of Woodside		



CREDENTIALS, DEGREES, AND AFFILIATIONS

- ▶ Master of Business Administration – Ellis College
- ▶ Bachelor of Science in Applied Management – Kaplan University

SPECIALTIES

- ▶ Project Management
- ▶ Conversion, Interface Planning, and Implementation Support
- ▶ Understanding of public sector departmental operations and application systems
- ▶ Workflow analysis and mapping
- ▶ Business Process Redesign
- ▶ System Configuration and Training
- ▶ Test and Go Live Plan Creation



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—Account Clerk
CA Municipality



Michael Truncale

Enterprise Applications Senior Management Consultant

Michael Truncale has over 16 years of experience working directly with municipalities and government agencies with software implementations. His experience includes business process assessments, project planning, software implementation, application configuration, custom integrations, scoping customization needs, managing multiple teams across disciplines, process documentation, and project management related to enterprise applications.

Having worked for a leading local government enterprise software provider, Michael brings a strong understanding of software implementation, consulting, process knowledge, and functional knowledge, along with customer needs and concerns throughout and post-implementation.

Michael's in-depth agency process knowledge, technical and functional background, and passion for helping people enable him to easily identify process gaps and quickly provide quantifiable solutions.

Highlights

- ▶ Business process gap analysis
- ▶ Multi-phased agency-wide software implementations
- ▶ Extensive knowledge of business and technical processes pertaining to enterprise applications
- ▶ Facilitator between C-level and functional roles

Agency Experience

City of Ann Arbor
City of Bellingham
City of Brentwood
City of Bryan
City of Canton
City of Carlsbad
City of Chico
City of College Station
City of Colleyville
City of East Palo Alto
City of Edmond
City of Emeryville
City of Elk Grove
City of Escondido
City of Gladstone
City of Glendora
City of Golden
City of Greeley
City of Greer
City of Helena
City of Larkspur
City of Medford
City of Norwalk
City of Novato
City of Pearland
City of Pflugerville
City of Piedmont
City of Pinole
City of Poway
City of Prescott
City of Round Rock
City of Sammamish
City of San Bernardino

City of San Clemente
City of San Marcos
City of Tracy
City of Tukwila
City of Vacaville
City of Walla Walla
City of West Covina
City of Westminster
City of Wildwood
Butte County
Glenn County
Hanover County
Lewis and Clark County
Lincoln County
Manatee County
Mendocino County
Nassau County
Spotsylvania County
Summit County
Yuma County
Town of Castle Rock
Town of Flower Mound
Town of Parker
Town of Windsor
Town of Woodside



CREDENTIALS, DEGREES, AND AFFILIATIONS

- ▶ Bachelor of Arts in Business Administration – California State University of San Marcos
- ▶ Project Management Institute Member – San Diego Chapter

SPECIALTIES

- ▶ Project Management
- ▶ Implementation Project Management
- ▶ Business Process Reviews
- ▶ Current System Needs Analysis and Improvement
- ▶ Project Management Oversight
- ▶ Conversion, Interface Planning, and Implementation Support
- ▶ Understanding of public sector departmental operations and application systems
- ▶ Workflow analysis and mapping
- ▶ Business Process Redesign
- ▶ System Configuration and Training
- ▶ Test and Go-Live Plan Creation



First of all, great work. You are an elite communicator. It's honestly your best skill and to be clear you are top notch in everything else.

—Senior Information Systems Analyst
CA Municipality

Michael...the speed of this delivery is amazing and the deliverable is just so clean. Well done. I'm looking forward to working more with you.

—Senior Information Systems Analyst
CA Municipality



Additional Practice Area Information

Virtual CIO Assistance Services

Our firm currently has more than a dozen active local government Interim IT Management and Virtual CIO engagements. Several are in Southern California, providing ongoing and/or transitional IT leadership and, as needed, consulting services.

