online business systems

Proposal Submitted to:

City of Coppell

ERP Discovery Services

Submitted by: Online Business Systems

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Confidentiality Statement

June 4, 2019

Michael Land
City Manager
City of Coppell
255 Parkway Blvd
Coppell, TX – 75019

Dear Mr. Land:

It is Online Business Systems' (Online's) genuine pleasure to provide this proposal to the City of Coppell (Coppell), for ERP Discovery services to assist with a Discovery Phase for the implementation of Tyler Asset Maintenance and Asset Performance.

Online is an ideal partner to assist Coppell. By choosing Online, Coppell will benefit from an organization who has:

> Provided information technology professional services for over 33 years,

> a strong project management service offering with 3 years' experience successfully delivering projects with Coppell,

> a culture that takes a balanced approach in providing a unique and refreshing customer experience to our customers, a great place to work for our people, and delivering with excellence,

Thank you for the opportunity to be of service to Coppell. Please feel free to contact me anytime to discuss this proposal at lhofmeister@obsglobal.com or 204.801.5245. We look forward to the opportunity to help!

Sincerely,

Laura Hofmeister
Senior Director, Business Development Operations

1.0 Background

1.1 Our Understanding

City of Coppell is planning to start the implementation of Tyler Asset Maintenance and Asset Performance and would like to conduct a Discovery over the next few months. The Discovery phase would include the following milestones / Deliverables.

1) Business Requirements Document – Identify the Business requirements for the implementation.

2) Current State Analysis (identify Current Business Processes and Integrations)

3) Business Process Documentation (Future State)

4) Solution Design document for the integrations.

The Asset Maintenance Implementation will enable City of Coppell to track and maintain assets effectively, increasing the reliability of physical assets, enhancing predictive maintenance, and providing configurability to address your most important asset management challenges. Asset Maintenance is designed for the field and office, this tool maximizes field-focused workforce using web-enabled programs as well as iPhone® and Android® mobile apps, allowing workers in the field to easily see their work, complete work orders on assets, manage inventory, and allocate resources from anywhere at any time.

In addition to that it would also,

• Track, rate, and manage assets with detailed inventory and condition assessments

• Schedule preventative maintenance and extend life of assets

• Review work orders and update them as completed

• Proactively manage infrastructure assets

• Plan and monitor unexpected and expected work activities, from initial request through   completion

• Manage critical business processes using a configurable dashboard

• Make informed decisions to repair, refurbish, or replace an asset

• Determine viability of assets with operational analytics

• Make decisions on how to best use resources

Asset Performance provides insight into the health of all the assets and helps asset managers plan, prioritize, and budget for future work that will maximize the ROI from those assets. This application empowers the organization by intuitively surfacing key asset-related data and provides robust analytical tools to support informed asset management decision making.

2.0 Approach

2.1 Why Online Business Systems

Online has many years of experience managing programs and projects. We work collaboratively with clients and third parties as necessary to ensure project objectives are met on-time, and on-budget. We organize project board governance upfront for escalations to minimize risks to outcomes and deliverables as well as remove barriers to success with predefined processes. We also facilitate regular status meetings with key stakeholders to keep them apprised of the project progress.

Online has managed numerous package implementation projects, and regularly provide services like the following:

> Discovery ahead of the package implementation to ensure scope, requirements, risks, and all considerations for a vendor contract have been worked through and reduce the likelihood of scope and budget increases during implementation as well as improve the overall quality and usability of the solution once implemented.

> Vendor management and project oversight - We perform regular audits to provide independent assessments of the project's health and meet with key project members on a regular basis to provide mentorship and oversight and perform vendor management.

> Augmentation of key roles - We provide resources for crucial roles in the implementation project, including project managers, architects, developers, business and system analysts, quality assurance leads and certified organizational change managers to work in conjunction with the product vendor team and ensure the client is able to realize the benefits of the product as quickly as possible.

Project Management Experience

Ultimately, projects are all about making change happen. We take our real-world experience in project management, process improvement and organizational change and work with our clients to create solutions that work for them, transferring our knowledge to them along the way. Using a collaborative model, we transform a vision for change into a plan of action and assemble and motivate teams to achieve the desired outcomes.

With our 20+ years of Project Management experience, we have learned what works, and we leverage this knowledge and adaptability to use a client's internal project methodologies effectively or to apply our own where needed. We understand there are personal elements to any change and that applying project and program management methods without acquired experience and expertise will only get you so far. It is our commitment to excellence and our awareness and sensitivity to all components of project change that allows us to get the job done.

