NEXLEVEL

Proposal For
Consulting Services For Solicitation Process Of Enterprise Land Management, Planning And Permitting System

for the

City of Fresno

Prepared by

NexLevel Information Technology, Inc.

October 22, 2014

THIS DOCUMENT IS FORMATTED FOR DUPLEX PRINTING – THIS PAGE IS INTENTIONALLY LEFT BLANK

Table of Contents

THIS DOCUMENT IS FORMATTED FOR DUPLEX PRINTING – THIS PAGE IS INTENTIONALLY LEFT BLANK

Section A – Executive Summary

October 22, 2014

Ms. Jennifer Clark, Director
Development and Resource Management Department
City of Fresno
2600 Fresno Street, Room 3065
Fresno, CA 93721

Dear Ms. Clark:

NexLevel Information Technology, Inc. (NexLevel) is pleased to submit this proposal to the City of Fresno (City) in response to your Request for Qualifications (RFQ) for professional consulting services to assist the City in the selection of an enterprise land management, planning and permitting system (LMS). We believe our proposal will clearly demonstrate that NexLevel offers the City an experienced, proven, and qualified consulting firm to support the City's goal of implementing an enterprise LMS.

Our Company. NexLevel is a California-based management consulting firm with a singular focus on helping California public sector clients implement and use information technology. In 1999, the company was founded on the belief that project success starts with effective planning. Once a plan is in place, successful execution of the plan requires strong project management. NexLevel has delivered planning, procurement, and project management services to more the 70 California public agencies, including working with more than 40 California municipalities.

Our Understanding. NexLevel has carefully reviewed the RFQ and other publically available information. Based on our review, NexLevel has identified the following key areas that need special consideration:

- Complete a comprehensive evaluation and analysis of current processes, documentation, and systems to identify new system requirements, integration opportunities to streamline current processes, process efficiencies to enhance permitting services, and other improvement recommendations for the City's consideration
- Prepare a well-organized and structured Request for Proposal (RFP) that allows the vendor community to provide quality responses and enables the City evaluators to accurately evaluate proposal responses
- Identify proven LMS solution providers to ensure the City receives a strong response to the RFP
- Facilitate an organized evaluation and selection process that ensures the City selects the best fit solution
- Assist the City in developing a negotiation strategy and ensuring comprehensive agreements that provide the basis for a successful implementation
- Create and maintain key project management deliverables (i.e. project plan, schedules, resource and budget tracking, risk management, issues management, etc.)

Our Team. For Fresno, NexLevel has assembled an experienced team of consultants who are well versed in enterprise system procurement and implementation for California local government agencies. The proposed team has a long history of successfully working together using our proposed approach and methodology. We are excited about the resources we are offering the City and firmly believe this team brings unparalleled knowledge, expertise, and depth required to ensure the successful implementation of an enterprise land management, planning and permitting system.

Our Approach. NexLevel's proven system procurement, selection, and project management methods are designed specifically to ensure an enterprise perspective so the City obtains the maximum benefit from new systems. NexLevel's methodology has been tailored to meet the unique environment and needs of the City. NexLevel recognizes that the success of the LMS project will ultimately be defined in business or operational terms such as streamlined functionality, improved productivity, and enhanced customer service. To that end, our proven approach and extensive experience will help ensure the successful implementation of an enterprise LMS.

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

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

Our Experience. Among the many projects completed since our inception in 1999, NexLevel has successfully completed significant projects for large clients including an Enterprise Asset Management System (EAMS) needs assessment and procurement for the City of Stockton, enterprise project management system for the City of Los Angeles, and an IT Assessment and Strategic Plan for the Port of Los Angeles. In addition, the proposed project team has significant and recent experience with LMS endeavors with NexLevel clients, along with hands-on experience managing the daily operations of a municipal Community Development operation. Most indicative of our success is that our clients are willing to ask us back to perform additional work, and also refer us to other organizations without hesitation.

Our proposal and proposal fee is valid and binding for ninety (90) days from the date of submission and will become part of the contract that is negotiated with the City. As a Founder and Managing Principal of NexLevel, I am authorized to bind and negotiate an agreement between NexLevel and the City of Fresno. I can be contacted at 916-692-2000, ext. 201 or via email at terry.hackelman@nexlevelit.com.

A consulting engagement with NexLevel will allow the City of Fresno to successfully implement a new Land Management, Planning and Permitting System.

We appreciate the opportunity to submit a proposal and look forward to working with the City of Fresno.

Sincerely,

Terry Hackelman, Managing Principal
NexLevel Information Technology, Inc.

NEXLEVEL

Section B – Primary Contractor Information

The following are specific responses to the City's RFQ requirements for Section B:

- ♦ Company Ownership – NexLevel is a California S Corporation as of December 2000. The company started business as an LLC in May 1999

- ♦ Company Headquarters – NexLevel's company headquarters is at 6829 Fair Oaks Boulevard, Suite 100, Carmichael, California 95608

- ♦ Number of Employees – 25+

- ♦ Location of Assigned Resources – NexLevel will assign resources located in Southern California and Northern California

- ♦ Point of Contact – Terry Hackelman, Managing Principal, NexLevel Information Technology, Inc., 6829 Fair Oaks Boulevard, Suite 100, Carmichael, California 95608, 916-692-2000 extension 201, terry.hackelman@nexlevelit.com

- ♦ Company Background – See prior proposal material

- ♦ Length of Time Providing Services Described in RFQ – Since May 1999

On the following pages we provide additional information about NexLevel and our experience assisting California agencies.