Function in the Role of Interim IT Manager or Virtual CIO

Communications

- ▶ Provide strong communication with the administration and the departments
- ▶ Report regularly to senior management
- ▶ Guide, supervise, and mentor IT staff
- ▶ Facilitate regular IT strategy and management meetings

Work Management

- ▶ Prioritize projects and tasks, and utilize Best Practice project management techniques in the best interests of the City
- ▶ Facilitate and participate in weekly internal IT departmental status meetings
- ▶ Coordinate project and management communications and provide direction as necessary
- ▶ Conduct project review meetings for critical or high-priority projects
- ▶ Assist with project coordination in conjunction with City project coordinators
- ▶ Expedite issues and other critical items to a rapid, successful conclusion

Vendor Management

- ▶ Evaluate existing contracts and third-party services to optimize expenditures and value
- ▶ Manage resources, vendors, and the IT budget
- ▶ Coordinate vendor activities and direct projects as necessary

In a Consultative Capacity

- ▶ Develop and support a long-term IT strategy and create a multi-year project roadmap
- ▶ Work with the IT staff to develop/maintain strong internal communications and a team atmosphere
- ▶ Advise and assist with the implementation of IT Best Practices
- ▶ Develop policies and procedures for AI, change management, and data management, providing training guides and implementation assistance
- ▶ Assess IT infrastructure, applications, and operations, and recommend cost-effective solutions for improvement
- ▶ Evaluate and recommend improvements in business applications, A/V systems (including SB-707 implementation), websites, and website management, including ADA compliance
- ▶ Provide full-service GIS assistance, including mapping, layer development, regular updates, and Public Safety support
- ▶ Conduct cybersecurity assessments, review and revise IT policies, Incident Response, Disaster Recovery, and Business Continuity plans
- ▶ Assist with mobile communications design, implementation, and provide direct expertise in supporting public safety vehicle communications
- ▶ Assistance with the recruitment, hiring, and transition to internal IT management
- ▶ Other IT strategy and management assistance as needed



IT Infrastructure and Operations Consulting

A core competency of ClientFirst is the design and implementation of digital infrastructure. We have ongoing projects that include pre-construction planning, structured connectivity system design, outside plant fiber design, audio/visual design, network design, resiliency upgrades, implementation, support, and maintenance. This includes the design and implementation of the following elements:

- ▶ Networks
- ▶ Hyperconverged and Virtual Environments
- ▶ Cloud Computing
- ▶ Video Surveillance Systems
- ▶ Door Access Control Systems
- ▶ Structured Connectivity Systems
- ▶ Outside Plant Fiber Optic Design
- ▶ Disaster Recovery and Resiliency
- ▶ Secure Networks for Public Safety
- ▶ Council Chambers Audio/Visual
- ▶ Cybersecurity
- ▶ Public Safety Communications
- ▶ Unified Messaging Design, Selection, and Implementation
- ▶ IoT Networks

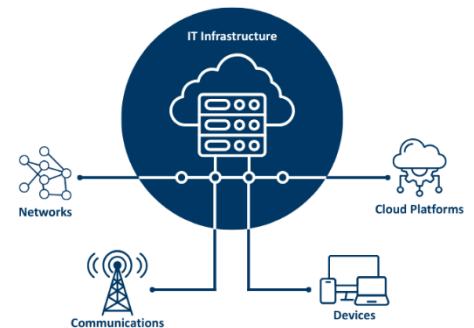


IT Infrastructure Consulting

At ClientFirst, we believe in a collaborative approach. We work closely with each client, understanding their unique requirements, and then design, procure, and implement the most suitable solution. Our extensive experience with Public Works bid projects, as well as traditional RFP and vendor selection methodologies, enables us to cater to a wide range of client needs.

We regularly manage procurement projects, providing assessment, design, implementation, project management, and/or construction observation for all of the above systems. We work with many cities similar to Coronado and understand the need for cost-effective solutions that are easy to implement and have low ongoing maintenance requirements.

Often, our clients ask us to provide implementation project management for complex multi-vendor infrastructure upgrades. We utilize traditional project management methodologies to develop, track, and, if necessary, expedite these projects. We work with our clients to establish realistic completion dates and then resolve any issues encountered during the project in a time-sensitive manner. The projects we manage are completed on budget and within the client-provided timeframes.



From the beginning, I was impressed with how inclusive the process has been. I've never been associated with such a collaborative, cooperative, and engaged project. Outstanding process.