Project management is a skilled discipline that requires experience and training. Our project and program managers have led projects in many different industries using various technologies, methodologies, and approaches. Their expertise spans several project disciplines including application development, modernization and maintenance, change management, package implementation and business process renewal. They have experience managing large, complex and strategic projects that can cross multiple divisions of an organization, as well as leading and mentoring other project managers.

Supported by our Project Management Practice, our project managers are given the time, training and mentoring required to develop their skills continually. Our Practice model provides a mechanism for our team to collaborate, share lessons learned and capitalize on the collective knowledge of a broader group.

The Project Management Practice focuses on ensuring the successful delivery of projects, the foundation of which is setting and managing expectations, communicating at the appropriate levels and continually monitoring and analyzing the universal constraints of schedule, budget and quality.

Our project managers are passionate about professional development and have, or are working towards, industry standard certifications such as the Project Management Institute's (PMI) Project Management Professional (PMP), Projects in a Controlled Environment (PRINCE2) Practitioner Level, Management of Risk (MoR) and Certified Management Consultant (CMC). They also value the benefits and growth opportunities that come with volunteering. Our Project Managers are leaders in the larger project management community within their geographies.

Online is home to 32+ dedicated Project Management professionals with varying degrees of experience and certifications as mentioned above. Please find below the breakdown:

	Experience			Certifications			
	10-15 Years	16-20 Years	21-25 Years	PMP Certified	Prince2 Practitioner	Prosci OCM	Management of Risks (MoR)
Number of Consultants	18	2	3	28	25	14	7

Our project and program managers have led projects in many different industries using various technologies, methodologies, and approaches. Their experience spans several project disciplines including application development, modernization and maintenance, change management, package implementation and business process renewal. They have experience managing large, complex and strategic projects that can cross multiple divisions of an organization, as well as managing and mentoring other project managers.

We are very proud to say that Online's projects have been recognized consistently by the Project Management Institute (PMI):

> 1st Place, PMI 2014 Project of the Year Award (Provincial Admission, Discharge and Transfer Project)

> 1st Place, PMI 2011 Project of the Year Award (OPAL Project)

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> 2nd Place, PMI 2010 Project of the Year Award (Lease Portfolio Integration Project)

> 1st Place, PMI 2009 Project of the Year Award (Farmer Procurement and Payment Services Project)

> PMI Portland's 2007 Excellence in Project Management Award (Pacific Express Project

Project Management Examples

Following are just a few examples of the kinds of projects that Online has managed.

ADT Project, Manitoba eHealth Award Winning Project – PMI Project of the Year

The Provincial Admissions, Discharge and Transfer (ADT) project was a program of projects, beginning with an initiative by Manitoba eHealth & WRHA to implement a shared, common Admission, Discharge and Transfer solution at six hospitals in Winnipeg, followed by 7 hospitals in the Interlake-Eastern Region Health Authority. This high-profile project within the healthcare community was delivered over a series of stages. The project team successfully integrated six separate organizations, streamlined processes and prepared them effectively for significant organizational change. The project has laid the very important foundation needed to realize Manitoba's vision for healthcare – one patient, one record, one database.

Business Transformation Program, Public Guardian and Trustee of Manitoba

The Manitoba Public Trustee, a Special Operating Agency of the Manitoba Provincial Government, began the Business Transformation Program in the fourth quarter of 2012. The early stages of this program were focused on investigating replacement of their information systems.

Online provided project management, strategic planning, organizational change management, and business analysis expertise to The Public Guardian and Trustee of Manitoba on this enterprise-wide business transformation project.

> Led a diverse, cross-functional team of eight including the Public Guardian and Trustee, Chief Financial Officer, section managers, and employees.

> Created a project plan and schedule, tracked progress, communicated status, resolved issues, documented lessons learned, and closed the project phase.

> Performed a current state assessment using functional decomposition, facilitated workshops to define goals and ensure alignment, and elicited requirements.

> Led the team through a process modelling and re-engineering exercise to increase operational efficiency.

> Created an organizational change management strategy and plan, assessed the organization and its employees, planned communications, coached leadership, and worked with stakeholders to execute the plan.

