

City of Piedmont
COUNCIL AGENDA REPORT

DATE: December 18, 2023

TO: Mayor and Councilmembers

FROM: Rosanna Bayon Moore, City Administrator

SUBJECT: Consideration of Approval of Consulting Services Agreement with
ClientFirst Technology Consulting in an Amount Not to Exceed \$218,045

RECOMMENDATION

Approve the attached consulting services agreement with ClientFirst Technology Consulting for ongoing delivery of strategic IT services in an amount not to exceed \$218,045.

DISCUSSION

With offices around the country, ClientFirst Technology Consulting has a track record of working with small and medium sized cities in several states, including many in California. The firm has extensive expertise in both strategic planning and operation of governmental information technology systems. In the Bay Area the Cities of Albany, Dublin, San Rafael, Hillsborough, and Healdsburg 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.

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 enterprise asset management (EAM), online permitting and licensing, timekeeping, relocated dispatch services and GIS.

FISCAL IMPACT

The associated consulting services will be paid from the following line items in the FY 2023/24 Budget:

Equipment Replacement Fund - Systems Development	\$138,045
General Fund - Labor	\$70,000
General Fund - IT Strategic Plan	\$10,000

CITY ATTORNEY REVIEW

The City Attorney has reviewed the staff report.

ATTACHMENTS

- A: Statement of Qualifications
- B: Consulting Services Agreement

Statement of Qualifications for

Innovation and Technology Services

December 14, 2023



Client Locations
Coast-to-Coast

Practice Locations
**Illinois
North Carolina
Texas
California**

800.806.3080
www.clientfirstcg.com

Optimal Technology Guidance

CLIENTFIRST
TECHNOLOGY CONSULTING

December 14, 2023

Ms. Rosanna Bayon Moore
City Administrator
City of Piedmont
120 Vista Avenue
Piedmont, CA 94611

RE: Statement of Qualifications for Innovation and Technology Services

Dear Ms. Bayon Moore:

ClientFirst appreciates the opportunity to present the City of Piedmont with our statement of qualifications to provide Innovation and Technology Services. Our consultants have decades of experience providing IT Infrastructure, enterprise system assessments, process reviews, procurement management, and implementation project management oversight to municipalities throughout the United States. Key qualifications include:

Local Government ONLY Focus – ClientFirst Technology Consulting specializes in helping local government agencies evaluate solutions that best fit their agency's specific business process requirements, foster buy-in and consensus across the organization, and provide the best value proposition.

True Independence – ClientFirst is completely independent and unbiased in its analysis and recommendations. We do NOT resell software or employ third-party implementers, trainers, or programmers for software solutions.

Expertise and Experience – ClientFirst has worked with hundreds of cities and counties. The proposed project team has a track record of successful local government software assessments, evaluations, and implementations throughout the United States.

Our clients say we excel in these areas:

- Following best practices
- Customizing the business process review and new system feature/function requirements for each specific agency
- Building consensus throughout the organization
- Educating staff and transferring knowledge
- Effectively supporting change management and buy-in at all levels
- Improving implementation readiness and reducing risk
- Helping gain management and support of elected officials through education and business-case development

Why ClientFirst is the Best Choice

- We pride ourselves on our ability to listen and communicate, affecting positive change at all personnel levels, including elected officials.
- We truly put our client's needs first. You are not just another project to us.
- Our partners are hands-on and do not just provide high-level oversight or project management assistance.
- We customize our deliverables to meet the unique requirements of each client. No cookie-cutter or boilerplate processes or deliverables.

Innovation and Technology Services



- We not only follow best practices but also educate staff at all levels on best practices in a manner that helps them understand the relevance to their organization and their role within the project.
- We seek to partner with our clients as integrated subject-matter experts and advisors.
- We work to help digitally transform your organization, transfer knowledge, manage change, and ingrain best practices into your processes and implementation.

For any questions, feel free to contact me at 951.739.7989 or via email at tjakobsen@clientfirstcg.com for additional information. We look forward to the opportunity of serving the City of Piedmont as one of our many satisfied clients.

Sincerely,

Tom Jakobsen

Partner

IT Support and Infrastructure Consulting Practice Leader

David W. Krout, CPA *(inactive)*

Partner

Management Consulting Practice Leader



Table of Contents

EXECUTIVE SUMMARY	5
Why ClientFirst is the Best Choice.....	6
BACKGROUND AND CERTIFICATIONS.....	7
Government Technology	8
Local Presence and Practice Locations.....	8
Business Management Approach	8
Practical Recommendations	8
True Independence.....	8
National Recognition.....	8
Industry Recognition	9
Diversified Experience	10
Integrated Technology Solutions Groups.....	10
Integrated Technology Services	11
Areas of Expertise	12
Consultants' Collective Experience.....	13
Technical Certifications.....	14
PROJECT TEAM	15
Proposed Personnel	16
APPENDIX A: PRACTICE AREA HIGHLIGHTS	35
IT Infrastructure Consulting	35
Project Management Services.....	36
Telecommunications and Unified Communications Consulting	37
Geographic Information System (GIS) Master Planning	38
Fiber-Optic Cabling.....	39
Enterprise Applications Consulting	40
APPENDIX B: GOVERNMENT AGENCY CASE STUDIES	42

Innovation and Technology Services

ClientFirst is well-equipped to assist the City of Piedmont in this endeavor. An overview of the project—including key differentiators that set our services apart—is outlined in this Executive Summary.



Thank you for your over-the-top customer service.

.....
—Chief Information Officer
IL School District

Thank you for all your help over these last few months - I couldn't be more pleased!

.....
—Administrative Services Director
CA Municipality



Why ClientFirst is the Best Choice

Experience with Municipalities – Our Team's experience in working with municipalities in Illinois and across the country has provided our staff with the subject-matter expertise to quickly understand operation demands and opportunities and then equate them to beneficial IT recommendations and improvement.

Locally Based – Our Illinois-based operations can react quickly to on-site project demands without the need for travel from remote areas. We have staff working nearby nearly every day.

Independence – We do not resell any hardware or software and, therefore, always have our clients' best interests in mind. We recommend products that are cost-effective, easy to support, and in use every day across our client base. We recommend products that work.

Stable, Strong, and Growing – We are a financially stable and profitable firm that has been serving local governments for over 17 years. We continue growing in both the addition of personnel as well as the expansion of new office locations.

Quality of Experience of Our Consultants – Our management team for this project is made up of four consultants with a collective experience of over 100 years in IT consulting. The leaders and founders of our company come from IT consulting and management experience at a Top-Five national accounting and consulting firm.

IT Assessment and IT Master Plan Experience – Our consultants have years of experience in delivering IT Assessments and IT Master Plans focused on local governments, including cities, counties, libraries, and local/regional districts.

Use of Best Practices – ClientFirst utilizes PMI, ITIL, COBIT, and EAP concepts, along with our own experience and best practices, as building blocks for completing IT assessments and delivering services. Governance is an essential component to overseeing that IT strategies and recommendations align with business objectives on an ongoing, repeatable basis.

- PMI (Project Management Institute)
- ITIL (Information Technology Infrastructure Library)
- COBIT (Control Objectives for Information and Related Technology)
- EAP (Enterprise Architecture Planning)



You and all at ClientFirst made an awesome difference in our City. Your light and professional touch kept us and Council on the rails! Look forward to more progress and will hopefully see you again soon.

—City Administrator
CA Municipality

Innovation and Technology Services

Our consultants have been assisting local governments with innovative technology solutions for nearly 20 years. Our risk-averse technology planning and the quality of service we provide our clients have resulted in numerous long-term business relationships. Our subject-matter experts offer a wide range of technology services that our clients often leverage to resolve specific issues. We are confident that no other consulting firm focusing on local governments offers the wide range of IT services that we do.



ClientFirst was extremely knowledgeable, and I felt I have learned more from my work with ClientFirst than anyone else I've worked with in that capacity. I haven't met anyone else who's even close to ClientFirst in their level of expertise.

—Director of Administrative Services
CA Municipality



Government Technology



Focusing on local governments means that we understand the unique needs, processes, protocols, and political nuances involved in the industry. This **understanding and experience** ensures that our strategies and recommendations are practical in all respects. 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 Illinois. ClientFirst is a national firm with practices located in Illinois, North Carolina, Texas, and California.



Corona, CA



Schaumburg, IL



Charlotte, NC



San Antonio, TX

Business Management Approach

We understand that not all government executives are versed in the latest technology issues and opportunities. Therefore, our approach and deliverables provide a business-management perspective that **allows the layperson the ability to understand the technology issues, strategies, and potential solutions required to make more informed business decisions.**

Practical Recommendations

We believe in using technology as a tool 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 individual 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 nor maintain relationships that would result in any add-on profit margins or referral fees. Our interest is in **putting the client first** by finding optimum solutions (i.e., the greatest value at lowest competitive cost) to meet their needs.



National Recognition

Our consultants are recognized nationally for their work by many of the industry's leading vendors. They appreciate the fairness and objectivity we demonstrate when dealing with their organizations.

CIO Review

[illegible]

ClientFirst personnel have conducted educational sessions at national and local conferences such as CSMFO, MISAC, and GFOA, among others.





