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City of Gainesville | February 08, 2018

RFQ #: CMGR-180051-GD- Management Consulting Services (Non-Construction)



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Wealth Management.



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February 08, 2018

Ms. Gayle Dykeman
Senior Buyer
Procurement Division
City of Gainesville, 200 East University Avenue,
Gainesville, FL 32627

Dear Ms. Dykeman:

Plante & Moran, PLLC is pleased to provide this Proposal to the City of Gainesville (City) to provide services related to Request for Qualification No. CMGR-180051-GD for Management Consulting Services (Non-Construction). Plante Moran is well qualified to assist the city with multiple management consulting services to meet your business objectives. Additionally, Plante Moran's proposed project team brings to this engagement extensive knowledge and experience gained in working with public sector clients in organizational design, human resource, information technology, project management services, process improvements, change management, system selections and implementations with a variety of solutions available in the market. We offer the following benefits:

- Our municipal practice has significant organizational assessment experience, specifically focused on Information Technology, Human Resource and Finance related operations of Cities and Counties. Examples include large municipalities like Cities of Philadelphia, Detroit, Cleveland, Broward and Miami-Dade County.
- Significant experience in assisting other clients restructure financial operations in conjunction with an ERP implementation. Examples include Marin County, City of Mesa, and Town of Hempstead, NY.
- Our project professionals are members of national organizations dedicated to improving the financial and technology operations of public sector organizations including GFOA, PTI, ICMA and GMIS.
- We are familiar with requirements of clients similar to the City of Gainesville.
- As accountants and advisors to nearly 500 government agencies recognize our firm as one of the leading providers of independent, objective consulting advice.
- A strong project team, blending public sector systems, process, best practices, and re-engineering expertise.
- We have significant Florida presence having worked with over 35 governmental clients in the State of Florida to include numerous City, County and special district governments. We are active in Florida associations for FLGISA, FCCMA and FGFOA and the South Florida PMI Group.

Our proposed team blends the local municipal operations knowledge with seasoned, management consultants to work on this important initiative. We believe that based upon these experiences and the

quality of our proposed team, we are well qualified to provide objective and comprehensive consulting services for the City of Gainesville.

If you have any questions concerning this proposal or need to contact any of the project team members, please contact me as follows, as I am authorized to enter into binding contracts on the firm's behalf:

Plante & Moran, PLLC

Mr. Scott Eiler, Partner

27400 Northwestern Hwy.

P.O. Box 307

Southfield, MI 48037-0307

Phone: 1-800-544-0203

Fax: 248-603-5618

Email: Scott.Eiler@plantemoran.com

Sincerely,

PLANTE & MORAN, PLLC



Engagement Partner

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Company Background and Experience

Summary

| | |
|-------------|---|
| 1 | Experienced team |
| 30+ | Years of experience providing project management consulting to government clients |
| 50+ | Years of government management consulting experience |
| 90+ | Years in business |
| 100+ | Technology engagements with state and local governments in the past five years |
| 200+ | Recurring government clients |
| 300+ | Technology best practices organized around 85 topical areas included in our Toolkit |

Plante Moran Background and Experience

Founded in 1924, Plante & Moran, PLLC (Plante Moran) is the 15th largest management consulting and public accounting firm in the United States. Plante Moran operates as a partnership. Plante Moran organizes the staff of over 2,200 persons into four major service areas: Management Consulting, Accounting and Auditing, Tax Consulting, and Personal Financial Planning Services.

Over the past several years, Plante Moran has continually expanded the scope and experience of its Management Consulting Services Group. The firm is committed to continuing this growth by retaining and attracting qualified professionals to provide the broad range of management and technical services that are necessary to serve the needs of our clients.

Plante Moran takes great pride in the quality of services it provides to its clients. We follow a rigorous set of quality controls designed to meet professional standards and our clients receive a high quality product. Plante Moran takes equal pride in our people and our professional work environment. Some of the facts about our firm that we are proud of include:

- Our partnership group is comprised of 22% women, which is the highest percentage of female equity partners among the nation's largest public accounting firms, according to CPA Personnel Report, a national public accounting trade publication.
- Staff turnover rate below 13%, which is significantly lower than that of other national public accounting firms.
- Fortune Magazine named Plante Moran as one of the “100 Best Companies to Work for in America” for the last nineteen years.

- Plante Moran's Management Consulting Group, consisting of over 125 dedicated consultants, is a versatile, full service consulting organization with a proven track record for providing quality professional services.

Our emphasis and commitment to management consulting has resulted in the extension of the consulting practice into all major aspects of government and education addressing our clients' unique needs related to information technology, security, compliance, and policy.

Plante Moran has become a leader in providing services to governmental organizations. At present, we work with well over 200 local governments. Our professionals have made substantial commitments to working with local, county and state government agencies. Our extensive experience with governmental clients has enabled us to assemble a project team that we believe is uniquely qualified to perform the proposed project.

Government Consulting Services Organization

Plante Moran has assumed a leadership role in providing consulting services to governmental entities. The range of services we provide includes the following:

- Information Technology Consulting
- Communications & Networking Services
- Project Management and Oversight
- Operations Analysis
- Consolidation Studies
- Organizational Planning and Development
- Financial Management Services
- Human Capital Management and Development
- Market Research Services
- Business Planning and Feasibility Analysis
- Employee Benefits Analysis
- Assurance Services
- Real-estate, Design and Construction Consulting

Industry Commitment

Because of our broad governmental client base, we are able to devote the necessary time to specialize and thus provide maximum service. Our consultants have a variety of professional designations and are active participants in state and national government organizations. In addition, our consultants are very active in making presentations to a variety of governmental organizations on current issues. To assist us in this specialization, we are also members of numerous county and municipal government professional associations that have a partial or major focus on the application of technology for government including:

- **Government Finance Officers Association (GFOA)**, an organization whose purpose is to enhance and promote the professional management of governments for the public benefit by identifying and developing financial policies and practices and promoting them through education, training and leadership.
- **Government Management and Information Sciences (GMIS)**, an organization composed of municipal information technology directors with a primary goal to foster a unified effort among government entities to integrate and disseminate their respective research and design efforts in the area of automated information sciences.
- **International City/County Management Association (ICMA)**, an organization that develops and advances professional local government management to create sustainable communities that improve lives worldwide.

- **Customer Service (CS) Week**, the premier annual educational and customer service conference serving electric, gas and water/wastewater utility professionals across North America and around the world. CS Week provides learning and networking opportunities in support of the utility customer experience lifecycle : Analytics, Billing and Payments, Contact Center, Credit and Collections, Digital Customer Engagement, Field Customer Service, and Strategies and Management.
- **American Public Works Association (APWA)**, an organization that serves professionals in all aspects of public works—a fact that sets it apart from other organizations and makes it an effective voice of public works throughout North America. APWA includes not only personnel from local, county, state/province, and federal agencies, but also private sector personnel who supply products and services to those professionals.
- **Project Management Institute (PMI)**, the organization supporting the Project Management Professional (PMP) credential of which many of our staff hold. PMI offers continuing education, required to maintain the credential, and has regional practitioner groups. Our South Florida-based staff are members of the South Florida PMI Group.
- **Public Technology Institute (PTI)**, a Non-Profit organization created by and for cities and counties that works with a core network of leading government officials to: identify opportunities for technology research, share best practices, offer consultancies and pilot demonstrations, promote technology development initiatives, and develop educational programming. PTI offers the Certified Government Chief Information Officer (CGCIO) program and Plante is fortunate to have staff with this credential.

As a result, of our continuing involvement with government organizations at all levels, we have acquired in-depth knowledge and experience in dealing with relevant technical, operational and procedural issues. This experience and knowledge, and our commitment to assure objectivity and a high level of independence, are fundamental to our proven and consistent ability to meet the needs of our governmental clients.

Industry Commitment with Florida Focus

As our Florida client base grows, we are also members of numerous local government professional associations that have a partial or major focus on the application of technology for government including:

- **Florida and National Government Finance Officers Association (FGFOA and GFOA)**, an organization whose purpose is to enhance and promote the professional management of governments for the public benefit by identifying and developing financial policies and practices and promoting them through education, training and leadership.
- **Florida and International City/County Management Association (FCCMA and ICMA)**, an organization that develops and advances professional local government management to create sustainable communities that improve lives worldwide.
- **Florida Local Government Information Systems Association (FLGISA)**, an organization composed of municipal information technology directors with a primary goal to foster a unified effort among government entities to integrate and disseminate their respective research and design efforts in the area of automated information sciences.

- **Plante Moran Staff Resident in Florida**, provide responsive service to our Florida communities and we are pleased to feature a staff member on our project team residing in the State currently serving Florida local government clients.

We are very involved with all of these organizations contributing our talents and expertise through speaking engagements, articles for their publications and involvement in conferences at the national level.

Commitment to Florida Governmental Entities

Plante Moran has significant experience in providing strategic consulting services to municipal governments in the State of Florida. Through these experiences we have gained a strong understanding as to how municipal operations function and, as a result, a strong understanding of the underlying business processes that will be critical in assessing associated risks. Our experience and commitment is highlighted as follows:

Over the last five years, we have providing consulting services to numerous governmental jurisdictions in the State of Florida in which many of the projects have spanned processes across all lines of business:

- 10 active governmental clients involving 14 different projects
- 7 different Counties to include:
 - Miami-Dade County
 - Broward County
 - Lee County
- 17 different municipalities to include:
 - City of Fernandina Beach
 - City of North Miami Beach
 - City of Hollywood
 - City of Ft. Lauderdale
 - City of Miramar
 - Town of Jupiter
 - Village of Wellington
 - City of West Palm Beach
- 6 different special districts to include:
 - Broward County Metropolitan Planning Organization
 - Solid Waste Authority of Palm Beach County
- We have been actively involved with a number of Florida governmental associations to include:
 - FLGISA (exhibitor in 2016, 2017)
 - FGFOA (exhibitor from 2013 – 2017; presented at regional users group on IT security; Cybersecurity presentation at State meeting in 2017)
 - FCCMA (exhibitor in 2014; speaker in 2017)

Service Capabilities

A tailored approach and custom solutions.

Focused on the unique needs of education and Public Sector clients

We have developed a comprehensive menu of services for our public sector clients. Our experienced, independent consultants can complement the expertise and skills of your in-house team.



FINANCIAL

- Financial statement audit
- Public pension system audit
- Single audit
- Accounting & financial services
- Long-range planning
- Institutional investment advisory



ENTERPRISE RISK SERVICES

- Enterprise risk management assessments
- Internal audit
- Internal control reviews
- Application controls
- Forensic, investigative services, & litigation support



OPERATIONAL EFFECTIVENESS

- Needs assessment
- Process redesign
- Operations review
- Right sizing/cost containment
- Shared services/ collaboration



TECHNOLOGY STRATEGY

- IT assessment
- Strategic planning
- Acquisition management
- Contract negotiations
- Project management
- Sourcing
- Cloud strategy



INFRASTRUCTURE SERVICES

- Network assessment
- Design & acquisition
- Implementation management
- Video surveillance/door access control
- Enterprise wired/wireless design & selection
- Independent verification & validation



CYBERSECURITY

- HIPAA/HITECH compliance
- Disaster planning
- SAS70/SSAE16/SOC assessment
- IT audit
- IT risk assessment
- PCI DSS assessment
- Network security assessment



ERP SERVICES

- Assessment & gap analysis
- Requirements definition
- Solution selection
- Contract negotiations
- Implementation management
- Independent verification & validation



FACILITIES

- Facility analysis & rationalization
- Project & financial feasibility
- Owner's representation – design management & construction oversight
- Lease, buy, build, monetize, & sale/leaseback
- Bond strategy, planning, & campaign



HUMAN CAPITAL

- Employee benefit strategies
- Personnel assessment
- Early retirement incentive plan, design, & consulting



Proposed Project Staff

Proposed Project Staff

The Company overview section presents the wide array of services and industries supported at Plante Moran, and we will utilize the appropriate staff for our engagements to ensure that we bring the most qualified and richest skilled team members to clients. We call this our “one-firm firm,” approach.

The following team members will lead efforts in their subject matter area defined in Role.

Project Team Overview

| Staff | Role | Relevant Expertise |
|--|--|--|
| Adam Rujan Partner | Engagement Director Will serve as the Engagement Director for Areas 1, 2, 3, and 4, Adam will ensure the overall quality and completeness of project activities and deliverables. | Firm's government practice leader with over 25 year's relevant experience. Routinely serves as Project Director for organizational assessments. |
| Scott Eiler Partner | Engagement Director Will serve as the Engagement Director for Areas 1, 2, 3, and 4, Scott will ensure the overall quality and completeness of project activities and deliverables. | Scott has over thirty years' experience assisting clients with various technology related needs and twenty- two years specifically devoted to serving public sector clients. He has extensive experience in providing numerous technology services for governmental clients including technology planning, system selection, technology assessments, IT organizational evaluations, and quality assurance and implementation management. |
| Nicole Simpkinson Senior Manager | Project Manager Nicole will serve as a project manager across Areas 1 -4, bringing her extensive training in project management to engage project stakeholders, develop project work plan, report project status and ensure overall quality of deliverables. | Nicole has more than 20 years' experience consulting to government and other public sector organizations. She specializes in assisting organizations assess, plan for, select and implement enabling technologies. Her areas of expertise include system needs assessment and feasibility studies, organizational and operational analysis, strategic technology planning, system selection, implementation oversight and IT governance based on best practices and industry frameworks such as Control Objectives for IT (COBIT), Val IT and Carnegie Mellon Capability Maturity Model Integration (CMI). |
| Sri Chalasani Principal | Senior Technical Architect For primarily Area 3, Sri will perform on-site technology assessments, IT infrastructure planning, design, selection and implementation management. Areas of technical expertise: enterprise-wide networks, wireless LANs, server/storage solutions, video distribution and video surveillance. | Sri has over 23 years' experience in IT and specializes in IT assessments, infrastructure systems designs, and cloud strategies and services, and data center environments. He has consulted in a number of industry segments – Education, Governmental, Non-profit, Manufacturing, Financial and Service Providers to name a few and his broad industry experiences |

| Staff | Role | Relevant Expertise |
|--|---|--|
| Scott Patton Senior Manager | Business Process Redesign Expert Scott has successfully implemented group wide initiatives to increase operational efficiencies and standardize business processes. Analyses included detailed process mapping of current and future state environments, stakeholder interviews, and efficiency models. | Scott brings fifteen years of experience in Michigan local government management to our team. He brings expertise in organizational efficiency, inter-governmental collaboration, organizational development, and public safety/ justice issues. Scott uses a variety of tools to add value for clients including process mapping, systems thinking, strategic planning, gap analysis, survey design/ analysis and performance assessment. |
| Christopher Blough Senior Manager | Project Manager Chris will act as a project manager for projects in the Technology and Project Management Areas. | Chris has 16 years of professional experience working in public sector consulting, county, and municipal government. His experiences with public sector technology solutions involving enterprise resource planning (ERP), geographic information systems (GIS), and enterprise asset management (EAM). |
| F. Alex Brown Senior Manager | Project Consultant with Subject Matter Expertise in Cybersecurity Alex will act as a project manager, identifying the work plans, staff and tools for technical security projects. | Alex has over 18 years of information technology audit, technology regulatory control compliance, and system integration project experience. Alex has extensive experience in the assessment of technology risk and evaluation of IT controls in support of IT security regulatory compliance engagements (e.g. HIPAA/HITECH and Sarbanes-Oxley). |
| Mike Blickhahn Manager | Project Consultant with Subject Matter Expertise in HR Will support projects in Area 2. Mike has extensive management experience and operational knowledge of all areas of Human Resources including HRIS and Payroll administration, Compensation and Benefits Plan Design and Administration, Talent Acquisition and Employee Onboarding. Project Consultant with Subject Matter Expertise in Infrastructure Will support engagements that fall under Area 4. Typical project roles include on-site technology assessments, IT infrastructure planning, design, selection and implementation management. Areas of technical expertise: enterprise-wide networks, wireless LANs, server/storage solutions, video distribution, video surveillance and VoIP. | Mike has over twenty-five years' experience leading various human resource operational functions in healthcare, government, and retail pharmacy. Mike has human resources leadership and operational experience at employers ranging from 500 to 200,000 employees. Mike has significant experience in employee compensation, benefits, and the administration of human resource systems. |

| Staff | Role | Relevant Expertise |
|---|---|---|
| Natalie Schwarz Manager | Project Manager Will create the project initiation materials, including a project schedule and work plan, Natalie will oversee the day-to-day activities of project in Areas 1, 2, 3 and 4. | Natalie has over seven years of professional service experience consulting and implementing ERP and Tax systems for both private and public sector clients over a wide range of industries. Natalie has a rare combination of experience including large-scale project management, service line process development, and ERP/Tax systems software selections and implementations. |
| | Project Consultant Has subject matter expertise in Area 3, Natalie will facilitate departmental interview sessions, document functional gaps in the current solution, develop business requirements, perform proposal analysis activities, and support other project activities described in the scope of work. | |
| Lori Blackmon Manager | Project Manager Will create the project initiation materials, including a project schedule and work plan, Natalie will oversee the day-to-day activities of project in Areas 1, 2, 3 and 4. | Lori has over thirty years of experience in sourcing, implementing, and managing Information Technology (IT) solutions to optimize service delivery for organizations. Her hands-on, experience includes: project management, business process reengineering, strategic planning and organizational change management. |
| | Project Consultant Has subject matter expertise in Areas 1, 3, and 4 Lori will facilitate departmental interview sessions, document functional gaps in the current solution, develop business requirements, perform proposal analysis activities, and support other project activities described in the scope of work. | |
| Kyle Macyda Manager | Senior Project Consultant Has subject matter expertise in Area 3 (Technology). Kyle's typical project roles include on-site technology assessments, IT infrastructure planning, design, selection and implementation management. Areas of technical expertise: enterprise server and storage solutions, server virtualization and cloud technologies, backup and recovery, business continuity and disaster recovery, data center operations and management | Kyle has over 17 years of experience in designing, implementing, and supporting Information Technology (IT) infrastructure solutions. His hands-on, enterprise experience includes various aspects of business continuity including geo-clustering, data replication, storage area networks, backup & recovery and data center operations. |
| Brian Pesis Senior Consultant | Lead Project Consultant With expertise in software acquisition, Brian will support Areas 1, 2, 3 and 4. Brian will facilitate interviews with process owners and end users, gathers business requirements, document functional gaps, identify | Brian has experience working with a variety of ERP systems for government clients across the country. At Plante Moran, Brian has served as the lead consultant on projects to assess the enterprise software environment for different municipalities |

| Staff | Role | Relevant Expertise |
|--|---|--|
| | <p>opportunities to apply best practices, define system requirements, compose RFP documents, perform vendor proposal analysis, facilitate software demonstrations, assist throughout the due diligence process and support other project activities described in the scope of work.</p> | <p>and special districts and lead them through the software selection process.</p> |
| <p>Stephen Morrison Senior Consultant</p> | <p>Senior Project Consultant Will facilitate departmental interview sessions, document functional gaps in the current solution, develop business requirements, perform proposal analysis activities, and support other project activities described in the scope of work. Stephen will support Areas, 1, 2, 3, 4</p> | <p>Stephen began working with technology in the public sector in 2014, taking on a development and support role with a permitting and licensing vendor. In this role, Stephen began to engage with both the technical and business considerations of implementing and supporting solutions for government.</p> |

Overall Proposed Team Matrix

The matrix below illustrates the areas that our proposed project team will support.

| | Rujan | Eiler | Chalasani | Simpkinson | Patton | Blough | Brown | Blickhahn | Schwarz | Blackmon | Macyda | Pesis | Morrison |
|--------------------------------|-------|-------|-----------|------------|--------|--------|-------|-----------|---------|----------|--------|-------|----------|
| Area 1 - Organizational Design | | X | | X | X | X | | X | X | X | | X | X |
| Area 2 - Human Resource Policy | | X | | X | X | | | X | | X | | X | X |
| Area 3 - Technology | X | X | X | X | | X | X | | X | X | X | X | X |
| Area - 4 Project Management | X | X | X | X | | X | X | | X | X | | | X |

Team Expertise Matrix

The team expertise matrix demonstrates the exposure of our project team to the typical services of a municipality. An X indicates exposure, a shaded X indicates that the proposed team member has unique and concentrated expertise in that area.

| | Rujan | Eiler | Chalasani | Simpkinson | Patton | Blough | Brown | Blickhahn | Schwarz | Blackmon | Macyda | Pesis | Morrison |
|---|-------|-------|-----------|------------|--------|--------|-------|-----------|---------|----------|--------|-------|----------|
| City of Gainesville Municipal Services | | | | | | | | | | | | | |
| Police/fire | X | X | X | X | X | | | X | X | X | X | X | X |
| Land planning | X | X | X | X | X | X | | X | X | X | | X | X |
| Zoning | X | X | X | X | X | X | | X | X | | | X | X |
| Code enforcement | X | X | X | X | X | X | | X | X | | | X | X |
| Neighborhood improvement | X | X | | X | X | | | X | X | | | X | X |
| Streets and drainage construction and maintenance | X | X | | X | X | | | X | | X | | | |
| Traffic engineering | X | X | | X | X | | | X | | X | | | |
| Refuse and recycling (oversight of franchise) | X | X | | X | X | | | X | | | | | |
| Recreation and parks | X | X | | X | X | | | | X | | | X | X |
| Cultural and nature services | X | X | | X | X | | | | X | | | X | X |
| Admin | | X | | X | X | X | X | X | X | X | X | X | X |
| Other Services | | | | | | | | | | | | | |
| Regional transit | | | | | | | X | | | X | | X | X |
| Municipal airport | | | | | | | X | | | X | | X | X |
| Golf course | | X | | X | X | | | | X | | | | |
| Utilities | | X | | X | X | X | | X | X | | | X | X |

Project Team Resumes



Adam Rujan

Partner
Management Consulting

Summary of Experience

Adam has nearly thirty years' experience consulting to government and public sector organizations. His experience includes assisting governmental units with organizational and operational analyses, IT Assessment, and system selection reviews. He has developed specific expertise in assisting organizations understand and implement new technology, including issues of IT governance and change management. Adam's clients have included a wide range of local municipalities, counties, agencies and authorities and state government. He is a frequent presenter and has authored numerous articles on improving operational efficiency and effectiveness. He recently authored a chapter on IT Governance for the book CIO Leadership for Cities and Counties, published by the Public Technology Institute. Adam was/is the Partner responsible for all of the referenced public sector client engagements.