Company Profile

Headquartered in Carmichael, California, NexLevel is a management consulting firm that helps public sector clients enhance their use of information technology. Since incorporating in California in 1999, NexLevel has worked with more than 70 California state and local government agencies to complete IT Assessments, IT Strategic Plans, GIS Strategic Plans, Network Assessments, IT Service Level Assessments, Policy / Procedure Documentation development, Project Management Organization implementations, Feasibility Studies, Request for Proposal (RFP) development and Procurement Management efforts. Figure 1 illustrates NexLevel's full range of IT services.
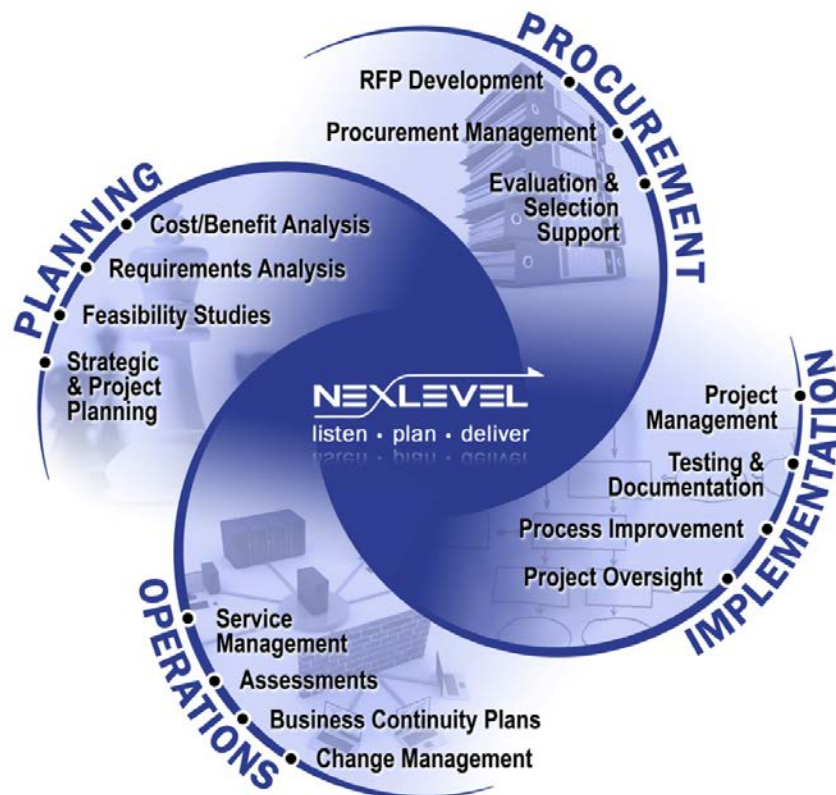
Figure 1 - NexLevel Services

Since our inception, NexLevel has invested in and developed toolkits (methodologies, processes, tools, and supporting processes) designed specifically for the unique needs and requirements of California local government entities. NexLevel consultants consistently improve and expand the knowledge base included in these toolkits based on real life experience with our clients. More importantly, we share these toolkits with our clients and leave them behind so they can be used to support future projects.

NexLevel employs more than 25 full-time staff consultants located throughout California, including several staff based in Orange County. For the City of Fresno's project, the primary project personnel (Patrick Griffin and Cindy Abbott) are located in Orange County and thus are available to serve on-site during the project engagement whenever needed.

Experience

As shown in Table 1, NexLevel has a strong record of accomplishment in providing technology consulting services for California public sector clients. A significant number of our client projects are of similar scope and size to what the City of Fresno is seeking. In addition, many clients have a similar organizational structure and technical infrastructure to that of the City of Fresno.

Table 1 - NexLevel Local Government Experience

	IT Master Plans	IT/GIS Assessments	IT Policies & Procedures	Project Management	IT Governance	Disaster Recovery Planning	System Selection & Procurements	Other Management Consulting
Cities and Counties								
City of Benicia							✓	
City of Beverly Hills	✓							
City of Chino				✓			✓	✓
City of Clovis		✓			✓			
City of Costa Mesa								✓
City of Daly City		✓						
City of Fairfield	✓	✓	✓					✓
City of Fremont				✓			✓	
City of Folsom	✓	✓	✓	✓	✓		✓	✓
City of Glendale	✓	✓					✓	✓
City of Hayward								✓
City of Huntington Beach	✓	✓						✓
City of Irvine		✓				✓		✓
City of Lake Forest	✓	✓	✓					
City of Lakewood	✓	✓			✓			✓
City of La Quinta				✓			✓	✓
City of Long Beach				✓			✓	✓
City of Los Angeles				✓				✓
City of Manhattan Beach	✓	✓			✓			✓
City of Newport Beach					✓		✓	✓
City of Novato	✓	✓			✓			✓
City of Ontario		✓						
City of Orange	✓	✓			✓		✓	✓
City of Palmdale	✓	✓						
City of Paso Robles							✓	✓
City of Pico Rivera	✓	✓			✓			✓
City of Pismo Beach	✓	✓					✓	
City of Pomona	✓	✓						
City of San Rafael								✓
City of Rancho Palos Verdes		✓						✓
City of Ridgecrest	✓	✓			✓		✓	✓
City of Riverside				✓	✓			✓
City of Rocklin		✓						
City of Sacramento								✓

NEXLEVEL

	IT Master Plans	IT/GIS Assessments	IT Policies & Procedures	Project Management	IT Governance	Disaster Recovery Planning	System Selection & Procurements	Other Management Consulting
City of San Bernardino		✓						
City of San Clemente		✓						
City of San Luis Obispo	✓	✓					✓	✓
City of Santa Clara	✓	✓	✓	✓	✓		✓	✓
City of Santa Cruz	✓	✓						
City of Santa Rosa								✓
City of Stockton	✓	✓			✓			✓
City of Walnut Creek	✓	✓			✓			✓
City of Westminster		✓						
Town of Truckee		✓						
Douglas County, Nevada		✓						✓
San Benito County				✓				✓
San Diego County				✓				✓
Sonoma County				✓				✓
Tulare County								✓
Special Districts								
Chino Valley Independent Fire District				✓			✓	
Central Contra Costa Sanitation District	✓	✓						
Delta Diablo Sanitation District	✓	✓						✓
Eastern Municipal Water District							✓	✓
Inland Empire Utility Agency	✓	✓						
Moulton Niguel Water District	✓	✓	✓	✓	✓		✓	✓
Port of Los Angeles	✓	✓						
Rancho California Water District	✓	✓			✓			✓
San Joaquin Council of Governments							✓	
Sacramento Metropolitan Fire District		✓						
Sacramento Municipal Utility District								✓
Santa Clara County Fire Department		✓						✓
Silicon Valley Power	✓			✓			✓	✓
Sonoma Marin Area Rail Transit		✓						✓
So. Orange Co. Wastewater Authority	✓	✓						
South Tahoe Public Utility District	✓	✓			✓	✓		
Turlock Irrigation District	✓							

NEXLEVEL

Section C – Methodology and Schedule

Methodology

The City is seeking assistance from an experienced and qualified consulting firm to serve as the City's owner representative and assist the City in the procurement of an enterprise land management, planning and permitting system (LMS). NexLevel understands that the City wishes to select a new LMS that will provide the advanced capabilities offered by leading vendors while allowing flexibility to accommodate the City's unique needs. The system procurement and implementation should provide the City with a cost-effective system capable of supporting all City departments that utilize any aspect of the land management, planning and permitting system.

