BerryDunn

PROPOSAL TO THE

City of Snoqualmie, Washington

TO PROVIDE AN

IT Management, Operations, and Staffing Assessment, and On-Call IT Staff Recruitment Consulting

berrydunn.com

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Proposal Submitted On:
March 3, 2023

March 3, 2023

City of Snoqualmie
Attn: Michael Sauerwein
38624 SE River Street
Snoqualmie, WA 98065

Dear Michael Sauerwein:

Thank you for the opportunity to submit this proposal describing how our consulting team may change our currently contracted engagement for IT Project Management Program and Capacity Modeling services. BerryDunn proposes transitioning the engagement to assisting the City of Snoqualmie (the City) by conducting an IT Management, Operations, and Staffing Assessment. We appreciate the relationship we have built with the City over the past few months, the time City leadership has taken to discuss goals for this effort, and the opportunity to adapt to the City's evolving needs.

Understanding the City's Needs

In December, BerryDunn began working with the City and its IT Department. Initially, our aim was to create an IT Project Management Program and Capacity Model, which would serve as a framework for managing the City's technology project portfolio and IT staff's capacity to execute those projects. As our team began the proposed fact-finding meetings with City departments, participants expressed a strong desire to report on IT service-related performance. It became clear that with IT staff capacity based primarily on IT service desk ticket data, City departments will not buy-in to the IT Project Management Program and Capacity Model we initially planned to develop.

Additionally, we have learned that City leadership would like more information on the IT Department's staffing—including its organizational structure, positions, skills, capabilities, and gaps in best practice—after a salary and compensation study was unable to find regional peers with IT departments of similar size, structure, and skillsets.

In light of the initial feedback our team gathered from City department stakeholders, as well as the desire to better understand the IT Department's current staffing, we recommend changing the scope of our engagement from an IT Project Management Program and Capacity Model to an IT Operations, Management, and Staffing Assessment. This assessment will provide the City with an objective analysis of the IT Department and answer City leadership's IT Department staffing questions. This assessment will highlight the operations, management, and staffing areas that are performing at or beyond the level similarly sized cities and identify areas for improvement. The assessment will provide the City with clear, actionable recommendations that it may use to close the identified service level gaps.

How BerryDunn Can Help

On the following pages, we proposed a revised scope of work, which will allow our team to build upon work completed to-date and provide the City with an IT Management, Operations, and Staffing Assessment. Our project team regularly conducts similar work as part of our IT strategic planning efforts, and we have completed standalone IT staffing analyses for clients such as the City of

Farmers Branch, Texas; Waukesha County, Wisconsin; and Cambridge Public Schools, Massachusetts.

As requested by the City, BerryDunn can also offer on-call recruitment assistance for the upcoming recruitment of the City's IT Director position.

Our team has first-hand experience leading IT departments in municipal government organizations, assessing IT operations, management, and staffing in local government organizations across the United States. As consultants, we specialize in providing actionable recommendations that position our clients for short- and long-term success in IT service delivery.

We appreciate the opportunity to work with the City and to revise our original scope of work in order to best meet the City's evolving needs. We are happy to discuss and refine our approach as needed, and we look forward to the next steps. As a principal in our Local Government Practice Group, I am authorized to bind BerryDunn to the commitments made herein. Should you have any questions, please do not hesitate to contact me directly.

Sincerely,

Chad Snow, PMP® I Principal and Chief Operating Officer
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Project Approach

Below and on the following pages, we provide a detailed account of our work plan, illustrated in Figure 1, to complete the City's desired IT Management, Operations, and Staffing Assessment.

We have incorporated the tasks necessary to complete this assessment into the work plan originally developed to execute the IT Project Management Program and Capacity Model. We have incorporated work completed to-date into the work plan, and we have applied the cost of work completed to-date from our revised fees.

Figure 1: BerryDunn's Proposed Work Plan

PHASE 1
Project Planning

PHASE 2
Assessment

Phase 1: Project Planning

Building strong relationships with our clients is key to our collaborative service approach, and collaborating on a clear project timeline and scope of work is the first step in the process.

1.1 Conduct initial project planning. We will facilitate a project planning teleconference with the City's project team, focusing on the following topics:

- Clarify goals and known project constraints
- Introduce project stakeholders
- Establish collaboration tools and methods

1.2 Develop a draft Project Work Plan and Schedule. Following the initial project planning teleconference, we will develop a draft Project Work Plan and Schedule. This will address specific City issues and concerns relating to our approach for managing communications, as well as our approach to scope, risks, and resource management. It will also address BerryDunn's approach to providing the exact services outlined in our proposal, delivered at the agreed-upon time frame for each task.

