INFORMATION TECHNOLOGY
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May 17, 2022

To: Mahesh Sharma, County Administrator

From: Matt Hirst, Information Technology Director

Subject: Professional Services for the selection of line of business application
             for the Planning and Development Department

Scott County Information Technology is working with Planning and Development (P&D) to review and modernize line of business applications and processes in the Department.

To that end, Scott County Information Technology has requested and received a proposal for Professional Services to assist in the development of requirements and issuance of a Request For Proposal (RFP) for software to support P&D.

The proposal from BerryDunn is comprised of four components:
1) Project design and requirements development. ($14,620)
2) RFP Development. (Optional - $3440)
3) System Selection. (Optional - $14,190)
4) Contract Negotiation. (Optional - $8,600)

BerryDunn was originally selected through an RFP as an IT professional services consultant to assist the department with a technology assessment in 2010. The company has subsequently assisted the County with the selection of Enterprise Resource Planning (ERP Financials) and Enterprise Content Management (ECM Document Imaging) software/technology solutions.

It is recommended that the Board authorize the IT Director to sign a service agreement with BerryDunn in an amount not to exceed $40,850. Monies are available in the CIP budget to pay for this service.

Encl(s): 1

Cc: Chris Mathias

May 4, 2022

Scott County
Attn: Stephanie Macuga, MSIT, MPA, PMP
600 W 4th Street
Davenport, Iowa 52801

Sent via email to Stephanie.Macuga@scottcountyiowa.gov.

Dear Stephanie Macuga:

On behalf of Berry Dunn McNeil & Parker, LLC (BerryDunn), thank you for the opportunity to present our approach to supporting Scott County (the County) as it selects a new community development software system. We value our existing relationship with the County and appreciate the time you have taken to discuss your goals for this project.

Understanding the County's Needs

We understand that the County is looking to procure and implement a new software system to support its Planning and Development Department (Department). The Department is currently using a 15-year-old custom-built software system. In many ways, this software still works well, but the Department and County recognize that it is time to modernize, and with a new director in place, the Department is poised to do so.

The County has experience with the enterprise software system selection process and will leverage this experience throughout the upcoming procurement. Already, the County has begun asking staff what they like about the current software and what functionalities they might want in a future software. Now, the County is seeking the support of a consultant who can, keeping the County's prior experience in mind, aid in requirements gathering, request for proposals (RFP) development and review, and vendor comparison and selection.

BerryDunn is pleased to provide a flexible approach that provides the exact level of support requested by the County. We understand that needs may change throughout the project, and the County can rely on our team to adapt in response. We hope the County will find continued confidence in our in-depth knowledge of your culture and goals for change as well as our experience conducting similar projects for other public sector community development agencies.

Detailed Approach

On the following pages, we provide a detailed account of our work plan to complete the County's desired tasks. BerryDunn strives to be flexible when it comes to development and execution of an effective project plan. We understand that no two projects are exactly alike, and we believe that one of the primary reasons we have been successful with similar projects is our willingness to be flexible in adapting to our clients' unique needs.

Throughout our three-phased approach, illustrated in Figure 1 on the following page, our team will apply quality assurance processes that incorporate Department review and approval of all deliverables and key milestones. Additionally, built-in project management and change management best practices will help keep the project on time, on budget, and progressing at a healthy pace.

Figure 1: BerryDunn's Project Approach

Scope of Services

Below, we present our detailed work plan to complete the County's requested scope of services.

Project Initiation

0.1 Conduct initial project planning. We will conduct an initial project planning teleconference with the County's project team to introduce key team members, clarify goals and objectives, identify known project constraints, and refine dates and/or tasks, as appropriate. We will discuss our approach for managing communications, scope, risks, and resources. We will also request names and contact information for the appropriate County staff members involved in the project. As part of this planning meeting, we will also confirm the stakeholder departments and divisions that will be included in the project.

0.2 Update the Project Work Plan and Develop a Project Schedule. Based on the information gathered from our initial project planning teleconference, we develop the draft Project Work Plan and Schedule. In addition to the components gathered from Task 0.1, the Project Work Plan and Schedule will address our approach to providing the services requested by the County, the agreed-upon time frame for each task, and agreed-upon procedures between our project team and the County's related to project control, including quality management and deliverable submission/acceptance management.