The scope of this project starts with a comprehensive needs assessment and ends with the selection and procurement of a new land management, planning and permitting system. For this project to be successful, it must incorporate input from each department that is involved in the City's land management, planning and permitting activities. By taking an enterprise approach from the outset of the project, it will promote a city-wide understanding of the project, establish realistic expectations, and ultimately ensure buy-in to the new system. For this reason, NexLevel's methodology puts an emphasis on heavy involvement and interaction with the users.

NexLevel is familiar with the problems and issues that can arise in developing RFPs for enterprise applications. We are skilled in managing multiple, and often conflicting, visions, missions, needs, and priorities. Our approach helps ensure staff buy-in by building organization wide understanding and consensus in the published RFP.

NexLevel believes a critical component of this project is to ensure that the City's key stakeholders understand the resources, risks, timeline, and have appropriate expectations prior to the City signing an agreement with a solution provider. To accomplish this, NexLevel's approach includes the following guiding principles:

- ♦ Use of a structured, proven methodology to ensure comprehensive understanding of requirements and operational needs at all levels

- ♦ Obtaining input from key staff while minimizing disruption to daily operations

- ♦ Fully identifying and disclosing the potential risks and providing realistic risk mitigation strategies

- ♦ Managing the expectations of users and stakeholders throughout the process to ensure a realistic level of expectation upon implementation and operation of the new system

- ♦ Establishing solid project management practices from the outset of the project

It is important to note that successful procurements have several characteristics in common, including:

- ♦ Involving the impacted staff in developing the requirements, attending vendor proof of capabilities, performing vendor evaluations, site visits, and reference checking. This provides multiple venues to allow staff voices to be heard

- ♦ Performing a detailed analysis of organization and department business/operational processes and requirements. This enables the organization to identify mandatory requirements, optional capabilities, and additional desirable features

NEXLEVEL

♦ Following a formal procurement process, including scripted vendor proof of capabilities. When done appropriately, the process should encourage vendor creativity and competitiveness to be leveraged to the City's advantage

♦ Using an objective enterprise-wide evaluation process for RFP responses. This is essential for a fair and unbiased procurement, to obtain department buy-in, and to eliminate problems associated with flashy promotions and high-pressure sales tactics

Throughout the project, communication among the various participants is critical to the successful completion of all tasks. NexLevel will work closely with the City in communicating status through written bi-weekly status reports and regular oral project status presentations.

NexLevel has segmented the scope of services identified in the RFQ into the following phases as depicted in Figure 2 below:
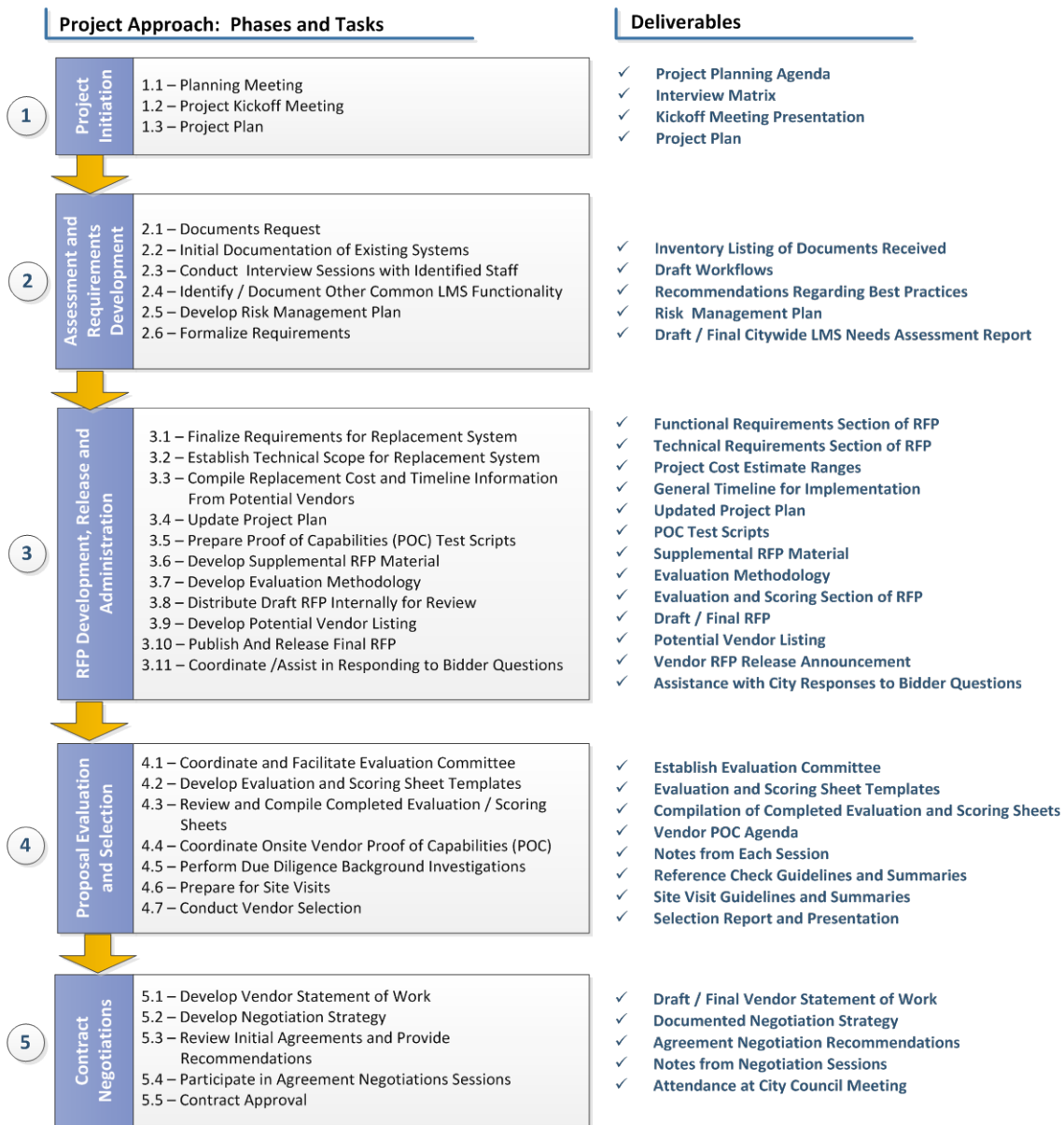

Project Approach: Phases and Tasks

Deliverables

1 — Project Initiation
1.1 – Planning Meeting
1.2 – Project Kickoff Meeting
1.3 – Project Plan