Education

Master of Business Administration
University of Michigan
Bachelor of Science Engineering,
Wayne State University

Selected Presentations/ Publications

Cost Savings in Information
Technology: ICMA webinar 2012
Outsourcing IT: ICMA Annual
Conference 2011
Improving Performance through IT
Governance: Public Technology
Institute 2009, 2010
Effectively Capturing Business
Intelligence: ICMA Annual Conference
2013

Selected Key Clients

- City of Alexandria, VA
- Town of Hempstead, NY
- City of Asheville, NC
- Broward County, FL
- City of Augusta, GA
- Cook County, IL
- City of Detroit, MI
- City of Cleveland, OH
- Johnson County, KS
- City of Corpus Christi, TX
- St. Louis County, MO
- City of Colorado Springs, CO
- City of Flagstaff, AZ
- City of Mesa, AZ
- City of Seattle, WA
- Marin County, CA



Scott Eiler, PMP

Partner
Management Consulting

Summary of Experience

Scott has over thirty years' experience assisting clients with various technology related needs and twenty three years specifically devoted to serving governmental clients at the local, County and State level. He has extensive experience in providing numerous technology services for governmental clients including technology planning, technology assessments, software selections and implementation management assistance. He is also a champion within the firm on the development and education of staff on project management theory, tools and techniques.

Education

Master of Business Administration
University of Michigan

Bachelor of Science in General
Engineering
University of Illinois

Professional Training & Affiliations

Public Technology Institute (PTI)

Government Finance Officers
Association (GFOA)

Florida Government Finance Officers
Association (FGFOA)

Project Management Institute (PMI)

Project Management Professional
(PMP) since 2003

ITIL V3 Foundation Certified

Prosci Change Management Certified

Selected Key Clients

- Broward County, FL
- Calhoun County, MI
- Cuyahoga County, OH
- Dane County, WI
- Miami-Dade County, FL
- DuPage County, IL
- Gwinnett County, GA
- Hancock County, OH
- Horry County, SC
- Johnson County, KS
- Kent County, MI
- Lake County, IL
- Oakland County, MI
- St. Louis County, MO
- Waukesha County, WI
- Urbana & Champaign Sanitary District, IL
- City of Cleveland, OH
- City of Battle Creek, MI
- City of Hollywood, FL
- City of Dublin, OH
- City of Kalamazoo, MI
- City of Chicago, IL
- City of Carrollton, TX
- City of Hallandale Beach, FL
- City of Mesa, AZ
- City of North Miami Beach, FL
- City of Ann Arbor, MI
- City of Miramar, FL
- City of Columbia, MO
- Town of Jupiter, FL
- City of Midland, MI
- City of Owensboro, KY
- City of Chandler, AZ
- Charter Township of Shelby, MI
- City of Pueblo, CO
- City of Pinellas Park, FL
- Central Ohio Transit Authority, OH
- State of Michigan



Nicole Simpkinson, PMP, ITIL

Senior Manager
Management Consulting

Summary of Experience

Nicole has more than 20 years’ experience consulting to government and other public sector organizations. She specializes in assisting organizations assess, plan for, select and implement enabling technologies. Her areas of expertise include system needs assessment and feasibility studies, organizational and operational analysis, strategic technology planning, system selection, implementation oversight and IT governance based on best practices and industry frameworks such as Control Objectives for IT (COBIT), Val IT and Carnegie Mellon Capability Maturity Model Integration (CCMI). Nicole’s clients have included a wide range of local municipalities, counties, utility agencies and state government. Nicole is a certified Project Management Professional (PMP) and experienced facilitator. She has facilitated a number of workshops and training seminars on topics including strategic technology planning, public sector project management, and government technology trends. Nicole graduated Magna Cum Laude from Claremont McKenna College with a Bachelor of Arts degree in Policy and Organizational Studies and received her MBA from UCLA Anderson School of Management where she graduated with honors.

Education

Master of Business Administration,
UCLA

Bachelor of Arts, Policy Studies,
Claremont McKenna College

Selected Presentations

Cybersecurity Trends: 2015 National
ICMA Conference

Public Sector Project Management:
The Project-Centered Organization for
Public Sector Executives sponsored by
The Anderson School at UCLA

Successful Project Management:
National Association of State
Telecommunications Directors
(NASTD) National Conference

Strategic Systems Planning:
Association of Public-Safety
Communications Officials (APCO)
Western Regional Conferences

Top 10 Trends in Government
Technology: Justice and Public Safety
Regional Conference

Findings from a Study of Emergency
Management at the Local Program
Level: Washington State Emergency
Management Association Annual
Conference

Certifications and Affiliations

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

Certified, Information Technology
Infrastructure Library (ITIL)
Foundations

Member, Project Management
Institute

Member, 2015 National Conference
Planning Committee, ICMA

Selected Key Clients

- City of Bend, OR
- City of Boise, ID
- City of Bothell, WA
- City of Carlsbad, CA
- City of Kent, WA
- City of Mountain View, CA
- City of Palo Alto, CA
- City of Redmond, WA
- City of Tacoma, WA
- City of Seattle, WA
- City of Vancouver, WA
- City/Borough of Juneau, AK
- Town of Jupiter Island, FL
- Adams County, CO
- King County, WA
- Los Angeles County, CA
- Mesa County, AZ
- Ramsey County, MN
- State of Alaska
- State of Washington
- Emerald Coast Utilities Authority, FL
- Escambia County Housing Finance Authority, FL
- Golden Gate Bridge Highway and Transportation District, CA
- Irvine Ranch Water District, CA
- Los Angeles County Metropolitan Transportation Authority, CA
- Metropolitan Water District of Southern California, CA
- Santa Clara Valley Water District, CA
- Santa Margarita Water District, CA
- Village Center Community Development District, FL
- West Basin Water District, CA
- Orange County, CA



Sri Chalasani

Senior Architect
Management Consulting

Summary of Experience

Sri has over twenty years of experience and specializes in the design, deployment, and troubleshooting of complex networks. He is well-versed in various LAN/WAN/WLAN technologies and protocols. Sri also has over sixteen years of experience in the design of multifunction networks to provide IP-based data, VoIP with unified messaging, video streaming, video conferencing systems, and video surveillance systems. He has worked with the product lines of all the major network and VoIP system manufacturers. He has worked on multiple data center design and migration projects, network security assessments, and DR planning efforts, helping determine needs and remediation.

Selected Key Clients

- National voluntary organization - IT Assessment & Planning
- Kansas City Area Transportation Authority, KS – IT Strategic Plan
- Michigan State Housing Development Authority, MI – IT Assessment
- County of Pierce, WA - Data Center Alternatives Study
- County of Coconino, AZ – IT Strategic Plan
- City of Fayetteville, AR – IT Assessment
- County of Muskegon, MI – IT Assessment
- County of Macomb, MI – IT Assessment
- County of Monterey, CA – Project Management (Infrastructure)
- County of Chester, PA – IT Strategic Plan
- County of Gwinnett, GA – IT Assessment
- City of Alexandria, VA – IT Assessment
- City of Carrollton, TX – IT Outsourcing
- City of Coldwater, MI – IT Assessment
- City of Corpus Christi, TX – IT Strategic Plan
- City of Des Moines, IA - IT Strategic Planning
- City of Flagstaff, AZ – IT Strategic Plan
- City of Mesa, AZ – Systems Requirement Analysis
- City of Round Rock, TX – IT Strategic Plan
- Michigan State University College of Veterinary Medicine
- Henry Ford Community College

Education

Master of Business Administration
Wayne State University
Master of Science, Computer Science,
Western Michigan University
Bachelor of Science, Electronics
Engineering, Bangalore University.

Selected Presentations

End user technology trends
presentation: TLN
Streaming video technologies: MAEDS
Physical security system in school
environment: MAEDS
TIA942 data center standards: MERIT
Intrusion recovery planning: MAEDS
iPad for the C-Suite: MTL
Tech tools for non-profit
organizations: MACPA
iPads in the business: Webinar
Dealing with mobile devices in the
classroom: Webinar

Professional Training & Affiliations

Association for Computer Operations
Management.
Society of Telecom Consultants



Scott Patton

Manager

Management Consulting

Summary of Experience

Scott M. Patton brings fifteen years of experience in local government management to our team. He brings expertise in organizational efficiency, inter-governmental collaboration, organizational development, and public safety/justice issues. Scott uses a variety of tools to add value for clients including process mapping, systems thinking, strategic planning, gap analysis, and survey design/analysis and performance assessment.

Education

Master of Public Administration
Michigan State University

Bachelor of Arts in Philosophy and
Political Science
Hope College

Professional Training & Affiliations

Washtenaw County Government
Ingham County Government

Organizational Structuring And Staffing Analysis: Identify and evaluate workload levels for governmental clients for a variety of services. Apply knowledge of best practice government operations. Projects have included reviewing resource utilization metrics, service level modeling, and analyzing unique position requirements to give an accurate assessment of a planned future state.

Operational Analysis: Synthesize data and trends to recommend strategic improvements within internal organizational functions. Focus includes organizational efficiency, customer satisfaction, and ongoing standardization. Reviews have included internal functions of treasury, facility space allocation, payroll, technology, accounting, and vendor management. Improvement recommendations focus on aligning structure with organizational goals and core business processes, operational efficiency, increased performance and customer service levels/satisfaction, and core process standardization.

Financial Modeling And Shared Service Analysis: Document opportunities for local governments to share service delivery through service consolidation, collaboration, or contract. Areas of focus have included treasury, procurement, assessing, fleet maintenance, recreation, technology, and facilities.

Business Process Mapping: Successfully implemented group wide initiatives to increase operational efficiencies and standardize business processes. Analyses included detailed process mapping of current and future state environments, stakeholder interviews, and efficiency models.

Selected Key Clients

- City of Bend, OR
- City of Carlsbad, CA
- City of Cleveland, OH
- City of Detroit, MI
- City of Philadelphia, PA
- City of Saline, MI
- Genesee County, MI
- Illinois State Treasurer
- Kent County, MI
- Southwest Michigan First
- Village of Spring Lake, MI
- Village of Beverly Hills, MI
- Washtenaw County, MI
- Wayne County, MI,
- Wexford County, MI
- Michigan House Business Office
- Michigan Municipal League
- Ottawa County, MI



Christopher Blough, PMP

Manager
Management Consulting

Summary of Experience

Chris has 15 years of professional experience working in county and municipal government as both a consultant and public servant. Within Plante Moran's Government Technology and Operations Team, he serves as both a project manager and lead consultant for enterprise resource planning (ERP) and enterprise asset management (EAM) engagements. His public sector technology solution development experience includes business requirements evaluation, system assessments, system selections, and implementation project management.

ERP Needs Assessment & Selections: He leads clients to fully assess their ERP solution objectives and application integration needs as a project manager, experienced business analyst, and technical advisor. He measures success through building long-term, client ownership of system design by connecting requirements to known business needs. Prepares detailed software requirements, conducts vendor marketplace evaluations, designs comprehensive request for proposal (RFP) documents with complete system specifications, and assists clients with analysis of proposals and identification of preferred vendors.

ERP Implementations: Currently provides ERP implementation management assistance to the City of Columbia, MO involving a \$6 million investment to replace its legacy HTE system. Activities include facilitating project management office operations, evaluating project deliverables, managing project action items, and leading contract development and negotiations to serve as an advisor to the City's ERP project manager.

Enterprise Asset Management (EAM): Performs needs assessments and provides selection support for asset management solutions servicing water, sanitary sewer, storm water, pavement, urban forest, fleet, and inventory control infrastructure systems. His engagements involve focused outcomes including the development of standardized workflows, solving capital budgeting needs, identifying KPI's, and performance metrics, improving project / program cost allocations, and approaches to maximize infrastructure asset service life based upon preventive and corrective maintenance practices.

Selected Key Clients

- City of Philadelphia, PA
- City of Arvada, CO
- City of Detroit, MI
- City of Palo Alto, CA
- City of Columbia, MO
- City of N. Las Vegas, NV

Education

Master of Public Administration,
Eastern Michigan University
Bachelor of Science in Geography/
Earth Science,
Central Michigan University

Selected Publications

The GIS Guide for Elected Officials,
City of Novi, MI – Moving Novi's
Online Mapping Services to the Cloud,
Esri Press, 2014

Professional Training & Affiliations

Project Management Professional
(PMP), Project Management Institute
IT Service Management, ITIL v3
Foundation, APM Group Ltd. (2012)
Project Management Institute, Great
Lakes Chapter



F. Alex Brown, CPA, CHP

Senior Manager
Information Technology Consulting

Summary of Experience

Alex has over 18 years of information technology audit, technology regulatory control compliance, and system integration project experience. Alex has extensive experience in the assessment of technology risk and evaluation of IT controls in support of IT security regulatory compliance engagements (e.g. HIPAA/HITECH and Sarbanes-Oxley). In addition, Alex has extensive experience in working with various IT security control frameworks (e.g. NIST 800, ISO 27001/27002, COBIT, HIPAA, FERPA). Alex has extensive industry experience including Healthcare, Government, Higher Education and Manufacturing. Alex's experience includes planning and performing engagements to evaluate and assess IT risk, evaluate the effectiveness of control measures implemented, identify IT control deficiencies, and develop remediation recommendations.

Selected Key Clients

- North Carolina A&T State University
- Michigan Technology University
- Hampton Roads Transit Authority
- Orange County, California
- New York State Teachers Retirement System
- Savannah State University
- McLaren Health Incorporated
- Volkswagen of North America
- California Earthquake Authority
- Chart Industries
- Marathon Oil Petroleum
- Hilex Industries
- Musashi Automotive Parts – North America
- Wayne County, MI
- OhioHealth Incorporated

Education

Bachelor of Science
Accounting
North Carolina A&T State University

Selected Presentations

IT Security Trends
2014 Annual ICMA (International City/County Management Association) Conference
IT Governance and Security Trends
2014 Annual GFOA (Government Finance Officers Association) Conference
IT Security in Healthcare
2014 Plante Moran Healthcare Symposium
Technology Governance
Ohio Society of CPAs Healthcare Conference

Professional Training And Affiliations

Certified Public Accountant (CPA)
Member of the American Institute of Certified Public Accountants (AICPA)
Certified HIPAA Security Professional (CHP)



Mike Blickhahn

Manager
Management Consulting

Summary of Experience

Mike has over twenty-five years' experience leading various human resource operational functions in healthcare, government, and retail pharmacy. Mike has human resources leadership and operational experience at employers ranging from 500 to 200,000 employees. Mike has significant experience in employee compensation, benefits, and the administration of human resource systems. Including several years at a fortune fifty company overseeing all aspects of human resources for all mergers, acquisitions and divestitures.

Mike has several years' experience conducting and leading all aspects of human resources for mergers, acquisitions, and divestitures at a fortune fifty organization. Including operational and leadership efforts in due diligence, human resource system data conversion and integration, all aspects of post transaction organizational design, and leading related staff onboarding and training initiatives.

Mike has led human resource teams through systems assessments at all levels, including overseeing the selection, data conversion and management training programs needed for new HRIS systems. Mike is well versed in the design of post implementation human resource processes and team structures, including the necessary change management techniques to ensure user acceptance.

Selected Key Clients

- Milwaukee County, WI
- Jefferson County, Co
- Kent County, MI
- Baton Rouge, La

Education

Bachelor of Science, University of Illinois

Professional Training & Affiliations

Society for Human Resource Management (SHRM)

International Public Management Association (IPMA)

International Association for Human Resources Information Management (IHRIM)



Natalie Schwarz, PMP

Consulting Manager
Management Consulting

Summary of Experience

Natalie has over eight years of professional service experience consulting and implementing systems for a wide range of clients and industries. Natalie has a rare combination of experience including large scale project management, service line process development, and software selections and implementations for Enterprise Resource Planning (ERP), Parks and Recreation Management, and additional municipal systems. She has extensive experience in developing needs assessments and options analysis, business and system requirements, and business process reviews along with detailed system analysis, design, development and implementation. In addition, Natalie has successfully guided clients through the vendor selection process, including facilitating workshops and vendor demos, development of requests for proposals (RFP's), evaluating vendor responses, analyzing costs, identifying best fit solutions, drafting contracts, and conducting post-implementation evaluations.

Education

Bachelor of Finance & Accountancy,
Illinois State University

Certifications and Affiliations

Project Management Professional
(PMP)

Illinois Government Finance Officers
Association (IGFOA)

Certified, Thomson Reuters Indirect
Tax OneSource

Certified, Vertex O Series

Certified, Oracle R12 E-Business Tax

Selected Key Clients

- Milwaukee County, WI
- Milwaukee County Zoo, WI
- Milwaukee County Parks, WI
- Town of Cary Parks, NC
- City of Santa Monica, CA
- Three Rivers Parks, MN
- Montgomery County, TX
- Village of Glencoe, IL
- St. Louis County, MO
- Spotsylvania County, VA
- Boone County, MO
- Jefferson County, DE
- Regional Transportation Authority (RTA)
- Solid Waste Authority of central Ohio (SWACO)
- Baton Rouge Parks Commission (BREC)
- City of Kirkwood, MO
- Horry County, SC
- Ramsey County, MN
- City of St. Charles, IL
- City of Lake Forest, IL
- City of Georgetown, TX



Lori Blackmon, MPA, PMP, CCMP

Consulting Manager
Management Consulting

Summary of Experience

Lori has over thirty years of experience in sourcing, implementing, and managing Information Technology (IT) solutions to optimize service delivery for organizations. Her projects require the ability to collect, manage and summarize large amounts of data on administration and technology and foresight to manage activities on time and within budget. Ms. Blackmon is a skilled facilitator, project manager and an expert in business process redesign.

Education

Bachelor of Arts in Political Science
Virginia Commonwealth University
Master of Public Administration
George Mason University

Professional Training & Affiliations

Certified, Project Management
Professional (PMP), PMI
Certified, Change Management
Professional, Acuity Institute (CCMP)
Member, Project Management
Institute (PMI)
Member, Public Technology Institute
(PTI)
Pi Alpha Alpha Honor Society

Project Management: Certified project manager applying Project Management Body of Knowledge (PMBOK) techniques to manage projects, engage stakeholders, develop and manage project governance, report progress and resolve issues. Strong organizational skills and skilled facilitator of technical meetings.

Business Process Redesign: Significant experience in the development of future-state business processes focusing on streamlining operations, value streams, and closing administrative gaps.

Transportation/Transit Expertise: Significant experience in designing and managing ERP solutions to meet unique requirements including federal reporting, labor costing and asset management.