— City Manager
Software Selection



Enterprise Applications Consulting

ClientFirst has a unique approach to Enterprise Applications consulting. Our Enterprise Application Consulting practice has expanded over the years and is now comprised of, but not limited to, the following elements:

- ▶ Process Review/Improvement, Assessment, and Business Case Justification
- ▶ Selection Services, including RFP development, proposal analysis, demonstration management, due diligence, and contract negotiation
- ▶ Implementation Project Management, including all phases of implementation. This process includes ensuring that all manual processes are improved, that paper is eliminated, and that internal and external customers receive services electronically and have access to information.
- ▶ Post-implementation review to ensure objectives/goals and utilization levels were met, including a plan to close any identified post-implementation gaps.
- ▶ Implementation Rescue Projects – We have the history and ability to assess enterprise application implementations that have become challenged or gone off the rails. Through analysis, we determine the problem(s) so implementation management best practices can be applied and the project can succeed. This may often include intermediary services to address problem issues with the existing vendor.
- ▶ Application Gap Analysis and Utilization Improvement for existing enterprise applications that are viable but require reconfiguration and setup, training, or other needs
- ▶ Integration – between applications, with tools (ECMS, GIS, Field-Based mobiles), desktop/office applications, external entities (payment processors, banks, PERS, etc.), and much more.
- ▶ Review the Technology Department's application support resources, including staff inventory, availability, skill sets, and related details.

Applications Experience	
General Ledger	CIP Planning
Budgeting	CIS & Utility Billing
Project Accounting	Tax Billing
Grant Accounting	Backflow
Accounts Receivable	Service Orders
Cash Receipts	Work Orders/Preventative
Purchasing & Receiving	Maintenance
Bids Management	Inventory Management
Contract Management	Fleet Management
Accounts Payable	Planning
Fixed Assets	Permitting
Loans	Inspection
Special Assessments	Code Enforcement
Financial Reporting	Land/Parcel/Address Management
Ad Hoc Reporting	Computer-Aided Dispatch (CAD)
Business Licensing	Records Management
Applicant Tracking	Mobile Computing
Human Resources	Citizen Request Management
Employee Self-Service	GIS
Benefits Tracking	Adjudication
Time & Attendance	Citation Management
Payroll	
Student Information Systems	



Enterprise Applications Consulting

In years past, it was typical to see that the largest line item in an organization's IT budget was for hardware infrastructure and the staff to support it (servers, desktops, printers, network equipment, etc.). Cities have often seen their Software Application budget line items grow. This growth in software results from an organization's need to eliminate manual, paper-based processes and adopt software to achieve greater efficiency and productivity. Still, it is also to improve public access and to provide electronic services to the public. This also includes access to electronic services for internal customers (employees) and to information and services for management, leadership, and elected officials to improve effective decision-making.



Cybersecurity

In an era of increasingly sophisticated and pervasive cyber threats, safeguarding your organization's digital assets is paramount. ClientFirst Technology Consulting stands at the forefront of cybersecurity, offering comprehensive, organization-wide methodologies designed to fortify your defenses against cybercrime and security breaches. Our approach encompasses every facet of the digital enterprise, ensuring that potential weaknesses are identified and remediated before they can be exploited.



Cybersecurity Consulting

ClientFirst adheres to the highest standards of cybersecurity practices, utilizing the National Institute of Standards and Technology (NIST) framework and collaborating with the National Cybersecurity Center of Excellence. These rigorous frameworks guide our processes, ensuring that our clients receive the most up-to-date and effective strategies for protecting their digital infrastructure.

Our end-to-end cyber consulting services cover all critical areas, from initial assessment to ongoing support. We start with a thorough evaluation of your current cybersecurity posture, identifying vulnerabilities and potential risks. Based on this assessment, we develop a tailored strategy and plan to enhance your security measures. Our services include detailed specifications and procurement support, ensuring you acquire the best technologies and solutions to meet your needs. Furthermore, we provide continuous training and program development, equipping your team with the knowledge and skills necessary to maintain a robust cybersecurity environment.

With ClientFirst Technology Consulting, you gain a trusted partner dedicated to securing your digital enterprise. We are committed to delivering proactive, innovative solutions that protect your organization against the ever-evolving landscape of cyber threats.