✓ Project Planning Agenda
✓ Interview Matrix
✓ Kickoff Meeting Presentation
✓ Project Plan

2 — Assessment and Requirements Development
2.1 – Documents Request
2.2 – Initial Documentation of Existing Systems
2.3 – Conduct Interview Sessions with Identified Staff
2.4 – Identify / Document Other Common LMS Functionality
2.5 – Develop Risk Management Plan
2.6 – Formalize Requirements

✓ Inventory Listing of Documents Received
✓ Draft Workflows
✓ Recommendations Regarding Best Practices
✓ Risk Management Plan
✓ Draft / Final Citywide LMS Needs Assessment Report

3 — RFP Development, Release and Administration
3.1 – Finalize Requirements for Replacement System
3.2 – Establish Technical Scope for Replacement System
3.3 – Compile Replacement Cost and Timeline Information From Potential Vendors
3.4 – Update Project Plan
3.5 – Prepare Proof of Capabilities (POC) Test Scripts
3.6 – Develop Supplemental RFP Material
3.7 – Develop Evaluation Methodology
3.8 – Distribute Draft RFP Internally for Review
3.9 – Develop Potential Vendor Listing
3.10 – Publish And Release Final RFP
3.11 – Coordinate /Assist in Responding to Bidder Questions

✓ Functional Requirements Section of RFP
✓ Technical Requirements Section of RFP
✓ Project Cost Estimate Ranges
✓ General Timeline for Implementation
✓ Updated Project Plan
✓ POC Test Scripts
✓ Supplemental RFP Material
✓ Evaluation Methodology
✓ Evaluation and Scoring Section of RFP
✓ Draft / Final RFP
✓ Potential Vendor Listing
✓ Vendor RFP Release Announcement
✓ Assistance with City Responses to Bidder Questions

4 — Proposal Evaluation and Selection
4.1 – Coordinate and Facilitate Evaluation Committee
4.2 – Develop Evaluation and Scoring Sheet Templates
4.3 – Review and Compile Completed Evaluation / Scoring Sheets
4.4 – Coordinate Onsite Vendor Proof of Capabilities (POC)
4.5 – Perform Due Diligence Background Investigations
4.6 – Prepare for Site Visits
4.7 – Conduct Vendor Selection

✓ Establish Evaluation Committee
✓ Evaluation and Scoring Sheet Templates
✓ Compilation of Completed Evaluation and Scoring Sheets
✓ Vendor POC Agenda
✓ Notes from Each Session
✓ Reference Check Guidelines and Summaries
✓ Site Visit Guidelines and Summaries
✓ Selection Report and Presentation

5 — Contract Negotiations
5.1 – Develop Vendor Statement of Work
5.2 – Develop Negotiation Strategy
5.3 – Review Initial Agreements and Provide Recommendations
5.4 – Participate in Agreement Negotiations Sessions
5.5 – Contract Approval

✓ Draft / Final Vendor Statement of Work
✓ Documented Negotiation Strategy
✓ Agreement Negotiation Recommendations
✓ Notes from Negotiation Sessions
✓ Attendance at City Council Meeting

Figure 2 – Project Approach and Deliverables

In the remainder of this section, we discuss each phase in detail, including associated tasks, activities and deliverables.

Phase 1 – Project Initiation

The primary purpose of Phase 1 is to prepare for and initiate the project under a well-defined project plan and schedule, and to ensure alignment of expectations (i.e. purpose, timeline, resources, activities, etc.) among all project participants.   To accomplish this, it requires careful planning and coordination between NexLevel and the City's Project Manager, as well as communication outreach activities to all City staff that will be involved in the project.

NexLevel recognizes the need to apply project management processes and standards to our projects that include the following:

♦ Confirm understanding of project goals and objectives at all levels of the City

♦ Identify potential risks, and working with the City, develop realistic risk mitigation strategies

♦ Communicate expectations to participants and stakeholders to ensure expectations are proactively managed

♦ Complete activities in a way that minimizes disruption to daily City operations

The following table identifies each activity and associated deliverables.

Table 2 - Phase 1 Activities and Deliverables

Project Approach: Phases and Tasks	Deliverables
1 Project Initiation: 1.1 – Planning Meeting / 1.2 – Project Kickoff Meeting / 1.3 – Project Plan	✓ **Project Planning Agenda** ✓ **Interview Matrix** ✓ **Kickoff Meeting Presentation** ✓ **Project Plan**

Task	Activity	Description	Deliverables
1.1	Planning Meeting	NexLevel will meet with the City's Project Sponsor and Project Manager to review and confirm the following project components: ♦ Project objectives, scope of work, and schedule ♦ Project status and update requirements ♦ Project risks and risk mitigation strategies ♦ Project issue management methods ♦ Identification of staff to be involved in the project which includes drafting the initial Interview Matrix	Project Planning Agenda Interview Matrix

Task	Activity	Description	Deliverables
1.2	Kickoff Meeting	It is important that all project participants have a common understanding of the project objectives, activities, timelines, and participant requirements. NexLevel wants to avoid any surprises to participants and strives for transparency in the methods to complete the project. To facilitate this, NexLevel will prepare a Microsoft PowerPoint presentation and facilitate a Project Kickoff meeting. The Kickoff meeting will prepare the staff for the project and provide an opportunity for staff to ask questions.	Kickoff Meeting Presentation
1.3	Project Plan	NexLevel will finalize and deliver an initial project plan that includes, at a minimum, objectives, scope, resources, risks, budget, and baseline schedule.	Project Plan

Phase 2 – Assessment and Requirements Development

NexLevel will perform a thorough assessment of the current environment capabilities, functions, and interfaces. All current features and functions will be documented, listed, and evaluated to determine if they are still required. The assessment of the current permitting system and processes will include a high level description for each permitting function.

The current environment assessment will help us determine the system features and functions that must be replaced. The capabilities of the current permitting system that are still required provide a starting point for requirements and specifications of the replacement system. Complete documentation of current environment and systems will also facilitate planning for an automated conversion of data to the replacement system.

Once the current environment is fully understood and documented, it is important to identify opportunities for improving processes, eliminating unnecessary procedures, increased information sharing, and automating workflow. As part of this phase, NexLevel will document any features not included in the current system that should be considered for a future system. This is the time for NexLevel to analyze existing processes to identify opportunities for improving the integration of data, avoiding potential redundancies, minimizing time-consuming steps, minimizing the potential for introduction of errors, and to generally improve the overall effectiveness of operations.