Deliverable 1 – Project Work Plan and Schedule

Phase 1. Requirements Development

1.1 Develop and issue an information request, and review the results. We will provide the County's project team with an information request sheet to help gather available documentation to support the work effort (e.g., organizational charts, documentation on existing systems, and policy documentation). We will respectfully request that the County's project team provide the documentation prior to the project kickoff presentation and fact-finding meetings, as reviewing this information in advance of our work will enable us to be more efficient, become more knowledgeable

of the current environment, and make best use of County personnel's time.

1.2 Facilitate a kickoff presentation. We will conduct a web conference project kickoff presentation with County project stakeholders that will serve as an opportunity to introduce our project team members, discuss goals, present our project approach and methodology, review the schedule of key project dates, and answer questions. As part of this presentation, the County's project sponsor is expected to participate and speak to the goals and objectives of the initiative.

1.3 Facilitate fact-finding meetings. Following the project kickoff presentation, we will conduct web conference fact-finding meetings with County staff from the departments identified as current and future users of the community development, including IT staff and representative stakeholders from each department. We have planned for up to 12 hours of meetings over a one-week period.

1.4 Develop Preliminary Functional and Technical Requirements. BerryDunn has developed a database of community development-specific technical and functional requirements based on our experience with other governmental agencies and our knowledge of software system functionality and best practices. Drawing from this database, we will make refinements for those processes that are critical or unique to the County. We will also update the previously developed community development requirements based on new stakeholders or additional information collected through fact-finding.

These requirements will support supplemental functionality requirements with key reporting, interface, and conversion enhancements. In our recent experience, those areas have significantly differentiated vendors' solutions and required a specific focus in the selection activities. Our analysis typically results in about 75% of the requirements being defined upfront for most of our clients.

Deliverable 2 – Preliminary Functional and Technical Requirements

1.5 Facilitate joint requirements planning (JRP) work sessions. We will facilitate a series of web conference JRP work sessions with County stakeholders and our project team members to review the preliminary requirements. We will reconvene many of the same stakeholders, organized by functional area, that met during fact-finding activities to discuss the future system capabilities. These sessions will also include one session focused on the technical aspects involved with the County's project. Using the preliminary list, we will review and confirm each item and assign a relative criticality to communicate to vendors responding to the list as part of their RFP responses. We will also facilitate similar meetings to review potential interfaces and data conversion objects. Once these have been reviewed, we will update the list to final.

Our role in facilitating the JRP work sessions is to contribute our focused knowledge of the vendor marketplace and align the items requested in the list with the goals and objectives of the project. For example, we might comment that functionality being requested is beyond the core capabilities of vendors and might represent a cost increase. Conversely, we can help recommend requirements to include that might be commonplace today, but beyond the familiarity of County stakeholders. We have planned for up to 12 hours of meetings over a one week period.

Deliverable 3 – Final Functional and Technical Requirements

Phase 2. RFP Development (OPTIONAL)

2.1 Develop RFP Package. We will develop a draft RFP Package that incorporates information pertaining to the history of the project; a high-level description of the County's current environment, desired approach to implementing a new community development solution, and functional and technical requirements; and a structured list of points for vendors to address in their responses.

Upon completion, we will coordinate a work session with the County's project team to review the draft RFP Package and collect any feedback or additional terms for inclusion before updating to final. We will provide the final RFP to the County's project team for distribution through standard channels. For added guidance in distribution, we will provide a list that includes most of the major community development solution vendors in the market.

Deliverable 4 – RFP Package

Phase 3. System Selection (OPTIONAL)

3.1 Assist with responding to vendor questions and developing addenda. Our project team will assist the County's project team in responding to vendor questions and developing corresponding addenda.

3.2 Assist with facilitating a vendor pre-proposal conference. Our project team will coordinate, plan, and lead a pre-proposal teleconference for interested vendors, facilitating the question-and-answer portion of the meeting. We will compile a list of questions raised and prepare suggested responses. These will be provided in a format that the County's project team can review, revise, and publish as an addendum to the RFP, as determined by procurement staff.