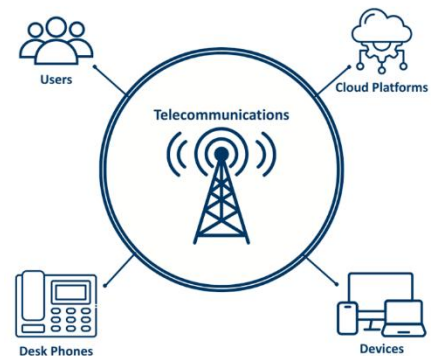
Telecommunications and Unified Communications Consulting

ClientFirst's unified communications consulting practice provides multi-channel communications solutions design and procurement assistance for clients who are ready to move beyond traditional telephony services.

Our staff is unique in the telecommunications consulting industry, providing agencies with digital communications platforms that can be used to support multi-channel call center solutions. We provide our clients with a focused, experienced, and innovative team of professionals.

We provide a wide breadth of professional services that include:

- ▶ Systems evaluation and assessments
- ▶ Unified Communications system management projects
- ▶ VoIP (Voice-over-Internet Protocol) readiness reviews and assessments
- ▶ Telecom billing audits and cost reviews
- ▶ Strategic digital communications planning
- ▶ Systems design and alternative analysis
- ▶ Business continuation planning and disaster recovery planning
- ▶ Call center planning and design
- ▶ Competitive system and vendor selection
- ▶ Project management and implementation projects



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

I have never seen such professionalism and thoroughness in managing an RFP as I have with ClientFirst. Whether or not we win this contract, I would be happy to provide a reference if you ever need it.

— Vendor
Vendor Selection Assistance



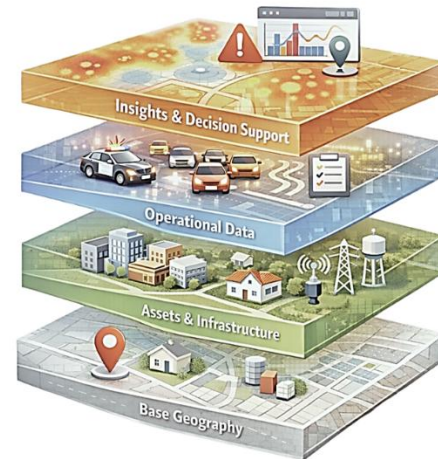
Telecom Consulting



Geographic Information System (GIS) Master Planning

ClientFirst assists in helping to develop improvements in Geographic Information Systems (GIS). With the ever-evolving use of technology in agency decision-making, the importance of GIS systems cannot be understated. Choosing sites, maintaining assets, planning distribution networks, drawing boundaries, capturing data, and other activities involve questions of geography and special imagery. GIS Master Planning sets forth procedures and methods used to determine where an agency envisions going with GIS in the future, which can include:

- ▶ Improvements to the GIS Enterprise
- ▶ Evaluating potential data sources and data needs
- ▶ Evaluating hardware and software solutions
- ▶ Updating and standardizing GIS databases
- ▶ Developing additional GIS applications
- ▶ Creating or improving interfaces to enterprise application systems
- ▶ Improved GIS data accuracy or granularity
- ▶ Staffing requirements
- ▶ Prioritized resource requirements
- ▶ Planning for the long-term maintenance of the GIS system and the data
- ▶ Development of a GIS-specific budget tied to the various elements or initiatives within the GIS Master Plan



GIS has become a basic building block for many enterprise applications and is incorporated into all ClientFirst Technology Planning engagements.



Project Management Services

ClientFirst stands out in the IT infrastructure consulting industry by not only offering highly skilled technicians but also providing clients with seasoned Project Managers. These professionals, who spend over 75% of their time working with public agencies, bring a wealth of industry best practices to the table. This unique blend of knowledge and experience has led to numerous success stories from IT departments nationwide.

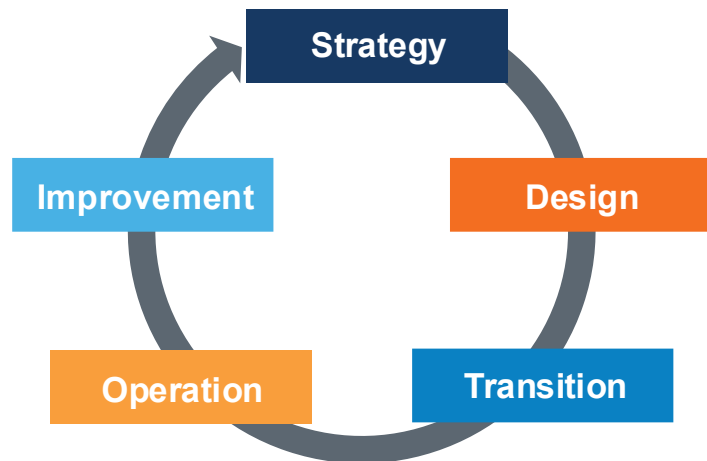
Our IT Management practice area works with clients to improve the quality of their IT management and service delivery. We apply our knowledge in this area to each of our client's situations and customize our management style to fit their specific needs.