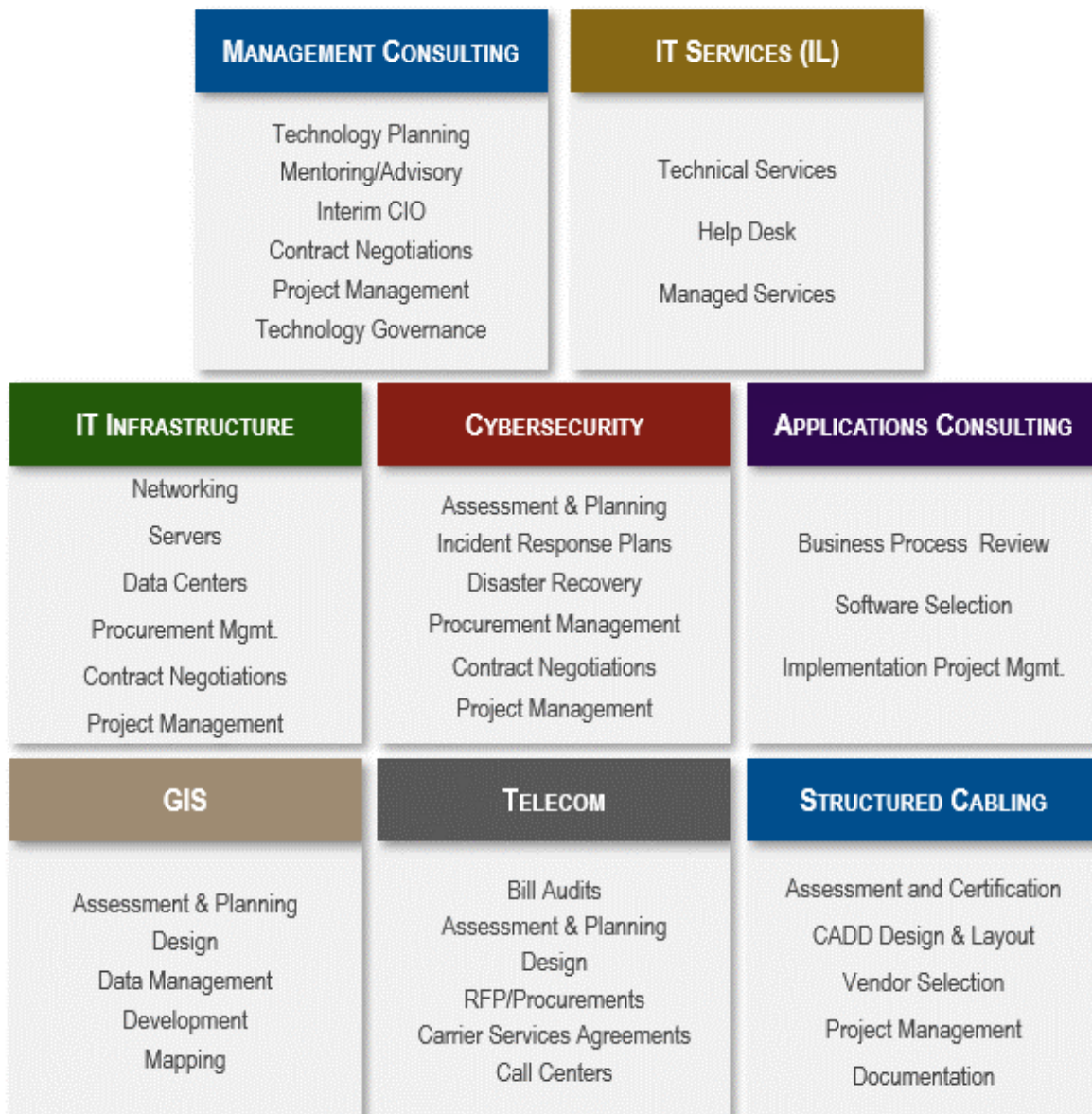
Diversified Experience

We have **extensive experience with a wide variety of organizations and technology and processing environments**. In addition, we have significant market knowledge regarding software and hardware providers and are well-informed with respect to vendor and industry developments.

Integrated Technology Solutions Groups

Whatever the agency's technology needs are, we offer a unique combination of experts in their given disciplines who can guide technology decisions, planning, implementation, and management, chosen according to 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





Integrated Technology Services

IT Services and Operations

IT Technical and Managed Services

- On-Site or Remote Support
- Inventory and Licensing Management
- Network, Server, Selection, Implementation, Configuration, and Management
- Security Systems Support
- Remote Systems Monitoring

IT Staffing/Augmentation

- IT Staffing Needs Assessment and Operational Reviews
- Interim IT Management
- Supplemental IT Management Staffing

IT Infrastructure

Networking and Servers

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

Disaster Recovery

- Risk Assessment and Business Impact Analysis
- Disaster Recovery Planning
- Hot-Site and Recovery Services 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

Management Consulting

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

GIS

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

Applications Consulting

Business Process Review

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

Software Selection

- Feature / Function Requirements
- 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

Telecommunications Consulting

- VoIP Readiness Review
- Systems Evaluation, Design, Specifications, 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 Reviews
- System Selection and Contract Negotiations



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

IT OPERATIONS / TECHNICAL SERVICES EXPERIENCE

- Technical Services
- 24/7 On-Call
- PC Break-Fix Services
- Routers and Switches
- Server Installation, Configuration and Troubleshooting
- On-Site or Remote Services
- Network Troubleshooting and Configuration
- Security Systems Support
- Managed Services
- Network Management
- Event Monitoring
- Patch Management
- Inventory Management
- Licensing Management
- Software Distribution
- Remote Network and Desktop Monitoring

Desktop Monitoring
• Remote Network and
• Software Distribution

TELECOM EXPERIENCE

- Systems Evaluation and Assessments
- Telecommunications System Management
- Voice and Data Cable Infrastructure Design and Engineering
- LAN/WAN Assessments, Design, Procurement, and Implementation
- VoIP (Voice-over-Internet Protocol) Readiness Reviews and Assessments
- Telecom Billing Audits and Cost Reviews
- Strategic IT and Telecommunications Planning
- Systems Design and Alternative Analysis
- Business Continuation Planning and Disaster Recovery Planning
- Call Center Planning and Operational Design
- Competitive System and Vendor Selection
- Project Management and Implementation

Implementation
• Project Management and

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

Information Systems
• SCADA

APPLICATION AREA EXPERIENCE

- 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

Database Management
• Citation 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:

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 Rockford
City of Rock Island
City of St. Charles
City of Waukegan
City of Wood Dale
County of DuPage County
County of Peoria County
County of Sangamon County
County of Winnebago County
Village of Arlington Heights
Village of Cary
Village of Glencoe
Village of Kenilworth
Village of Lake Barrington
Village of Libertyville
Village of Lincolnwood
Village of Matteson
Village of Norridge
Village of Northbrook
Village of Northfield
Village of Oak Brook
Village of Oak Park
Village of Oswego
Village of Palos Park
Village of River Forest
Village of Riverside
Village of Westmont
Village of Wheeling
DuPage County Health Dept.
Batavia Public School District
Central Community Unit
School District 301
Champaign County Forest
Preserve District
Civitas Schools
Community High School
District 99
Community Unit High School
District 205
Community Unit School
District 300
Community Unit School
District 308
Consolidated High School
District 230
Consolidated School District
Gower School District
Hampton School District 29
Harlem School District 122
Harrison School District 36
Harvard Community Unit
School District
Harvey School District 152
Hinsdale Township High
School District 86
Indian Prairie Community Unit
School District 204
J. Sterling Morton High
School District 201

Lake Zurich Community Unit
School District 95
Mount Prospect School
District 57
Naperville Community Unit
School District 203
Naperville Park District
Norridge Park District
Oswego School District 308
Pace Suburban Bus Division
Park Ridge Schools
Port Byron Central School
District
Posen-Robbins SD 143.5
Prospect Heights School
District
Riverside Public School
District 96
Rockford Public Library
Rock River Water
Reclamation District
Sherrard Community Schools
St. Charles School District
Sunset Ridge School District
Township High School District
214
Wheaton-Warrenville School
District 200
Winnetka Public Schools
District 36
Lake Forest College
Lincolnwood Public Library
Oak Park Library
Oswego Library District
Park District of Highland Park

Alabama

City of Pelham

Arizona

County of Maricopa

California

City of Albany
City of Azusa
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 Chico
City of Chino
City of Clovis
City of Colton
City of Corona
City of Coronado
City of Downey
City of Dublin
City of Escondido
City of Foster City
City of Glendora
City of Healdsburg
City of Hemet
City of La Habra
City of La Puente
City of Laguna Niguel
City of Larkspur
City of Lathrop
City of Lomita
City of Menlo Park
City of Mission Viejo
City of Montclair
City of Murietta
City of Pacifica
City of Pacific Grove

City of Palm Desert
City of Palmdale
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 Rohnert Park
City of Rosemead
City of Sacramento
City of San Clemente
City of San Gabriel
City of San Jacinto
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 Tustin
City of Upland
City of Vacaville
City of West Covina
County of Butte
County of Mariposa
County of Mendocino
County of Riverside
County of San Bernardino
County of Tuolumne
County of Yolo
Town of Danville
Town of Hillsborough
Town of Truckee
Town of Yucca Valley
CA-NV American Water
Works Association
Castaic Lake Water Agency
Castro Valley Sanitary District
Cucamonga Valley Water
District
Glendale Water and Power
Hayward Area Recreation
and Park District
Irvine Unified School District
Jurupa Community Services
District
Livermore Area Recreation
and Park District
Midpeninsula Regional Open
Space District
Newhall County Water District
Piedmont Police and Fire
Ramona Municipal Water
District
Rincon del Diablo Municipal
Water District
Rosamond Community
Services District
San Bernardino Municipal
Water
San Mateo Fire District
San Marino Unified School
District
Southern California Coastal
Water Research
Sweetwater Authority
Walnut Valley Water District
West County Wastewater
District

Western Municipal Water
District
Colton Joint Unified School
District
Irvine Unified School District
Lake Elsinore Unified School
District
Menifee Unified School
District
Mesa Water District
Mountain View School District
Romoland School District
West Covina Unified School
District
Ohlone Community College
San Jose Community College
University of California
Berkeley
University of California San
Francisco
UCSF Medical Center
Stanislaus Council of
Governments
Mechoopda Indian Tribe

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

Idaho

City of Sandpoint

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 New Hampton
City of West Des Moines
County of Johnson
County of Linn
State of Iowa
Burlington Community School
District
Cedar Rapids Community
School District
Davenport School District
Diocese of Davenport
Catholic Schools
Dubuque Community School
District
Knoxville Community School
District
Mason City School District
North Scott School District
Des Moines Area Community
College
Cedar Falls Utilities

Kansas

City of Shawnee

Michigan

University of Michigan
Lake Superior State
University

Minnesota

County of Anoka

Nevada

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
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 Dallas
City of Pflugerville
City of University Park
County of Denton
Corpus Christi Fire
Highland Park Police and Fire
International Bank of
Commerce
River Oaks Country Club
State Bank of Texas
University of
Texas Health Science
Center
Westwood Country Club

Utah

Washington County School
District

Virginia

Commonwealth of Virginia
City of Manassas Park

Wisconsin

City of Appleton
City of Brookfield
City of Eau Claire
City of Wauwatosa
City of West Allis
County of Brown
County of Kenosha
County of Milwaukee
County of Waukesha
HIDTA Milwaukee
Diocese of Madison Catholic
Schools
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.



Innovation and Technology Services

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.





Proposed Personnel

The personnel selected for this engagement are local government experts in their given IT and Technology disciplines, chosen according to the specific needs of this project. They have each worked with dozens of agencies, primarily municipalities. Detailed qualifications are listed in their resumés below. ClientFirst does not anticipate utilizing subcontractors for these engagements but would work with the City if such need is required.