3.3 Perform an initial completion review of vendor proposals received, identify items for clarification, and develop a Proposal Executive Summary Memo. We will facilitate the proposal review process to identify issues, risks, exceptions, omissions, and objections, compiling them into a single Proposal Executive Summary Memo. The memo will identify key areas for consideration by the County's evaluation team related to each vendor's ability to meet minimum requirements, and their alignment with the evaluation criteria within the RFP. This memo will also include a comparison of vendor responses to the Functional and Technical Requirements. We plan to review up to eight proposals.

3.4 Facilitate Round 1 scoring meetings to identify short-listed vendors and items needing clarification. We will meet via web conference with the evaluation team to review the proposal summaries, discuss each proposal received, assist in the scoring process, and collect scores to identify the top preferred vendors to invite for demonstrations. We will clarify any open items with these short-list vendors before issuing invitations for demonstrations.

Deliverable 5 – Proposal Executive Summary Memo and Vendor Short List

3.5 Assist the County's project team in planning for demonstrations and writing demonstration scripts. We will meet with the County's project team to discuss the format of vendor

demonstration scripts. We will develop a draft demonstration script template and provide it to the County's project team for review. After finalizing an approved version, we will provide the appropriate scripts to each vendor in advance of their demonstrations.

3.6 Facilitate vendor demonstrations. One of our project team members will facilitate web conference demonstrations and assist the County's project team with facilitation for a period of up to three days (24 hours). Our project team's extensive background in the demonstration process will provide the County's project team with a unique perspective on how to score, prepare, evaluate, and participate in vendor demonstrations. We will participate in the second round of vendor scoring immediately following the final demonstration to identify the vendor or vendors for which the County's project team should perform its reference checks.

3.7 Facilitate a Round 2 scoring meeting to identify preferred vendors. We will meet with the evaluation team via web conference to review the proposal summaries, discuss each proposal received, assist in the scoring process, and collect scores to identify the top preferred vendors.

3.8 Assist in planning for reference checks and site visits. We will assist the County's project team with identifying tasks that should be accomplished prior to meeting at each site visit. We will also coordinate with the County's project team to discuss the suggested approach for the reference checks.

3.9 Facilitate a Final Scoring meeting. We will participate in the Final Scoring meeting via teleconference following the completion of reference checks and site visits. The objective will be to identify a preferred vendor and a second-choice vendor should contract negotiations with the first be unsuccessful.

Deliverable 6 – Preferred Vendor Identification

 Phase 4. Contract Negotiations (OPTIONAL)

4.1 Support the County in the contract negotiation process with its preferred vendor. Once a preferred vendor is selected, our project team will support the County in the contract negotiations process. We have been involved in contract negotiations from the client, vendor, and independent consultant perspectives, and understand how the contract impacts the implementation process. In conducting contract negotiations, we will draw on these experiences to help ensure the County's best interests are being met.

We will also work with the County's project team and legal counsel, as well as the preferred vendor, to develop a draft contract, using the County's contracting procedures and the vendor's proposal as starting points. We will review the contract documents with the County's project team to help ensure that requirements are clearly defined and to establish that the County agrees to the schedule, implementation process, fee arrangement, scope of services, vendor resources, deliverables, costs, acceptance criteria, and terms and conditions. We will also be present during negotiations with the preferred vendor. Should it become clear at any point during negotiations that the preferred vendor's solution or contract terms will not meet the needs of the County, we might recommend halting negotiations with that vendor and commencing negotiations with the alternate vendor.

In recognition of the many variables not yet known related to the contract negotiation timeline and work effort, and the potential to award to multiple vendors, we plan to commit up to 40 hours, billed as incurred.

Deliverable 7 – Contract Negotiation Assistance

Proposed Staff

Our proposed team, illustrated in Figure 4, has the in-depth experience and knowledge required to provide the County with the requested system selection support. Below and on the following page, we provide summaries of our team members' roles, responsibilities, and qualifications as they relate to this project. Full resumes are included at the end of this letter.