We provide our clients with a complete project management methodology that improves communication and service delivery and lays the groundwork for high-quality, low-cost solutions that meet the City's needs.

Because we are a full-service, independent consulting firm, we can provide non-biased expertise in all areas of information technology.

Our methodology includes:

- ▶ **Strategic Planning** – Maintaining a Five-Year Strategic Plan and Capital Replacement Plan
- ▶ **Project Planning** – Planning and executing individual projects on time and within budget
- ▶ **Budgeting** – Working with our client to maintain their IT budget and meet budgetary goals
- ▶ **Regular Communications** – Communicating upcoming goals, objectives, and IT support status through monthly or quarterly IT committee meetings
- ▶ **Rapid Escalation** – Rapidly escalating critical problems within ClientFirst so the right subject-matter expert can be engaged to resolve the problem quickly and efficiently
- ▶ **Attention to Detail** – Working to maintain accurate documentation and track maintenance, vendor contracts, and software licenses to ensure that there are no surprises in these often-overlooked areas
- ▶ **Regular Measurement** – Measuring our accomplishments monthly and working to improve our performance
- ▶ **Productivity Improvement** – Continually assessing areas for improved business processes rather than simply maintaining existing systems



Attachment B

Exhibit A: Scope of Work

1. Planning and Building:
 - a. Ongoing support for Community Development (formerly TRAKIT)
 - i. Annual Fee Schedule Update
 - b. Project management for the vendor-required conversion to AWS
 - c. Project management for the vendor-required conversion to a new geographic systems interface for permits
2. Communications
 - a. Website replacement RFP Assistance
3. Police Department
 - a. Selection of a vendor to provide improved support for Police Department cameras
4. Fire Department
 - a. Assistance with the implementation of a replacement time and attendance system
5. Recreation
 - a. Assistance with the procurement of cameras to assist in preventing vandalism and theft for the Aquatic Center.
6. Citywide Ongoing IT Management Assistance
 - a. Procurement, Cybersecurity, GIS, Telecom, IT Budgeting

Attachment C

Exhibit B: Hourly Rate Schedule & Estimated Budget

ClientFirst's professional fees and expenses are based on the scope and approach outlined in the final statement of work. Standard billing rates for these types of services reflect the levels and skill sets of the consultant(s) assigned to specific aspects of the project.

Title	Hourly Rate
Partner	\$ 235
Director	\$ 225
Manager	\$ 215
Senior Network Engineer	\$ 205
Senior Consultant/GIS Manager	\$ 195
Consultant	\$ 185

Project	Estimated Cost	Notes
Annual Training	\$25,000	SharePoint Training
Comm Dev - Ongoing support	\$40,000	Ongoing support
Comm Dev - AWS Migration - project management	\$10,000	Move Land Management System to AWS from existing platform which will not be supported by the vendor
Comm Dev - Geo Interface with County	\$10,000	Revised Integration with ComDev, required by the vendor
IT Management Assistance	\$70,000	vCIO, IT Strategy, IT priorities, contract management
GIS Assistance	\$35,000	Ongoing GIS updates, maps, reports
Fire Time and Attendance Assistance	\$8,000	Replace Fire Time and Attendance with less complex alternative
Incident Response and Disaster Recovery Tabletop Exercises	\$7,500	Required by cybersecurity insurance
ComDev Fee Schedule Update	\$4,000	Annual fee schedule changes
Website Selection RFP	\$15,000	Assist Communications in the selection of a new website.
Pool Video Camera Bid	\$15,000	Develop bid documents for Pool video cameras - focus on potential vandalism/theft
Data Management Implementation (PII controls for AI)	\$15,000	Cybersecurity controls in preparation for AI
ClientFirst Services	\$254,500	