Position Title	Resource Name	Description of the Position	Years of Relevant Work Experience
Managing Partner, Management Consulting Practice Leader	David Krout	Management Consulting, Enterprise Applications, Project Management	25
Senior Partner, IT Infrastructure and Operations Consulting Practice Leader	Tom Jakobsen	IT Infrastructure and IT Operations Consulting, including IT Assessments and Strategic Planning	40
Senior Director, IT Infrastructure	James Smith	IT Infrastructure and Project Management	25
Enterprise Communications Consulting Practice Leader	Thomas Weiman	Telecommunications and Carrier Services	30
Director, IT Infrastructure and Cable Systems Consulting	Craig Williams	IT and Cable Infrastructure IT Assessments and Strategic Planning	25
Director, IT Infrastructure and Cybersecurity Consulting	Paul Miller	IT Infrastructure and Cybersecurity	25
Director, IT Infrastructure Consulting Practice	Chad Griewahn	IT Infrastructure and Project Management	30
Senior Telecommunications Consultant and Project Manager	Marcia Struwing	Telecommunications	29
Manager, IT Operations and Support	Keith Culp	IT support operations	12
Senior System Engineer	Aaron Ayala	Network and Systems Engineering and Project Management	20
Senior Network Engineer	Pete Graziano	Network and System Engineering	25
Senior GIS Consultant	Toby Soto	GIS	26
Director, Enterprise Applications Consulting	Jamie Shell	Enterprise Applications - ERP Systems	25
Director, Enterprise Applications Consulting	Tatjana Meser	Enterprise Applications - Land Management and ERP Systems	13
Senior Management Consultant and Project Manager	Alicia Burns	Enterprise Applications - HRIS Specialist	15
Senior Management Consultant and Project Manager	Cyndi Hoxie	Enterprise Applications - Land Management Systems	30
Senior Management Consultant and Project Manager	Janet Federico	Enterprise Applications - Financial Systems Project and Strategic Planning Management	20
Senior Management Consultant and Project Manager	Michael Truncale	Enterprise Applications - Land Management Systems	16



Tom Jakobsen

Partner – IT Infrastructure and Operations Consulting Practice Leader

Tom Jakobsen has over 40 years of experience in the information technology arena. His interdisciplinary experience has given him a unique understanding of the interrelationship between IT infrastructure, operations, and business applications. Tom focuses on IT Strategic Planning, Governance, IT management mentoring, Virtual CIO, and other IT management projects. Tom has over 20 years of experience in local government infrastructure, operations, staffing, and project management.



Highlights

- Former National IT Infrastructure Consulting Practice Leader for RSM McGladrey, the nation's fifth-largest CPA and consulting firm
- Virtual CIO for multiple agencies
- Mentor for newly appointed IT Directors and CIOs
- IT Strategic advisor for cities, counties, and not-for-profits
- Two-time Interim CIO at Illinois Action for Children
- Managed hundreds of IT consulting projects with dozens of municipalities and local governments

Agency Experience

Town of Danville
Town of Groton
Town of Woodside
Town of Yucca Valley
Town of Windsor
City of Albany
City of Azusa
City of Big Bear Lake
City of Bloomington
City of Brentwood
City of Brisbane
City of Burbank
City of Calabasas
City of Carlsbad
City of Cedar Hills
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 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 Murrieta
City of Norco
City of Newark
City of Oakbrook Terrace
City of Pacific Grove
City of Palm Desert
City of Palmdale
City of Piedmont
City of Pismo Beach
City of Pflugerville
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 University Park
City of Vacaville
City of West Covina
City of West Des Moines
City of West Sacramento
City of Wilton Manors
County of Atascosa
County of Denton
County of Davie
County of Mariposa
County of Mendocino
County of Tuolumne
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
Four Rivers Sanitation Authority
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

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



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

Know that I am extremely satisfied with the team we have assembled. It is comforting to have steady hands guiding us into the 21st century!

—City Administrator
CA Municipality



David W. Krout, CPA *(Inactive)*

Partner – Enterprise Applications Consulting Practice Leader

David Krout has 25 years of experience assisting local governments with a broad scope of information technology needs. He specializes in working with organizations to identify their strategic, organizational, application, and functional requirements to determine which system and/or specific applications are a proper fit for both the agency and the vendor.

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

Having also worked for a leading local government enterprise software provider, David brings a unique understanding of consulting, client representation, and vendor relationships to the collaboration between the agency and software vendors.

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 California Society of Municipal Finance Officers (CSMFO), Municipal Information Systems Association of California (MISAC), and Texas Association of Government Information Technology Managers
- Project lead with over 140 public-sector agencies throughout the United States

Agency Experience

Town of Danville	City of Murrieta	Village of Oswego	Rosamond Community
Town of Groton	City of Pacifica	Village of River Forest	Services District
Town of Hillsborough	City of Palm Desert	CA-NV American Water	Salisbury-Rowan Utilities
Town of Truckee	City of Palmdale	Works Association	San Bernardino
City of Batavia	City of Pelham	Castaic Lake Water	Municipal Water
City of Bloomington	City of Piedmont	Agency	Southern California
City of Brentwood	City of Rancho Mirage	Castro Valley Sanitary	Coastal Water
City of Brisbane	City of Redlands	District	Research (SCCWRP)
City of Burbank	City of Rialto	Colton Joint Unified	Walnut Valley Water
City of Burlington	City of Riviera Beach	School District	District
City of Carlsbad	City of Rosemead	Cucamonga Valley	West County
City of Camarillo	City of Salisbury	Water District	Wastewater District
City of Chino	City of Sandpoint	Gastonia Water & Power	Western Municipal
City of Clovis	City of San Gabriel	Glendale Water and	Water District
City of Colton	City of San Jacinto	Power	Mechoopda Indian Tribe
City of Corona	City of Shawnee	HIP Housing	Eastern Band of
City of Coronado	City of Sierra Madre	Lake Elsinore Unified	Cherokee Indian
City of Dublin	City of Simi Valley	School District	
City of Foster City	City of South Gate	Menifee Unified	
City of Gastonia	City of Tustin	School District	
City of Healdsburg	City of West Covina	Mesa Water District	
City of Hemet	City of West Des Moines	Midpeninsula	
City of Highland Park	County of Butte	Regional Open	
City of Indio	County of Buncombe	Space District	
City of La Habra	County of Denton	Ramona Municipal	
City of La Puente	County of Mendocino	Water District	
City of Laguna Niguel	County of Orange	Rincon del Diablo	
City of Lake Forest	County of Riverside	Municipal Water	
City of Larkspur	County of San	District	
City of Lomita	Bernardino	Rock River	
City of Manassas Park	Village of Glencoe	Reclamation	
City of Menlo Park	Village of Lincolnwood	District	
City of Mission Viejo	Village of Northfield		



CREDENTIALS, DEGREES, AND AFFILIATIONS

- Certified Public Accountant (CPA) (Inactive)
- Bachelor of Science in Business Administration and Accounting – CSU San Bernardino

SPECIALTIES

- 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



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



James Smith

Senior Director, IT Infrastructure Consulting

James Smith is a seasoned technology executive with a remarkable career spanning over 25 years, characterized by a diverse array of high-level roles in the Information Technology sector. James has solidified his reputation as an accomplished leader, adept manager, and visionary technology strategist.

Throughout his professional journey, James has demonstrated a penchant for driving success in various capacities. His expertise encompasses a spectrum of specialties, including sales and services engagement processes, systems design consulting, sales management, and managed services. He possesses a unique knack for formulating and executing IT strategies, developing technology plans, and offering expert insights in cloud services consulting, business continuity, disaster recovery, and deep storage solutions.

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, designing, and selling IT solutions
- Proficient in communicating and implementing IT strategies, managing high-visibility initiatives, and providing technology consulting at Director, Vice President, and CxO levels nationwide
- Specialties encompass a wide range of areas, including sales and services engagement processes, systems design consulting, sales management, and managed services
- Expertise in IT strategy and technology plan development, cloud services consulting, business continuity, disaster recovery, master data management, distributed end-user technologies, and end-to-end systems architecture

Agency Experience

City of Cedar Hill
City of Mountain View
City of Petaluma
County of Kings
County of Travis
Village of River Forest
Township High School District 214
Bloomington School District
Byron School District
DeKalb School District
Elmhurst School District
ESQ Region 20
Hoover Schrum District 157
Oak Lawn School District
Sycamore School District
DuPage County Sheriff

Harris County Toll Authority
Placer County Sheriff
Aurora Public Library
Alamo Community College
DeVry University
Kishwaukee College
Moraine Valley Community College
Oakton Community College
Rock Valley College
Roosevelt University



SPECIALTIES

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



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

Town of Danville	City of San Gabriel	Davenport School District	PACE Suburban Bus Division
Town of Truckee	City of San Rafael	DeKalb CUSD 428	RTA
City of Bettendorf	City of Sierra Madre	Diocese of Davenport Catholic Schools	Park District of Highland Park
City of Bloomington	City of Sioux Falls	Diocese of Madison Catholic Schools	Park Ridge-Niles CCSD 64
City of Brentwood	City of South Pasadena	Dubuque Community School District	Port Byron Central School District
City of Burbank	City of South San Francisco	Eastern IL University	Rapid City Area Schools
City of Calabasas	City of St. Charles	Elgin School District	Riverdale CUSD 100
City of Camarillo	City of Upland	Forest Preserve District of Will County	Riverside SD 96
City of Cape Coral	City of Waukegan	Geneva Community Unit SD 304	Rockford Public Library
City of Chino	City of Wauwatosa	Glenview Schools	Salisbury-Rowan Utilities (SRU)
City of Corona	City of West Allis	Gower School District 62	San Bernardino Municipal Water Department
City of Countryside	City of West Covina	Hampton SD 29	San Jose/Evergreen Community College
City of Deerfield Beach	City of West Des Moines	Harlem SD 122	Schaumburg Township District Library
City of Downey	City of West St. Paul	Harrison SD 36	Sherrard Community Schools
City of Dunedin	County of Buncombe	Harvard CUSD 50	Shorewood School District
City of Eau Claire	County of Cabarrus	IL Action for Children	South Florida Water Management
City of Escondido	County of DuPage	Illinois State University	St. Ambrose University
City of Fort Lauderdale	County of Milwaukee	Indian Prairie CUSD 204	St. Charles CUSD 303
City of Foster City	County of Montgomery	Irvine School District	Sunset Ridge SD 29
City of Kinston	County of Orange	Knoxville Community School District	University of Chicago
City of La Habra	County of Peoria	Livermore Area RFD	University of Michigan
City of La Puente	County of San Bernardino	Madison School District	University of Notre Dame
City of Laguna Niguel	County of Sangamon	Mason City School District	Wahlert Catholic High School
City of Lake Forest	County of Tazewell	Mount Prospect SD 57	Whitnall School District
City of Mason City	County of Tuolumne	Naperville CUSD 203	Cedar Falls Utilities
City of Matteson	County of Will	Newhall County Water District	Central Illinois Power
City of Miami Springs	County of Winnebago	Norridge Park District	Church of Our Savior
City of Moline	County of Yolo	North Scott School District	
City of Mount Airy	Village of Arlington Heights	Oak Park Public Library	
City of Mount Dora	Village of Cary	Ohlone Community College	
City of Murrieta	Village of Lincolnwood	Omaha Public Power District (OPPD)	
City of Naperville	Village of Northfield	Orland Park CHSD 230	
City of New Hampton	Village of Oak Brook	Oswego CUSD 308	
City of New Haven	Village of Oak Park	Oswego Public Library District	
City of Oakbrook Terrace	Village of Palos Park		
City of Orland Park	Village of River Forest		
City of Palm Desert	Village of Riverside		
City of Palmdale	Civitas Schools		
City of Piedmont	Consolidated SD 158		
City of Pompano Beach	Algonquin CUSD 300		
City of Port St. Lucie	Arlington Heights Township HSD 214		
City of Prospect Heights	Assumption Catholic High School, Davenport		
City of Rancho Cucamonga	Batavia SD 101		
City of Rancho Mirage	Burlington Central CUSD 301		
City of Redlands	Castaic Lake Water Agency		
City of Rock Island	Cedar Rapids Community School District		
City of Rockford	Davenport Community Schools		
City of Sacramento			
City of Salisbury			
City of San Clemente			



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.