Figure 4: BerryDunn Team Organization
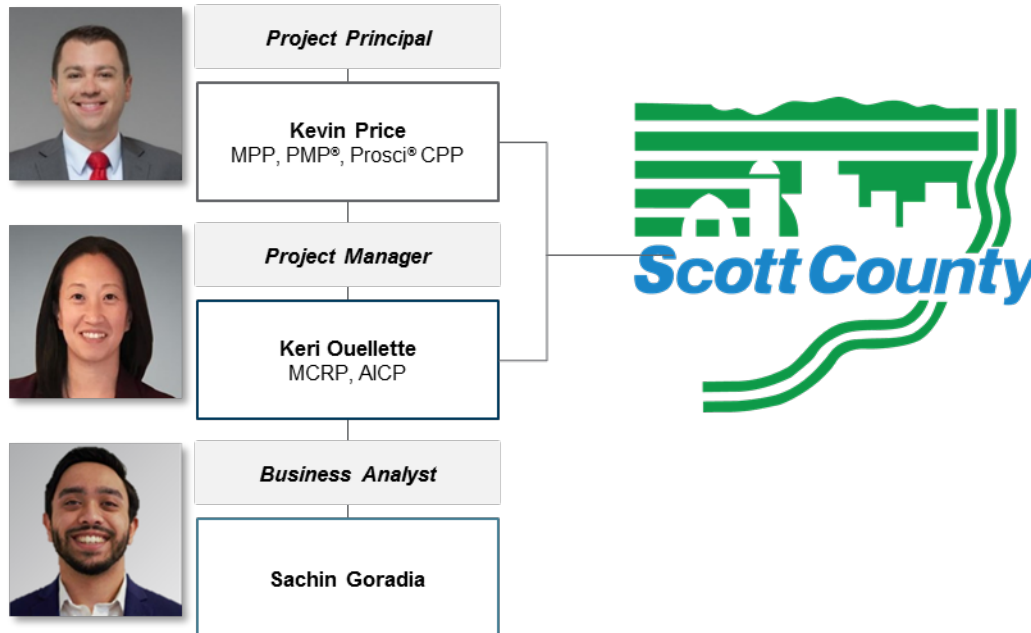
Should the scope of the project expand, we are able to pull from a team of more than 250 consultants who specialize in supporting public sector entities such as the County. In particular, our Community Development and Utility Operations (CDUO) Practice is comprised of former planning and development professionals who have experience leading agencies like the Department and overseeing software selection and implementation processes.

PROJECT PRINCIPAL

Has overall responsibility for the services we have proposed to the Department.

Kevin Price, MPP, PMP®, Prosci® CCP

Kevin is a principal in our Local Government Practice Group and leads our Community Development and Utility Operations (CDUO) Practice. He focuses his efforts on assisting local government clients with business process improvement, fee analysis, system selection, and implementation projects. A certified Project Management Professional® (PMP®), he has extensive experience in assessing the business needs and processes of municipal clients for permitting, inspections, planning, code enforcement, and land management functions. Kevin is also a Lean Six Sigma Green Belt, allowing him to continuously define, measure, analyze, improve, and control projects and environments for his clients.

PROJECT MANAGER

Acts as primary liaison with the Department and maintains a constructive and clear line of communication between Department staff and BerryDunn. Monitors the progress of the project, tracks the initiation and completion of tasks and milestones, and facilitates our meetings and project activities.

Keri Ouellette, MCRP, AICP

Keri is a senior consultant in BerryDunn's Local Government Practice Group. She joined BerryDunn after working as permitting manager for the City of Portland, Maine, where she gained a broad understanding of the complex issues that municipalities face in addressing growth and managing enforcement. Thanks to her previous work with New York City's Department of Housing Preservation and Development and the Town of Eastchester, New York, Keri has keen understanding of local government policy development in both small towns and large city agencies. Keri regularly helps clients evaluate processes and leads the development of standard operating procedures to improve efficiency.

BUSINESS ANALYST

Assists with current environment data analysis, stakeholder interviews, and deliverable development.

Sachin Goradia

Sachin is a consultant in BerryDunn's Local Government Practice Group. He is an expert at policy and economics research and analysis. He recently advised organizations on economic resources available for rebuilding services impacted by the COVID-19 pandemic. He is skilled in legislative analysis and in assisting public-sector clients to comply with local, state, and federal regulations, as well as ethical obligations.

Proposed Fees

Our total fixed-fee price to complete the County's desired scope of work is **$14,620.** In Table 1, we have outlined our costs by project deliverable. We have also provided a fixed-fee cost proposal for optional RFP Development, System Selection, and Contract Negotiation Assistance.

The following table contains the fees for services by deliverable, on a fixed-fee basis. We anticipate that this work will be completed remotely and travel expenses are excluded from the fees presented. We will submit monthly progress invoices based on the progress towards the completion of each deliverable and any actual travel expense incurred. We will not submit a final invoice for a deliverable without signed acceptance from the County.