Selected Key Clients

- County of Lee, FL
- County of Miami-Dade, FL
- County of Monterey, CA
- Golden Gate Bridge Highway Transportation District
- Kansas City Area Transportation Authority, MO
- Hillsborough County Aviation Authority, FL (Tampa Airport)
- City of Hollywood, FL
- Alaska Department of Transportation
- Colorado Department of Transportation
- Mississippi Department of Transportation
- Louisiana Department of Transportation



Kyle Macyda

Consulting Manager
Management Consulting

Summary of Experience

Kyle has over eighteen years of experience in designing, implementing, and supporting Information Technology (IT) infrastructure solutions. His hands-on, enterprise experience includes various aspects of business continuity including geo-clustering, data replication, storage area networks, backup & recovery and data center operations. He has expertise in operating system deployment, systems management, and workload migrations utilizing both traditional rack and blade servers. He also has extensive knowledge of complex virtualized environments that include a mixture of on premise, private cloud and public cloud solutions. His projects have required understanding clients' business needs and technology requirements, designing solutions, and providing hands-on assistance to ensure the successful implementation. Prior to joining Plante Moran, Kyle was a senior-level systems engineer at one of the nation's top healthcare organizations, and in other roles elsewhere, has provided IT integration services to a variety of K-12, higher education, and private sector clients.

Selected Key Clients

- County of Lee, FL
- City of Detroit, MI
- L'Anse Creuse School District
- Forest Hills Public Schools
- Rochester Community Schools
- Pierce County, WA
- Broward County, FL

Education

Bachelor of Science in Computers
University of Michigan

Selected Presentations

Cybersecurity in K12: PM Webinar

Professional Training & Affiliations

Microsoft Certified Systems Engineer
Microsoft Certified Systems
Administrator

Microsoft Certified Technology
Specialist (MCTS)

Microsoft Certified Professional

Hewlett-Packard Master Accredited
Systems Engineer (Storage Solutions,
Master SAN Architect)

Hewlett-Packard Accredited Systems
Engineer (Storage Solutions)

Hewlett-Packard Accredited
Integration Specialist (Storage
Solutions)

Hewlett-Packard Accredited Presales
Consultant (Enterprise Storage
Solutions)



Stephen Morrison

Senior Consultant
Management Consulting

Summary of Experience

Stephen began working with technology in the public sector in 2014, taking on a development and support role with a permitting and licensing vendor. In this role, Stephen began to engage with both the technical and business considerations of implementing and supporting solutions for government. Key activities included support of the vendor's cloud architecture, system configuration, workflow design, data conversion, and report development. Since joining Plante Moran, he has served as a project consultant on a variety of ERP, EAM, Community Development, and Utility Billing procurement and implementation efforts

Education

A.B. in Chemistry with Secondary in
Computer Science
Harvard University

Selected Key Clients

- County of Monterey, CA
- City of West Palm Beach, FL
- City of Grand Rapids, MI
- County of Kent, MI
- City of St. Charles, IL
- City of Sunnyvale, CA
- Town of Jupiter, FL
- County of Milwaukee, WI
- County of Miami-Dade, FL
- City of Carlsbad, CA
- City of Bismarck, ND
- City of Des Moines, IA
- Hampton Roads Transit, VA
- City of Sacramento, CA
- County of Livingston, MI
- City of Hallandale Beach, FL



Brian Pesis

Senior Consultant
Management Consulting

Summary of Experience

As a Senior Consultant, Brian has years of experience providing consulting services to government and public sector organizations. His experience includes performing IT assessments and strategic planning initiatives. Additionally, Brian has performed many ERP needs assessments, system selections, and software implementations, coupled with business process mapping and optimization. He has worked primarily with Financial Management Information Systems (FMIS), Human Resources Information Systems (HRIS), Customer Information (CIS) and Utility Billing Systems (UB), and Enterprise Asset Management (EAM) systems.

During enterprise software engagements, Brian plays a key role in the development of functional requirements and the RFP document, performing vendor proposal analysis, and assisting with due diligence. Throughout all projects, he conducts interviews with process owners and end users to understand current business needs, functional gaps, and how to apply public sector best practices.

Selected Key Clients

- City of Arvada, CO
- City of Bend, OR
- City of Bismarck, ND
- City of Cheyenne, WY's Board of Public Utilities
- City of Independence, MO
- County of Adams, CO
- County of Boone, MO
- County of Jefferson, CO
- County of Midland, MI
- County of St. Lucie, FL
- Cuyahoga County Public Library, OH
- Hillsborough County Aviation Authority, FL
- Santa Margarita Water District, CA
- Town of Longboat Key, FL
- Village of Park Forest, IL

Education

Bachelor of Business Administration,
Ross School of Business,
University of Michigan

Selected Presentations

Creating an Enterprise View of Asset
Information at the City of Arvada, CO:
APWA Colorado Chapter Conference
2015

Professional Affiliations

Member, American Public Works
Association



Area 1 - Organizational Design

Project Understanding and Approach

We understand the City wishes to retain qualified consultants to provide consulting on a wide variety of organizational issues. In the Summary section, we outlined our general approach to Organizational Planning and Development. In this section, we provide detailed information about the types of organizational analysis, design and management engagements we support, including:

- Business Analysis
- Business Process Design

Business Analysis

Our staff follow the guidelines provided in the International Institute of Business Analysis, Business Analysis Body of Knowledge (BABOK). Following the BABOK knowledge areas, we present more information on our services and qualifications.

- **Business Analysis Planning and Monitoring:** Many of our staff are certified project management professionals, and are familiar with the BABOK approach to analysis. We have specified methodologies for launching our projects, communicating progress and supporting governance. We also have an internal training program on business analysis methodology for our incoming consultants.
- **Elicitation and Collaboration:** We use a variety of approaches, including: focus groups, interviews, document analysis. The results of the data collection produce results that support the prioritization of requirements as well as address stakeholder concerns. We leverage existing best practice software specifications that we have developed for government clients of similar size and complexity then tailor them based upon the City's critical and unique requirements and interfaces. We distribute these baseline requirements to City departments for review, feedback, and prioritization. We facilitate a series of cross-departmental web meetings to incorporate edits, additions, and deletions to the baseline requirements.
- **Requirements Life Cycle Management:** We package the results of the elicitation to exposure the requirements to a broader audience. This may include preparing an RFP, or completing an assessment for stakeholders of current-City concerns.
- **Strategy Analysis:** Our needs assessments are highly collaborative, starting with kickoff meetings and moving to staff interviews, where we can perform a deep dive into the current state of technology use. Our clients report high-levels of satisfaction with our final products, which contain clearly described actionable steps.
- **Requirements Analysis and Design Definition:** We have performed hundreds of requirements gathering and assessment sessions for our clients. We also assess the value of upgrading versus new investments, and provide clear cost-benefit analysis to support the decision-making process. We are collaborative, yet methodical, in our approach, following our carefully designed project plans, communicating progress and producing valuable deliverables.
- **Solution Evaluation:** Our assessments reflect our commitment to the success of our clients. We present unbiased options for review, with objective analysis to allow clients to make informed decisions about strategic initiatives.

Business Process Design

Plante Moran has extensive experience with business process reengineering efforts. Our business process optimization involves the redesign or validation of existing business processes to achieve the following:

- Align processes with organizational goals
- Improve productivity, reduce inefficient or redundant steps
- Effectively leverage the functionality of available technology

Typical Plante Moran business process workshops:

- Facilitate and document key business processes by mapping business process flows and recommending process improvement
- Document issues and opportunities with the existing processes in the Issues & Opportunities Matrix
- Identify issues/barriers to implementation of the “To Be” process, rank them, and develop implementation plans for their removal “To-Be” Supporting Documentation
- Document the gap analysis between the current and future business processes in the Needs Assessment document

The resulting improvements using this approach would result in increased productivity, efficiency, service delivery to strengthen accountability and help to mitigate risk. Using the lean approach throughout the project can support the following areas:

- Provide an understanding of the current ERP environment including where other systems used in the Organization could be replaced or integrated with the overall Organization system
- Starts the change management process early and provides tools to continue the change and communication process throughout the project
- Defines key business process outcomes early, and allows for the Organization to design an overall business model for the Organization to operate within
- Assists in defining role based security and workflow process through the definition of roles and responsibilities in the future business processes
- Identifies variances and unique steps within a process that need to be addressed in the solution
- Supports configuration of the software and provides a thorough knowledge transfer to the Organization staff
- Provides business process documentation can be used as input to configuration rules, security and workflow set up, testing, change communication, user documentation and training

The key is to incorporate lean / six sigma throughout the phases of the ERP project and to leverage the deliverables as tools to communicate and facilitate the evolution to the new business environment.

Response time

We structure our approach to each consulting engagement to provide the services and level of professional support required to meet the individual needs of the City. Although we have developed well-defined methodologies for conducting consulting engagements, we do not attempt to impose a rigid structure onto each assignment. Rather, we attempt to understand the fundamental challenges and opportunities of our clients and develop an approach that addresses those particular conditions.

Once project proposals are available, our project team can respond to requests within a week. This is a general time frame for response and we want to be sensitive to any schedule considerations as needed. A comprehensive and appropriate project plan would require a minimum of a week.

Qualifications of Firm

In support of the work efforts in the **Organizational Design Area**, we present our qualifications in these following areas:

- Organizational Planning & Development
- Systems Analysis
- Operations Analysis
- Project Management
- Information Technology Consulting

We follow these qualifications with references and descriptions of projects with similar experience.

Organizational Planning & Development

Our organizational planning and development consulting services focus on assisting government clients in realizing their full organizational potential by working with our clients to:

- Determine goals and objectives of the organization
- Assess current operating environments
- Recommend staffing level adjustments and the deployment of new staff
- Determine appropriate organizational structures via comparison with similar organizations and best practices

Included in these activities is the development of organization charts, definition of reporting relationships, and determination of authority and responsibility levels. Additionally, Organization Planning and Development includes the evaluation of communication channels and working relationships among all levels of administrative staff. Toward this end, we place particular emphasis on defining information requirements essential for the effective performance of all organizational positions.

Functional and Operational Analysis

Our Firm's management consultants have experience in analyzing the functional and operational areas of governmental entities. Operations analysis is a comprehensive and systematic review of an organization, department, or function. Such an analysis identifies cost and service enhancement opportunities within the operation and devises methods for improving overall cost effectiveness. The analysis also focuses on optimizing the use of resources and emphasizes improved operational performance and efficiency. Resources in this context may include personnel, facilities, technology, materials and equipment.

These areas include:

- Administrative operations
- Financial functions, including audit
- Purchasing and inventory practices
- Overall administration and management
- Economic development
- Planning
- Transportation
- Information systems services
- Public works activities
- Public safety services
- Community service and development functions
- Purchasing and inventory practices
- Public safety services
- Court systems
- Water and sewer operations
- Vehicle and equipment maintenance

Additionally, our consultants have assisted our government clients in evaluating the potential benefits of contracting for services. We design our approach to identify and assess both the advantages and disadvantages of this service option, including the full range of relevant cost, service and management issues.

Project Management Methodology

Our firm has extensive experience in using a project management methodology based on the principles in the Project Management Body of Knowledge (PMBOK). PMBOK, a theory and set of principles developed by the Project Management Institute (PMI), provides a project management framework for projects of any size, type, complexity and industry. Application of PMBOK increases the ability to complete projects on time, within budget, within scope and meet the objectives desired by the client while managing change that frequently occurs on any project.

Our consultants have received extensive project management training, have conducted seminars and training in project management theory for clients and have developed an extensive toolset of project management templates, tools and lessons learned for managing projects. In fact, many of our client adopt these tools and templates to manage their own internal projects. Elements of our approach to managing projects are as follows:

- Assign personnel to areas of the project where their expertise is required
- Ensure that project expectations and scope are clearly defined up-front through development of a project charter
- Ensure frequent communications with the client
- Identify and anticipate potential project risks to minimize their occurrence and impact
- Closely monitor project timelines and budgets

Similar Project Experience

In this section, we present references on similar projects that members of the proposed project team have had in **organizational design** and management projects.

Examples of the type of work we have performed for Florida municipalities include:

- Broward County – IT Organizational Assessment
- Hillsborough Regional Airport Authority – IT Organizational Assessment
- Osceola County Property Appraiser’s Office – IT Organizational Assessment

We present representative projects of reference in **organizational design** below.

Regional Transportation Authority – Northeastern Illinois

Janice Meeks
Manager
175 W. Jackson Blvd., Suite 1650
Chicago, Illinois 60604
312.913.3228
meeksj@rtachicago.org

Business Process Optimization and ERP Strategic Sourcing

The Regional Transportation Authority of Northeastern Illinois (RTA) is charged with financial oversight, funding, and regional transit planning for the region’s transit operators or Service Boards: the Chicago Transit Authority (CTA), Metra and Pace Suburban Bus and Pace Americans with Disabilities Act (ADA) Paratransit. The RTA selected Plante Moran to document and optimize its current processes (90+), develop proposed future state processes, develop comprehensive system requirements, conduct a comprehensive technical infrastructure assessment and provide cost estimates for various solution options that were expected to meet the RTA specifications.

Project Staff: Rujan, Rivera, Schwarz, Grossman
Project Fees: \$285,000
Project Timeline: June 2016 – May 2017

City of Bend, OR

Ms. Sharon Wojda
Finance Director
PO Box 1024
Bend, OR 97709
541.693.2158
swojda@bendoregon.gov
Population (2013): 81,000

Business Process Review Services

The City engaged Plante Moran to conduct a business process review of the Fire Department’s timekeeping functions, and provide recommendations to streamline the workflow and implement best practices and appropriate control points to ensure accuracy and accountability. We facilitated cross-departmental business process reviews with key stakeholders from the Fire Department, Human Resources, and Finance Department. We documented current state issues and opportunities, and developed “to be” business processes and specific recommendations to improve timekeeping and payroll business processes.

Project Staff: Simpkinson, Patton
Project Fees: \$25,200
Project Timeline: April 2016 – Present

City of Seattle, WA

Mr. Michael Mattmiller
IT Director
700 Fifth Ave, Suite 2700
Seattle, WA 98124
206.684.0600
Michael.mattmiller@seattle.gov
www.seattle.org

FY 2016 Budget: \$5.1B

IT Organizational Assessment/ IT/GIS Assessment and Strategic Plan

Conducted an organizational assessment for the City's Department of Information Technology. The Department has nearly 200 employees providing IT services to over 11,000 city employees. Our assessment included interviews with city department customers to evaluate customer interactions and service satisfaction. We evaluated and made specific recommendations for citywide IT governance structures and processes; IT services and performance measures; and department organizational structure and staffing. As a result of our recommendations, the City is now implementing a new, more strategic and collaborative governance structure; developing a formal IT service catalog; and reorganizing IT into a more scale-able, accountable, service-centric organization structure based on best IT service management principles and practices.

Project Staff: Rujan, Simpkinson, Vanderford, Cunliffe, Gelerman

Project Fees: \$225,000

Project Timeline: September 2014 – March 2015



Area 2 - Human Resource Policy

Project Understanding and Approach

We understand the City wishes to retain consulting expertise in support of **human resource policy** projects.

In this section we present our approach for the following types of HR projects:

- HR Policy Analysis
- HR/Payroll Software System Analysis

HR Policy Analysis

Plante Moran may be asked by a City to review and revise policies to assure City Management that they are up to date in policy and code with regards to the oversight of county staff. A typical process for us would include the following steps:

- Review and inventory all current Human Resources policies (not to exceed forty total policies) and compare them to those of local governments
- Conduct department and stakeholder interviews to assess culture and department priorities
- Assess the readiness for change the stakeholders have when new policies are introduced
- Develop a prioritized list of policies to be developed and work with project team to finalize
- Review and revise Human Resource Policies based on available data and best practices
- Present Draft Policies and Discuss Recommendations
- Present completed policies for final approval and implementation by the County

Throughout the process, we are collecting, categorizing and conducting an initial assessment of the current County Human Resources policies. These policies address all aspects of Human Resources including position control, employee investigations, applications and selection, and overtime rules. We then work with the County to identify which policies are specifically referenced in local ordinances. The end product is a detailed table outlining the policies in place, most recent revision date and note which are specifically referenced in local ordinance.

Plante Moran will then summarize this information and meet with the project team to review and discuss findings from the interviews. Copies of the summary will be provided at the end of this step.

During this step Plante Moran will work with the project team to develop a plan for the approval, communication, and implementation of the completed policies. Also, any identified need for changes in county codes will be finalized with the project team during this phase.

HR/Payroll System Analysis

In these efforts, we bring our staff with experience in managing human resource technology implementations to lead team through the identification of requirements for a new system. Our team members are familiar with the particular complexities such as the impact of bargaining units or labor agreements on these systems. As a component of these projects, our teams must revisit human resource policies in place and assess the impact of the system.

We evaluate the existing systems environment and create the requirements documentation necessary to create an RFP. We assist with negotiations and can serve in a project management role during the implementation of the solution. In conjunction with the implementation, we review current HR operations, identify opportunities for improvement and provide recommendations and tools for more efficient processes.

A representation of our approach is below:

- Conduct stakeholder interviews and current state process mapping
- Process map and analyze current recruitment and onboarding processes
- Develop recommended practice process maps for selection and onboarding
- Present draft and discuss recommendations
- Final process maps and recommendations

Examples of the type of work we have performed for Florida municipalities include:

- City of Hollywood – ERP Financial and HR/Payroll Selection Assistance
- Hillsborough Regional Airport Authority – IT Organizational Assessment
- Osceola County Property Appraiser’s Office – IT Organizational Assessment

HR/Payroll System Selection

Having performed similar projects for many small, mid-size and large public sector entities over the years, Plante Moran’s seasoned project consultants have developed and refined a proven methodology and set of related tools that are intended to mitigate our clients risk during this complex project by leveraging best practices while incorporating the clients unique needs. Though our focus on best practices we list the specific tasks as well a detailed timeline for completion all the while, highlighting the key project milestones. Our approach consists of engaging our proposed qualified project team to develop, refine and execute a proven project plan, supported by our mature project toolkit, to meet our client’s expressed project objectives.

Our methodology provides continuous project management oversight across four key phases to assist our clients with the selection and negotiation of a contract with the selected vendor(s), as well as an additional *optional* subsequent implementation management assistance phase:

- Phase 0: Project Management
- Phase 1: Product Analysis
- Phase 2: RFP Development
- Phase 3: Evaluation and Selection
- Phase 4: Contract Negotiation
- *Phase 5: Implementation Management Support*

Response time

We structure our approach to each consulting engagement to provide the services and level of professional support required to meet the individual needs of the City. Although we have developed well-defined methodologies for conducting consulting engagements, we do not attempt to impose a rigid structure onto each assignment. Rather, we attempt to understand the fundamental challenges and opportunities of our clients and develop an approach that addresses those particular conditions.

Once project proposals are available, our project team can respond to requests within a week. This is a general time frame for response and we want to be sensitive to any schedule considerations as needed. A comprehensive and appropriate project plan would require a minimum of a week.

Qualifications of Firm

In support of the work efforts in the **Human Resource Policy Area**, we present our qualifications in these following areas:

- Human Resource Information Systems (HRIS)
- Government Consulting
- Information Technology Consulting

We follow these qualifications with references and descriptions of projects with similar experience.

Human Resource Information Systems (HRIS)

Plante Moran has been providing needs assessment, software selection and implementation consulting services to governmental clients for the last thirty years. We provide the full-range of services related to the planning for, selection, contract negotiations and implementation of new technologies and processes for municipal governmental software. These experiences have included HRIS modules and processes relevant to all organizational components of a municipal operation for both process owners and end-users.

Through these experiences, we have been able to derive best practices associated with HRIS system functional requirements, processes and technologies that, taken together, maximize the value that can be delivered to stakeholders within and external to the City. Additionally, our ability to negotiate contracts that maximize value for the client both financially and relative to terms and conditions is well recognized. Our contract negotiation capabilities frequently generate savings well in excess of our fees on the project.