1.3 Facilitate a remote work session to review the draft Project Work Plan and Schedule. Our team will review the draft Project Work Plan and Schedule with the City's project team and incorporate any requested changes before updating to final.

Phase 1: Project Planning

1.4 Update Project Work Plan and Schedule to include an IT Management, Operations, and Staffing Assessment. Should the City like to move forward with the expanded scope and conduct an IT Management, Operations, and Staffing Assessment, BerryDunn will update the Project Work Plan and Schedule to accommodate the expanded scope. We estimate that this will add an extra three to four weeks to the overall project schedule, and we will meet with the City's project team to review and finalize the updated Project Work Plan and Schedule.

Deliverable 1 – Project Work Plan and Schedule

Phase 1 Differentiators

✓ Our team will apply A Guide to the Project Management Body of Knowledge (PMBOK® Guide) project management principles to establish a measurable timeline.

✓ The Project Work Plan will incorporate agreed-upon procedures between BerryDunn and the City related to project control, including quality management and deliverable submission/acceptance management.

✓ Applied Prosci® change management methodology prepares City staff for change at each project step.

Phase 2: Assessment

The foundation of our research and recommendations will come from the City's input. The tasks outlined in this phase will allow our team to assess the City's current IT management, operations, and staffing environment, identify gaps in best practices, and make actionable recommendations to address the gaps.

2.1 Submit document request to the City and review documentation. To prepare for IT fact-finding activities, we will request materials that enable our team to analyze the City's baseline. The documents requested from the City will be used to gain an understanding of the City's current technology environment and will likely include IT policies and procedures, an organization chart, job descriptions, network infrastructure diagrams, an inventory of software applications, and a list of custom developed applications or interfaces as well as other documentation. This documentation will supplement information already provided to BerryDunn as part of the current Project Management Program and Capacity Modeling Services engagement.

We respectfully request that the City provide available documentation prior to the project re-kickoff meeting and fact-finding interviews, as reviewing this information in advance of this work will enable us to be more efficient, become more knowledgeable of the current environment, and make best use of City personnel's time.

2.2 Develop and administer an IT position questionnaire. BerryDunn will develop a questionnaire to gather feedback from current IT staff related to their current workload, daily tasks, job satisfaction, job skills, relevant education, and more. We will review the questionnaire responses and compare the feedback to current job descriptions and time allocation data provided as part of the information request.

Phase 2: Assessment

2.3 Conduct remote fact-finding interviews. We will conduct a series of interviews and work sessions with City stakeholders. We will facilitate one-on-one interviews with IT staff to gather information related to staffing analysis, e.g., current workload, daily tasks, job skills and relevant education, job satisfaction, and more. We will lead topic-based interviews with multiple participants to gather information related to IT management and operations. We will include all information gathered to-date, including information gathered during the January 2023 fact-finding meetings, in our analysis.

2.4 Develop draft Current Environment Assessment Report. Based on the data and documentation shared by the City, as well as information gathered through fact-finding interviews, we will develop a draft Current Environment Assessment Report. This will cover the following requested areas:

- IT Organizational management and governance
- Network configuration and capacity
- Network perimeter management
- Server configuration and capacity
- Configuration management
- Database management
- Change control
- Data Security
- Disaster Recovery and Business Continuity
- Physical and environmental controls
- End-user device management
- IT Service Management and Performance Measurements
- Software Asset Management
- Application management
- IT Staffing Structure, Capabilities, and Qualifications

The assessment will include a list of critical gaps in best practices for municipal IT organizations.

2.5 Review and update the Draft Current Environment Assessment Report. We will review the Current Environment Assessment in draft form with the City's project team. As part of this step, we will confirm the list of critical gaps with the City's project team. We will incorporate feedback and requested revisions to the draft Current Environment Assessment before preparing recommendations in the next draft version of the report.

Deliverable 2 – Draft Current Environment Assessment Report

2.6 Develop actionable recommendations. After reviewing the Draft Current Environment Assessment Report with the City's project team, we will develop a list of actionable recommendations that they City may follow in order to address the critical gaps identified.

2.7 Update Current Environment Assessment Report to final. We will update the assessment to final form, incorporating the list of actionable recommendations. We will confirm these recommendations with the City's project team and incorporate any final feedback and revisions.

Deliverable 3 – Final Current Environment Assessment Report

Phase 2: Assessment

2.8 Conduct ongoing project management. Throughout the project, BerryDunn will communicate project status updates on at least a biweekly basis. Status updates will include project activities and accomplishments, upcoming activities, issues encountered, and anticipated challenges that may impact project delivery as well as mitigation strategies.

Deliverable 4 – Biweekly Project Status Updates

Phase 2 Differentiators

✓ The documentation request and fact-finding interviews help to clarify the current IT operations, management, and staffing within the City.