Table 1: CD Software Selection Fees

No.	Phase/Deliverable	Fees
	Project Initiation	
	D1. Project Work Plan and Schedule	$1,720
1	**Requirements Development**	
	D2. Preliminary Functional and Technical Requirements	$7,740
	D3. Final Functional and Technical Requirements	$5,160
2	**RFP Development (OPTIONAL)**	
	D4. RFP Package	$3,440
3	**System Selection (OPTIONAL)**	
	D5. Proposal Executive Summary Memo and Vendor Short List	$7,310
	D6. Preferred Vendor Identification	$6,880
4	**Contract Negotiation Assistance (OPTIONAL)**	
	D7. Contract Negotiation Assistance	$8,600
	Project Initiation and Requirements Development Total	**$14,620**
	Project Total, Including Optional Phases	**$40,850**

In Closing

We value the County's openness and flexibility to discussing our proposed services, and we would be happy to provide any needed clarification on our methodology and approach. On the following pages, we have included our proposed consultants' resumes.

Should you have any questions, or if you would like to discuss this proposal, please do not hesitate to contact our team directly. We appreciate the opportunity to continue to work with the County and to assist with this important initiative.

Sincerely,

Kevin Price, MPP, PMP®, Prosci® CCP | Principal
2211 Congress Street | Portland, ME 04102
207-541-2379 | kprice@berrydunn.com

Phase(s) Accepted:
Project Initiation and Requirements Development
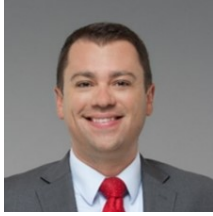RFP Development
System Selection
Contract Negotiation Assistance

_____   _____
Signature (County Representative)   Date

_____
Printed Name

Kevin Price, MPP, PMP, Prosci® CCP
Project Principal

Kevin is a Principal in BerryDunn's Government Consulting Group. He leads our Community Development and Utility Operations (CDUO) Practice, assisting local government clients with system selection, system implementation, fee study, and business process improvement projects.

Relevant Experience

Project Management: Kevin has managed system selection and IT strategic planning projects for some of BerryDunn's most complex local government clients. He previously managed BerryDunn's Municipal Street Addressing and Right-of-Way Permitting and Code Violation System Assessment Projects for the City of Philadelphia.

System Selection and Implementation: Kevin has assisted BerryDunn clients with every stage of system replacement and implementation projects, from needs assessment to requirements definition, RFP development, proposal evaluation, facilitation of vendor demonstrations, contract negotiation, and implementation project management. He is currently assisting the City of Grand Prairie, Texas with the implementation of a new permitting system.

Process Analysis and Improvement: Kevin has assisted BerryDunn clients with process improvement projects as part of system replacement projects and as standalone projects. Kevin has previously led the process improvement projects with the Cities of Rockville, Maryland; Alexandria, Virginia; Philadelphia, Pennsylvania; and Frisco, Texas. He also led the mapping of Community Development and Utility Operations processes for the City of Richland, Washington.

Selected Local Government Clients

- Berks County, PA
- City of Bloomington, MN
- City of Boca Raton, FL
- City of Bozeman, MT
- City of Broken Arrow, OK
- City of Detroit, MI

- City of Farmers Branch, TX
- City of Frisco, TX
- City of Philadelphia, PA
- City of Sioux Falls, SD
- Lake County, IL
- Manatee County, FL

- Outagamie County, WI
- Person County, NC
- Scott County, IA
- Waste Commission of Scott County, IA

Education and Memberships

Master's in Public Policy and Management, Concentration in Financial Management, University of Southern Maine

BA, Economics and Political Science, University of Maine

Project Management Professional® (PMP®), Project Management Institute®

Prosci® Certified Change Practitioner (CCP)

Lean Six Sigma Green Belt Certified

City of Westbrook, ME Recreation and Conservation Commission – Associate Member, 2021 – 2023

City of Westbrook, ME Sewer Commission – Member, 2021 – 2023

Keri Ouellette, MCRP, AICP
Project Manager

Keri is a Senior Consultant in BerryDunn's Government Consulting Group. She has 15 years of experience in local government permitting, inspections, and land development departments. From smaller towns (Portland, Maine) to large city agencies (New York City), Keri brings deep knowledge of policy development and the complex issues municipalities face in addressing growth and managing enforcement. This knowledge is augmented by strong technical literacy in the technology that support permitting and planning, as Keri pioneered system modernizations in her positions with multiple municipalities.