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

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

Town of Groton
City of Azusa
City of Cedar Hill
City of Glendora
City of Joliet
City of Manassas Park
City of Pacific Grove
City of Piedmont
City of Pismo Beach
City of Rancho Cucamonga
City of Rancho Mirage
City of Riviera Beach
City of San Pablo
City of South San Francisco
City of University Park
City of Vacaville
City of West Covina
City of West Des Moines
Village of Lincolnwood
Village of Northfield
Village of Orland Park
Village of Park Forest
Village of River Forest
Village of Riverside
Village of Wheeling
County of Davie
County of Mariposa
County of Mendocino
County of Tuolumne
Champaign County Forest Preserve District
Forest Preserve District of Lake County
Hayward Area Recreation and Park District
Four Rivers Sanitation Authority

San Bernardino Municipal Water District
Joliet Public Library
Northbrook Public Library
Rancho Cucamonga Library
Rockford Public Library
Steppenwolf Theatre
Algonquin SD 158
Arie Crown Hebrew Day School
Batavia SD 101
Bloomingdale SD 13
Bunker Hill SD 8
Butler SD 53
Carpentersville CUSD 300
Central CUSD 301
Chicago International Charter Schools
Community High School District 99
DeKalb CUSD 428
Durand CUSD 322
Elmhurst SD 205
Forest Ridge SD 142
Geneva CSD 304
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
J. Sterling Morton HSD 201
Joliet PSD 86
Lake Zurich SD 95
Maine Township HSD 207
Marmion Academy

Mt. Prospect SD 57
Naperville CUSD 203
Niles Township HSD 219
Posen-Robbins SD 143.5
Prairie Grove SD 46
Salt Creek SD 48
Sunset Ridge School District
Thornton Fractional HSD 215
Township HSD 214
West Aurora SD 129
Wheaton Warrenville CUSD 200
Winnetka SD 39
Worth SD 127



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

I appreciated Craig's knowledge of IT issues, as well as his ability to convey them in a manner that made sense to me.

—Library Director
IL School District



Paul Miller

Director, IT Infrastructure Consulting

Paul Miller is a seasoned IT professional known for his pragmatic and solution-oriented approach to management. With a wealth of experience in leading teams and overseeing intricate projects, he has consistently demonstrated his ability to navigate complexity and deliver results. At the core of his leadership style is the cultivation of an environment rooted in excellence, emphasizing quality, service, and profitability.

Paul is deeply dedicated to facilitating the success of individuals, leaders, and teams, consistently surpassing goals and expectations. His proficiency shines in strategic planning, adept decision-making, and innovative problem-solving, all underscored by a strong sense of urgency, ownership, and personal accountability. Committed to continuous development, both personally and professionally, Paul Miller remains a driving force in the IT industry.

Highlights

- Leading Digital Transformation and Information Security teams
- Translating internal audit requirements into actionable plans
- Expertise in technology architecture, networking, applications, and information security
- Delivering complex technical solutions and cross-functional collaboration
- Leading a team in assessing and designing IT solutions across various services
- Developing pursuit strategies for complex engagements and RFPs
- Creating customer-facing documents and technical presentations
- Growing and maintaining key vendor technical knowledge and certifications

Agency Experience

Community and Economic Development (CEDA)
 University of Illinois Veterinary Medicine
 Rich Township District 227
 City of Country Club Hills
 Logicalis
 MNJ Technologies
 The Northern Trust Company
 Bank of America
 Arthur Andersen & Co
 CenturyLink (Lumen)
 Windstream Enterprise
 Hewlett Packard
 IBM Global Services



CREDENTIALS, DEGREES, AND AFFILIATIONS

- Bachelor of Science in Software Engineering – DePaul University
- ITILv2 Foundation

SPECIALTIES

- Digital Transformation Leader
- Information Security Expert
- Complex Technical Solutions Delivery
- Networking and Applications Proficiency
- Internal Audit Translation to Actionable Plans
- Network Infrastructure and Security
- Strategic Engagement Pursuits
- Customer Liaison and Relationship Management
- Vendor Technical Knowledge and Certifications Management
- Technical Training and Team Guidance
- Business Development and Renewals





Chad Griewahn

Director – IT Infrastructure and Operations Consulting Practice

Chad Griewahn has over 30 years of experience in information technology, focusing on telecommunications, local government infrastructure, operations, staffing, and project management. Through his years of experience, Chad has gained an invaluable understanding of the connections between IT infrastructure, operations, and business applications. Chad's role as a former CTO and other IT management roles has strengthened and refined his IT Strategic Planning, Governance, and IT management mentoring skills, allowing him to serve and meet clients' needs effectively.



CREDENTIALS, DEGREES, AND AFFILIATIONS

- Bachelor of Arts in Political Science – Kings College
- CompTIA A+ 1994
- Project Management Professional 2000
- Certified Novell Engineer (CNE) 1995
- Microsoft Certified Systems Engineer 2000
- Microsoft Certified Product Specialist 1998
- CCNP Cisco Certified Professional 1995
- Fotec Fiber Optic Certified
- ITIL Certified Foundation 2006
- CATO NETWORKS SASE Expert Certification
- FORTINET NSE2 Certified
- VMware SD-WAN Technical Sales Professional (VTSP)
- VMware Cloud Technical Sales Professional (VTSP)
- Cisco Meraki CMA Certified
- Cisco Meraki Solutions Specialist

Highlights

- Former CTO/COO for Booth Creek Management Corporation, one of the oldest private equity investment firms
- CIO Advisor for the City of Atlanta and Fulton County Government
- Strategic Advisor for IT Directors and CIOs
- IT Strategic advisor for both private and public entities
- 30 years of global telecommunications experience
- Managed hundreds of IT consulting projects with both public and private sectors

Agency Experience

City of Alpharetta
City of Atlanta
City of Des Moines
City of Doraville
City of John's Creek
City of Mission Viejo
City of New York
City of Petaluma
City of Salinas
City of San Leandro
City of Tracy
Village of Northfield
County of DeKalb
County of Fulton

County of Mendocino
Coachella Valley Mosquito & Vector Control District
Fresno Irrigation District
Las Virgenes Water District
Oregon Wastewater Management
East Bay Regional Park District
Addison School District
Fontana Unified School District
Niles Township High School District
North Shore School District
Oregon State Lottery
State of Texas HSC
Department of Defense (DOD)

SPECIALTIES

- Voice and Data Design, Procurement, Implementation, and Oversight
- Cybersecurity
- Network Transformations
- Disaster Recovery
- IT Operations Management
- CTO/IT Management
- IT Management Mentoring
- IT Governance
- Policies Development
- Project Management
- Assessments, Strategy, and Planning



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).

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

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 Carlsbad
City of Chino
City of Fairfield
City of Foster City
City of La Habra
City of Laguna Niguel
City of Lake Forest
City of Murrieta
City of Palmdale
City of Piedmont
City of Rancho Cucamonga
City of Redlands
City of Rockford
City of San Clemente
City of San Pablo
City of San Rafael
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
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
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

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

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

Town of Windsor	City of South Gate	Fresno Irrigation District	Indian Prairie CUSD 204
Town of Woodside	City of University Park	San Bernardino Municipal Water	Joliet PSD 86
City of Albany	City of Vacaville	West County Wastewater	Marmion Academy
City of Azusa	City of West Covina	Zone 7 Water	Mt. Prospect SD 57
City of Big Bear Lake	City of West Sacramento	Los Angeles Community	Naperville CUSD 203
City of Carlsbad	City of Wilton Manors	Development Authority	Niles Township HSD 219
City of Cedar Hill	City of Woodside	Batavia Public Library	Orland Park D230
City of Corona	City of Yucca Valley	Hemet Public Library	Posen-Robbins SD 143.5
City of Farmers Branch	County of Mendocino	Joliet Public Library	St. Charles CUSD
City of Glendale	County of Tuolumne	Rockford Public Library	Salt Creek SD 48
City of Hawaiian Gardens	County of Yolo	Steppenwolf Theatre	Thornton Fractional HSD 214
City of Hemet	Village of Barrington	Algonquin SD 158	Township HSD 214
City of Hutto	Village of Barrington Hills	Arie Crown Hebrew Day School	TrueNorth Educational Cooperative
City of La Puente	Village of Lincolnwood	Batavia SD 101	804
City of Laguna Niguel	Village of Lisle	Butler SD 53	West Aurora SD 129
City of Manassas Park	Village of Northfield	Carpentersville SD 300	Wheaton-Warrenville SD 200
City of Mission Viejo	Village of Oak Brook	Central Burlington SD 301	Winfield SD 34
City of Murrieta	Village of Orland Park	Chicago International Charter	Worth SD 127
City of Newark	Village of Park Forest	School	
City of Pacific Grove	Village of River Forest	DeKalb CUSD 428	
City of Palm Desert	Village of Riverside	Durand CUSD 322	
City of Palmdale	Village of South Barrington	East Aurora SD 131	
City of Petaluma	Champaign County Forest	Elgin SD U-46	
City of Piedmont	Preserve District	Geneva	
City of Pinole	East Bay Regional Park District	Community SD	
City of Pismo Beach	Hayward Area Recreation and	304	
City of Port Hueneme	Park District	Glen Ellyn SD 41	
City of Rancho Cucamonga	Livermore Area RPD	Harlem SD 122	
City of Rancho Mirage	Norridge Park District	Harvard SD 50	
City of Rialto	Moraga-Orinda Fire District	Harvey SD 152	
City of Salinas	Riverside County Sheriff's	Hinsdale HSD 86	
City of San Clemente	Department	Hononegah SD	
City of San Leandro	Castaic Lake Water Agency	207	
City of San Pablo	Castro Valley Sanitary	Huntley SD 158	
City of Sandpoint	Four Rivers Sanitation Authority		

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.