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Consistent Project Management Practices by Online's Project Manager, coupled with strong executive support, made the Provincial ADT project incredibly successful. Not only did the project team implement the technical solution at each of the sites on time and on budget, but they brought the leadership, processes and staff from the initial sites together and created one standardized approach to patient registration using one common system.

Opal Project, University of Manitoba

Award winning project - PMI Project of the Year

Online Business Systems partnered with the Faculty of Medicine at the University of Manitoba to develop Opal, the Online Portal for Advanced Learning. Opal is a Curriculum Management System customized specifically for medical education institutions to ensure critical objectives are met: a high-quality education and meeting accreditation standards. Online has a deep understanding of the stakeholders and critical success factors of implementing a portal in a higher education environment. This project involved the development of 17 individual functional components, as well as the selection, implementation and integration of two third party components.

Online's involvement included planning, development and deployment of Opal. A team comprised of University of Manitoba and Online successfully delivered the project. Online's roles during implementation included Project Manager, Business Analyst, Architect, Development and QA consultants.

The Faculty of Medicine contracted with Online to provide application management services for OPAL. Online continues to serve the Faculty of Medicine in this capacity. The Opal project won the 2011 PMI Manitoba Project of the Year award.

OPAL employs Java technologies including LifeRay Portal, Spring, Hibernate, Struts, JavaScript, and Postgres SQL.

Online has provided Application Management Services (AMS) to the University for the past 7 years with a dedicated team of 2 consultants.

Our experience working with City of Coppell

Online has a successful track record working with Coppell over the last few years, assisting with various projects such as: ExecuTime, TCM, Tyler, PIER, and BEAM implementations, as well as performing a Security Risk Assessment. We have described our role in the BEAM/EnerGov, PIER and Security projects in more detail below.

BEAM / Energov Implementation

The City of Coppell embarked on a project to improve their business operation that also included business process improvement, data storage, processing, and capture; permitting, inspections and engineering. The project called for enhancing business through automation and mobility.

In the context of this Business Enhancement through Automation and Mobility (BEAM) project, on September 2014, the City of Coppell issued a Request for Proposal (RFP) for a solution for Planning, Inspections, Permitting and Engineering (PIPE) System Software and Services. A proposal by Tyler Technologies was submitted, and the City elected Tyler as the main supplier for the system, and their product ENERGOV as the main solution (to be integrated with other Coppell's already in use systems like Laserfiche). The City of Coppell hired Online to globally manage the system assessment, definition, configuration, and implementation.

PIER Implementation Project

It was a significant proactive preparatory effort sponsored by the Director of Finance, addressing scoping, diligence, risk, procurement and implementation road mapping for the PIER project. PIER will implement Tyler Munis Financials, HR / Payroll, Utility Billing and other modules, migrating from the City of Coppell's current New World Logos implementation and peripheral systems. PIER will be the largest IS project the City has conducted. City council approved negotiated contracts in July 2017 and the implementation project proceeded. Online planned and managed the project, including enterprise architecture consulting.

Security Risk Assessment & Penetration Testing Services

Online assessed Coppell's security posture and provided high level strategic security advice pertaining to continuing to mature and expand Coppell's information security program, including policies, procedures, and overall risks.

2.2 Proposed Approach

Based on our understanding of Coppell's requirements, current project management capability, industry best practices and our experience, we recommend adding a full time Solution Architect under the guidance of the current Senior Project Manager (Andy Bhatnagar).

3.0 Investment and Timelines

3.1 Term

The term for this work: 4 months

July 8, 2019 – October 31, 2019

3.2 Investment

The following represents the firm fixed fee for the proposed Discovery phase, inclusive of travel & living expenses:

- $115,000 (to be paid on satisfactorily completion of agreed to regular milestones)

The proposed resource will be on-site at Coppell office 3-4 days a week every other week on average, working remotely the other days. Once the detailed plan for the work is completed, travel plans will be specifically mapped out to ensure on-site attendance for necessary meetings / activities.

If there will be a need to exceed the duration in the performance of the services, Online will work with Coppell to review and adjust the fee accordingly.

3.3 Assumptions

Assumptions

Online has made the following assumptions for the approach and pricing of this project:

> Coppell will provide on-site working facilities, network access and other project related material and equipment as required.

> Coppell will provide off-site network access and other project related material and equipment as required.

> Coppell has sufficient documentation in areas such as organizational charts, roles and responsibilities, current tools (electronic or manual).

> General PM responsibilities such as: provide status reports, conduct steering committee meetings, provide Project plan and track the plan etc.

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