This process should focus on functional visions, objectives, and goals, rather than a specific technology or system. The following list contains considerations that need to be evaluated when procuring an enterprise system to ensure that in the future state, work is performed more efficiently and effectively:

- Maximizing resources by providing staff timely and easy access to information
- Doing work once and on time
- Collecting and recording each piece of information only once
- Sharing information online to allow for immediate and concurrent delivery of multiple services
- Eliminating the need for paper and forms-based work queues
- Integrating policy into the automated processes and procedures

NEXLEVEL

♦ Simplifying processes to eliminate the need for task compartmentalization, excessive specialization, and multiple hand-offs
♦ Completing services in an integrated manner to the extent possible
♦ Taking maximum advantage of enabling technologies
♦ Using the system to perform and control routine work actions
♦ Applying common sense in matching processes, approaches, and technology

In Table 3 – Phase 2 Activities and Deliverables, we identify the activities and deliverables to be completed as part of this phase.

Table 3 - Phase 2 Activities and Deliverables

Project Approach: Phases and Tasks	Deliverables
2 *Assessment and Requirements Development* 2.1 – Documents Request 2.2 – Initial Documentation of Existing Systems 2.3 – Conduct Interview Sessions with Identified Staff 2.4 – Identify / Document Other Common LMS Functionality 2.5 – Develop Risk Management Plan 2.6 – Formalize Requirements	✓ Inventory Listing of Documents Received ✓ Draft Workflows ✓ Recommendations Regarding Best Practices ✓ Risk Management Plan ✓ Draft / Final Citywide LMS Needs Assessment Report

Task	Activity	Description	Deliverables
2.1	Documents Request	NexLevel will request documentation to familiarize us with current processes, systems, data flows, reports, policies, and procedures for processes that utilize the land management, planning and permitting functions.	Inventory Listing of Documents Received
2.2	Initial Documentation of Existing Systems	Working with the City, NexLevel will document the current environment to include key workflows of existing practices and procedures that support the City's land management, planning and permitting functions.	Draft Workflows
2.3	Conduct Interview Sessions with Identified Staff	This task involves conducting interviews with City staff to understand the current processes, requirements, issues, business practices, future needs, potential problems and opportunities for improvement. NexLevel will create an interview checklist that will be used in the interviews to ensure consistency and completeness in the sessions. This list of questions will be based on our experience with other cities selecting new software. Working with City staff, NexLevel will determine what sessions should be group or individual interviews. NexLevel anticipates approximately 20 interviews to complete this process.	

NEXLEVEL

Task	Activity	Description	Deliverables
2.4	Identify / Document Other Common LMS Functionality	NexLevel will research current LMS applications and utilize information gathered to compare current application features and functions with what the City is considering in its use of a new LMS application.	Recom-mendations regarding Best Practices
2.5	Develop Risk Management Plan	After reviewing the current environment, NexLevel will develop a Risk Management Plan that will highlight the areas requiring mitigation either prior to, during, or after implementation. Our approach to assessing risk focuses on the following areas: ♦ Business Continuation Risk ♦ Migration Risk ♦ Technology Risk ♦ Implementation Approach Risk ♦ Economic Risk	Risk Management Plan
2.6	Formalize Requirements	Utilizing data gathered during the previous activities, NexLevel will develop the system's functional and technical requirements that will clearly identify the City's user needs. NexLevel will provide an initial draft needs assessment report for City review and comment, revise the draft report based on City input, and produce a final needs assessment report.	Draft Citywide LMS Needs Assessment Report Final Citywide LMS Needs Assessment Report

Phase 3 – RFP Development, Release and Administration

This phase is focused on creating the RFP and supporting processes to allow the City to select and procure the solution(s) that provide the best overall value. An RFP is a highly structured document that specifies minimally acceptable administrative, functional, technical, and contractual requirements, as well as the evaluation criteria that will govern the contract award. It is important to note that while the RFP is a highly structured document, it should also be concise and straightforward such that vendors are able to respond in an efficient and comprehensive fashion.

The City's technical requirements should also allow room for vendors to offer innovative solutions that exceed the specifications in the RFP. Meeting the minimum mandatory requirements should receive no more than a satisfactory rating. To demonstrate added value, a vendor must describe how a component is integrated with other solution components. Explaining, in addition, the technical component's contribution to the organization's business objectives is an illustration of maximum added value.

In Table 4 – Phase 3 Activities and Deliverables, we identify the activities and deliverables to be completed as part of this phase.

NEXLEVEL

Table 4 - Phase 3 Activities and Deliverables

Project Approach: Phases and Tasks	Deliverables
3 — RFP Development, Release and Administration 3.1 – Finalize Requirements for Replacement System 3.2 – Establish Technical Scope for Replacement System 3.3 – Compile Replacement Cost and Timeline Information From Potential Vendors 3.4 – Update Project Plan 3.5 – Prepare Proof of Capabilities (POC) Test Scripts 3.6 – Develop Supplemental RFP Material 3.7 – Develop Evaluation Methodology 3.8 – Distribute Draft RFP Internally for Review 3.9 – Develop Potential Vendor Listing 3.10 – Publish And Release Final RFP 3.11 – Coordinate /Assist in Responding to Bidder Questions	✓ Functional Requirements Section of RFP ✓ Technical Requirements Section of RFP ✓ Project Cost Estimate Ranges ✓ General Timeline for Implementation ✓ Updated Project Plan ✓ POC Test Scripts ✓ Supplemental RFP Material ✓ Evaluation Methodology ✓ Evaluation and Scoring Section of RFP ✓ Draft / Final RFP ✓ Potential Vendor Listing ✓ Vendor RFP Release Announcement ✓ Assistance with City Responses to Bidder Questions

Task	Activity	Description	Deliverables
3.1	Finalize Requirements for Replacement System	NexLevel will document the functional requirements to be met by the new application software. This activity includes: ♦ Business process/workflow assessment and recommendations ♦ System improvements and user need evaluations ♦ Review of existing software strengths and weaknesses ♦ Discussion of future trends in enterprise permit management ♦ Software integration planning	Functional Requirements Section of RFP
3.2	Establish Technical Scope for Replacement System	NexLevel will work with the City to establish the technical scope for the replacement system procurement. This should identify not only the relevant modules, but also the following components: hardware, software, database, technical platform, development approach, integration issues, technical interfaces, testing plan, resource requirements, training plan, ongoing maintenance, information security, impact on existing infrastructure and end-users, and backup and operational recovery.	Technical Requirements Section of RFP
3.3	Compile Replacement Cost and Timeline Information From Potential Vendors	NexLevel will informally gather information from potential LMS software vendors regarding cost estimates and implementation timelines for the replacement of the City's current LMS system. This process will also provide vendors with an informal notification that the City is planning on issuing an RFP for LMS system replacement.	Project Cost Estimate Ranges General Timeline for Implementation