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

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

Agency Experience

City of Hawaiian Gardens
 City of Norco
 City of Pacific Grove
 City of Piedmont
 Village of Barrington Hills
 Village of Hales Corners
 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
 Media Financial Management Association
 Four Rivers Sanitation Authority
 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



Pete 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

Town of Danville
Town of Southern Pines
Town of Truckee
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
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



CERTIFIED





Toby Soto

Senior GIS Consultant

Toby Soto has 26 years of GIS experience in the local government sector. Toby's previous GIS positions in local government provide clients with tremendous GIS implementation and integration experience. He understands the link between Business Unit GIS needs, technical requirements, and a practical, cost-effective GIS strategy. Toby is an industry expert in GIS Leadership and Management and regularly publishes GIS-related articles and resources. He also hosts monthly webinars addressing GIS managers' pain points and best practices.



EDUCATION

- CSU Fullerton

SPECIALTIES

- GIS Strategic Planning
- GIS Implementation
- GIS Integration
- GIS Web Development
- GIS Mobile Applications
- Open Data/ Philanthropy

Highlights

- Esri SAG Award with the City of Anaheim GIS
- 2011 Implemented Project ViewFinder Application saving the City of Anaheim \$100,000 per year in repaving cost
- Extensive GIS presentations at Esri's User Conferences, Meetups, User Groups, Podcasts, and Webinars
- Former Orange County GIS Users Group Coordinator
- Multiple Local Government GIS Implementations and Implementations
- Former IT Manager, City of Lake Elsinore
- Former Chief of Technical Information, Western Riverside County Regional Conservation Authority

Project Experience

- Process Streamlining and Redefinition
- Process Workflow Creation
- Software Configuration and Troubleshooting
- Project Management
- GIS Strategy and Organization Development
- GIS Policy Development
- Open Data Strategy Development
- Business Process Analysis
- Web/Cloud-Based Technology and Workflow Optimization
- GIS ROI Analysis
- GIS Web App Development
- Citizen Access GIS Web Maps Development
- GIS Migration and Workflow Development
- ETL Conversions
- Cognos and Crystal Reports
- GIS Enterprise Application Integrations
- Implementation and Maintenance of Online GIS Services
- Database Administration
- GIS Budget Development
- GIS Leadership Coaching and Mentoring
- Server Management
- Network Analysis and Maintenance
- CIP Project Tracking

Agency Experience

Town of Windsor
City of Anaheim
City of Azusa
City of Brisbane
City of Carlsbad
City of Diamond Bar
City of Larkspur
City of Lake Elsinore
City of Pflugerville
City of Piedmont
City of Pinole
City of Rancho Cucamonga
City of Rancho Mirage

City of Riverside
City of Salinas
City of San Clemente
City of Sandpoint
City of Simi Valley
City of Vacaville
City of West Sacramento
City of Wood Dale
Village of Oswego
Riverside County
Mendocino County
Four Rivers Sanitation Authority

Western Riverside County
Regional Conservation
Authority
Disneyland (GIS
Programmer/Analyst –
Water/Electric utilities)



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 to determine which system 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 allowed him to work jointly with C-level executives, agency/department heads, and staff to maximize their 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 vendors
- Successfully managed onsite and remote projects for over 50 public-sector agencies throughout the United States

Agency Experience

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



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 eight 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

Town of Windsor
City of Batavia
City of Beaumont
City of Carlsbad
City of Corona
City of Coronado
City of Escondido
City of Fairfield
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 Oceanside
City of Palm Desert
City of Palmdale
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 St. Cloud
City of St. Paul
City of Vacaville
City of Vallejo
City of West Covina
City of West Sacramento
City of Wood Dale
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, CSM

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 allowed her to obtain knowledge 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 jumped to full-time software implementations for a major private enterprise distributor and transitioned 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 allows 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 Burlingame
City of Cathedral City
City of Coronado
City of Diamond Bar
City of Dublin
City of Dublin
City of Farmers Branch
City of Fontana
City of Gilroy
City of Great Falls
City of Hanford
City of Independence
City of Lancaster
City of Lemoore
City of Long Beach
City of Long Beach Harbor
City of Oxnard
City of Petaluma
City of Piedmont
City of Port Hueneme
City of Redlands
City of Richland
City of Richmond
City of Rohnert Park

City of Yorba Linda
County of Lassen
County of Mendocino
East Side Union Highschool District
Muskogee Creek Nation
Muskogee Creek Nation Tribal Health
Maricopa Association of Governments
San Diego Association of Governments
City of Nampa
Helix Water District
Santa Margarita Water District
San Bernardino Municipal Water District
Desert Water Agency
Golden Gate Bridge, Highway, and Transportation District



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





Cyndi Hoxie

Management Consultant

Cyndi Hoxie has over 30 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.

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

Town of Davie	City of Newberg
Town of Lady Lake	City of Norfolk
Town of Los Altos Hills	City of North Port
Town of Normal	City of Novato
Town of Windsor	City of Oswego
City of Aurora	City of Pearland
City of Aventura	City of Piedmont
City of Bakersfield	City of Pinole
City of Boynton Beach	City of Plano
City of Brentwood	City of Pompano Beach
City of Broken Arrow	City of Rio Rancho
City of Carlsbad	City of St. Cloud
City of Cary	City of St. Helena
City of Champaign	City of St. Petersburg
City of College Station	City of Salinas
City of Coral Springs	City of San Bernardino
City of Crestview	City of San Clemente
City of Delray Beach	City of Solana Beach
City of Folsom	City of Tamarac
City of Fresno	City of West Palm Beach
City of Grand Prairie	City of Winter Haven
City of Greenville	Village of Lincolnwood
City of Gresham	County of Butte
City of Las Vegas	County of Hanover
City of Los Altos	County of Mendocino
City of Manchester	
City of Marietta	
City of Miami Springs	
City of Mission Viejo	



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



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 11 years of experience with local and federal government agency software implementations. Her in-depth experience with software configuration, business analysis, and user needs assessment allows her 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.

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

Town of Windsor
Town of Woodside

City of Batavia

City of Bartlesville

City of Bentonville

City of Carlsbad

City of Clovis

City of Coronado

City of Corvallis

City of Decatur

City of Fort Smith

City of Glendora

City of High Point

City of Highland Park

City of Hutchinson

City of Hutto

City of San Bernardino

City of Tulsa

City of Westmont

City of West Sacramento

City of Wichita

City of Wilton Manors

City of Wisconsin Springs

City of Wood Dale

Village of Hinsdale

Village of Orland Park County of

Champaign

County of Collin

County of Denton

County of Lassen

County of Mendocino

County of Minnehaha

County of St. Joseph

East Bay Regional Park District

Jurupa Community Services District

Los Angeles County Development Authority

State of Texas (DFPS)



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



Michael Truncale

Enterprise Applications Senior Management Consultant

Michael Truncale has over 14 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 identify process gaps and quickly provide quantifiable solutions easily.

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

Town of Castle Rock
Town of Flower Mound
Town of Parker
Town of Windsor
Town of Woodside City of Ann Arbor
City of Bellingham
City of Brentwood
City of Bryan
City of Canton
City of Carlsbad
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 Poway
City of Prescott
City of Round Rock
City of Sammamish
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



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



Appendix A: Practice Area Highlights

The following section includes additional information that would be essential to the proper evaluation of ClientFirst's response to this request for qualifications. ClientFirst is uniquely positioned for this engagement due to our diversified technology consulting disciplines and our hands-on project types that we routinely provide to our many government client agencies.

IT Infrastructure 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, network design, resiliency upgrades, implementation, support, and maintenance. This includes 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 Redundant Systems
- Secure Networks for Public Safety Applications
- Cybersecurity
- Public Safety Communications
- Unified Messaging Design, Selection, and Implementation
- IoT Networks

We work with each client to design, procure, and implement the appropriate solution according to their unique requirements. We have significant experience with Public Works bid projects in addition to the more traditional RFP and vendor selection methodologies.

For Public Works bid projects, we provide ongoing contract administration expertise in conjunction with the Public Works Department. We utilize a traditional American Institute of Architects (AIA) methodology for these projects, including cut sheet review and approval, weekly project meetings, multiple site visits (as needed), punch lists, and documentation close-out.



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



Often, we are asked by our clients 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 work to resolve any issues encountered during the project in a time-sensitive way. The projects we manage are completed on budget and within the timeframes provided by the client.

Project Management Services

One of ClientFirst's key differentiators is that, in addition to providing highly skilled technicians, we provide our clients with tremendously experienced Project Managers. These individuals work with public agencies over 75% of their time and have extensive knowledge of industry best practices. This combination of knowledge and experience has resulted in success stories from IT departments across the country.

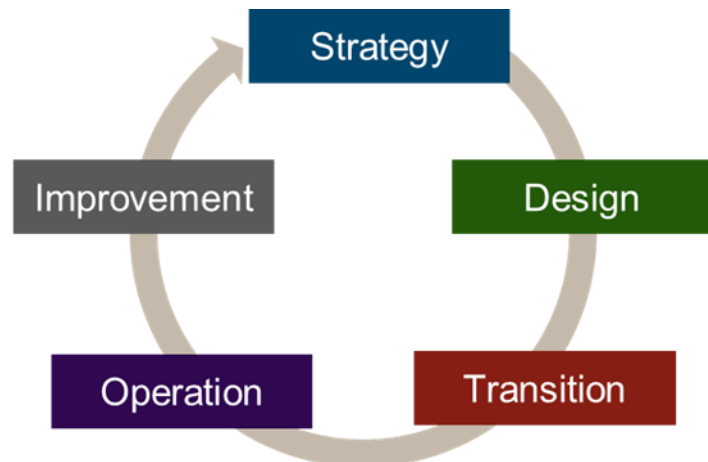
Our IT Management practice area works with clients to improve the quality of their IT management and service delivery. We apply our knowledge in this area to each of our client's situations and customize our management style to fit their specific needs.