✓ We will engage IT staff to solicit input and first-hand insights and perspectives. This will allow IT staff to participate in identification of strengths and gaps in IT Department operations, generation of ideas for skill development, and organizational structure recommendations. Through our experience conducting similar engagements, we understand the importance of involving City stakeholders in a collaborative manner to facilitate understanding of the City's current baseline and obtain support for recommendations and new or modified processes.

Project Team and Timeline

The additional scope of work will be completed by the same project team members currently working on the IT Project Management Program and Capacity Model engagement, with an additional team member joining. We estimate the revised work plan will add an estimated five to six weeks to the overall project timeline estimated in the current engagement, and we will review those changes with the City's project team during Task 1.4, Update Project Work Plan and Schedule, to include IT Management, Operations, and Staffing Assessment. We recognize that the City would like to complete this initiative quickly, and we will work with the City to maintain an efficient pace throughout the engagement.

Approach to IT Director Recruitment Assistance

BerryDunn's team is committed to partnering with the City to assist with the recruitment of its next IT Director. Our team will assist the City with drafting a job description and posting, as well as application review and interviews, to identify candidates that not only possess the necessary technical skills to perform the critical elements of the position but to understand the behaviors and personality types that would best fit into the organization's culture.
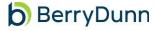
Our proposed steps are as follows:

1. BerryDunn will provide feedback on the City-drafted IT Director job description, helping to ensure responsibilities and qualifications align with the needs of the City. We will also provide guidance to the City on where to post position. For example, ads can be placed on local or national websites, alumni sites, networking sites, industry websites and in any specialty publications or websites that might draw candidates from a specific industry.

2. As applications come in, we can review resumes and qualification materials for their relevance to the IT Director position, participate in initial or short-listed candidate ranking meetings with the City, and provide consulting on any salary requirements conveyed by candidates.

3. Our team can then participate in the City's interview process. We can also provide you with interview questions that will help you identify the best IT Director candidate to fit the City.

4. If needed, we can check references and provide summaries of those references as requested.

5. Following interviews and needed reference checks, we can participate in a final selection meeting with the City's hiring authorities.

All of the above steps are offered to the City on an as-needed, on-call basis at an hourly rate proposed in the next section.
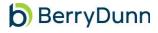
Proposed Fees

IT Management, Operations, and Staffing Assessment

Our estimated fixed fee to complete the City's revised scope of work is $63,940, as represented in Table 1. As of February 28, 2023, BerryDunn has completed work on the contracted engagement totaling $36,733. The existing work will contribute to the IT Management, Operations, and Staffing Assessment, and BerryDunn therefore will apply that work and associated January, February, and March 2023 invoices to this revised scope of work.

These costs represent a fixed price for completing the City's requested scope of work, assuming that all project activities will occur remotely. Should the City desire BerryDunn complete portions of the project on-site, we will bill travel as incurred.

Table 1: Cost by Project Phase

No.	Phase	Original Cost	Revised Cost
1	Project Planning	*$4,595*	$5,595
2	Assessment *(and original Framework and Capacity Modeling Phase)*	*$40,400*	$58,345
	Fixed-Fee Project Total	*$44,995*	**$63,940**
	January 2023 invoice applied		($4,135.50)
	Projected February 2023 invoice applied		($9,679.50)
	Projected March 2023 invoice to be applied		($13,392.50)
	Remaining Revised Fixed-Fee Project Total:		**$36,733**

IT Director Recruitment Assistance

In Table 2, we have provided our estimated hours of assistance for each of the steps in the Approach to IT Director Recruitment Assistance services. The estimated hours form the basis for the not-to-exceed cost associated with these services at an hourly rate of $210.

We will submit monthly progress invoices based on the actual hours expended that month. We will include the monthly progress amount in hours along with a tracker of the utilization rate versus planned and remaining hours.

Table 2: Cost Estimate by Assistance Steps

No.	Step	Estimated Maximum Hours	Estimated Cost
1	Job Description Review and Feedback	3	$630
2	Application Review and Feedback	12	$2,520
3	Interview Preparation and Participation	12	$2,520
4	Candidate Reference Checks and Summaries	8	$1,680
5	Candidate Selection Consulting	6	$1,260
	Hours-Based Not-to-Exceed Total	*41*	**$8,610**

Proposed New Contract Fees

IT Management, Operations, and Staffing Assessment Fixed-Fee Total	Hours	Cost
IT Management, Operations, and Staffing Assessment Total	*n/a*	**$36,733**
IT Director Recruitment Assistance Not-To-Exceed Hourly Total	*41*	**$8,610**
New Contract Total		**$45,343**