

PRE-PROPOSAL MEETING ON I.T.'S RFP

Council Chambers
January 23, 2012
9:00 to 11:00 a.m.

Note: Questions asked by the audience are bolded.

RA: Everyone needs to sign the sign-in sheet to say you were here. Sign and print your name with your phone number, e-mail address, and business name.

Deadline for questions is on **January 30, 2012** by the end of the business day. Make sure you check the website frequently to see if any Amendments have been added or answers to questions have been posted or just sign up for the City of Costa Mesa E-mail Notification. You will receive a message if something has been added to the website.

Proposals are due on **February 14 @ 4:00PM** to:

Jones & Mayer
Attn: Kimberly Hall Barlow
3777 N. Harbor Blvd.
Fullerton, CA 92835

RE: Professional Consulting Services for Information Technology Management

Pay special attention to Section 4, page 23 of the RFP, which is proposal format guidelines, in addition to Section 5, which is the pattern for submitting a quote. Some people neglect to read these things; unfortunately, this could eliminate their proposal. They may have submitted a good quality proposal, and then all of a sudden, I'm going to reject the proposal because you left something out or you did not do something, so please follow the guidelines.

Inside Section 4, I believe it calls for 20 pages in the proposal. I'm thinking that they're going to get a questions in my e-mail, ask a number of questions saying, "Hey, I have x number of resumes that I'm going to put in and that's already going to eliminate me putting in the meats and potatoes of my proposal. With that being said, I want to have a little discussion with you, guys, right now, if you don't mind. Those 20 pages might seem a little low. Do I take that and say I'm not going to include the resumes? I give you 20 pages and take the resumes out. Or do I say to you bring that 20 up to 30?

Is there any preference?

Don't include resumes as part of the 20 page limit.

Don't give me a 3-paged, 2-paged resume. Try to give me at least like a one-paged resume or bullet points summary.

You have to remember to direct your questions directly to me. Do not contact any employee.

Direct your questions to Richard Amadril via e-mail; rick.amadril@costamesaca.gov. Realize that we are taking notes and recording this meeting to post the answers to your questions on the website. If your questions haven't been asked, you may e-mail me those additional questions. They must be submitted to me before January 30, 2012.

Evaluation Process

Responsive to the RFP

Reviewing will be based on the criteria set forth on page 28.

Interviews of short list may be held on **March 5, 2012**.

Make sure that you have the following forms included in your proposal:

- Vendor Application
- Ex Parte Communications Certificate
- Price Proposal Form
- Disclosure of Government Positions
- Disqualifications Questionnaire

PRICING PROPOSAL needs to be submitted with the RFP in the format that I've given you. If you change, have additional pricing that you're going to want to submit and that's extra because that is optional. I ask you to be creative.

(Comments unintelligible)

Q: You also want to have a listing of your standard labor rates. Can we put that in the appendix?

RA: As long as you're giving me what I ask you for in the pricing form....

Let's talk about protocol on questions and answers.

Victoria is taking notes. She's taking notes; I'm having this recorded. The reason why I'm recording this is so that I can make sure that we get everything that you have said and that will help us post these questions on the web. Our response today is not binding on the City of Costa Mesa. We'll respond to your questions; hopefully, they will

be answered. "I don't know" is an answer, correct? We're going to get back, hopefully, to be able to answer your question, that's why I want this recorded.

Number 2 is so that if you want to go back over what our responses to the questions are, we want to make sure that we are okay in our response to the questions.

Speak slowly, speak loud. Direct your questions, if they're not T's and C's, to Rick Kirkbride. Rick, show us your hand. He will field the questions and give it over to somebody else when he gets the question from you. At the end of this meeting here, what I'm going to do is compile all the questions and answers, then I will post them on the web as soon as I have those. Hopefully before January 30th.

So there's going to be a pre-proposal question-and-answer process along with the regular Q&A that's due on January 30th and will be posted by Feb 6th.

RA: Not every one of these services will be outsourced. We need to consider key factors to outsourcing in addition to these proposals. Some of these considerations are implementation, workforce transition, and monitoring of contracts.