Government Consulting Services Organization

Plante Moran has assumed a leadership role in providing consulting services to governmental entities. The range of services we provide includes the following:

- Human Capital Management and Development
- Employee Benefits Analysis

Information Technology Consulting

Plante Moran's management consultants have made a significant commitment to assist public sector clients develop and implement appropriate technology. We are among the few accounting and consulting firms that are completely vendor independent with respect to the offering of hardware or application software for our governmental clients. This enables our consultants to select the most appropriate solution for our clients based on the client's current situation and future goals and objectives. The services we offer address virtually all aspects of information systems including the following:

- Strategic Information Technology Planning
- Information Technology Assessments
- IT Infrastructure Solution Design / Selection / Implementation Management
- Cloud Strategy
- Project Budgeting and Return on Investment (ROI) Analysis
- Request for Proposal Development
- System Selection Assistance
- Contract Review and Negotiations
- Systems Implementation Planning
- Process Redesign
- Cybersecurity risk assessments
- ERP Needs Assessment
- Preparation of ERP System Requirements
- Quality Assurance
- Project Management
- Systems Controls Review

Similar Project Experience

In this section, we present references on similar projects that members of the proposed project team have had in **human resource policy** projects.

Representative projects of reference **human resource** focus or component below.

HR Policy Analysis

County of Prince William, VA

Ms. Linda Satlin
Human Resources Director
County of Prince William
4380 Ridgewood Center Drive
Woodbridge, VA 22192
703.792.6770
lsatlin@pwcgov.org

Human Resources Policy Consulting

Plante Moran is currently assessing the County's HR policies to determine if they adequately reflect current HR requirements. The HR expert on the team is reviewing the language for consistency and relevancy, and identifying outdated or non-existent policies. This effort is in support of another Plante Moran engagement to assist the county with the identification of an HR/Payroll ERP replacement.

Project Staff: Riffel, Blickhahn, Morrison, Allen
Project Timeline: August 2017 – Present

Village of Elk Grove, IL

Mr. Michael Krcik
Director of Human Resources
Village of Elk Grove
901 Wellington Avenue
Elk Grove Village, IL 60007
847.354.4019
mkrcik@elkgrove.org

Village Staff: 175

HR System Analysis and Selection

City-Parish of East Baton Rouge, LA

Mr. Eric Romero
Director of Information Services
City of Baton Rouge, LA
222 Saint Louis Street, Rm. B284
Baton Rouge, LA 70802
225.389.3070
eromero@brgov.com

City-Parish Population (2013): 229,000
Parish Staff: 4,100
Bargaining units: 2
Labor agreements: 3

Human Resources Process Optimization

Plante Moran previously assisted the Village with a comprehensive Enterprise Resource Planning (ERP) needs assessment to evaluate the existing systems environment. Subsequently, we returned to assist with negotiations and serve in a project management role during the implementation of the solution. In conjunction with the implementation, the Village asked us to **review their current HR operations, identify opportunities for improvement and provide recommendations and tools for more efficient processes.**

Project Fees: Fixed fee, \$29,400

Project Timeline: October 2017 – Present

ERP Needs Assessment, System Selection and Implementation Management Assistance

Assisted the City-Parish with an assessment of existing ERP systems and selection of a future ERP solution. Incorporated future needs and related services into an ERP request for proposal, formal solicitation and analysis of proposals received. Upon completion of selecting the vendor, we then assisted in providing assistance in negotiating a contract and statement of work with the selected vendor. We are currently providing project management assistance associated with the implementation of the selected Solution. **Mike Blickhahn is providing implementation assistance on HR policy review and process redesign for all areas of Human Resources.**

Project Fees: Fixed fee, \$178,000

Project Timeline: February 2014 – Present

City of Carlsbad, CA

Mr. Chuck McBride
Administrative Services Director
City of Carlsbad
1200 Carlsbad Village Drive
Carlsbad, CA 92008
760.602.2430
finance@calrsbadca.gov

ERP Needs Assessment, System Selection and Implementation Management Assistance

The City of Carlsbad serves more than 110,000 residents with an operating budget of \$240.1 million. Approximately 830 employees in more than 20 city departments provide public safety, fire safety, community and economic development, housing and neighborhood services, library and cultural arts, parks and recreation, public works, and other general government services.

Plante Moran assisted the City with a gap analysis of its existing finance, **human resource, payroll**, and asset management systems to identify opportunities for business process and system improvements. The scope of this effort includes 28 distinct business processes across every City department. We also evaluated existing systems and processes against peer practices and conducted a return on investment analysis of alternative solutions. The outcome of this project produced specific recommendations for business processes redesign and citywide key performance measures, and a business case for enterprise resource planning (ERP) and enterprise asset management (EAM) system improvements.

Project Fees: Fixed fee, \$180,000

Project Timeline: January 2016 – April 2016



Area 3 - Technology
(Information, Data
Collection, Citizen
Engagement, etc.)

Project Understanding and Approach

We understand that the City wishes to retain consulting expertise in support of technology initiatives involving projects for a variety of technology-based projects including those supporting citizen-engagement, data collection, and information gathering. In this section, we provide detailed information about the types of organizational analysis, design and management engagements we support, including:

- Technology Project Management
- Software Selection
- Infrastructure Assessment
- IT Security Risk Assessment
- Cybersecurity Assessment
- Application and Wireless Penetration Testing

Technology Project Management

Our project team brings experience in a wide-variety of systems designed for the management of citizen-focused service such as parks and recreation, community development, permitting systems, and utilities. Team members are familiar with all of the major systems supporting these areas and have an arsenal of best practices to bring to City projects. Projects in this area focus on efforts to support system selection by conducting interviews with process owners and process end-users, developing an RFP, performing the proposal analysis, and providing due diligence assistance and contract negotiations with the selected software vendor.

A typical project in this Area is a comprehensive Enterprise Resource Planning (ERP) needs assessment and selection project to replace legacy applications within multiple lines of business. We conduct interviews with process owners and process end-users, develop an RFP, analyze the proposal, and support due diligence. We may also assist the City with contract negotiations and statement of work development with the selected vendor.

| Objective | Deliverable(s) / Milestones |
|--|---|
| Assess current systems, replacement strategy | <ul style="list-style-type: none"> ○ Review their Community & Cultural Services department’s current business processes and system environment ○ Provide system requirements and an overall recommendation for a future environment ○ Conducting internal and external stakeholder interviews, ○ Develop and validate of system requirements, ○ Development of a comprehensive needs assessment report including <ul style="list-style-type: none"> ▪ issues and opportunities matrix ▪ user personas ▪ application inventory ▪ system requirements ▪ options analysis ▪ and overall recommendation ○ Final presentation and visioning session to communicate assessment findings to key project stakeholders. |

Plante Moran has assisted numerous local government organizations in evaluating both enterprise system (e.g., ERP, EAM, ECM, GIS, CRM) and departmental systems (e.g., recreation management software, public safety, utility billing) capabilities. As such, we have compiled best practices in terms of business process transformation, implementation, hosting, integration, risk mitigation and support. With this knowledge, our goal is to assist our clients in making the best possible decisions and positioning their transformation initiative for future success. This approach has resulted in numerous success stories and value to our clients. With our comprehensive service offering, we have evaluated the capabilities of recreation management solutions that are used by many of our local government clients.

In addition to recreation management software department specific requirements, we have developed an understanding of how these solutions can be hosted (e.g., on-premises or in the “cloud”), technology vendor support models (e.g., software as a service, service level agreement, maintenance), internal infrastructure and support needs, and integration with enterprise systems such as ERP, CRM, ECM, etc.

Software Selection

Having performed similar projects for many small, mid-size and large public sector entities over the years, Plante Moran’s seasoned project consultants have developed and refined a proven methodology and set of related tools that are intended to mitigate our clients risk during this complex project by leveraging best practices while incorporating the clients unique needs. Through our best practice approach we present the specific tasks to be completed as well as detail the timeline for their completion, highlighting the key project milestones. Our approach consists of engaging our proposed qualified project team to develop, refine and execute a proven project plan, supported by our mature project toolkit, to meet our client’s expressed project objectives.

Our methodology lays a project management foundation under four key phases to assist our clients with the selection and negotiation of a contract with the selected vendor(s), as well as an additional *optional* subsequent implementation management assistance phase:

- Phase 0: Project Management
- Phase 1: Product Analysis
- Phase 2: RFP Development
- Phase 3: Evaluation and Selection
- Phase 4: Contract Negotiation
- *Phase 5: Implementation Management Support*

Plante Moran has completed over 300+ selections and resulting RFPs without a single protest, attesting to the thoroughness and accuracy of our final products.

Infrastructure Assessments

When performing an infrastructure assessment, we typically conduct a review of the existing technical infrastructure environment including aspects of hardware, software, networking, telecommunications, systems management / administration and the overall security of the environment. The review considers:

- Web architecture, components and functionality
- Back end systems (databases and platform)
- Interaction / integration with other internal / external systems, data flows
- Development and content management approach

We also conduct a high-level review of other aspects of IT listed that may help understand the overall network and server infrastructure environment. Some of the topics we consider are listed below:

- Network system architecture & complexities (traffic flow and management)
- The physical network layer (cabling), network hardware and software versions
- Network (Internet, WAN & LAN, WLAN) physical infrastructure/connectivity, logical network design, capacity, security, the reliability of the current and future network infrastructure
- Network security architecture (internal & external)

IT Security Risk Assessment

Our assessment usually includes an analysis of critical applications to review the design and determine the effectiveness of security controls implemented. The web application testing focuses on both externally facing and internally facing applications. The web application testing includes, but not limited to, the following:

- Manual testing of security access and authentication controls
- Manual examination of data interface and exchange points
- Review of application access within the application and related data bases
- Review of the design of audit trails implemented to record transaction events and activities
- Review data validation controls implemented

We conduct Service Organization Control (SOC) 2 examinations in accordance with attestation standards established by the American Institute of Certified Public Accountants (AICPA), which is referred to as Attestation Standards (AT) Section 101 “Attest Engagements”. The SOC 2 report, “Reporting on Controls at a Service Organization Relevant to Security, Availability, Processing Integrity, Confidentiality or Privacy”, will be based on standards established in AT Section 101.

Cyber Security Analysis

Our service auditor examination will provide the information needed by departments in the City to gain an understanding of:

- Controls over the system through which services are provided;
- Design and operating effectiveness of the relevant controls in place to meet the applicable trust services criteria.

We base our methodology on a phased approach to control the progression of the engagement. Additionally, the phased progression allows us to build momentum and synergy into each phase of the engagement. We develop each phase of a security assessment to provide a framework to deliver valuable results.

The control objectives to be included in the scope of the examination will be limited to the objectives defined by the work orders (WOC) issued by DAS. Typical objectives of a cybersecurity analysis include:

For Operational & Information Technology Controls

- **Information Security** - Controls provide reasonable assurance that policies and procedures are in place to ensure effective communication of information security practices.

- **Logical Access** - Controls provide reasonable assurance that logical access to applications and data is limited to authorized individuals.
- **System Security & Event Monitoring** - Controls provide reasonable assurance that systems are monitored for security issues; that issues are promptly resolved; and that patches and antivirus definition file updates are applied in a timely manner.
- **System Availability & Capacity Monitoring** - Controls provide reasonable assurance that systems are monitored for availability and capacity issues; that issues are promptly resolved; and that redundancy is built into the systems architecture.
- **System Operations** - Controls provide reasonable assurance that programs are scheduled and executed as authorized, and that program failures are identified, investigated, and resolved in a timely manner.
- **Data Backup and Recovery** - Controls provide reasonable assurance that data and systems are backed up successfully and completely, and that backups are validated periodically and secured.
- **Physical Security** - Controls provide reasonable assurance that physical access to systems equipment, storage media, negotiable instruments, and program documentation is restricted to authorized personnel.
- **Environmental Controls** - Controls provide reasonable assurance that systems equipment, storage media, negotiable instruments, and program documentation are adequately protected from environmental factors.
- **Subservice Organization Management** - Controls provide reasonable assurance that subservice organizations are properly evaluated during the selection process and continually monitored for quality and compliance with confidentiality practices, security standards, and service level agreements.
- **Systems Development and Change Management** - Controls provide reasonable assurance that changes to or development of applications is authorized, tested, approved, properly implemented, and documented.
- **Data Privacy & Encryption** - Controls provide reasonable assurance that data at rest and in transit is encrypted, and that employees are trained on privacy and confidentiality policies.

For Processing & Implemented Business Controls

- Can include data entry and data scanning related to financially relevant systems based on the WOC.

Application & Wireless Penetration Testing

We perform validation services to complete the PCI DSS Self-Assessment Questionnaire (SAQ) and provide recommendations to enhance PCI DSS assessment processes. Perform outsourced penetration testing services to satisfy 11.3 requirements. In addition, we routinely conduct internal vulnerability scanning services, penetration testing, and web application security assessments.

Our testing process simulates various threat scenarios based on understanding the appropriate threats facing the organization. These threats range from external non-knowledgeable to internal knowledgeable. Using traditional "hacker" attacks, our security assurance specialists will identify specific targets and launch controlled exploits against existing security controls. Common targets include Internet perimeter, remote access VPN's, internal network infrastructure, sensitive resources, enterprise applications, and decision support databases.

Plante Moran will attempt to penetrate the organization's external (Internet) network. The penetration test will include the organization's available systems and subnets as a time-based penetration test of these devices up to a period deemed by the client.

Our Penetration Testing Methodology is modeled after the Penetration Testing Execution Standard and the Open Web Application Security Project. Both standards are designed to provide a common framework and scope for performing effective penetration testing and general security analysis. We perform external penetration testing on selected organization's devices available on the external (Internet) network to simulate a real-world attack. Testing includes enumeration, port scanning, manual testing, and automated testing and will attempt to avoid detection during testing.

In addition to our standard external testing, we may include additional testing procedures in an attempt to gain access to the client's information systems. Additional testing may include but not be limited to

- **Social Engineering Assessment** – testing to attempt to deceive the organization's employees into providing data, passwords, confidential information, or information that can lead to obtaining such information. Assessment can include: phishing emails, pre-text phone calls, physical impersonation, etc.
- **Wireless Security Assessment** – testing of wireless connections in an attempt to leverage systems to gain internal access
- **External Devices** – devices tested include, but are not limited to: firewalls, remote access (i.e. VPN's), Internet accessible servers, and organization postings.

In addition to manual techniques, we use various automated tools, such as vulnerability scanners to perform the network security review. These tools are configured not to cause system disruptions or degradation of service. We will work closely with the technology department to identify the specific tools we use and the timing for running the tests to minimize any potential impact.

Response time

We structure our approach to each consulting engagement to provide the services and level of professional support required to meet the individual needs of the City. Although we have developed well-defined methodologies for conducting consulting engagements, we do not attempt to impose a rigid structure onto each assignment. Rather, we attempt to understand the fundamental challenges and opportunities of our clients and develop an approach that addresses those particular conditions.

Once project proposals are available, our project team can respond to requests within a week. This is an offer of a general timeframe for response and we want to be sensitive to any schedule considerations as needed. A comprehensive and appropriate project plan would require a minimum of a week.

Qualifications of Firm

Government Consulting Services Organization

Plante Moran has assumed a leadership role in providing consulting services to governmental entities. The range of services we provide includes the following:

- Information Technology Consulting
- Communications & Networking Services
- Project Management and Oversight
- Operations Analysis
- Consolidation Studies
- Organizational Planning and Development
- Financial Management Services Market Research Services
- Business Planning and Feasibility Analysis
- Assurance Services
- Real-estate, Design and Construction Consulting

We follow these qualifications with references and descriptions of projects with similar experience.

Infrastructure Architecture

Plante Moran has a rich talent pool to utilize for infrastructure projects. We believe in a holistic approach to architecture projects, focusing on the triad of people, process, and technology to take on infrastructure changes will reflect the long-term goals of the client.

| People | Process | Technology |
|--|--|--|
| <p>Support</p> <ul style="list-style-type: none"> • External service providers • Vendor management • Capacity planning / resource allocation | <p>Delivery</p> <ul style="list-style-type: none"> • Network / server / workstation management • AV, patch & software management • Operating procedures • Help desk support <p>IT Strategy & Policy</p> <ul style="list-style-type: none"> • Standards • Disaster recovery / continuity planning | <p>Infrastructure systems</p> <ul style="list-style-type: none"> • Physical infrastructure • Internet / LAN / Security (architecture & scalability) • Wireless LAN • Server / virtualization, Storage / Backup systems architecture • Telecommunication <p>Web Architecture</p> <ul style="list-style-type: none"> • Data flow / architecture • Development methodology • Integration & security approach <p>Applications</p> <ul style="list-style-type: none"> • Email & messaging • Cloud strategy |

Project Management Methodology

Our firm has extensive experience in using a project management methodology based on the principles in the Project Management Body of Knowledge (PMBOK). PMBOK, a theory and set of principles developed by the Project Management Institute (PMI), provides a project management framework for projects of any size, type, complexity and industry. Application of PMBOK increases the ability to complete projects on time, within budget, within scope and meet the objectives desired by the client while managing change that frequently occurs on any project.

Our consultants have received extensive project management training, have conducted seminars and training in project management theory for clients and have developed an extensive toolset of project management templates, tools and lessons learned for managing projects. In fact, many of our client adopt these tools and templates to manage their own internal projects. Elements of our approach to managing projects are as follows:

- Assign personnel to areas of the project where their expertise is required
- Ensure that project expectations and scope are clearly defined up-front through development of a project charter
- Ensure frequent communications with the client
- Identify and anticipate potential project risks to minimize their occurrence and impact
- Closely monitor project timelines and budgets

Similar Project Experience

In this section, we present references on similar projects that members of the proposed project team have had in **technology** projects.

Examples of the type of work we have performed in **Area 3** for Florida municipalities include:

- Town of Jupiter – Utility Billing, Work Order and Cashiering Selection
- Escambia County Housing Finance Authority – IT Strategic Master Plan
- Emerald Coast Utilities Authority – IT Assessment and Strategic Technology Plan

We present representative projects with a **technology, data collection, citizen-engagement** focus or component under the categories below:

- IT Assessments
- IT Strategic Plans & Security Assessments
- Community-based projects

IT Assessments

Hillsborough County

Aviation Authority (HCAA)

Mr. Michael Stephens, Esq.
General Counsel for
Hillsborough County Aviation
Authority
4100 George J. Bean Parkway
Tampa, FL 33607
813.676-4623
MStephens@TampaAirport.co
m

IT Assessment

HCAA engaged Plante Moran in 2016 to perform an information technology assessment of the IT department. This assessment measured the administration, organization and technology areas and offered recommendations to improve the IT organization productivity and efficiency. Plante Moran performed the following tasks: collected and reviewed current documents; assessed the technical environment; identified targets for benchmarking and conducted comparisons with similar public and private sector organizations; interviewed executive and senior level management; interviewed IT staff; conducted an end-user survey and analyzed questionnaires completed by IT and department staff. This effort resulted in a number of organizational recommendations for governance, management and staffing levels.

Project Staff: Milne, Vanderford, Blackmon, Pesis

Project Timeline: May 2016 – September 2016

Project Fees: \$86,010

Yakima County, WA

Mr. Craig Warner
Financial Services Director
1128 North 2nd Street
Yakima, WA 98901
509.574.1313
Craig.warner@co.yakima.wa.us

Mr. Charles Ross, Auditor
1128 North 2nd Street, #117
Yakima, WA 98901
509.574.1400
Charles.ross@co.yakima.wa.us

Ms. Becky Bishop
Project Manager
128 North 2nd Street
Yakima, WA 98901
509.574.2035
beckyb@co.yakima.wa.us
Population (2013): 247,000

Financial System Discovery

Yakima County manages a budget of \$235.6 million, of which roughly \$61.2 million is General Fund. Approximately 1,000 full-time employees provide services to a population of more than 247,000. The County selected Plante Moran to provide an independent business needs assessment and fit gap analysis of its existing financial system, Cayenta, which was implemented in the early 1990s. We conducted process owner interviews and end user working sessions to review business needs in approximately 20 business functions and document over 40 unique business processes. We defined specific functional and technical requirements, evaluated enhancement, upgrade, and replacement options, and developed a change readiness survey for the County.

Project Staff: Rujan, Simpkinson, Bevins, Colletti, Lanhaus

Project Fees: \$78,500

Project Timeline: Jan 2017 – September 2017

IT Strategic Plans & Security Assessments

Kansas City Area

Transportation Authority (KCATA)

Mr. Mike Grigsby
Chief Information Officer
1200 E. 18th Street
Kansas City, MO 64108
816.346.0279
mgrigsby@kcata.org

IT Audit and Strategic Plan

KCATA engaged Plante Moran to conduct a comprehensive information technology (IT) audit and 5-year technology plan. The scope of the audit primarily included:

- IT Systems
- IT Infrastructure and Security
- Regional Integration
- On Vehicle Technology and Customer Facing Applications
- IT Structure and Staffing
- 5 Year Technology Plan

Several interviews and focus groups were conducted throughout the course of the project to assess the current state of technology at KCATA in the areas of organization, administration, and technology. Following this assessment, all of KCATA's key stakeholders collaboratively developed a vision for the future state of technology at KCATA during an IT Visioning workshop. This vision served as the basis for IT strategic planning. Working with KCATA, Plante Moran developed a 5-year IT Strategic Plan that aligned the organizational structure, IT governance, projects, and strategies with the overall IT vision.