NEXLEVEL

Task	Activity	Description	Deliverables
3.4	Update Project Plan	NexLevel will update the Project Plan that includes the following basic elements: ♦ Phases ♦ Tasks and Subtasks ♦ Milestones and Deliverables ♦ Schedule The Project Plan will include dependencies, thus enabling a Gantt chart to be developed. In addition, it will include details pertaining to participants, project costs, staff, assets, and budgetary resources required for each task.	Updated Project Plan
3.5	Prepare Proof of Capabilities (POC) Test Scripts	Working with the City, NexLevel will define test scripts and scenarios that vendors will follow when demonstrating the features of their products and that will allow for the identification of key differentiators.	POC Test Scripts
3.6	Develop Supplemental RFP Material	Drawing on previous work products, NexLevel will prepare the supplemental RFP material and requirements: ♦ Prepare RFP introductory material ♦ Prepare current system/environment material ♦ Prepare administrative requirements material ♦ Prepare technical requirements material ♦ Prepare deliverable requirements material ♦ Prepare costing requirements material ♦ Incorporate City's contract material ♦ Prepare format section material	Supplemental RFP Material

NEXLEVEL

Task	Activity	Description	Deliverables
3.7	Develop Evaluation Methodology	The purpose of this task is to thoroughly define the Evaluation Methodology, which will guide the selection process. This step is critical to the ultimate selection of the appropriate vendor. NexLevel will provide examples from other municipal organizations and assist in identifying criteria appropriate for the City. These criteria may include factors such as: ♦ Responsiveness to functional and technical requirements ♦ Responsiveness to administrative requirements ♦ Long-term viability ♦ Vendor support and maintenance ♦ Vendor implementation approach ♦ Vendor experience ♦ Cost	Evaluation Methodology Evaluation and Scoring Section of RFP
3.8	Distribute Draft RFP Internally for Review	NexLevel will compile a draft RFP for the City's review. It is essential for this document to be reviewed for accuracy by all key stakeholders including representatives of each department or division that will use or be affected by the new system.	Draft RFP
3.9	Develop Potential Vendor Listing	Based on NexLevel's experience and research, we will provide a recommended vendor listing to ensure the City procurement creates a competitive environment and offers the City quality and qualified proposal responses.	Potential Vendor Listing Vendor RFP Release Announcement
3.10	Publish and Release Final RFP	NexLevel will update the RFP and complete the preparation of the Final RFP. The Final RFP should be made available to vendors in both hard and electronic copy formats.	Final RFP
3.11	Coordinate and Assist in Responding to Bidder Questions	NexLevel will assist the City in responding to bidder questions. NexLevel will work with the City to develop answers to technical questions, compile responses to all bidder questions, and format them for publication.	Assistance with City Responses to Bidder Questions

Phase 4 – Proposal Evaluation and Selection

The primary purpose of this phase is to ensure that the vendor selected is in the best interest of the City. This requires careful and detailed review of information provided in response to the RFP, as well as independent research, validation and verification.

In Table 5 – Phase 4 Activities and Deliverables, we identify the activities and deliverables to be completed as part of this phase.

Table 5 - Phase 4 Activities and Deliverables

<table>
<tr>
<td colspan="2">Project Approach: Phases and Tasks</td>
<td>Deliverables</td>
</tr>
<tr>
<td>4

Proposal Evaluation and Selection</td>
<td>
4.1 – Coordinate and Facilitate Evaluation Committee
4.2 – Develop Evaluation and Scoring Sheet Templates
4.3 – Review and Compile Completed Evaluation / Scoring Sheets
4.4 – Coordinate Onsite Vendor Proof of Capabilities (POC)
4.5 – Perform Due Diligence Background Investigations
4.6 – Prepare for Site Visits
4.7 – Conduct Vendor Selection
</td>
<td>
✓   Establish Evaluation Committee
✓   Evaluation and Scoring Sheet Templates
✓   Compilation of Completed Evaluation and Scoring Sheets
✓   Vendor POC Agenda
✓   Notes from Each Session
✓   Reference Check Guidelines and Summaries
✓   Site Visit Guidelines and Summaries
✓   Selection Report and Presentation
</td>
</tr>
</table>

Task	Activity	Description	Deliverables
4.1	Coordinate and Facilitate Evaluation Committee	NexLevel will work with the City to identify individuals who should participate in the evaluation of the replacement system. This should include key stakeholders and representatives of departments or divisions that have a significant dependence on permitting functions.	Establish Evaluation Committee
4.2	Develop Evaluation and Scoring Sheet Templates	NexLevel will work with the City to develop evaluation and scoring sheets. The evaluators will use these sheets to document their evaluation results and to ensure each evaluator focuses on the same evaluation factors.	Evaluation and Scoring Sheet Templates
4.3	Review and Compile Completed Evaluation and Scoring Sheets	NexLevel will gather and summarize the evaluation and scoring sheets that have been completed by the Evaluation Committee.	Compilation of Completed Evaluation and Scoring Sheets

NEXLEVEL

Task	Activity	Description	Deliverables
4.4	Coordinate Onsite Vendor Proof of Capabilities	In support of this activity, NexLevel will: ♦ Prepare the Vendor POC Agenda and high level scripts that will be utilized by the Vendors during the sessions ♦ Develop the scoring approach for evaluating the Vendor POCs ♦ Participate in these sessions, estimating three (3) vendors and two (2) days of demonstrations per vendor ♦ Provide a debriefing of the sessions at the conclusion of each day of demonstrations Because NexLevel believes these sessions to be invaluable when selecting a new software solution, we will work with the City to determine who should attend these sessions and participate in the evaluation process. NexLevel also recommends requesting the vendors utilize City data within the scripts whenever possible.	Vendor POC Agenda Notes from Each Session
4.5	Perform Due Diligence Background Investigations	NexLevel will prepare Reference Check Guidelines to be used when calling clients of the vendors. NexLevel will develop the guidelines to focus on the key City issues. NexLevel recommends that City personnel actually perform the reference checks, as these are a valuable education tool.	Reference Check Guidelines Reference Check Summaries
4.6	Prepare for Site Visits	NexLevel will prepare a Site Visit Agenda and Guidelines for use in the visits to other agencies currently utilizing the proposed software. NexLevel recommends that City personnel participate in the site visits, as this enhances the City staff learning experience.	Site Visit Guidelines Site Visit Summaries
4.7	Conduct Vendor Selection	NexLevel will assist the City in reviewing the evaluation and scoring for the vendor proposals, demonstrations, reference checks and site visits, and help lead the evaluation process to aid in selecting a final vendor. NexLevel will document the results of this analysis in the Selection Report and prepare an executive level presentation.	Selection Report and Presentation

NEXLEVEL

Phase 5 – Contract Negotiations

The purpose of this phase is to support the City during the negotiations between the City and the selected vendor. It is important that the City and the consultant remain consistent through the negotiations phase of the project. Thus, the tasks will focus on providing the City with the continuity to ensure all items and issues are documented and resolved prior to contracts being signed, and to ensure that commitments made during the proposal process and negotiations are accounted for in the final contract.