Q: **Is the purpose for this to save money?**

RA: I think it makes sense that they want to save money. If you take a look at what's going on, even though Costa Mesa is on the map for this, a lot of other government agencies are doing the same thing. Government is changing. How they are going to change, I can't tell you. But it's pretty exciting to see what some of the changes we are going to look at. What is critical is providing the information so that it helps in making these types of decision.

Rick: My name is Richard Kirkbride. I go by "Rick." I'm the I.T. Manager. I've been here for 13 years. This is a portion of my staff. Victoria is my assistant, and, as already pointed out, she will be taking shorthand notes. We are recording this. Bill Verderber has been with the City almost longer than any of the other I.T. employees. I would refer to Bill as a "generalist" for us, but his specifics are in Finance, so all of the PeopleSoft answers, if I can't take care of them, I'd be deferring them to Bill. He also handles our Permits processing. On my right is Adam Silva. Adam is my network administration supervisor. He's been with me now for about 10 years. Jim Liu is in charge of the applications as his principal responsibility. He's in charge of the applications for the Police Department. Jim also doubles up and helps with some of our other applications, but for today's purposes, Jim will mostly be answering any questions you have about the Police Department applications.

Q: **It's been a very public process and I think probably most of the firms in here are doing outsourcing for government agencies of some sort or another, but it's very rare that we are actually taking over for an existing I.T. department. And it seems like there is going to be a lot of you evaluating us, both as a service provider as well as a potential**

partner going forward. So the question I have is: How in this process will that dialogue be facilitated?

Rick: Actually, I'm going to defer that question back to Mr. Amadril.

RA: Before I get into that answer right now, the other thing, too, is that even though they don't outsource this, I think the City of Costa Mesa needs help. One of the things that the city would probably do is look at these proposals to see if we can get some assistance. So if you look at the methodology section of RFP, it talks about creativity. It talks about encouraging you to be innovative when providing services that will maximize efficient, cost-effective approach.

Now, as far as the evaluation process is concerned, I am not disclosing who my evaluators are. One of the things I want to do is make sure that my evaluators are an enigma to this operation. One of the things that I want to make sure that you understand is that, yes, it is management, there will be outside evaluators. People from other cities helping us evaluate this process. When I go through this process, I give them forms to evaluate them. I will get their scoring numbers, along with their comments. Evaluators will be called Rater No. 1, No. 2, No. 3, No. 4, etc. That's all you'll know. Then in the comment section, you will see their comments, but you will not see their names but only as Rater No. 1 and so forth. When I check your references (because I will check your references), the ones you gave me and the ones you didn't, but you won't see who the responder is of your reference. I will show you what the reference says but you won't see who that is. And, of course, that's for obvious reasons.

Q: Are you going to be posting all of the questions that everyone submits and the answers to those on the website or they're going to be, if we ask questions, will they remain private? I wasn't clear on that based on your comment before?

RA: The questions that I'm going to get and then I'm going to post. It will not show who asked the questions. It will just show that there is a question. And then there is an answer to that question. But all will be posted so everybody has the same opportunity. I would try to answer your questions. If I don't and I can't, I will own up to it and say, "I don't know," or "I will try to find out" to get you that information.

Q: In order for something like this to be successful, it is very helpful to be able to transition the existing resources. I'm wondering - is it public information or will you disclose the current salary and benefit levels of the team?

Rick: That information is already on our webpage. One of the other potential vendors asked that question. I checked in terms of what page to find that on the webpage. If it's not already posted, it will be shortly. (Note: It's posted under the City's budget and under Human Resources Division in the Public Employee Compensation Report.)

Q: Will you be getting out more specific information on current systems and infrastructure, the age, and if you have manufacturer support contracts on critical pieces at this point? (Repeating) Do you have more granular information on current systems and infrastructure, the age of systems and infrastructure, and what do you have current manufacturer support on your systems and infrastructure?