Project Staff: Bagley, Milne, Chalasani, Brown, Auchter, Blackmon, Carrier, Zalewski

Project Fees: \$270,660

Project Timeline: July 2016 – January 2017

Padre Dam Municipal Water District

Brian Croom
Information Systems Manager
9300 Fanita Parkway
Santee, CA 92071
619.258.4770
bcroom@padre.org

IT Strategic Plan

Padre Dam Municipal Water District provides water, wastewater, recycled water, and recreation services to over 100,000 residents. A staff of 130 manages 24,000 active service connections to the potable water system and \$900 million in infrastructure assets. The District selected Plante Moran to conduct a current state and gap analysis of its IT environment, and facilitate the development of an IT strategic plan. Our scope included a review of the District's IT strategy, security risk vulnerabilities, application portfolio, technical infrastructure, and IT organizational structure and staffing.

Project Staff: Bagley, Simpkinson, Blough, Macyda

Project Fees: \$64,000

Project Timeline: January 2017 – Present

Community Based Projects

City of Santa Monica

Katie Seaman

1685 Main Street, Room 210, Santa Monica, CA

310.458.8381 x 2374

Katie.Seaman@SMGOV.NET

Recreation Management System (RMS) Needs Assessment Project

Assisted the City of Santa Monica in a Recreation Management System (RMS) Needs Assessment project to review their Community & Cultural Services (CCS) department's current business processes and system environment (ACTIVE solutions), to provide system requirements and an overall recommendation for a future RMS environment. Project included conducting internal (CCS staff) and external (public) stakeholder interviews, development and validation of system requirements, development of a comprehensive needs assessment report including issues and opportunities matrix, user personas, application inventory, system requirements, options analysis, and overall recommendation, and a final presentation and visioning session to communicate assessment findings to key project stakeholders.

Project Staff: Rujan, Schwarz, Jones, Rajcevic

Project Fees: \$ 75,000

Project Timeline: May 2017 - Jan 30 2018

City of Lake Forest, IL

Sally Swarthout

Recreation Management Director

400 Hastings Rd

Lake Forest, IL 60045

847.810.3942

swarthos@cityoflakeforest.com

Recreation Management Software System Needs Assessment and Selection

Conducted a recreation management software system needs assessment and selection project for the City to replace legacy applications utilized by the City. This project included conducting of interviews with process owners and process end-users, development of a needs assessment report and gap analysis preparation of an RFP, proposal analysis, and due diligence assistance, and contract negotiation assistance.

Project Staff: Riffel, Schwarz

Project Fees: \$ 36,000

Project Timeline: January 2014 – November 2014

City of Bend, OR

Mr. Kevin Riper
Assistant City Manager
710 NW Wall Street
Bend, OR 97701
kriper@bendoregon.gov
541.323.8561
www.bendoregon.gov

Community Development (Land Management) System Vendor Selection and Implementation Management Assistance

Plante Moran conducted a comprehensive Enterprise Resource Planning (ERP) needs assessment and selection project for the City to replace legacy applications within multiple lines of business, including land management. This project included conducting of interviews with process owners and process end-users, development of an RFP, proposal analysis, and due diligence assistance. We assisted the City with contract negotiations and statement of work development with the selected vendor.

Project Staff: Bagley, Simpkinson, Patton, Bevins, Colletti, Jones
Project Assessment and Selection Timeline: August 2013 – December 2016
Project Implementation Support: September 2017 - Present



Area 4 - Project Management

Project Understanding and Approach

We understand the City seeks project management expertise and support on future projects. In this section, we present our project management methodology and experience in demonstration of our ability to meet this requirement.

Project Management Engagements

Many of our team members are credentialed project management professionals (PMP). We provide project management and independent validation and verification (IV&V) services and present our approach in the sections below.

Plante Moran will assign a credentialed Project Management Professional (PMP) to ensure consistency and adherence to PMBOK principles. We have developed an extensive toolset of project management templates, tools and lessons learned for managing projects. In fact, our client adopt many of these tools and templates to continue to manage the project. Elements of our approach to managing projects are as follows:

- Assign personnel to areas of the project where their unique expertise is required
- Develop a project charter to ensure that project expectations and scope are clearly defined up-front
- Follow a communications plan to address frequent communications with the client
- Create risk assessment and mitigation plans to identify potential project issues and minimize the occurrence and impact
- Closely monitor and report status of project timelines and budgets

Plante Moran will deliver project management services based on our project management methodology. We understand the challenges that can occur with any change in business or organizational processes.

- ***Managing Issues and Risk:*** Managing issues and risks throughout the project is critical to keep a project on track. We aggressively manage issues on a regular basis throughout the project. Our approach also identifies the areas of risk early in the project and defines specific mitigations for each risk. It is our experience that managing risk aggressively is the key to successful project management. Any risk can affect the budget, schedule, and overall completion of the project. Our section on software systems used for project management provides additional details on the tools and reports we use to manage the project.
- ***Managing Change:*** Resistance to change is one of the biggest obstacles to achieving the desired level of organizational performance. This is true whether the change involves business processes, information technology, or the cultural work setting for people within the organization. Effective cultural change management will educate individuals about the changes, reduce resistance to change, and inspire individuals to accept change as quickly as possible. Managing change appropriately for each type of project will assist in the acceptance of new business processes or systems.
- ***Managing Scope:*** Throughout any project, it is equally important to manage scope. When the scope of the project is changed, it typically affects the cost and schedule. The main causes for scope creep are poor requirements analysis prior to the start of the project, lack of user involvement early on, underestimating the complexity of the project, and lack of change control. Plante Moran has experience in helping clients to define the project upfront, and following the best practices in project management to manage scope.

Coordination and Verification Services (IV&V)

The roles that we have fulfilled contain a variety of criteria focused on achieving the maximum value for our services and mitigating project risk. The approach that Plante Moran further describes below will ensure projects in Gainesville achieve the key objectives as follows:

- Identify and mitigate risk
- Verification of project deliverables and work products to meet contractual and business requirements
- Communication on project status
- Observations and recommendations to improve the program and project performance
- Validation of quality of the project to ensure completeness and accuracy

We believe that our approach will provide the projects in the City with significant value in terms of the ability to execute project activities delivered on time and within budget, as well as minimize the overall risk to the organization.

The approach used consistently across all IV&V services is as follows:

- ***Real-Time Versus After-the-Fact Monitoring and Review:*** Due to Plante Moran's extensive experience in conducting IV&V services on other public sector engagements, our clients' find the most value in having Plante Moran involved real-time in various project activities. Performing real-time monitoring versus performing an after-the-fact audit of activities will minimize the amount of rework that might otherwise be required and allows the City to take advantage of the experiences that Plante Moran can offer to the project.
- ***Prevention versus Detection:*** In-line with the real-time monitoring and review of project activities, the focus of any IV&V effort is on prevention versus detection. Prevention will include Plante Moran being responsible for reviewing all vendor payment and non-payment deliverables and work products.
- ***Process versus Product:*** In addition to reviewing the developed deliverables and work products, Plante Moran will monitor project activities to ensure that the Vendor follows the project approach as outlined in documentation included in the Statement of Work. Phase activity verification checklists assist in this activity.
- ***Leveraging of Best Practices:*** During the project, Plante Moran will offer up procedures, methods, tools and templates used on other similar projects for the City and vendor to consider.
- ***Independence from the Project Management Function:*** An important aspect of the IV&V function is separation from the project management activities of the City and vendor. The manner in which this independence will be retained is as follows:
 - Preparing verification checklists to monitor and report on activities such as status, concerns, observations, issues and risks.
 - Providing recommendations and associated resolutions for each of the items on the checklist based on Plante Moran's IV&V services as documented in each Statement of Work (SOW).
 - Monitoring of the various project management processes supported through SharePoint by conducting a weekly check of the various logs, files and folders.

Response time

We structure our approach to each consulting engagement to provide the services and level of professional support required to meet the individual needs of the City. Although we have developed well-defined methodologies for conducting consulting engagements, we do not attempt to impose a rigid structure onto each assignment. Rather, we attempt to understand the fundamental challenges and opportunities of our clients and develop an approach that addresses those particular conditions.

Once project proposals are available, our project team can respond to requests within a week. This is a general time frame for response and we want to be sensitive to any schedule considerations as needed. A comprehensive and appropriate project plan would require a minimum of a week.

Qualifications of Firm

Plante Moran has assumed a leadership role in providing consulting services to governmental entities. The range of services we provide includes the following:

- Information Technology Consulting
- Communications & Networking Services
- Project Management and Oversight
- Operations Analysis
- Consolidation Studies
- Business Planning and Feasibility Analysis
- Assurance Services

In support of the work efforts in the **Project Management Area**, we present our qualifications in these following categories:

- Project Management
- Information Technology Consulting

We follow these qualifications with references and descriptions of projects with similar experience.

Project Management

Plante Moran has been providing management-consulting services to public sector clients for the last thirty years to include:

- High-level advisory services
- Functional team project manager
- Project management advisement to the client project manager
- Co-client project manager
- IV&V / Third Party Assurance (3PA)

We specialize in assisting public sector organizations with project management, process improvements, change management, planning for technology selection, contract negotiations and implementation support for new business processes and technologies. We also provide a full-range of services related to operations analysis, organizational development, and operations improvement for clients ranging from states, large and small counties and cities, and transit and special districts. Through these experiences, we have been able to derive best practices associated with public sector business processes, software functional requirements, internal controls and technologies that, taken together, maximize the delivered value to stakeholders within and external to city.

We have successfully incorporated best practices from PMBOK, PMI, ITIL, IPMA-HR, GFOA and other frameworks into our methodology and continually update these methods through projects, industry involvement and market research.

Having performed similar projects for many small, mid-size and large public sector entities over the years, Plante Moran's seasoned project consultants have developed and refined a proven methodology and set of related tools that are intended to mitigate our clients risk during complex projects by leveraging best practices while incorporating the clients unique needs. Through our best practice approach, we present the specific project management tasks for each phase of the project from project initiation to project closeout. Our approach consists of engaging our proposed qualified project team to develop, refine and execute a proven project plan, supported by our mature project toolkit, to meet the City's expressed project objectives.

Information Technology Consulting

Plante Moran's management consultants have made a significant commitment to assist public sector clients develop and implement appropriate technology. We are among the few accounting and consulting firms that are completely vendor independent with respect to the offering of hardware or application software for our governmental clients. This enables our consultants to select the most appropriate solution for our clients based on the client's current situation and future goals and objectives. The services we offer address virtually all aspects of information systems including the following:

- Strategic Information Technology Planning
- Information Technology Assessments
- IT Infrastructure Solution Design / Selection / Implementation Management
- Cloud Strategy
- Project Budgeting and Return on Investment (ROI) Analysis
- Request for Proposal Development
- System Selection Assistance
- Contract Review and Negotiations
- Systems Implementation Planning
- Process Redesign
- Cybersecurity risk assessments
- ERP Needs Assessment
- Preparation of ERP System Requirements
- Quality Assurance
- Project Management
- Systems Controls Review

Similar Project Experience

In this section, we present references on similar projects that members of the proposed project team have had in **project management** projects.

We typically provide project management for implementations of a new financial, HR/Payroll, cashiering, utility or other systems. Our project management work includes PMO support, project administration, and business analysis services. Our team members bring specific expertise and to augment functional and technical teams as well. Finally, members of our project team have certifications in organizational change management and develop change management and communications plans for clients.

Examples of the type of work we have performed in Area 4 for Florida municipalities include:

- Village of Wellington – ERP Selection Management
- City of Fernandina Beach – ERP Implementation and Management Assistance
- Solid Waste Authority of Palm Beach County – Project Management Methodology Development

We present representative projects with a **project management** focus or component below.

Project Management Leadership

Solid Waste Authority for Palm Beach County, FL

Mr. Paul Dumars
Chief Financial Officer
Solid Waste Authority of Palm Beach County
7501 North Jog Road
West Palm Beach, FL 33412
561.640.4000 x4542
pdumars@swa.org

Project Management Methodology Development

Assisted the County in the creation of a **project management office** to support two large-scale projects. Developed a project management methodology, developed and delivered training to executive leadership and other staff in support of the Authority’s Technology Strategic Plan. Also supported the development of an application lifecycle management strategy, creating a methodology and delivering training to staff.

Project Staff: Eiler, Simpkinson, Blough

Project Fees: \$50,800

Project Timeline: June 2017 - Present

Great Lakes Water Authority (GLWA)

Formerly Detroit Water and Sewerage Department

Nicolette N. Bateson, CPA
Chief Financial Officer/Treasurer
Great Lakes Water Authority
735 Randolph, Room 1608
Detroit, Michigan 48226
313.964.9225
Nicolette.Bateson@glwater.org

Project Management Assistance

Currently assisting GLWA with providing project facilitation support related to multiple projects occurring during the initial years of the organization’s existence. Supporting the client’s Financial Services team by meeting facilitation, issues and action item tracking, risk identification, project status tracking reporting, management of scope, schedule and resources. In addition to this effort, Plante Moran also completed the ERP Options Analysis, Contract Negotiation and currently provides implementation project management support for the ERP.

Project Staff: Warner, Hoose, Dilworth, Rajcevic

Project Fees: (For PM Assistance \$ 50,000, for ERP PM \$150,000)

Project Timeline: March 2017 – Current

Saint Louis University

David Hakanson
Vice President, CIO and Chief
Innovation Officer
Saint Louis University
1 N Grand Blvd.
St. Louis, MO 63103

City of Tacoma, WA

Mr. Jack Kelanic
IT Director
733 Market Street, Rm. 50
Tacoma, WA 98402
253.382.2630
jkkelanic@cityoftacoma.org
www.cityoftacoma.org

Ms. Michelle Lewis-Hodges
IT Manager / PMO Manager
733 Market Street, Rm. 50
Tacoma, WA 98402
253.502.2210
mlewis@cityoftacoma.org

Program Oversight for HIPAA Remediation

Worked with University SLUCare program to coordinate and oversee the **overall program**, establish program standards, develop tools and templates, review and validate project plans. Also managed all communications, identified, tracked and resolved issues and escalated resource concerns. Managed interdependencies between program teams and ensured all efforts aligned with the overall program vision.

Project Staff: Bagley, Bailey-Woods, Dilworth, Jones
Project Fees: \$1,152,000
Project Timeline: August 2016 – Present (24 month duration)

Program Management Office Assessment

The City of Tacoma's Information Technology Department (ITD) has approximately 115 employees serving 3,600 city staff across 13 departments, including three utilities (Power, Water, and Rail). Plante Moran conducted a maturity assessment of the City's IT Program Management Office (PMO) using a proprietary maturity assessment model based on the Carnegie Mellon Capability Maturity Model Integration (CMMI). We evaluated services and capabilities, methodology and processes, tools and technology, stakeholder management, and governance and value management. We also reviewed job classifications and conducted a comparative market survey of wage and salary data to assess project management career path opportunities at the City. Our recommendations provide the City with a clear vision for its PMO, organization, and services; and a year-by-year roadmap to increase its maturity and transition from a balanced matrix to a strong matrix organization.

Plante Moran was asked to return to Tacoma in 2017, to perform a review of the project office and develop an IT Strategic Plan. This reference is shown in **Area 3 - Technology**.

Project Staff: Rujan, Simpkinson, Cunliffe
Project Fees: \$49,440
Project Timeline: May 2015 – July 2015

Project Management Support

Miami-Dade County, FL

Ms. Margaret Brisbane
Assistant Director, IT
5680 SW 87th Avenue
Miami, FL 33173
305.596.8320
mbrisb@miamidade.gov
County staff: 28,200
Bargaining units: 10

ERP RFP Development and Procurement Assistance

Assisted the County in the development of a comprehensive ERP integrator RFP for a Countywide implementation of the PeopleSoft and Hyperion products. Subsequent to development of the RFP, we provided procurement assistance that has included proposal evaluation, reference-checking assistance, demonstration assistance and other due diligence activities. Currently, we are assisting the County in the negotiation of a contract and Statement of Work with the selected ERP System Integrator.

Project Staff: Eiler, Blackmon, Morrison
Project Fees: \$500,000
Project Timeline: June 2015 - Present

City of Palo Alto, CA

Mr. Brad Eggleston,
Assistant DPW Director
250 Hamilton Ave.
Palo Alto, CA 94301
650.329.2636
Brad.Eggleston@cityofpaloalto.org

Enterprise Asset Management System Needs Assessment & Selection Services

Plante Moran provided the City with needs assessment and software selection services to enable the City to select its first Enterprise Asset Management System. Plante Moran is working as partner with the City to identify software options best suited to fulfill the infrastructure management objectives of the community. These objectives included finding a system to develop asset inventories, create preventive maintenance cycles, track operations / maintenance costs, aggregate of project costs, perform capital maintenance budgeting, and forecast asset lifespans.

Project Timeline: January 2014 – Present

Independent Validation & Verification (IV&V)

Broward County, FL

Mr. John Bruno
 Chief Information Officer
 Broward County Government Center
 West Building
 1 N. University Drive
 Suite 4003A
 Plantation, FL 33324-2019
 954-357-8821
 jbruno@broward.org
 Staff: 11,659
 Labor Agreements: 1
 Bargaining units: 6

ERP Third Party Assurance Services

Providing assistance to the County as part of the implementation of their selected ERP solution to include the following Third Party Assurance services:

- Pre-Implementation Activities
- On-Going Project Assurance
- Business Process and System Controls Assurance
- Deliverables Assurance and Payment Authorizations
- Post-Implementation Assessment of Key Controls
- Technical Environment and Procedures Review

Project Staff Title: Agnawal, Sandah Samach
 Project Fee: Fixed fee, \$3,500,000
 Project Timeline: June 2014 Present



Forms and Exhibits

Drug Free Workplace Form

DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that

Plante & Moran, PLLC

does:

(Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty of nolo contendere to, any violation of Chapter 893, Florida Statutes, or of any controlled substance law of the United State or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.



Bidder's Signature

February 6, 2018

Date

Exhibit B: Certification of Compliance with Living Wage

EXHIBIT B

CITY OF GAINESVILLE

CERTIFICATION OF COMPLIANCE WITH LIVING WAGE

The undersigned hereby agrees to comply with the terms of the Living Wage Ordinance and to pay all covered employees, as defined by City of Gainesville Ordinance 020663 as amended at 030168 (Living Wage Ordinance), during the time they are directly involved in providing covered services under the contract with the City of Gainesville for _____ a living wage of \$11.8269 per hour to covered employees who receive Health Benefits from the undersigned employer and \$13.08 per hour to covered employees not offered health care benefits by the undersigned employer.

| |
|---|
| Name of Service Contractor/Subcontractor: <u>Plante & Moran, PLLC</u> |
| Address: <u>27400 Northwestern Hwy., Southfield, MI 48034</u> |
| Phone Number: <u>248.352.2500</u> |
| Name of Local Contact Person <u>E. Scott Eiler</u> |
| Address: <u>27400 Northwestern Hwy., Southfield, MI 48034</u> |
| Phone Number: <u>248.223.3447</u> |
| \$ <u>N/A</u> (Amount of Contract) |

Signature: *E. Scott Eiler* Date: February 6, 2018

Printed Name: E. Scott Eiler

Title: Partner

Exhibit D: Living Wage Compliance

Exhibit D

LIVING WAGE COMPLIANCE
See Living Wage Decision Tree (Exhibit B hereto)

Check One:

- Living Wage Ordinance does not apply
(check all that apply)
- Not a covered service
 - Contract does not exceed \$100,000
 - Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.
 - Located within the City of Gainesville enterprise zone.
- Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.

Exhibit F: Proposal Response Form

Exhibit F

PROPOSAL RESPONSE FORM – SIGNATURE PAGE

(submit this form with your proposal)

TO: City of Gainesville, Florida
200 East University Avenue
Gainesville, Florida 32601

PROJECT: Management Consulting (Non-Construction)

RFQ#: CMGR-180051-GD

RFQ DUE DATE: February 8, 2018, 3:00pm Local Time

Proposer's Legal Name: Plante & Moran, PLLC

Proposer's Alias/DBA: _____

Proposer's Address: 27400 Northwestern Hwy.
Southfield, MI 48034

PROPOSER'S REPRESENTATIVE (to be contacted for additional information on this proposal)

Name: E. Scott Eiler Telephone Number 248.223.3447
Date: February 6, 2018 Fax Number 248.233.8587
Email address scott.eiler@plantemoran.com

ADDENDA

The Proposer hereby acknowledges receipt of Addenda No.'s 1, _____, _____, to these Specifications.