We provide our clients with a complete project management methodology that improves communication and delivery of services 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 and 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





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 and provides the information our clients need to make informed decisions and realize the best value for their purchasing dollar.

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



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.



Fiber-Optic Cabling

ClientFirst understands the need for a reliable fiber-optic cable infrastructure, especially with remote work becoming more common and thus the need for more reliable communications connections.

Fiber optic planning can provide guidelines for the design, construction, implementation, maintenance, regulation, and funding of an agency's fiber optics assets and related technologies. We work to help each client review their existing fiber-optic cable plant and its use. We are then able to create a guide regarding the development and utilization of this important infrastructure resource using the following approach:

- Site Visits and Existing Conditions Review
- Interview Stakeholder Departments
- Contract and Installation Q & A
- Research Alternatives and Potential Opportunities
- Identify Potential Business Opportunities
- Develop Broadband Installation Standards
- Resiliency Recommendations
- Identify Ongoing Maintenance Recommendations
- Identify Potential Funding/Joint Partnership Ideas
- Develop a Report and Budget Plan
- Workshop Discussion



In addition to evaluating the fiber-optic needs of an organization and developing strategies to address those needs, we design and administer inside-plant and outside-plant fiber-optic cabling installations for our clients.



Enterprise Applications Consulting

ClientFirst has what we believe is 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 all manual processes are improved, paper is eliminated, and 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 be put on a successful path. 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 of the Technology Department's application support resources, including staff inventory, staff availability, skill sets, etc.



In years past, it was typical to see the largest line item in an organization's IT budget was related to hardware infrastructure and the staff to support this hardware (servers, desktops, printers, servers, network equipment, etc.) In many cases, cities have seen their Software Application budget line items grow. Often, Technology Departments have not adjusted to address this change and are now adding more Application Software Business Analysts to their organizations to support the expanding software needs and demands of the user community.



This growth in software is the result of an organization's need to eliminate manual and paper-based processes to use software to gain efficiencies and increase productivity, but it is also to improve public access and to provide electronic services to the public. This also includes access and electronic services to internal customers (employees), as well as access to information and services for management, leadership, and elected officials to improve effective decision-making.

Our specialization in local government and cities provides an in-depth knowledge of all the related local government operations and applications and the vendors that provide them.

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

The level of detail ClientFirst explored in our software project was extremely valuable. We had attempted to do the same effort a few years ago, and there was no comparison. Through a needs assessment process, ClientFirst collected a tremendous amount of valuable details.

—IT Coordinator
Software Selection

From the beginning of our software selection process, 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

Departmental / Functional Area Experience	
Council/Board	Parks & Recreation
Administration	Engineering
Building & Safety	GIS
City Clerk	Water & Waste Water
Finance	Sanitation
Fire	Field Operations
Library	Laboratories
Utility Billing	Environmental
Customer Service/Call	Sciences
Centers	Facilities
Payroll	Treatment Plants
Human Resources	Fleet Management
Planning	Engineering
Police	Warehousing
Purchasing	SCADA
Public Works	Information Systems



Appendix B: Government Agency Case Studies

The following case studies are California agencies that ClientFirst has worked with to transform their technology environments digitally. These case studies began with Technology Master Planning. The cities' technology governance and commitment at all levels, including their city councils, has since resulted in significant digital transformation that has improved internal business department process, management decision-making, transparency, citizen services, and citizen engagement. Also provided separately is a sample Information Technology Plan recently completed for another California municipality.



Mendocino County

Project Background

ClientFirst started with a County-wide Technology Master Plan and Roadmap to digitally transform the County and its operations. Other following projects have included:

- Technology Plan development and funding
- Technology Plan management and semi-annual plan updates in conjunction with mid-year and annual Board of Supervisors budget workshops
- Initial risk mitigation projects to increase resiliency of critical systems
- Emergency Operations Center redesign and refresh of EOC technology and equipment (Phase 1 & 2)
- Public Safety Cabling and Fiber Optic Improvements
- Public Safety and Radio Data Center Space Planning
- Detailed public safety County-wide radio assessment, cost analysis, and successful funding request
- Fiber Optic Systems Upgrades
- Procurement Business Process Review and Improvements
- Cannabis Permit and Licensing Process Improvements Efficiency Study
- Budgeting Process Improvements
- Point Arena Radio & Microwave Project Management (Improved Public Safety Radio Resiliency)
- County-Wide Radio and Broadband Upgrade Project Management
- Property Tax System Assessment and Project Restart
- Property Tax System Implementation Oversight
- Cannabis Permits & License Business Process Review and Improvements
- Cannabis E-Permitting
- Cybersecurity Roadmap and Board Presentation
- Network Upgrade RFP & Project Management Assistance
- IT Strategic Advisory Services
- IT staffing and staff roadmap to support digital transformation and Board goal of increased efficiency



Description of Services Performed and Outcomes

ClientFirst was initially engaged to develop a multi-year Technology Master Plan and Roadmap. The initial five-year plan is budgeted at over \$20 million. The initial assessment also uncovered several high-risk areas. County management placed the project on hold, but immediately allocated \$605K to mitigate many of those high-risk items. ClientFirst provided oversight and project management services for the implementation of these risk mitigation measures. The Board appropriated \$1MM for Phase 1 projects and has subsequently appropriated over \$1MM every six months for additional project work. ClientFirst provides oversight for approximately twenty-five Technology Master Plan projects. ClientFirst is also managing the Master Plan budget and project portfolio, with project additions and subtractions based on Board and Executive Office priorities.

In addition to managing the Technology Master Plan, ClientFirst provides detailed project management and vendor selection assistance for a wide range of projects. Implementation assistance is provided to augment staff for critical or high-profile projects such as E-Permitting (now implemented for about 65% of permit types), Cannabis business process improvements, public safety and emergency operations projects, preparations and replacement of a fragile end-of-life tax system, and others.

Also, ClientFirst and Mendocino County jointly presented at the California Society of Municipal Finance Officers (CSMFO) on process improvements resulting from these digital transforming projects.



City of Rancho Mirage

Project Background

ClientFirst started with a citywide Technology Master Plan. We also jointly presented these transformation efforts at the annual California Society of Municipal Finance Officers (CSMFO) conference. Also, see attached published article on the City's digital transformation efforts, *City of Rancho Mirage Published Digital Transformation Article*.

Other following projects have included:

- Technology Master Planning
- IT Organization Improvement Assistance
- Enterprise Software Needs Assessment
- ERP Selection and Contract Negotiations
- Audio Visual System Design, RFP, and Implementation Oversight
- Contract Management Process Review and Improvements
- Disaster Recovery Planning Services
- Cybersecurity Assessment and Risk Mitigation
- EDMS Needs Assessment Services
- Electronic Mail Implementation Consulting Services
- IT Management Mentoring and Advisory Services
- Wireless Network Design – Amphitheater, Library, Park Spaces
- Network Improvement Vendor Procurement
- Work Order/Asset Management Preliminary Assessment

***Description of Services Performed and Outcomes***

ClientFirst developed a Technology Master Plan to address City's desire to integrate and automate business applications in a secure manner. This project included working with ongoing City Council sub-committee. ClientFirst presented Plan to Council, and Council approved funding of the plan in its entirety. ClientFirst worked with City staff to upgrade technology infrastructure, resident connectedness, and applications improvement and integration. The Master Plan also included a comprehensive analysis of the IT human resources to ensure the City had the resources to maintain existing technology, implement new technology projects, and maintain the environment that would be put in place as part of the implementation of the Technology Master Plan. A significant piece of the future IT organizational structure included an increase in business analyst talent to help implement and support critical enterprise applications.

ClientFirst assisted with the ERP system selection, which was concluded on time and within budget. Departmental assistance was also provided for the selection of a new Contract Administration system.

Technical assistance was provided for the development of a Disaster Recovery Plan. ClientFirst worked with Departments to develop a prioritized recovery plan that met the needs of the City.

**CONSULTANT SERVICES AGREEMENT
STRATEGIC INFORMATION TECHNOLOGY SERVICES**

This AGREEMENT FOR CONSULTANT SERVICES ("**Agreement**") is entered into as of the _____, by and between the City of Piedmont ("**City**"), a California municipal corporation, and ClientFirst, ("**Consultant**"), a California corporation, with reference to the following facts, understandings and intentions.

Recitals

WHEREAS, City desires to contract for strategic information technology services that support and advance the business operations of the City of Piedmont; and

WHEREAS, the Consultant has demonstrated the skills and ability to provide such services described in Section 3 of this Agreement; and

WHEREAS, City desires to retain Consultant pursuant to this Agreement to provide the services described in Section 3 of this Agreement, subject to the terms and conditions of this Agreement.

Agreement

NOW, THEREFORE, in consideration of their mutual covenants, the parties hereto agree as follows:

1. Incorporation of Recitals. The recitals and all defined terms set forth above are hereby incorporated into this Agreement as if set forth herein in full.
2. Project Coordination. Authorized representatives shall represent City and Consultant in all matters pertaining to this Agreement.
 - a. City. The City Administrator or his/her designee shall represent City for all purposes under this Agreement, except where approval for the City is specifically required by the City Council, and shall have authority to supervise the progress and execution of this Agreement.
 - b. Consultant. The Consultant shall assign Tom Jakobsen responsibility for the overall progress and execution of this Agreement for Consultant.
3. Scope and Performance of Services.
 - a. Scope of Services. Subject to such policy direction and approvals as the City through its staff may determine from time to time, Consultant shall perform the services set out in the "Scope of Work" attached hereto as Exhibit A and incorporated herein by reference.

- b. Time of Performance. The services of Consultant are to immediately commence upon execution of this Agreement and Consultant understands that time is of the essence when conducting the Scope of Work.
 - c. Standard of Quality. City relies upon the professional ability of Consultant as a material inducement to entering into this Agreement. All work performed by Consultant under this Agreement shall be performed 1) with due diligence, using its best efforts to perform and coordinate all activities in a timely manner; 2) in accordance with all applicable legal requirements; and 3) with the standard of quality ordinarily to be expected of competent professionals in Consultant's field of expertise. Consultant shall correct all errors made in the provision of services under this Agreement.
4. Compensation and Method of Payment.
- a. Compensation. The compensation to be paid to Consultant, including both payment for professional services and reimbursable expenses, shall be at the rate and schedules attached hereto as Exhibit B, and incorporated herein by reference. However, in no event shall the amount City pays Consultant exceed Two Hundred Eighteen Thousand Forty Five Dollars (\$218,045). Payment by City under this Agreement shall not be deemed a waiver of unsatisfactory work, even if such defects were known to the City at the time of payment. Payment shall be paid within 30 days of presentation of invoices based on services and costs incurred in the prior month.
 - b. Changes in Compensation. Consultant will not undertake any work that will incur costs in excess of the amount set forth in Section 4(A) of this Agreement without prior written amendment to this Agreement. City shall have the right to amend the Scope of Work within the Agreement by written notification to the Consultant. In such event, the compensation and time of performance shall be subject to renegotiation upon written demand of either party to the Agreement. Consultant shall not commence any work exceeding the Scope of Work without prior written authorization from the City. Failure of the Consultant to secure City's written authorization for extra or changed work shall constitute a waiver of any and all right to adjustment in the contract price or time due, whether by way of compensation, restitution, quantum meruit, etc. for work done without the appropriate City authorization.
 - c. Taxes. Consultant shall pay all taxes, assessments and premiums under the federal Social Security Act, any applicable unemployment insurance contributions, Workers Compensation insurance premiums, sales taxes, use

taxes, personal property taxes, or other taxes or assessments now or hereafter in effect and payable by reason of or in connection with the services to be performed by Consultant.