Rick: The short answer to that is “Yes, we can to some level.” We’ll need a little more detailed question, I prefer that one come to us in writing, just to be on the safe side. As a generalization, we have not done any significant upgrades in the past 4 to 5 years. I think that the RFP spells out the fact that we are still running systems that, although supported by the primary vendor, are very much beyond current release levels of what’s available. XP server 2003, we’re running older levels of PeopleSoft, and we can give you specifics for the release level on the PeopleSoft. If you’re looking for all of the applications in every release level, we’ll have to put that one in writing. It will take some time to run through the whole list, and quite frankly, I don’t have all of them in my head.

RA: What’s your level of effort to provide that information?

Rick: That’s going to take some time. At least a week, maybe 10 days, to get that together.

RA: Are you okay with that? Do you understand because you got things to do and I don’t know how long that takes? If I got to post that later, I’ll post that later. All right? But I just want you to know that, yeah, if you can get to it, you’d get into it.

Rick: Much of it is actually spelled out in the RFP. I can’t say that all of it is, so refer back to our RFP. After seeing what we did give you, please revise your question; that will shorten my list to having to respond back.

Q: This kind of dovetails into that question. In the RFP, it’s difficult to see what release level you are on and to what extent you count on the vendors to maintain their purchased products. This gives me several questions I’m going to ask, and you can answer me in the order, but what I understand in front of everybody here is that a lot of the purchased software products are probably out of date because of the funding problems in the City. So there’s going to be sometimes when you have to, and the vendor would require you, to bring them up to date.

One of the things that – I ask the question – I saw something that I thought was a little unusual. I saw a lot of development activity going on, especially for the PD, and I was hopeful that someone could comment on this.

Is it that your current RMS and CAD don’t provide, for example, evidence system, or was there a place from the PD or someone to create this because it’s unusual now for I.T. departments to develop stuff. It’s more common to purchase it, and then as a subset to that, you indicated that you created your own time card system because PS

didn't have it. Normally, the way you do that is you go to them and say, "Why should I fix your system and here's what we need, so that in future releases they include it and you don't end up being, you know, 500 guys over here and you're over here and you got your own version of PS.

Rick: I'm going to hold you up there because otherwise, I'm going to get lost in the haze. Of the applications we're currently running, there's only one version of a major piece of software that I know we're not on the supported list for, and that is the Financials segment of PeopleSoft. We're running a version that is, at least, a couple of levels out of date there. There was a plan to bring that up to 8.8 for PeopleSoft, which is supposedly where their lifetime support begins. However, we have not had the resources and with what's going on now, we decided to pull back a little bit. To expend a lot of money and a lot of time didn't make a lot of sense either if we weren't going to be here and there's going to be another product base on place.

As far as the rest of the software that we're running, I believe the vast majority of it is currently under support. Is it the most current release level? No, it is not. Are we patched to the most current release level where critical patches are necessary? The answer to that is "Yes."

As far as the Police Department is concerned, we have Motorola as our vendor. They do provide the CAD and RMS (Record Management System) support. There are a number of requests that have come through, and Jim, a few years ago, was asked to look for a jail management system. We actually acquired one from the City of Newport Beach. We got it in. We realized that it had been written on a much older version of code. Jim actually rewrote the entire system. We turned around and sold it back to Newport Beach. In doing so, there were a number of enhancements that they chose to ask for. Jim wrote those enhancements and has put most of them in place. Jim is a very competent programmer and has been able to do things for us that, if handed over to Motorola, would possibly take 5 years or more because of their production cycle.

As far as the timekeeping is concerned, what was written was an electronic time entry system that interfaces into our primary payroll system. Now the payroll system is up for RFP bid, but is not part of our discussion today, so I'll just leave it at that.

Q: The important thing is that most of the software that you have that has been re-purchased is under maintenance by them, and if I would read it as your first response to a request from the user would be to see what it would cost the vendor to make the change or whether it's coming up in a future release or what have you?