TAXES

The Proposer agrees that any applicable Federal, State and Local sales and use taxes, which are to be paid by City of Gainesville, are included in the stated bid prices. Since often the City of Gainesville is exempt from taxes for equipment, materials and services, it is the responsibility of the Contractor to determine whether sales taxes are applicable. The Contractor is liable for any applicable taxes which are not included in the stated bid prices.

LOCAL PREFERENCE (check one)

Local Preference requested: YES NO

A copy of your Business tax receipt and Zoning Compliance Permit should be submitted with your bid if a local preference is requested.

QUALIFIED LOCAL SMALL AND/OR DISABLED VETERAN BUSINESS STATUS (check one)

Is your business qualified as a Local Small Business in accordance with the City of Gainesville Small Business Procurement Program? (Refer to Definitions) YES NO

Is your business qualified as a Local Service-Disabled Veteran Business in accordance with the City of Gainesville Small and Service-Disabled Veteran Business Procurement Program? (Refer to Definitions) YES NO

LIVING WAGE COMPLIANCE

See Living Wage Decision Tree (Exhibit C hereto)

Check One:

- Living Wage Ordinance does not apply
(check all that apply)
 - Not a covered service
 - Contract does not exceed \$100,000
 - Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.
 - Located within the City of Gainesville enterprise zone.
- Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.

SIGNATURE ACKNOWLEDGES THAT: (check one)

- Proposal is in full compliance with the Specifications.
- Proposal is in full compliance with specifications except as specifically stated and attached hereto.

Signature also acknowledges that Proposer has read the current City of Gainesville Debarment/Suspension/Termination Procedures and agrees that the provisions thereof shall apply to this RFP.

ATTEST:


 Signature _____
 By: Kim Szlachetka
 Title: Sr. Administrative Assistant

(CORPORATE SEAL)

PROPOSER:


 Signature _____
 By: E. Scott Eiler
 Title: Partner

Dun & Bradstreet Report



Printed By: Strite Potter
Date Printed: January 29, 2018

Live Report : PLANTE MORAN, P.C.

D-U-N-S® Number: 14-326-3254

Trade Names: PLANTE & MORAN

Endorsement/Billing Reference: potterst@dnb.com

| D&B Address | | Endorsement : |
|---|---|------------------|
| Address 27400 Northwestern Hwy Ste 300 Plante Moran Bldg Southfield, MI, US - 48034 Phone 248 362-2500 Fax 248-362-0018 | Location Type Headquarters Web | potterst@dnb.com |

Company Summary

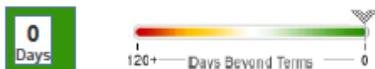
Currency: Shown in USD unless otherwise indicated

Score Bar

| | | |
|---|------------|---|
| PAYDEX® | | Paying on time. |
| Commercial Credit Score Percentile | | Low Risk of severe payment delinquency. |
| Financial Stress Score National Percentile | | Low Risk of severe financial stress. |
| D&B Viability Rating | | 2 1 C G View More Details |
| Bankruptcy Found | | No |
| D&B Rating | 1R2 | 1R indicates 10 or more Employees, Credit appraisal of 2 is good |

Detailed Trade Risk Insight™

Days Beyond Terms Past 3 Months



Dollar-weighted average of 5 payment experiences reported from 3 Companies

Recent Derogatory Events

| | Nov-17 | Dec-17 | Jan-18 |
|-----------------------|--------|--------|--------|
| Placed for Collection | - | - | - |
| Bad Debt Written Off | - | - | - |

Total Amount Current & Past Due - 13 Month Trend

Detailed Trade Risk Insight™

Days Beyond Terms Past 3 Months

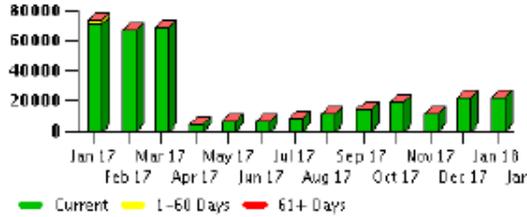


Dollar-weighted average of 5 payment experiences reported from 3 Companies

Recent Derogatory Events

| | Nov-17 | Dec-17 | Jan-18 |
|-----------------------|--------|--------|--------|
| Placed for Collection | - | - | - |
| Bad Debt Written Off | - | - | - |

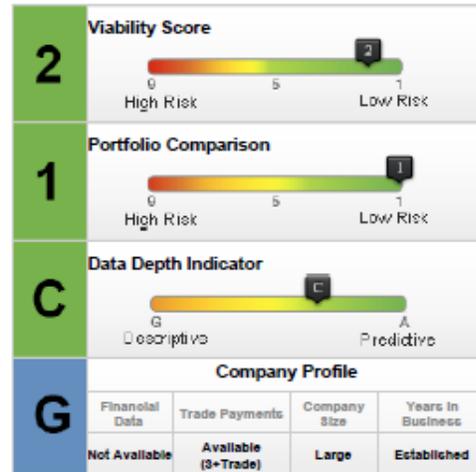
Total Amount Current & Past Due - 13 Month Trend



PAYDEX® Trend Chart



D&B Viability Rating



D&B Company Overview

This is a headquarters location

| | |
|---------------------------------|--------------------------------------|
| Branch(es) or Division(s) exist | Y |
| Mailing Address | PO BOX 307 SOUTHFIELD, MI48037 |
| Chief Executive | GORDON KRATER, MNG PTNR |
| Year Started | 2002 |
| Employees | 1600 (600 Here) |
| SIC | 8721 |
| Line of business | Accounting/ auditing/ bookkeeping |
| NAICS | 541219 |
| History Status | CLEAR |

FirstRain Company News

i

! This Company is not currently tracked for Company News

Powered by FirstRain

Public Filings

The following data includes both open and closed filings found in D&B's database on this company.

| Record Type | Number of Records | Most Recent Filing Date |
|--------------|-------------------|-------------------------|
| Bankruptcies | 0 | - |
| Judgments | 0 | - |
| Liens | 0 | - |
| Suits | 0 | - |
| UCCs | 0 | - |

The public record items contained herein may have been paid, terminated, vacated or released prior to today's date.

Corporate Linkage

Subsidiaries (Domestic)

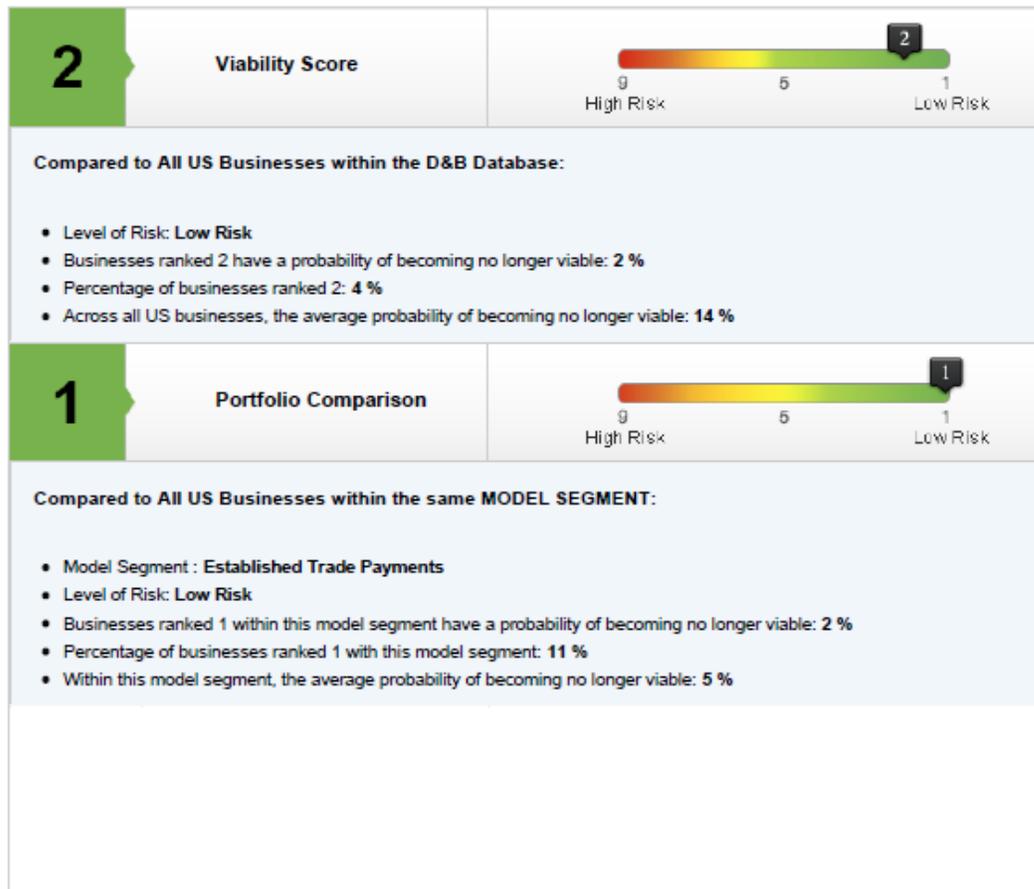
| Company | City, State | D-U-N-S® NUMBER |
|---------------------------|----------------|-----------------|
| PLANTE & MORAN, PLLC | SOUTHFIELD, MI | 00-491-3299 |
| P&M HOLDING COMPANY, INC. | SOUTHFIELD, MI | 08-077-7294 |

Predictive Scores

Currency: Shown in USD unless otherwise indicated 

D&B Viability Rating Summary

The D&B Viability Rating uses D&B's proprietary analytics to compare the most predictive business risk indicators and deliver a highly reliable assessment of the probability that a company will go out of business, become dormant/inactive, or file for bankruptcy/insolvency within the next 12 months. The D&B Viability Rating is made up of 4 components:



3

C

Data Depth Indicator



G Descriptive A Predictive

Data Depth Indicator:

- ✓ Rich Firmographics
- ✓ Extensive Commercial Trading Activity
- ✗ No Financial Attributes

Greater data depth can increase the precision of the D&B Viability Rating assessment.

G

Company Profile

| | | | |
|----------------|----------------------|--------------|-------------------|
| Financial Data | Trade Payments | Company Size | Years in Business |
| Not Available | Available (3+ Trade) | Large | Established |

Company Profile Details:

- Financial Data: **Not Available**
- Trade Payments: **Available (3+ Trade)**
- Company Size: **Large** (Employees: 50+ or Sales: \$500K+)
- Years in Business: **Established (5+)**

Credit Capacity Summary

This credit rating was assigned because of D&B's assessment of the company's creditworthiness. For more information, see the

D&B Rating Key

D&B Rating : **1R2**

Number of employees: 1R indicates 10 or more employees
Composite credit appraisal: 2 is good

The Rating was changed on December 15, 2016 because of D & B's overall assessment of the company's financial, payment and history information.

The 1R and 2R ratings categories reflect company size based on the total number of employees for the business. They are assigned to business files that do not contain a current financial statement. In 1R and 2R Ratings, the 2, 3, or 4 creditworthiness indicator is based on analysis by D&B of public filings, trade payments, business age and other important factors. 2 is the highest Composite Credit Appraisal a company not supplying D&B with current financial information can receive.

Below is an overview of the company's rating history since 02-14-2004

| D&B Rating | Date Applied |
|------------|--------------|
| 1R2 | 12-15-2016 |
| ER1 | 08-14-2014 |
| -- | 12-16-2013 |
| 1R2 | 02-23-2010 |
| -- | 02-14-2004 |

Number of Employees Total: 1,600 (600 here)

Payment Activity: (based on 19 experiences)

Average High Credit: 16,576

Highest Credit: 100,000

Total Highest Credit: 215,750

D&B Credit Limit Recommendation

Conservative credit Limit: 400,000

Aggressive credit Limit: 900,000

Risk category for this business :

LOW



4

The Credit Limit Recommendation (CLR) is intended to serve as a directional benchmark for all businesses within the same line of business or industry, and is not calculated based on any individual business. Thus, the CLR is intended to help guide the credit limit decision, and must be balanced in combination with other elements which reflect the individual company's size, financial strength, payment history, and credit worthiness, all of which can be derived from D&B reports.

Risk is assessed using D&B's scoring methodology and is one factor used to create the recommended limits. See Help for details.

Financial Stress Class Summary

The Financial Stress Score predicts the likelihood of a firm ceasing business without paying all creditors in full, or reorganization or obtaining relief from creditors under state/federal law over the next 12 months. Scores were calculated using a statistically valid model derived from D&B's extensive data files.

The Financial Stress Class of 1 for this company shows that firms with this class had a failure rate of 0.03% (3 per 10,000), which is lower than the average of businesses in D & B's database

Financial Stress Class :



Lower than average risk of severe financial stress, such as a bankruptcy or going out of business with unpaid debt, over the next 12 months.

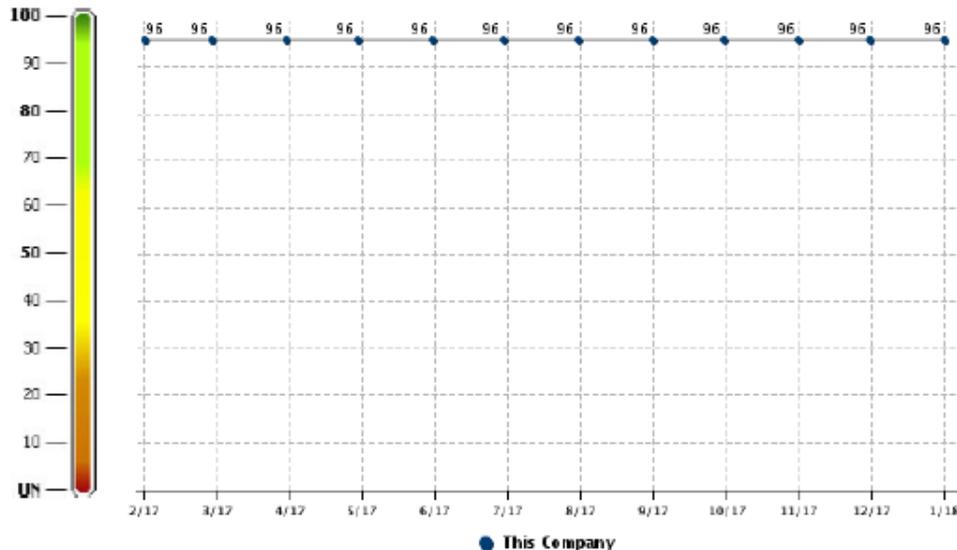
Probability of Failure:

Risk of Severe Financial Stress for Businesses with this Class: **0.03 %** (3 per 10,000)
 Financial Stress National Percentile : **96** (Highest Risk: 1; Lowest Risk: 100)
 Financial Stress Score : **1576** (Highest Risk: 1,001; Lowest Risk: 1,875)
 Average Risk of Severe Financial Stress for Businesses in D&B database: **0.48 %** (48 per 10,000)

The Financial Stress Class of this business is based on the following factors:

High number of inquiries to D & B over last 12 months.

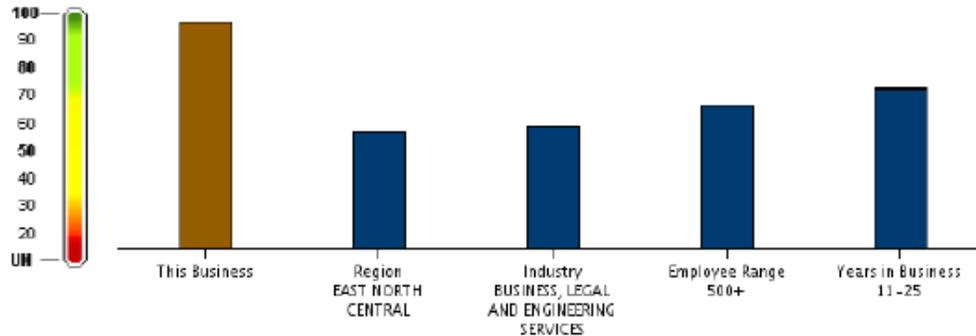
Financial Stress Percentile Trend:



Notes:

The Financial Stress Class indicates that this firm shares some of the same business and financial characteristics of other companies with this classification. It does not mean the firm will necessarily experience financial stress.
 The Probability of Failure shows the percentage of firms in a given Class that discontinued operations over the past year with loss to creditors. The

Probability of Failure - National Average represents the national failure rate and is provided for comparative purposes.
 The Financial Stress National Percentile reflects the relative ranking of a company among all scorable companies in D&Bs file.
 The Financial Stress Score offers a more precise measure of the level of risk than the Class and Percentile. It is especially helpful to customers using a scorecard approach to determining overall business performance.



| Norms | National % |
|--|------------|
| This Business | 96 |
| Region: EAST NORTH CENTRAL | 50 |
| Industry: BUSINESS, LEGAL AND ENGINEERING SERVICES | 52 |
| Employee range: 500+ | 61 |
| Years in Business: 11-25 | 68 |

This Business has a Financial Stress Percentile that shows:

- Lower risk than other companies in the same region.
- Lower risk than other companies in the same industry.
- Lower risk than other companies in the same employee size range.
- Lower risk than other companies with a comparable number of years in business.

Credit Score Summary

The Commercial Credit Score (CCS) predicts the likelihood of a business paying its bills in a severely delinquent manner (91 days or more past terms).

The Credit Score class of 1 for this company shows that 1.1% of firms with this class paid one or more bills severely delinquent, which is lower than the average of businesses in D & B's database.

Credit Score Class :



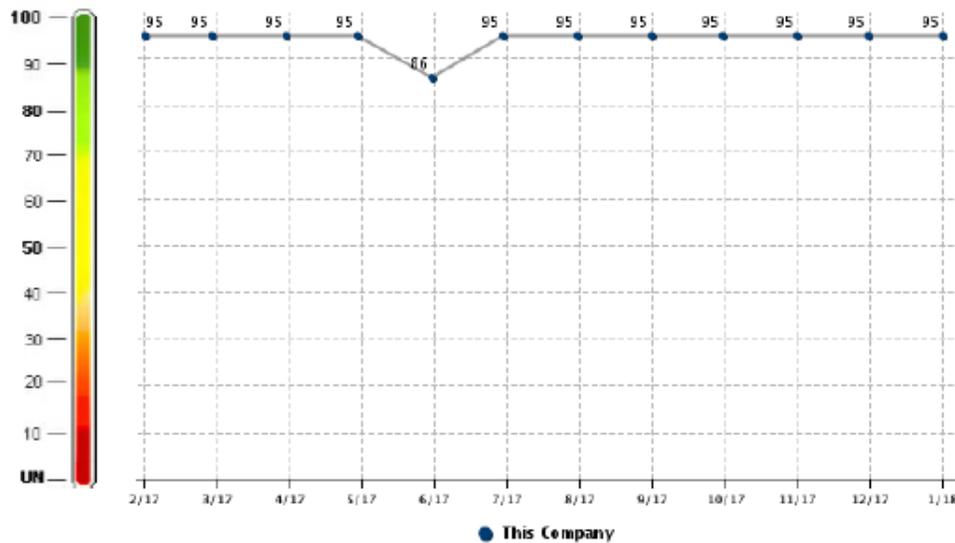
Incidence of Delinquent Payment

Among Companies with this Classification: **1.10 %**
 Average compared to businesses in D&Bs database: **10.20 %**
 Credit Score Percentile : **95** (Highest Risk: 1; Lowest Risk: 100)
 Credit Score : **596** (Highest Risk: 101; Lowest Risk: 670)

The Credit Score Class of this business is based on the following factors:

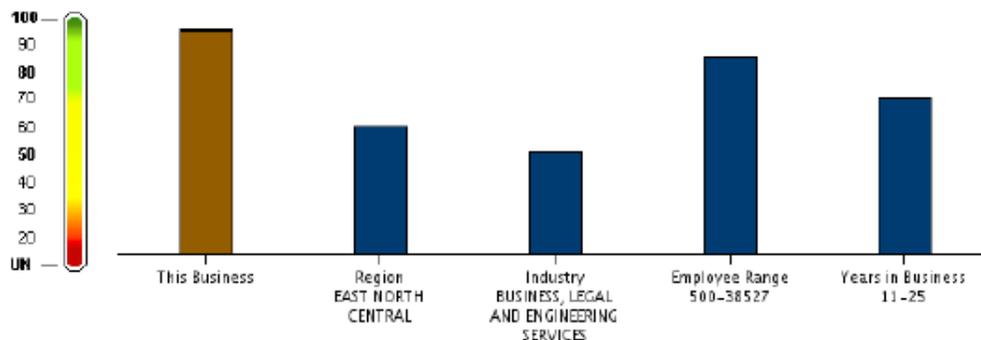
- Higher risk industry based on delinquency rates for this industry

Credit Score Class Percentile Trend:



Notes:

The Commercial Credit Score Risk Class indicates that this firm shares some of the same business and financial characteristics of other companies with this classification. It does not mean the firm will necessarily experience severe delinquency.
 The Incidence of Delinquent Payment is the percentage of companies with this classification that were reported 91 days past due or more by creditors. The calculation of this value is based on D&B's trade payment database.
 The Commercial Credit Score percentile reflects the relative ranking of a firm among all scorable companies in D&B's file.
 The Commercial Credit Score offers a more precise measure of the level of risk than the Risk Class and Percentile. It is especially helpful to customers using a scorecard approach to determining overall business performance.



| Norms | National % |
|--|------------|
| This Business | 95 |
| Region: EAST NORTH CENTRAL | 54 |
| Industry: BUSINESS, LEGAL AND ENGINEERING SERVICES | 43 |
| Employee range: 500-38527 | 84 |
| Years in Business: 11-25 | 66 |

This business has a Credit Score Percentile that shows:

- Lower risk than other companies in the same region.
- Lower risk than other companies in the same industry.
- Lower risk than other companies in the same employee size range.
- Lower risk than other companies with a comparable number of years in business.