Relevant Experience

Permitting and Inspections Management: As the permitting manager for the City of Portland, Maine, Keri oversaw the entire permitting process from intake through inspection completion for all construction permits. During her tenure, Keri managed the implementation of a modern online permitting and records management system. She was integral in the technical pieces such as system customization and conducting quality assurance testing while leading the business processes to support the systems, including training staff and establishing workflows.

Program Coordination and Management: Keri held the positions of program coordinator and senior program manager for the New York City Department of Housing Preservation and Development (HPD), Division of Building and Land Development Services. She was responsible for coordinating and planning services related to HPD's loan programs for both new construction and preservation of affordable housing. This involved maintaining the electronic submission system and reviewing the submitted development projects. Keri often worked interdepartmentally, serving as a liaison between city agencies and external partners to improve client services.

City Planning: Keri evaluated development applications and zoning and environmental reviews for the Planning, Zoning, and Architectural Review Boards for the Town of Eastchester, New York. She modernized the technology environment by implementing the use of GIS to prepare maps for planning analysis. Her work also involved community-based research around policy issues and she drafted local laws related to zoning, housing, urban design, and environmental management.

Selected Local Government Clients

- City of Chelsea, MA
- City of Plano, Texas
- City of Wilmington, NC
- Massachusetts Department of Housing and Community Development
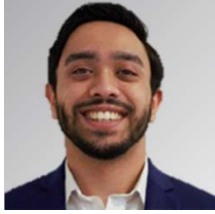- Travis County, TX

Education and Memberships

Master's in City and Regional Planning (MCRP), Georgia Institute of Technology

BA Urban Studies and Architectural Studies, Connecticut College

American Planning Associations (APA) Member

American Institute of Certified Planners (AICP)

APA Northern New England Chapter

Sachin Goradia
Business Analyst

Sachin is a consultant in our Local Government Practice Group who has a strong background in advocacy, coordination, and strategic marketing and communication. Having worked in the public sector, Sachin is well-versed in many aspects of government operations, including policy and strategy formation, business process optimization, and research and trend analysis.

Relevant Experience

Research and Analysis: Sachin has developed a knowledge base in various federal policies and systems through research and analysis. For instance, he researched economic resources for small businesses and non-profit organizations to use to help rebuild their services during the COVID-induced pandemic that culminated in a timeline of the U.S. federal response to COVID-19. He also analyzed recommendations for the Innovation ENJINE Challenge to strengthen the New Jersey government during his time in the Department of the Treasury.

Strategy Development: Through his work with the Rutgers Consulting Group, Sachin provided marketing strategies and services to Soochak, an Indian education startup, with a specific emphasis on branding, values, strategies, and best practices. As a result of his work, Sachin helped develop strong relationships with both businesses and clients. As part of his efforts, Sachin presented information related to optimization, analytics, social media marketing, and data presentation to create effective marketing strategies.

Collaboration and Coordination: Sachin has been involved in numerous groups with a focus on advocacy. He has worked with political constituents and groups, students, and university departments on issues such as diversity, legislation, ethics, and social issues with the intent of creating an engaging discourse for all.

Relevant Public Sector Experience

Rutgers Department of External Affairs, NJ

New Jersey Department of Treasury, Division of Administration

Education and Certifications

BA, Political Science and Economics, Rutgers University

Eagleton Institute of Politics Undergraduate Associate

Memberships

Co-Founder/President, Meeting Point Rutgers

Director of Advocacy, Rutgers Residence Hall Association

R E S O L U T I O N

SCOTT COUNTY BOARD OF SUPERVISORS

May 26, 2022

APPROVING PROFESSIONAL SERVICES FOR PLANNING AND DEVELOPMENT SOFTWARE SELECTION

BE IT RESOLVED BY the Scott County Board of Supervisors as follows:

Section 1.   The authority of the IT Director to sign a professional services

agreement with BerryDunn in an amount not to exceed $40,850 is

hereby approved.

Section 2.   This resolution shall take effect immediately.