In Table 6 – Phase 5 Activities and Deliverables, we identify the activities and deliverables to be completed as part of this phase.

Table 6 - Phase 5 Activities and Deliverables

Project Approach: Phases and Tasks	**Deliverables**
5 — Contract Negotiations 5.1 – Develop Vendor Statement of Work 5.2 – Develop Negotiation Strategy 5.3 – Review Initial Agreements and Provide Recommendations 5.4 – Participate in Agreement Negotiations Sessions 5.5 – Contract Approval	✓ Draft / Final Vendor Statement of Work ✓ Documented Negotiation Strategy ✓ Agreement Negotiation Recommendations ✓ Notes from Negotiation Sessions ✓ Attendance at City Council Meeting

Task	Activity	Description	Deliverables
5.1	Develop Vendor Statement of Work	NexLevel will develop a draft Statement of Work document for the City's review and feedback, and will publish a final Statement of Work based on the City's feedback.	Draft Vendor Statement of Work Final Vendor Statement of Work
5.2	Develop Negotiation Strategy	It is critical that the City establish a negotiation strategy prior to entering into negotiations with the successful vendor. The negotiation strategy should consider areas of concern or weakness, outstanding issues, pricing, and risks. Formalizing a negotiation strategy will help ensure a unified front to the vendor and help ensure key items are not overlooked.	Documented Negotiation Strategy
5.3	Review Initial Agreements and Provide Recom-mendations	NexLevel will assist the City in review of the agreements for the successful bidder. It is anticipated that the enterprise permitting system will require several agreements (i.e. professional services, software licensing, maintenance/support, integration, etc.).	Agreement Negotiation Recommendations
5.4	Participate in Agreement Negotiations Sessions	NexLevel will participate in negotiation sessions with the successful bidder and record the results of negotiations concerning the statement of work, implementation services, software licensing, and warranty and maintenance.	Notes from Negotiation Sessions

NEXLEVEL

Task	Activity	Description	Deliverables
5.5	Contract Approval	NexLevel will attend City Council meetings as required to provide support for the selection team's chosen vendor and to help justify the related expense.	Attendance at City Council Meeting

Proposed Project Schedule

Based on our experience with past LMS procurements, and taking into consideration the size and complexity of the City, NexLevel proposes the following project timeline:

Table 7 – Proposed Project Timeline

Phase	Proposed Timeline (in weeks)
Phase 1 – Project Initiation	Weeks 1 – 2
Phase 2 – Assessment and Requirements Development	Weeks 2 – 10
Phase 3 – RFP Development, Release and Administration	Weeks 10 – 14
RFP Close Date	
Phase 4 – Proposal Evaluation and Selection	Weeks 15 – 24
Phase 5 – Contract Negotiations	Weeks 25 - 32

The proposed timeline was developed to help ensure a successful procurement process that will lead to the selection of the best fit solution for the City of Fresno. Based on our prior experience, we anticipate the completion of Phases 1 – 3 within four months of contract signing. Once vendors have responded and the RFP close date has passed, we anticipate completing Phases 4 and 5 within five months.

As part of Phase 1 of the project, NexLevel will work with the City to review, refine and finalize a detailed project schedule.

THIS DOCUMENT IS FORMATTED FOR DUPLEX PRINTING – THIS PAGE IS INTENTIONALLY LEFT BLANK

Section D – Subcontractor Information

NexLevel will not be utilizing subcontractors for any portion of this project.

THIS DOCUMENT IS FORMATTED FOR DUPLEX PRINTING – THIS PAGE IS INTENTIONALLY LEFT BLANK

Section E – Representative Resumes

NexLevel's foundation is in talented, high-caliber individuals guided by the personal and professional principles of honesty, integrity, quality, and a commitment to client satisfaction. This foundation and associated ethics help us to attract and retain a veteran staff that inspires confidence in our clients.

Our proposed team has extensive hands-on experience in similar application procurement efforts in California, as well as demonstrating a proven history of successfully working together. On the following pages, we provide a resume pertaining to each individual.

Patrick Griffin – Managing Consultant

Engagement Manager / Subject Matter Expert

Mr. Griffin has a 31 year background in local government, including oversight of day to day IT operations for both City Hall and Police Department operations, and general management experience at the Assistant City Manager level. He has served as project sponsor for a variety of IT related projects in full service municipal organizations, and is familiar with the complexity of IT service delivery in local government. Having been responsible for a variety of areas in his municipal career, Mr. Griffin's participation provides a unique and valuable management perspective to the City's project. During his municipal career, Mr. Griffin held the following positions:

2010 – 2012 City of Chino Assistant City Manager - Community Development
Mr. Griffin served as the Director of the Department and was responsible for all activities relating to building, planning, code enforcement, economic development, and redevelopment. In addition, Mr. Griffin oversaw the activities of the City's Planning Commission.

1994 – 2012 City of Chino Assistant City Manager
Mr. Griffin was responsible for a variety of activities including citywide information technology management, citywide budget, investments, public information, and negotiations with the development community relating to major annexations and master development projects. During this time, Mr. Griffin served as the project sponsor and manager for the implementation of a comprehensive ERP replacement system (Tyler MUNIS).

1980 – 1994 City of Orange Financial Management
Mr. Griffin managed a variety of Finance Department functions including payables, receivables, budget and other finance-related activities.

Mr. Griffin also served on the Fullerton Planning Commission for four years.

Since retiring from the public sector and joining NexLevel, Mr. Griffin has managed several significant projects throughout California, including the recently completed project for the City of La Quinta in which Mr. Griffin and Ms. Abbott provided management consulting services for the needs assessment, selection, contract negotiations, and subsequent implementation support for a new land management, planning and permitting system for the City.