Trade Payments

Currency: Shown in USD unless otherwise indicated 

D&B PAYDEX®

The D&B PAYDEX is a unique, weighted indicator of payment performance based on payment experiences as reported to D&B by trade references. [Learn more about the D&B PAYDEX](#)

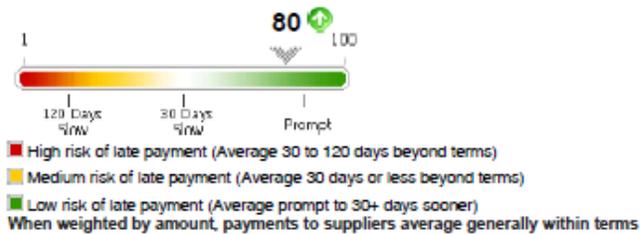
Timeliness of historical payments for this company.

Current PAYDEX is **80** Equal to generally within terms (Pays more promptly than the average for its industry of 3 days beyond terms)
 Industry Median is **78** Equal to 3 days beyond terms
 Payment Trend currently is  Unchanged, compared to payments three months ago

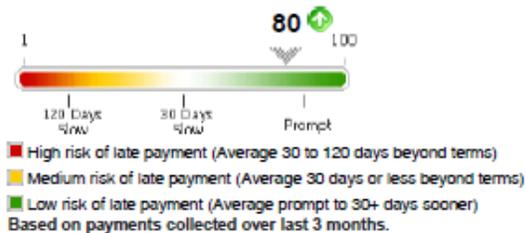
Indications of slowness can be the result of dispute over merchandise, skipped invoices etc. Accounts are sometimes placed for collection even though the existence or amount of the debt is disputed.

| | |
|---|---------|
| Total payment Experiences in D&Bs File (HQ) | 19 |
| Payments Within Terms (not weighted) | 100 % |
| Trade Experiences with Slow or Negative Payments(%) | 0.00% |
| Total Placed For Collection | 0 |
| High Credit Average | 16,576 |
| Largest High Credit | 100,000 |
| Highest Now Owing | 20,000 |
| Highest Past Due | 0 |

D&B PAYDEX



3-Month D&B PAYDEX



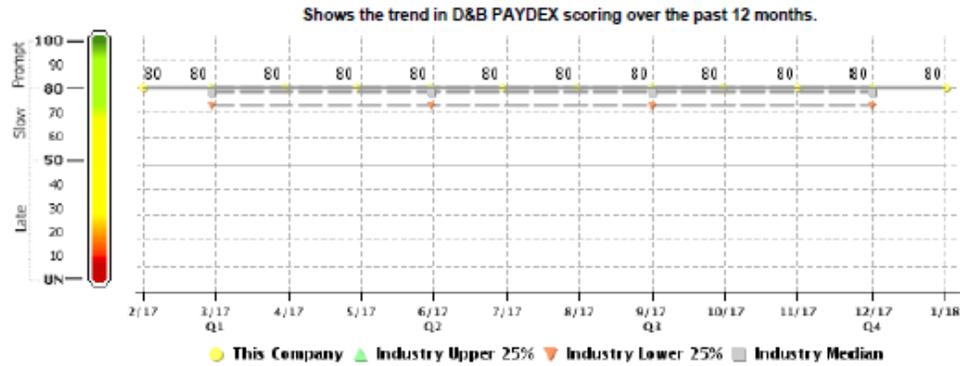
When weighted by amount, payments to suppliers average within terms

D&B PAYDEX® Comparison

8

Current Year

PAYDEX® of this Business compared to the Primary Industry from each of the last four quarters. The Primary Industry is Accounting/auditing/bookkeeping , based on SIC code 8721 .

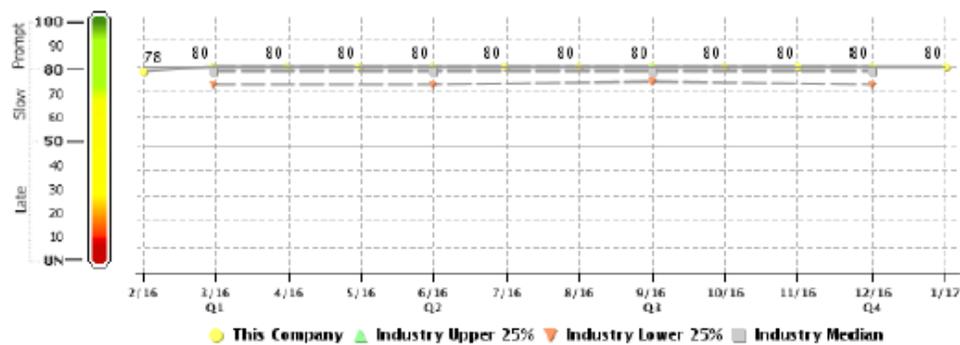


| | 2/17 | 3/17 | 4/17 | 5/17 | 6/17 | 7/17 | 8/17 | 9/17 | 10/17 | 11/17 | 12/17 | 1/18 |
|---------------------------|------|------|------|------|------|------|------|------|-------|-------|-------|------|
| This Business | 80 | 80 | 80 | 80 | 80 | 80 | 80 | 80 | 80 | 80 | 80 | 80 |
| Industry Quartiles | | | | | | | | | | | | |
| Upper | . | 80 | . | . | 80 | . | . | 80 | . | . | 80 | . |
| Median | . | 78 | . | . | 78 | . | . | 78 | . | . | 78 | . |
| Lower | . | 73 | . | . | 73 | . | . | 73 | . | . | 73 | . |

Current PAYDEX for this Business is 80 , or equal to generally within terms
 The 12-month high is 80 , or equal to GENERALLY WITHIN terms
 The 12-month low is 80 , or equal to GENERALLY WITHIN terms

Previous Year

Shows PAYDEX of this Business compared to the Primary Industry from each of the last four quarters. The Primary Industry is Accounting/auditing/bookkeeping , based on SIC code 8721 .



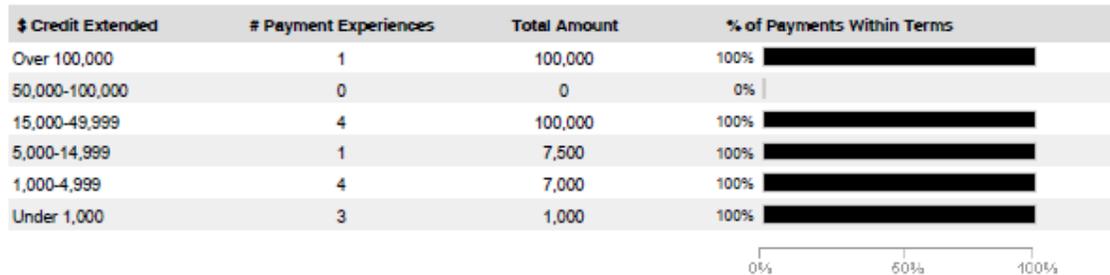
| Previous Year | 03/16 Q1'16 | 06/16 Q2'16 | 09/16 Q3'16 | 12/16 Q4'16 |
|---------------------------|----------------|----------------|----------------|----------------|
| This Business | 80 | 80 | 80 | 80 |
| Industry Quartiles | | | | |
| Upper | 80 | 80 | 80 | 80 |
| Median | 78 | 78 | 78 | 78 |
| Lower | 73 | 73 | 74 | 73 |

Based on payments collected over the last 4 quarters.

Current PAYDEX for this Business is 80 , or equal to generally within terms
 The present industry median Score is 78 , or equal to 3 days beyond terms
 Industry upper quartile represents the performance of the payers in the 75th percentile
 Industry lower quartile represents the performance of the payers in the 25th percentile

Payment Habits

For all payment experiences within a given amount of credit extended, shows the percent that this Business paid within terms. Provides number of experiences to calculate the percentage, and the total credit value of the credit extended.



Based on payments collected over last 24 months.

All Payment experiences reflect how bills are paid in relation to the terms granted. In some instances, payment beyond terms can be the result of disputes over merchandise, skipped invoices etc.

Payment Summary

There are 19 payment experience(s) in D&Bs file for the most recent 24 months, with 9 experience(s) reported during the last three month period.

The highest Now Owes on file is 20,000 . The highest Past Due on file is 0

Below is an overview of the companys currency-weighted payments, segmented by its suppliers primary industries:

| | Total Revd (#) | Total Amts | Largest High Credit | Within Terms (%) | Days Slow (<31 31-60 61-90 90> (%)) |
|---------------------------------|----------------|----------------|---------------------|------------------|-------------------------------------|
| Top Industries | | | | | |
| Nonclassified | 5 | 128,250 | 100,000 | 100 | 0 0 0 0 |
| Telephone communictns | 2 | 42,500 | 40,000 | 100 | 0 0 0 0 |
| Whol computers/softwr | 1 | 25,000 | 25,000 | 100 | 0 0 0 0 |
| Natnl commercial bank | 1 | 15,000 | 15,000 | 100 | 0 0 0 0 |
| Mfg manifold forms | 1 | 2,500 | 2,500 | 100 | 0 0 0 0 |
| Help supply service | 1 | 1,000 | 1,000 | 100 | 0 0 0 0 |
| Whol piece goods | 1 | 1,000 | 1,000 | 100 | 0 0 0 0 |
| Reg misc coml sector | 1 | 250 | 250 | 100 | 0 0 0 0 |
| Newspaper-print/publ | 1 | 0 | 0 | 0 | 0 0 0 0 |
| Other payment categories | | | | | |
| Cash experiences | 5 | 250 | 100 | | |
| Payment record unknown | 0 | 0 | 0 | | |
| Unfavorable comments | 0 | 0 | 0 | | |
| Placed for collections | 0 | N/A | 0 | | |
| Total in D&B's file | 19 | 215,750 | 100,000 | | |

Accounts are sometimes placed for collection even though the existence or amount of the debt is disputed.

Indications of slowness can be result of dispute over merchandise, skipped invoices etc.

Detailed payment history for this company

| Date Reported (mm/yy) | Paying Record | High Credit | Now Owes | Past Due | Selling Terms | Last Sale Within (month) |
|-----------------------|----------------------|-------------|----------|----------|---------------|--------------------------|
| 01/18 | Ppt | 25,000 | 0 | 0 | | 4-5 mos |
| | Ppt | 20,000 | 20,000 | 0 | | 1 mo |
| 12/17 | Ppt | 40,000 | 2,500 | 0 | | 1 mo |
| | Ppt | 15,000 | 15,000 | 0 | | 1 mo |
| | Ppt | 2,500 | 0 | 0 | N30 | 6-12 mos |
| | Ppt | 2,500 | 0 | 0 | | 1 mo |
| | Ppt | 1,000 | 0 | 0 | | 6-12 mos |
| 11/17 | (008) | | | | Sales COD | 1 mo |
| 10/17 | (009) | 50 | | | Cash account | 1 mo |
| 09/17 | Ppt | 7,500 | 0 | 0 | | 6-12 mos |
| | Ppt | 1,000 | 0 | 0 | | 6-12 mos |
| | (012) Satisfactory . | 0 | 0 | 0 | | 6-12 mos |
| 05/17 | Ppt | 100,000 | 0 | 0 | | 6-12 mos |
| | Ppt | 500 | 0 | 0 | | 6-12 mos |
| | Ppt | 250 | 0 | 0 | | 6-12 mos |
| 10/16 | (016) Satisfactory . | 250 | | | | 1 mo |
| 09/16 | (017) | 100 | | | Cash account | 1 mo |
| 02/16 | (018) | 50 | | | Cash account | 1 mo |
| | (019) | 50 | | | Cash account | 1 mo |

Payments Detail Key: ■ 30 or more days beyond terms

Payment experiences reflect how bills are paid in relation to the terms granted. In some instances payment beyond terms can be the result of disputes over merchandise, skipped invoices, etc. Each experience shown is from a separate supplier. Updated trade experiences replace those previously reported.

Public Filings

Currency: Shown in USD unless otherwise indicated

Summary

A check of D&B's public records database indicates that no filings were found for PLANTE MORAN, P.C. at 27400 Northwestern Hwy Ste 300 , Southfield MI .

D&B's extensive database of public record information is updated daily to ensure timely reporting of changes and additions. It includes business-related suits, liens, judgments, bankruptcies, UCC financing statements and business registrations from every state and the District of Columbia, as well as select filing types from Puerto Rico and the U.S. Virgin Islands.

D&B collects public records through a combination of court reporters, third parties and direct electronic links with federal and local authorities. Its database of U.S. business-related filings is now the largest of its kind.

Government Activity

Activity summary

| | |
|---------------------|----|
| Borrower (Dir/Guar) | NO |
| Administrative Debt | NO |

| | |
|--|----|
| Contractor | NO |
| Grantee | NO |
| Party excluded from federal program(s) | NO |

Possible candidate for socio-economic program consideration

| | |
|---------------------|------------|
| Labour Surplus Area | YES (2018) |
| Small Business | N/A |
| 8(A) firm | N/A |

The details provided in the Government Activity section are as reported to Dun & Bradstreet by the federal government and other sources.

History & Operations

Currency: Shown in USD unless otherwise indicated 

Company Overview

| | |
|-----------------------------------|--|
| Company Name: | PLANTE MORAN, P.C. |
| Doing Business As : | PLANTE & MORAN |
| Street Address: | 27400 Northwestern Hwy Ste 300 Plante Moran Bldg Southfield , MI 48034 |
| Mailing Address: | PO Box 307 Southfield MI 48037 |
| Phone: | 248 352-2500 |
| Fax: | 248-352-0018 |
| History | Is clear |
| Present management control | 16 years |

History

The following information was reported: **04/28/2017**

Officer(s): GORDON KRATER, MNG PTNR
JERRY SMITH, CFO
SUE NOVAK, MNG PTNR
JERRY SMITH, CFO

DIRECTOR(S) : THE OFFICER(S)

The Michigan Secretary of State's business registrations file showed that Plante Moran, P.C. was registered as a Professional Corporation on May 17, 2010, under the file registration number 02965P.

Business started 2002.

GORDON KRATER. Graduated from the University of Michigan, Stephen M. Ross School of Business, with a B.B.A. in accounting.

JERRY SMITH born 1956. 1999 Present active here.

SUE NOVAK. Antecedents not available.

JERRY SMITH. Antecedents not available.

Business address has changed from 27400 Northwestern Highway, Southfield, MI, 48034 to 27400 Northwestern Hwy, Southfield, MI, 48034.

Business Registration

Feb 14 2017

Registered Name: PLANTE MORAN, P.C.
Business type: CORPORATION
Corporation type: PROFIT
Date incorporated: May 17 2010
State of incorporation: MICHIGAN
Filing date: May 17 2010
Registration ID: 02965P
Duration: PERPETUAL
Status: ACTIVE
Where filed: CORPORATIONS & DEVELOPMENT BUREAU , LANSING , MI
Registered agent: CHRISTOPHER NELSON , 27400 NORTHWESTERN HWY , SOUTHFIELD , MI , 480340000
AgentStatus: ACTIVE

Operations

04/28/2017

Provides accounting, auditing and bookkeeping services (100%).

Description: Terms are cash Net 30. Sells to general public, commercial concerns, wholesalers, retailers. Territory : United States.

Nonseasonal.

Employees: 1,600 which includes officer(s). 600 employed here.

Facilities: Rents 112,495 sq. ft. on 4th floor of a multi story steel building.

Location: Central business section on main street. This address is believed to be a mail-drop location including a commercial mail receiving agency (CMRA) address.

Subsidiaries: This business has multiple subsidiaries, detailed subsidiary information is available in Dun & Bradstreet's linkage or family tree products.

SIC & NAICS

SIC:

Based on information in our file, D&B has assigned this company an extended 8-digit SIC. D&B's use of 8-digit SICs enables us to be more specific about a company's operations than if we use the standard 4-digit code.

The 4-digit SIC numbers link to the description on the Occupational Safety & Health Administration (OSHA) Web site. Links open in a new browser window.

8721 0000 Accounting, auditing, and bookkeeping

NAICS:

541219 Other Accounting Services

Financials

Company Financials: D&B

Additional Financial Data

D & B has updated this report using available sources.

Request Financial Statements

Request Financial Statements

Requested financials are provided by PLANTE MORAN, P.C. and are not DUNSRight certified.

Key Business Ratios

D & B has been unable to obtain sufficient financial information from this company to calculate business ratios. Our check of additional outside sources also found no information available on its financial performance.

To help you in this instance, ratios for other firms in the same industry are provided below to support your analysis of this business.

Based on this Number of Establishments

32

Industry Norms Based On 32 Establishments

| | This Business | Industry Median | Industry Quartile |
|-----------------------------------|---------------|-----------------|-------------------|
| Profitability | | | |
| Return on Sales % | UN | 7.9 | UN |
| Return on Net Worth % | UN | 60.8 | UN |
| Short-Term Solvency | | | |
| Current Ratio | UN | 1.2 | UN |
| Quick Ratio | UN | 1.1 | UN |
| Efficiency | | | |
| Assets to Sales % | UN | 29.1 | UN |
| Sales / Net Working Capital | UN | 11.5 | UN |
| Utilization | | | |
| Total Liabilities / Net Worth (%) | UN | 135.8 | UN |

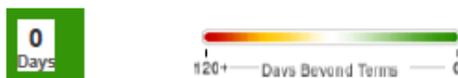
UN = Unavailable

Detailed Trade Risk Insight™

Detailed Trade Risk Insight provides detailed updates on over 1.5 billion commercial trade experiences collected from more than 260 million unique supplier/purchaser relationships.