- d. No Overtime or Premium Pay. Consultant shall receive no premium or enhanced pay for work normally understood as overtime, i.e., hours that exceed forty (40) hours per work week, or work performed during non-standard business hours, such as in the evenings or on weekends. Consultant shall not receive a premium or enhanced pay for work performed on a recognized holiday. Consultant shall not receive paid time off for days not worked, whether it be in the form of sick leave, administrative leave, or for any other form of absence.
 - e. Litigation Support. Consultant agrees to testify at City's request if litigation is brought against City in connection with Consultant's work product. Unless the action is brought by Consultant or is based upon Consultant's negligence, City will compensate Consultant for the preparation and the testimony at Consultant's standard hourly rates, if requested by City and not part of the litigation brought by City against Consultant.
- 5. Term. This Agreement shall commence as of the date first above written and shall continue in full force and effect, amended pursuant to Section 19, or otherwise terminated as provided herein.
 - 6. Inspection. Consultant shall furnish City with every reasonable opportunity for City to ascertain that the services of Consultant are being performed in accordance with the requirements and intentions of this Agreement. All work done and all materials furnished, if any, shall be subject to the City's inspection and approval. The inspection of such work shall not relieve Consultant of any of its obligations to fulfill the Agreement as prescribed.
 - 7. Ownership of Documents. Title, including the copyright and all intellectual property rights, to all plans, specifications, maps, estimates, reports, manuscripts, drawings, descriptions, designs, data, photographs, reports and any other final work products compiled, prepared or obtained by the Consultant under the Agreement shall be the property of Consultant. Consultant agrees not to disclose or discuss any information gathered, discussed or generated in any way through this Agreement without the written permission of City during the term of this Agreement, unless required by law.
 - 8. Employment of Other Consultants, Specialists or Experts. Consultant will not employ or otherwise incur an obligation to pay other consultants, specialists or experts for services in connection with this Agreement without the prior written approval of the City.

9. Conflict of Interest Requirements.

- a. Consultant covenants and represents that neither it, nor any officer or principal of its firm, has, or shall acquire any investment, income, business entity, interest in real property, or other interest, directly or indirectly, which would conflict in any manner with the interests of City, hinder Consultant's performance of services under this Agreement, or be affected in any manner or degree by performance of Consultant's services hereunder. Consultant further covenants that in the performance of the Agreement, no person having any such interest shall be employed by it as an officer, employee, agent, or subcontractor without the express written consent of the City. Consultant agrees at all times to avoid conflicts of interest, or the appearance of any conflicts of interest, with the interests of the City in the performance of the Agreement.
- b. Consultant is not a designated employee within the meaning of the Political Reform Act because Consultant:
 - (1) will not have the power to make any governmental decision, including whether to: approve any rates, rules, regulations, policies, standards, or guidelines of the City or any of its subdivisions; adopt or enforce any laws; issue, deny, suspend, or revoke any permit, license, application, certificate, order, or any similar authorization or entitlement; authorize, modify, or renew any form of City contract; grant approval to any City contract specifications on behalf of the City; or grant City approval for any plans, designs, reports, or similar; and
 - (2) will not participate in the making of any governmental decision in the equivalent of a staff capacity - for the purposes of this provision, "participating in a governmental decision" including providing information, an opinion, or a recommendation directly to any person at the City empowered to make a decision on behalf of the City without significant intervening substantive review; and
 - (3) will not perform the same duties for the City that would otherwise be performed by a staff member required to report under the City's conflict of interest code. (2 Cal. Code Regs. § 18700.3.)

10. Liability of Members and Employees of City. No member of the City and no other officer, elected official, employee or agent of the City shall be personally liable to Consultant or otherwise in the event of any default or breach of the City, or for any amount which may become due to Consultant or any successor in interest, or for any obligations directly or indirectly incurred under the terms of this Agreement. To the maximum

extent permitted by law, the City shall have no liability or responsibility for any accident, loss, or damage to any work performed under this Agreement whether prior to its completion or acceptance or otherwise.

11. Indemnity.

- a. Indemnification. To the fullest extent permitted by law, Consultant shall, at its own expense, indemnify, protect, defend (by counsel reasonably satisfactory to the City) and hold harmless City and any and all of its officers, officials, employees, agents and volunteers ("Indemnified Parties") from and against any and all liability (including liability for claims, demands, damages, obligations, suits, actions, arbitration proceedings, administrative proceedings, regulatory proceedings, losses, expenses or costs of any kind, whether actual, alleged or threatened, including attorneys' fees and costs, court costs, interest, defense costs and expert witness fees) of any nature ("Liability"), whether actual, alleged or threatened, which arise out of, pertain to, or relate to the performance or failure to comply with this Agreement, regardless of any fault or alleged fault of the Indemnified Parties. The only exception to Consultant's responsibility to indemnify, protect, defend, and hold harmless the Indemnified Parties from Liability is due to the willful misconduct of City or its elective or appointive boards, officers, agents and employees.
- b. Scope of Obligation. Consultant's duty to indemnify, protect, defend and hold harmless as set forth in this Section 11 shall include the duty to defend (by counsel reasonably satisfactory to the City) as set forth in California Civil Code § 2778. This indemnification obligation is not limited in any way by any limitation on the amount or type of damages or compensation payable by or for Consultant under worker's compensation, disability or other employee benefit acts or the terms, applicability or limitations of any insurance held or provided by Consultant and shall continue to bind the parties after termination/completion of this agreement. This indemnification shall be regardless of and not in any way limited by the insurance requirements of this contract. This indemnification is for the full period of time allowed by law and shall survive the termination of this agreement. Consultant waives any and all rights to express or implied indemnity against the Indemnified Parties concerning any Liability of the Consultant arising out of or in connection with the Agreement or Consultant's failure to comply with any of the terms of this Agreement.
- c. Independent Contractor. It is expressly agreed that Consultant, in the performance of the work and services agreed to be performed by Consultant, shall act as and be an independent contractor and not an agent or employee of City and shall have responsibility for and control over the details and means of

providing its services under this Agreement. Consultant shall furnish, at its own expense, all labor, materials, equipment, tools, transportation and services necessary for the successful completion of the services under this Agreement. As an independent contractor, Consultant shall obtain no rights to retirement benefits or other benefits which accrue to City's employees, and Consultant hereby expressly waives any claim it may have to any such rights. Consultant, its officers, employees and agents shall not have any power to bind or commit the City to any decision.

12. Compliance with Laws.

- a. General. Consultant shall use the standard of care in its profession to comply with all applicable federal, state, and local laws, codes, ordinances, and regulations. Consultant represents and warrants to City that it has and shall, at its sole cost and expense, keep in effect or obtain at all times during the term of this Agreement any licenses, permits, insurance and approvals which are legally required for Consultant to practice its profession. City is not responsible or liable for Consultant's failure to comply with any or all of the requirements contained in this paragraph or in this Agreement.
- b. Workers' Compensation. Consultant certifies that it is aware of the provisions of the California Labor Code which require every employee to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that Code, and Consultant certifies that it will comply with such provisions before commencing performance of the Agreement and at all times in the performance of the Agreement.
- c. Injury and Illness Prevention Program. Consultant certifies that it is aware of and has complied with the provisions of California Labor Code § 6401.7, which requires every employer to adopt a written injury and illness prevention program.
- d. Business Licenses. Unless exempt by law, Consultant shall have acquired, at Consultant's expense, a business license from the City in accordance with Chapter 5.04 of the Piedmont Municipal Code, prior to City's issuance of an authorization to proceed with the Services. Such license(s) shall be kept valid throughout the term of this Agreement. City may withhold compensation from Consultant until such time as Consultant complies with this section.

13. Confidential Information. All data, documents, discussions or other information developed or received by or for Consultant in performance of this Agreement are confidential and not to be disclosed to any person except as authorized by City, or as

required by law.

14. Assignment; Subcontractors; Employees.

- a. Assignment. Consultant shall not assign, delegate, transfer, or convey its duties, responsibilities, or interests in this Agreement or any right, title, obligation, or interest in or to the same or any part thereof without the City's prior written consent, which shall be in the City's sole discretion. Any assignment without such approval shall be void and, at the City's option, shall immediately cause this Agreement to terminate.

15. Insurance. Without limiting Consultant's indemnification provided herein, Consultant shall, at its own expense, procure and maintain insurance that complies with the requirements set forth in Exhibit C to this Agreement, which is attached hereto and incorporated by reference. Consultant shall upon thirty (30) days' notice comply with any changes in the amounts and terms of insurance as may be required from time-to-time by City's risk manager.

16. Termination of Agreement; Default.

- a. This Agreement and all obligations hereunder may be terminated at any time, with or without cause, by the City upon five (5) days' written notice to Consultant.
- b. If Consultant fails to perform any of its obligations under this Agreement within the time and in the manner herein provided or otherwise violates any of the terms of this Agreement, in addition to all other remedies provided by law, City may terminate this Agreement immediately upon written notice. In such event, Consultant shall be entitled to receive as full payment for all services satisfactorily rendered and expenses incurred hereunder, an amount which bears the same ratio to the total fees specified in the Agreement as the services satisfactorily rendered hereunder by Consultant bear to the total services otherwise required to be performed for such total fee; provided, however, that the City shall deduct from such amount the amount of damages, if any, sustained by City by virtue of the breach of the Agreement by consultant. In the event this Agreement is terminated by City without cause, Consultant shall be entitled to any compensation owing to it hereunder up to the time of such termination, it being understood that any payments are full compensation for services rendered prior to the time of payment.
- c. Upon termination of this Agreement with or without cause and if requested by City, Consultant shall turn over to the City Administrator immediately any and all

copies of studies, sketches, drawings, computations, and other data, whether or not completed, prepared by Consultant or its subcontractors, if any, or given to Consultant or its subcontractors, if any, in connection with this Agreement. Consultant, however, shall not be liable for the City's use of incomplete materials nor for the City's use of complete documents if used for other than the project contemplated by this Agreement.