Mr. Griffin possesses the necessary analytical skills and attention to detail to ensure that the final work product delivered will meet or exceed the expectations of the City. Mr. Griffin has actively managed and / or provided subject matter expertise on the following NexLevel engagements:

City of Beverly Hills	City of La Quinta
City of Los Angeles	City of Glendale
City of Pismo Beach	City of Manhattan Beach
City of Ontario	City of Rancho Palos Verdes
City of San Clemente	Inland Empire Utilities Agency
East Valley Water District	City of Moreno Valley
Camrosa Water District	City of San Bernardino

NEXLEVEL

Cindy Abbott, PMP – Managing Consultant

Subject Matter Expert

Ms. Abbott has a proven ability to work with clients to define requirements, manage projects, research technical options, and successfully deliver innovative solutions to support organizational goals. In addition, she has more than 19 years of experience as a hands-on IT manager and Project Manager for the cities of Irvine, Orange and Chino. Ms. Abbott's experience in these municipalities is outlined below:

2004 – 2010   City of Chino   Information Technology Manager

Ms. Abbott directed all information technology activities for the City, including day-to-day operations management, project management, application support, help desk and desktop support, LAN/WAN, network security, and data center management. During this time, Ms. Abbott served as project manager for the implementation of the permitting application, the procurement and implementation of recreation software, the ERP RFP and the technical activities related to the City's ERP implementation.

2000 – 2004   City of Irvine   Information Technology Manager

In addition to responsibility for the day-to-day operations of the City's IT function, Ms. Abbott was involved in several significant projects while in Irvine, including project oversight and contract negotiations for the streaming video system implementation, the document management system and the permitting system data conversion and go-live.

1994 – 2000   City of Orange   Information Technology Manager

During her time at Orange, Ms. Abbott was responsible for all IT activities for the organization. In addition to IT oversight, Ms. Abbott provided project oversight for the requirements definition, RFP, vendor selection and negotiation, and implementation for the Police Department's replacement Computer Aided Dispatch and Records Management Systems.

Most recently, Ms. Abbott supported the City of La Quinta in a project to replace their existing land management, planning and permitting system, including a needs assessment, RFP development, vendor selection, and contract negotiations.   In addition, Ms. Abbott performed similar services for the City of Fairfield in 2012-2013. Ms. Abbott is currently working with the City of Moreno Valley to complete a comprehensive Development Services Business Processes analysis in preparation for replacement of the City's current LMS system. Ms. Abbott is an active certified Project Management Professional with significant project management experience including the following NexLevel engagements:

City of Pasadena	City of Beverly Hills
City of Moreno Valley	City of Novato
City of Huntington Beach	City of Stockton
City of Fairfield	City of San Luis Obispo
City of Novato	City of Walnut Creek
City of Santa Cruz	City of Rancho Palos Verdes
City of Manhattan Beach	Douglas County, Nevada
Santa Clara County Fire Department	Moulton Niguel Water District
Inland Empire Utilities Agency	Rancho California Water District
South Orange County Wastewater Authority	

NEXLEVEL

LuAnne Sloan – Senior Consultant

Subject Matter Expert

Ms. Sloan has over 25 years of experience in the IT and telecommunications industries in both public and private sectors. She has an extensive and diverse information technology background, having held the positions of consultant, project manager, process management specialist, and systems analyst. Ms. Sloan has developed excellent analytical, technical, facilitation, project management, and communications skills. With these skills, Ms. Sloan has established a successful record of accomplishment supporting both small and large-scale project management and system implementation efforts. In addition, her skills have been refined through successfully leading cross-functional teams in support of many product implementations and reengineering efforts.

Most recently, Ms. Sloan served as the as project manager for the state-wide development and implementation of the Department of Fish and Wildlife's Automated Data License System (ALDS).

Ms. Sloan has led or participated in the following NexLevel projects:

City of Riverside	City of Santa Clara
City of Pomona	City of Orange
City of Lakewood	City of Mountain View
City of Santa Clara	California Department of Fish and Wildlife
Academic Senate-California Community Colleges	University of California San Francisco

NEXLEVEL

Section F – Cost Proposal

Based on NexLevel's past experience on similar projects, as well as our review of the City's RFQ, we will complete this project per the RFQ requirements and our proposed scope of services for a single fixed cost of $98,208. This single fixed cost is inclusive of all travel and overhead to complete the project.

Hourly Cost Schedule for Additional Work

Per the RFQ requirements, we provide the required hourly cost schedule for any additional work that may be requested by the City.

Table 8 – Cost Schedule For Additional Work

Staff Resource / Type	Hourly Rate	Direct Cost Item	Billable Rate
Managing Consultant	$165.00	Travel Costs from Orange County Area	Actual Cost including mileage at $.56/mile
Senior Consultant	$140.00	Travel Costs from Sacramento Area	Actual Cost including mileage at $.56/mile

THIS DOCUMENT IS FORMATTED FOR DUPLEX PRINTING – THIS PAGE IS INTENTIONALLY LEFT BLANK

Section G - References

NexLevel offers the City of Fresno significant experience with public sector clients offering similar demographics to the City. For this proposal, NexLevel has provided client references for our most recently completed or currently underway projects.

Reference No. 1

Client Name:	City of La Quinta	Contact Name:	Chris Escobedo, Assistant to City Manager
Address:	78495 Calle Tampico La Quinta, CA 92253	Phone Number:	(760) 777-7010
Date of Project:	2013-2014	Email Address	Cescobedo@la-quinta.org
Services Performed:	Land Management / Planning / Permitting System Requirements, Procurement and Project Management services; ERP System Requirements and Procurement services. Contract amount $123,000.		

Reference No. 2

Client Name:	City of Fairfield	Contact Name:	Steve Garrison, CIO
Address:	1000 Webster Street Fairfield, CA 94533	Phone Number:	(707) 428-7582
Date of Project:	2012-2013	Email Address	sgarrison@ci.fairfield.ca.us
Services Performed:	Permitting System Needs Assessment. Contract amount $24,840.		

Reference No. 3

Client Name:	City of San Luis Obispo	Contact Name:	Steve Schmidt, IT Manager
Address:	990 Palm Street San Luis Obispo, CA 93401	Phone Number:	(805) 781-7570
Date of Project:	2011 - 2013	Email Address	sschmidt@slocity.org
Services Performed:	Application Procurement Services. Contract Amount $37,260		

Upon request, NexLevel would be happy to provide additional reference information.

NEXLEVEL

THIS DOCUMENT IS FORMATTED FOR DUPLEX PRINTING – THIS PAGE IS INTENTIONALLY LEFT BLANK