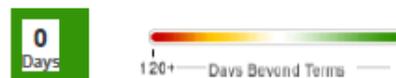
Days Beyond Terms - Past 3 & 12 Months

3 months from Nov 17 to Jan 18



Dollar-weighted average of 5 payment experiences reported from 3 companies

12 months from Feb 17 to Jan 18

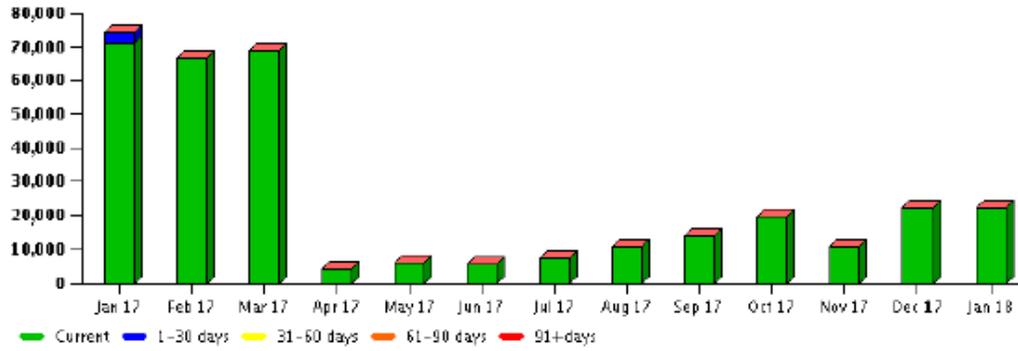


Dollar-weighted average of 8 payment experiences reported from 4 companies

Derogatory Events Last 13 Months from Jan 17 to Jan 18

No Derogatory trade Event has been reported on this company for the past 13 Months

Total Amount Current and Past Due - 13 month trend from Jan 17 to Jan 18



| Status | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 | Oct-17 | Nov-17 | Dec-17 | Jan-18 |
|---------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total | 74,155 | 66,718 | 68,972 | 4,240 | 6,143 | 5,965 | 7,571 | 10,837 | 14,073 | 19,399 | 11,100 | 22,224 | 22,224 |
| Current | 71,228 | 66,718 | 68,972 | 4,240 | 6,143 | 5,965 | 7,571 | 10,837 | 14,073 | 19,399 | 11,100 | 22,224 | 22,224 |
| 1-30 Days Past Due | 2,927 | - | - | - | - | - | - | - | - | - | - | - | - |
| 31-60 Days Past Due | - | - | - | - | - | - | - | - | - | - | - | - | - |
| 61-90 Days Past Due | - | - | - | - | - | - | - | - | - | - | - | - | - |
| 90+ Days Past Due | - | - | - | - | - | - | - | - | - | - | - | - | - |

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State of Florida Department of State

I certify from the records of this office that PLANTE & MORAN PLLC is a Michigan limited liability company authorized to transact business in the State of Florida, qualified on May 9, 2011.

The document number of this limited liability company is M11000002358.

I further certify that said limited liability company has paid all fees due this office through December 31, 2018, that its most recent annual report was filed on January 26, 2018, and that its status is active.

I further certify that said limited liability company has not filed a Certificate of Withdrawal.

*Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capital, this
the Twenty-sixth day of January,
2018*



Ken DeFries
Secretary of State

Tracking Number: CC7952178446

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>



Additional
Information

Attachment A – Hourly Rates

Area 1 – ORGANIZATIONAL DESIGN

Respondent's Name: Plante Moran

| Job Title | Principal | Senior Consultant | Consultant | Junior Consultant | Program & Admin Support |
|--------------------|-----------|-------------------|------------|-------------------|-------------------------|
| Hourly Rate | \$300 | \$260 | \$200 | \$140 | \$80 |

Area 2 – HUMAN RESOURCE POLICY

Respondent's Name: Plante Moran

| Job Title | Principal | Senior Consultant | Consultant | Junior Consultant | Program & Admin Support |
|--------------------|-----------|-------------------|------------|-------------------|-------------------------|
| Hourly Rate | \$300 | \$260 | \$200 | \$140 | \$80 |

Area 3 – TECHNOLOGY (INFORMATION, DATA COLLECTION, CITIZEN ENGAGEMENT, ETC.)

Respondent's Name: Plante Moran

| Job Title | Principal | Senior Consultant | Consultant | Junior Consultant | Program & Admin Support |
|--------------------|-----------|-------------------|------------|-------------------|-------------------------|
| Hourly Rate | \$300 | \$260 | \$200 | \$140 | \$80 |

Area 4 – PROJECT MANAGEMENT

Respondent's Name: Plante Moran

| Job Title | Principal | Senior Consultant | Consultant | Junior Consultant | Program & Admin Support |
|--------------------|-----------|-------------------|------------|-------------------|-------------------------|
| Hourly Rate | \$300 | \$260 | \$200 | \$140 | \$80 |

Attachment B – Addendum 1 Signed

CMGR-180051-GD
Management Consulting (Non-Construction)



ADDENDUM NO. 1

Date: February 1, 2018

Bid Date: February 8, 2018
at 3:00 P.M. (Local Time)

Bid Name: Management Consulting (Non-Construction)

Bid No.: CMGR-180051-GD

NOTE: This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary.

Please find attached:

- a) Copy of the black out period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters) distributed during mandatory pre-bid meeting.

The following are answers/clarifications to questions received on or before 3:00pm January 25, 2018:

1. Question: As an RFQ, we plan to provide a representation of the subject matter experts in our stable. Are we required to utilize the staff we propose, and if not, what is the process for approval of additional staff once a project is defined?
Answer: No; the City is open to varying resources based on the project needs at the time. Please share the resumes of your associates or those persons that will work on the project.
2. Question: What is the latest version of the strategic plan and is it available online? If so, what is the URL?
Answer: Information pertaining to Gainesville's most recent strategic framework (i.e., strategic plan), including the three phase process that led to its development, is described at: <http://www.cityofgainesville.org/CityManager/StrategicPlanning/CityStrategicPlan.aspx>
Additionally, a link the strategic framework one-pager can be found directly at: <http://www.cityofgainesville.org/Portals/0/openGNV/Framework%20One-Pager%20-%20for%20prezi.pdf>
Please note that this framework presents guiding questions for the city to continually align projects, processes and organizational resources. This is not intended to be a strategic plan in the typical "mission, vision, values, objectives" format.
3. Question: What is the general criteria for onsite work for the potential projects covered by this RFQ
Answer: Please see number 4.

4. Question: Does City of Gainesville encourage and/or permit virtual work tools for meetings and presentations (e.g., WebEx or GoToMeeting)?
Answer: Yes
5. Question: When was the last time the City of Gainesville conducted a review and update of their Human Resource policies?
Answer: This effort has been continuous since 2003, including a comprehensive rewrite that began in 2009. We've found that policies in general are fragmented and in some instances, silent, unclear and/or confusing, inconsistent or outdated relative to changing workplace practices/regulations, market and employee needs.
6. Question: Are there any areas of particular concern regarding Human Resource policies?
Answer: Policies in general are fragmented and in some instances, silent, unclear/confusing, inconsistent or outdated relative to changing workplace practices/regulations, market and employee needs
7. Question: What is the current approval process and structure for policy governance (i.e., how are policies approved)?
Answer: Policies are developed, reviewed and approved, through the department who owns the policy, reviewed as to form and legality with the City Attorney's office, escalated to the City's Charter Officers for review and approval, and when necessary, final approvals are decided on by the elected body consisting of the City Commission and Mayor.
8. Question: Does the City currently outsource any of the IT operations?
Answer: Yes
9. Question: In reference to the statement that Gainesville is not a tourist destination, what primary sources of revenue for the City
Answer: The primary source of revenue for the city is the general fund which is generated through property values, etc.
10. Question: Are there examples to further describe the expectations of a "citizen-centered" City?
Answer: The most comprehensive resources that describe our citizen centered efforts include the following materials:

- a. The Blue Ribbon Report found at:
<http://www.cityofgainesville.org/Portals/0/clerk/CityComm/BlueRibbonReport.pdf>
- b. A Fast Company Magazine article, available at:
<https://www.fastcodesign.com/3065107/how-one-florida-city-is-reinventing-itself-with-ux-design>
- c. The city's citizen centered microsite, available at:
www.gainesvillecitizens.org

11. Question: When was the last time you had a Management Consulting study?

Answer: Over the years, consultants have been brought in for certain departments if needed. We are not aware of an overarching management consultant study that has been conducted for the overall organization in recent years.

12. Question: Did a consultant perform this study? If so, who was the consultant and at what professional fee structure?

Answer: See response to question 11. Fees and fee structure have varied based on the services needed at that time.

13. Question: Is there a preference for using a firm that can complete all areas vs. a firm that is bidding on only a few areas of the project?

Answer: We are open to any proposal whether it includes all services or a few areas as outlined in the RFQ.

14. Question: Do you have a timeline needed for completion?

Answer: This is dependent on the project and would be defined by determining what resources are available, the prioritized need for the work and the timeline the City and consultant agree upon. In some cases it is possible to request that services be expedited

15. Question: Do you have a project budget range for this project or these project areas?

Answer: We are developing a budget range for the various projects. This will be dependent on the department's available funding and the project need

16. Question: Will a company's Acord Form, Certificate of Liability Insurance, provide the City with proof of required insurance?

Answer: Acord Form, COI is acceptable

17. Question: Areas 2, 5 & 6 seem to have common threads; will the City consider merging into one?

Answer: Yes, the City will consider merging various subject areas.

18. Question: What is the meaning of Area 5 - Leadership? Does this refer to cutting-edge / innovative citizen-centered strategies or, more literally, the city's leadership and office leadership?
- Answer: We are interested in proposals on either topic. There is a need for leadership development programs, particularly in the areas of management and executive coaching.
19. Question: Is the Leadership area during implementation?
- Answer: Yes. This bid is intended to encompass a series of projects depending on the City's needs at that point in time. The specific project and implementation timelines will be defined dependent on the department or organization's needs.
20. Question: Will consultant have the ability to identify new gaps and blend into an existing area?
- Answer: Yes. We welcome any feedback the consultant would provide and we would remain open to discussing suggested solutions.
21. Question: If consultant bids for one or less than all areas, how does the city plan to project manage multiple consultants? e.g. Governance structure?
- Answer: Consultants are going to be awarded to be in a pool of consultants that will be individually selected as needed by the City on a per project basis. Consultants will work with the department that has requested their assistance. This will be dependent on the department's available funding and the project need.
22. Question: How will the Smart City Lab with the University of Florida be intertwined into each area?
- Answer: The Lab will be staffed by personnel from both the City and University. The Lab will be the vehicle by which the City and University conduct joint research into smart city technologies and policies.
23. Question: Will ongoing City projects be folded into the consulting services by area or will only new tasks, jointly developed with the consultant and city be in scope?
- Answer: This could be current and existing projects or new projects as determined by the City's prioritized needs and funding availability. Please refer to the RFQ.
24. Question: Would consultant be excluded from any new projects coming out of this engagement, e.g. AV/EV strategy requirement?
- Answer: No

25. Question: What is the fee estimate?
Answer: The fee estimate is under development at this time.
26. Question: What is the expected contract duration for each area?
Answer: The expected contract duration will be determined at the time a department selects a vendor
27. Question: What is the procurement type?
Answer: This is a Request for Qualifications
28. Question: Will PM role apply to all areas in the RFQ? Other projects to be determined at a later date, e.g. Smart City Lab with the University of Florida?
Answer: I do not foresee us procuring PM services for projects in the Smart City Lab.
29. Question: If we have more than one respondent identified for an area should we blend the rate or just list separately?
Answer: Blending is acceptable.
30. Question: Is there a page limit?
Answer: No, however, responses should be kept as concise as possible.
31. Question: Our understanding is that the "Projected award date" refers to the timeframe in which respondents will be informed that they have been selected by the City to contract for Management Consulting Services. Can you provide additional timeline details for the "Projected award date" at this time?
Answer: The projected award date is April, 2018.
32. Question: How much lead/response time does the City anticipate allotting to qualified contractors to respond to the specific project following selection of qualified contractors?
Answer: The city is willing to determine lead time during the negotiations process.
33. Question: Of the six management areas outlined, which one does the following bullet point apply to – "Management or strategy consulting, including strategy implementation and execution"?
Answer: The bullet point applies to consulting, implementation, and implementation as determined during contract negotiations.
34. Question: In Section K. the City states four (4) areas in which the City will be responsible to work with the selected consultant(s). Will the City also be able to make staff available for a

specific project (or projects) to serve in roles that might be typically supported by City staff – such as participating on a Steering Committee, or serving as a Subject Matter Resource (SMR) to assist with validating and/or reviewing the project approach and deliverables?

Answer: Yes

35. Question: Given that the RFQ process as described is intended to assist the City in selecting qualified firms or individuals - and that there would be a subsequent effort to negotiate a contract or contracts with firms or individuals that the City selects - in our response we would provide proposed project staff who represent the qualifications and related experience required for the scope of the corresponding requested services. Final determination of the actual staff to be assigned to a project or projects would be confirmed as part of contract negotiations, as the timeframe in which a negotiated contract would begin is not yet determined, and staff availability may change accordingly.

In turn, if proposed project staff is not fully available during the timeframe of a negotiated project, we would make the effort to include those staff as Subject Matter Resources (SMRs) wherever possible and appropriate. **Please confirm that this approach will meet the requirements of RFQ No. CMGR-180051-GD.**

Answer: Yes as long as project staff is listed in the RFQ

36. Question: “D3. Consultant’s firm shall provide a Dun & Bradstreet report to the city or some other acceptable means for the City to evaluate the firm’s financial stability and reliability.” Is this to be provided with the qualifications or after consultant selection?

Answer: Yes

37. Question: “D4. Consultant’s firm shall provide proof of insurance in a form acceptable to the City, which give the City 30 days’ written notice (except the City will accept ten (10) days’ written notice for non-payment) prior to cancellation or material change in coverage, in the amounts as noted below.” Is this to be provided with the qualifications or after consultant selection?

Answer: After consultant selection

38. Question: “D6. Consultant’s firm shall provide updated contact information for all clients served within the past three (3) years who were provided with the same management consulting services covered under the Statement of Qualifications being submitted.” We have conducted 190 projects within the last three years in the areas on which we are proposing. We will be happy to list the clients. For how many do you want contact information?

Answer: Please provide 3-5 reference of similar management consultant requirements.

39. Question: "A copy of the consultant's current Florida Professional Registration Certificate must be provided. If the consultant is a corporation, it must be chartered to conduct business in Florida." Is this to be provided with the qualification or after consultant selection?

Answer: Yes with the qualification

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 1 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 1 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER: Plante & Moran, PLLC
BY: E. Scott Eiler (E. Scott Eiler)
DATE: 2/2/18

CITY OF
GAINESVILLE

FINANCIAL SERVICES
PROCEDURES MANUAL

41-424 Prohibition of lobbying in procurement matters

Except as expressly set forth in Resolution 060732, Section 10, during the black out period as defined herein no person may lobby, on behalf of a competing party in a particular procurement process, City Officials or employees except the purchasing division, the purchasing designated staff contact. Violation of this provision shall result in disqualification of the party on whose behalf the lobbying occurred.

Black out period means the period between the issue date which allows for immediate submittals to the City of Gainesville Purchasing Department for an invitation for bid or the request for proposal, or qualifications, or information, or the invitation to negotiate, as applicable, and the time the City Officials and Employee awards the contract.

Lobbying means when any natural person for compensation, seeks to influence the governmental decision making, to encourage the passage, defeat, or modification of any proposal, recommendation or decision by City Officials and Employees, except as authorized by procurement documents.

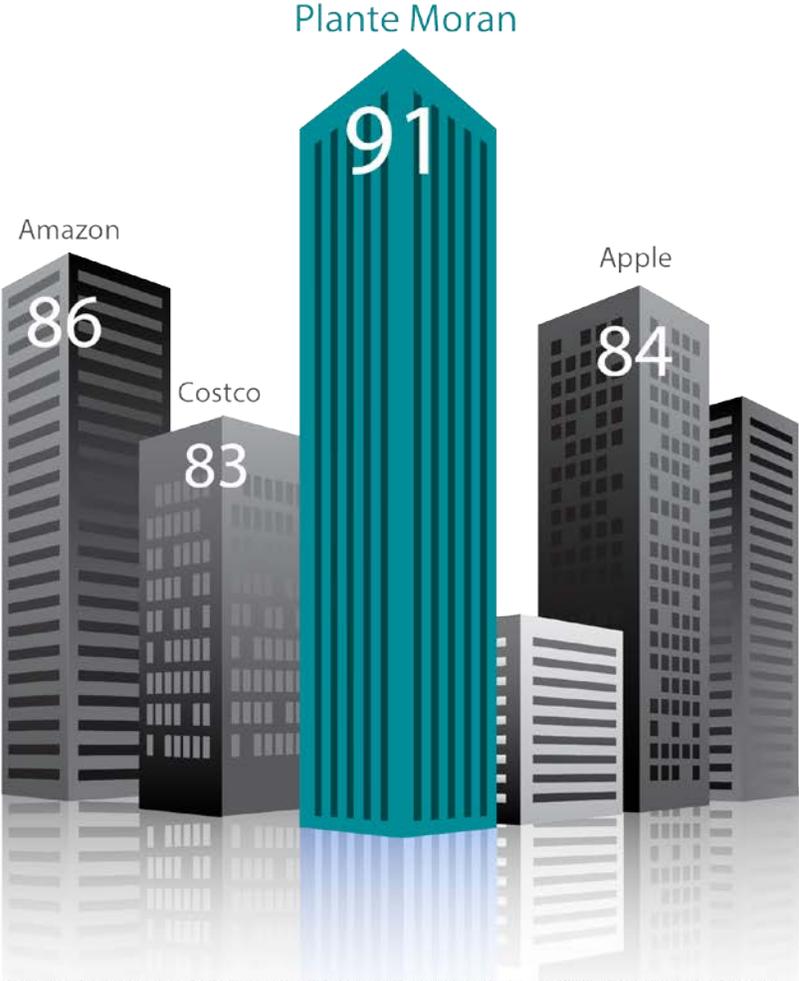
Client Feedback

You deserve world-class client service.

Let our customers do the talking

Our client satisfaction survey is performed by an independent firm that utilizes the American Customer Satisfaction Index (ACSI) methodology to compare our rating against a diverse group of companies. The ACSI represents aggregated customer satisfaction benchmarks based upon key drivers such as service approach, level of expertise, quality of work, and value added.

Our clients rate Plante Moran above the world's most respected brands for best-in-class service.



Source: Plante Moran's rating is from our client satisfaction survey conducted by the CFI Group using the American Customer Satisfaction Index (ACSI) methodology. Other companies' scores provided by the ACSI.

Customer Service & Client Satisfaction - The Plante Moran Way

When clients engage Plante Moran as their advisor, they say they can feel the difference almost immediately. Whether it is an innovative approach to problem solving, our collaborative culture, or solutions borne out of deep industry expertise, our clients benefit from an attentive advisor who brings a caring approach to each engagement.

Here are a few considerations that we believe make Plante Moran different and help ensure that we provide responsive service to our clients:

- **Low staff turnover** — We have the lowest staff turnover rate of any major accounting firm in the United States. By minimizing turnover, we can provide better staff continuity, which in turn ensures that our teams are organized, prepared, and not slowed down by on-the-job learning.
- **More senior-level involvement** — Our staffing mix involves a high degree of partner and senior manager-level involvement in our engagements. As a result, we bring more experience directly to the field, improving the quality and effectiveness of our interactions with your internal accounting staff and executive management, often generating additional value.
- **Flexibility and experience** — Our deep experience in working with clients of all sizes and ownership structures allows us to acclimate to your organizational environment quickly.
- **Communication** — We believe that communication is the key to a successful relationship. Our clients tell us that we regularly exceed their expectations because we take ownership of that requirement. Regular communication avoids surprises, keeps projects on track, and promotes a healthy relationship.
- **Commitment** — We listen upfront to what you need and we deliver. On time and what you requested. We meet the promises we make. This is the number one thing that business executives tell us they want when we ask them what is important when hiring a professional service company, and we strive to meet their needs.

Client Satisfaction and Project Success Commitment

Our consultants and, more importantly, senior staff on our project team take significant pride and ownership in ensuring that the services provided to our clients achieve the highest level of satisfaction and quality results. Our consultants are engaged with all levels of staff from Executive Sponsors to line staff who are executing the various land management, plan review, permitting, and enforcement system related processes. Evidence of our ability to take leadership and ownership of the project's success is exhibited in a number of ways as follows:

- We have been involved with a number of clients in performing multiple software engagements for land management, plan review, permitting, and enforcement system in connection with enterprise resource planning (ERP) other software selection projects.
- We are increasingly being requested by clients for whom we have provided land management, plan review, permitting, and enforcement system selection services to also assist in providing implementation management services.
- We have received awards from clients due to the quality and work ethic in performing technology-related projects. For example, Lake County, IL has awarded Plante Moran a Partner in Excellence award as a result of two significant technology-related projects.

Additional steps that we perform to achieve client satisfaction are as follows:

- Staff will be assigned to the project that have significant experience in other public sector software implementation projects from needs assessment through implementation management who also have deep knowledge of municipal operations including land management, plan review, permitting, and enforcement processes.
- Frequent communications with the client through status meetings and other methods of communication.
- Significant project management capabilities to ensure that the project is completed on-time, within budget and achieves the overall goals and objectives of the project.

Throughout the year, we engage an independent company to survey our clients and measure their satisfaction. What is important to us is not just success, but providing value and quality to our clients. Our service philosophy is built around putting our clients' needs front and center, even when it is difficult or inconvenient.

Thank you



plante moran | Audit. Tax. Consulting.
Wealth Management.

For more information contact:

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scott.eiler@plantemoran.com

plantemoran.com