17. Merger; Amendment. This Agreement constitutes the complete and exclusive statement of the agreement between City and Consultant and shall supersede all prior negotiations, representations, or agreements, either written or oral. This document may be amended only by written instrument, signed by both the City and Consultant. All provisions of this Agreement are expressly made conditions.
18. Interpretation. This Agreement shall be interpreted as though it was a product of a joint drafting effort and no provisions shall be interpreted against a party on the ground that said party was solely or primarily responsible for drafting the language to be interpreted.
19. Time of the Essence. Time is of the essence of this Agreement. Upon receipt of a written notice from City to proceed with work required by this Agreement, Consultant shall immediately commence work to perform the services required in accordance with the schedule of work. In the event that the Agreement does not include a fixed schedule for completion of work, Consultant shall diligently prosecute all work until completion.
20. Written Notification. Any notice, demand, request, consent, approval or communication that either party desires or is required to give to the other party shall be in writing and either served personally or sent by prepaid, first class mail. Any such notice, demand, etc. shall be addressed to the other party at the address set forth below. Either party may change its address by notifying the other party of the change of address. Notice shall be deemed communicated within 72 hours from the time of mailing if mailed as provided in this section.

If to City:

Rosanna Bayon Moore
City Administrator
120 Vista Avenue
Piedmont, California 94611

If to Consultant:

Tom Jakobsen
Partner
ClientFirst Consulting Group
980 Montecito Drive, Suite 209
Corona, CA 94611

21. Consultant's Books and Records.

- a. Consultant shall maintain any and all ledgers, books of account, invoices, vouchers, canceled checks, and other records or documents evidencing or relating to charges for services, or expenditures and disbursements charged to City and all documents and records which demonstrate performance under this Agreement for a minimum period of three (3) years, or for any longer period required by law, from the date of termination or completion of this Agreement.
- b. Any records or documents maintained by Consultant pursuant to this Agreement shall be made available for inspection or audit, at any time during regular business hours, upon written request by the City Attorney, City Administrator, or a designated representative of any of these officers. Copies of such documents shall be provided to City for inspection when it is practical to do so. Otherwise, unless an alternative is mutually agreed upon, the records shall be available at Consultant's address indicated for receipt of notices in this Agreement.

22. Equal Employment Opportunity. Consultant is an equal opportunity employer and agrees to comply with all applicable state and federal regulations governing equal employment opportunity. Consultant will not discriminate against any employee or applicant for employment because of race, religion, age, sex, creed, color, sexual orientation, marital status or national origin. Consultant will take affirmative action to ensure that applicants are treated during such employment without regard to race, religion, age, sex, creed, color, sexual orientation, marital status, or national origin. Such action shall include, but shall not be limited to, the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; lay-offs or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. Consultant further agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.

23. Non-Exclusive Agreement. This is a non-exclusive agreement. City reserves the right to provide, and to retain other consultants to provide, services that are the same or similar to the services described in this Agreement.

24. City Not Obligated to Third Parties. The City shall not be obligated or liable for payment hereunder to any party other than Consultant.

25. Remedies/Waiver. No failure on the part of either party to exercise any term, covenant, condition, right or remedy hereunder shall operate as a waiver of any other term,

covenant, condition, right or remedy that such party may have hereunder. All remedies permitted or available under this Agreement, or at law or in equity, are cumulative and alternative. As a condition precedent to commencing legal action involving a claim or dispute against the City arising from this Agreement, the Consultant shall comply with claims presentation requirements under the Government Tort Claims Act, California Government Code Sections 900 et seq. and the Piedmont Municipal Code.

26. Severability. If any one or more of the provisions contained herein shall for any reason be held to be invalid, illegal or unenforceable in any respect, then such provision or provisions shall be deemed severable from the remaining provisions hereof, and such invalidity, illegality, or unenforceability shall not affect any other provision hereof, and this Agreement shall be construed as if such invalid, illegal, or unenforceable provision had not been contained herein.
27. Exhibits. The following exhibits are attached to this Agreement and incorporated herein by this reference:
 - a. Exhibit A: Scope of Work
 - b. Exhibit B: Hourly Rate Schedule & Budget Estimate
 - c. Exhibit C: Insurance Requirements
28. Execution. This Agreement may be executed in several counterparts, each of which shall constitute one and the same instrument and shall become binding upon the parties when at least one copy hereof shall have been signed by both parties hereto. In approving this Agreement, it shall not be necessary to produce or account for more than one such counterpart.
29. News Releases/Interviews. All Consultant and subconsultant news releases, media interviews, testimony at hearings and public comment shall be prohibited unless expressly authorized by City.
30. Applicable Law; Venue. This Agreement shall be construed and interpreted according to California law. In the event that suit shall be brought by either party hereunder, the parties agree that a trial of such action shall be held exclusively in a state court in the County of Alameda, California.
31. Authority. Each individual executing this Agreement on behalf of one of the parties represents that he or she is duly authorized to sign and deliver the Agreement on behalf of such party and that this Agreement is binding on such party in accordance with its terms.

IN WITNESS WHEREOF, City and Consultant have executed this Agreement as of the date first above written.

CITY OF PIEDMONT

CONSULTANT

Rosanna Bayon Moore
City Administrator

David Krout
Managing Partner

EXHIBIT A

Scope of Work

- 1) **Public Works Department**
 - a. Enterprise Asset Management Project
 - i. Project Design
 - ii. Solicitation
 - iii. Vendor Selection
 - iv. Implementation Project Management
- 2) **Fire Department**
 - a. Scheduling Project
 - i. Timekeeping Interface & Implementation Project Management
- 3) **Public Works, Planning, Building, Planning, City Clerk**
 - a. TRAKiT Implementation Project Management
 - i. Community Development
 - ii. Business Licenses
- 4) **Police Department**
 - a. Dispatch Center Relocation Project
 - b. Criminal Justice Information System Compliance Assistance Project
- 5) **Citywide Ongoing IT Management Assistance**
 - a. Procurement, Cyber Security, GIS, Telecom, IT Budgeting

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	\$ 230
Director	\$ 225
Manager	\$ 215
Senior Network Engineer/GIS Manager	\$ 195
Senior Consultant	\$ 185
Systems Engineer	\$ 185
IT/Technology Consultant	\$ 175

Project	Estimated Cost
Enterprise Asset Management System	\$21,345
Scheduling	\$19,200
TRAKiT	\$97,500
Dispatch Center	\$5,000
CJIS Compliance	\$10,000
IT Management Assistance	\$65,000

TOTAL ESTIMATED BUDGET	\$ 218,045
-------------------------------	-------------------

EXHIBIT C
Insurance Requirements for Consultant Services Agreement

Consultant shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Consultant, its agents, representatives, or employees.

MINIMUM SCOPE AND LIMIT OF INSURANCE

Coverage shall be at least as broad as:

1. Commercial General Liability (CGL): Insurance Services Office Form CG 00 01 covering CGL on an "occurrence" basis, including products and completed operations, property damage, bodily injury and personal & advertising injury with limits no less than \$2,000,000 per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (ISO CG 25 03 or 25 04) or the general aggregate limit shall be twice the required occurrence limit.
2. Automobile Liability: Insurance Services Office Form Number CA 0001 covering, Code 1 (any auto), or if Consultant has no owned autos, Code 8 (hired) and 9 (non-owned), with limit no less than \$2,000,000 per accident for bodily injury and property damage.
3. Workers' Compensation insurance as required by the State of California, with Statutory Limits, and Employer's Liability Insurance with limit of no less than \$1,000,000 per accident for bodily injury or disease. (Not required if consultant provides written verification it has no employees)
4. Professional Liability (Errors and Omissions) Insurance appropriate to the Consultant's profession, with limit no less than \$2,000,000 per occurrence or claim, \$2,000,000 aggregate.

If the Consultant maintains broader coverage and/or higher limits than the minimums shown above, the City requires and shall be entitled to the broader coverage and/or the higher limits maintained by the Consultant. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the City.

Other Insurance Provisions

The insurance policies are to contain, or be endorsed to contain, the following provisions:

Additional Insured Status

The City, its officers, officials, employees, and volunteers are to be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of the Consultant including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Consultant's insurance (at least as broad as ISO Form CG 20 10 11 85, or **both** CG 20 10, CG 20 26, CG 20 33, or CG 20 38; **and** CG 20 37 forms, if later revisions used).

Primary Coverage

For any claims related to this contract, the Consultant's insurance coverage shall be primary insurance primary coverage at least as broad as ISO CG 20 01 04 13 with respect to the City, its officers, officials, employees, and volunteers. Any insurance or self-insurance maintained by the City, its officers, officials, employees, or volunteers shall be excess of the Consultant's insurance and shall not contribute with it.

Notice of Cancellation

Each insurance policy required above shall state that coverage shall not be canceled, except with notice to the City.

Waiver of Subrogation

Consultant hereby grants to City a waiver of any right to subrogation which any insurer of said Consultant may acquire against the City by virtue of the payment of any loss under such insurance. Consultant agrees to obtain any endorsement that may be necessary to effect this waiver of subrogation, but this provision applies regardless of whether or not the City has received a waiver of subrogation endorsement from the insurer.

Self-Insured Retentions

Self-insured retentions must be declared to and approved by the City. The City may require the Consultant to provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention. The policy language shall provide, or be endorsed to provide, that the self-insured retention may be satisfied by either the named insured or City.

Acceptability of Insurers

Insurance is to be placed with insurers authorized to conduct business in the state with a current A.M. Best's rating of no less than A:VII, unless otherwise acceptable to the City.

Claims Made Policies

If any of the required policies provide coverage on a claims-made basis:

1. The Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work.
2. Insurance must be maintained and evidence of insurance must be provided for at

- least eighteen (18) months after completion of the contract of work.
3. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, the Consultant must purchase "extended reporting" coverage for a minimum of five (5) years after completion of contract work.

Verification of Coverage

Consultant shall furnish the City with original Certificates of Insurance including all required amendatory endorsements (or copies of the applicable policy language effecting coverage required by this clause) and a copy of the Declarations and Endorsement Page of the COL policy listing all policy endorsements to City before work begins. However, failure to obtain the required documents prior to the work beginning shall not waive the Consultant's obligation to provide them. The City reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time.