Rick: That is correct, although funding has been extremely tight here, and I hope many of you have some knowledge of the past history with Costa Mesa. Allan Roeder retired as City Manager a little more than a year ago and had been the City Manager for quite a long time. I've been here 13 years. Allan and I kind of came to an understanding. He

understood that if I asked for it, it meant that I couldn't support what was there any longer. That is the basis under which we would receive funding. In other words, I didn't have a wish list that was out there that said, "Hey, I would really like to go do this," and have any expectation that that would get through within a lean budget year. Yet, in that same lean budget year, if I told Allan that I could no longer keep our security safe, or I can no longer keep a particular application running, then I'd get the funding for that and we kept things within maintenance support. Jim, I believe, has something to add for Police applications.

Jim: Just one last thing to add is you use the property-and-evidence system as an example to your question why we are doing our own instead of getting from vendor of a popular application already on the market. One thing that Rick has mentioned, we currently have Motorola RMS. There is no property-and-evidence inventory tracking system in there. And they are not going to have that. And we did look at other applications on the market. One very popular application is called "Tracker," which is being used by a few Police Departments here in the county. We've been to Tustin, Garden Grove, and Newport Beach to take a look and talk to their respective Police Departments. We evaluated that application but came up with the conclusion that that application is a stand-alone. You can use that to track property- and-evidence, but that is it. The major thing we need is a property-and-evidence program that talks to RMS, so that when we manage properties, we get information from RMS.

For example, when an officer prints a property card, the property program will get the DR number, officer name, and event status all pulled from RMS, instead of having an officer manually type in this information themselves. There could be a case that if the officer mis-enters a wrong DR# on the property card, that property could be placed in the wrong category. So integration with RMS is a must-have feature for the property-and-evidence barcode program. It is not a simple barcode scanning and tracking system. So to get back to your question, we did look at existing applications on the market but they are not fit to what we are looking for.

Rick: A couple of footnotes here. I mentioned that we did not ask for things on a wish list. That doesn't mean we didn't know what we needed to do in moving forward. We have, approximately, a \$4 million backlog. That includes a complete clean sweep of the network, of security, of our server farm (and an upgrade to that server farm), a sweep of our desktop, which is, by the way, 7 years old, all of the mobile data computers that are in our squad cars and in our Fire rigs. And a round number for that is, approximately, \$4,000,000. That does not include any application replacement. In other words, we'd still be sticking with the PeopleSoft, the Motorola, the Accela permits processing, the sort of stuff that we have today. If those are thrown in, then that number goes up significantly.

Q: Going along the same lines of the evidence tracking application, how much ongoing development is there now, assuming that the application in use has been developed and all that?

Rick: There are a number of minor applications that are in our Intranet. There are helpdesks that were created out there. Now this isn't ongoing. This is what we're currently using in production. I'll get you our ongoing in a minute. But there are a number of applications that are on the Intranet. There's a helpdesk for telephone, there's a helpdesk for Facilities, there's a helpdesk for I.T. There's an online timekeeping that's there (we spoke about that a little bit ago). Those are being done by the man who is my Programming Supervisor. Our Web has been farmed out already. We haven't gotten the finished product back yet.

As far as a backlog of current application requests, Jim and I were going through that for the Public Safety side the other day, and I believe right now, there's a list of about 8 or 10 projects that he is working on.

We are also in the process right now of rolling out a field portable version of Accela for the permit processing for the inspectors.

There are some modifications to the network. This room, for example, has Wi-Fi. We had not done a lot of Wi-Fi in the City. There's been no funding for it. The new Council decided they wanted it in here so we facilitated that.

There are a number of other small projects. I consider them small. I'm sure my people, because we're pretty shorthanded, don't consider them all that small. The gentleman on my right, in particular, I think right now, he has something in the neighborhood of 15 either laptops or tablets that he has to get configured and out into the field fairly quickly. One of those would be for medical service in Orange County. I'm not talking about the Fire part of this, but if someone comes to your location, wherever that location is, and renders medical assistance, they don't want to see that on paper anymore; they want to see it electronically, so we're in the process of rolling out an electronic version of that document control.

Q: Just wanted to clarify what the number of servers and workstations, there seems to possibly be some discrepancy. We count either 44 or 59 servers. I'm not sure if you could clarify that. And then also with the workstation, if you could possibly break out the number of MDCs outside of that number that are in Fire machines or Fire patrol cars.

Rick: As far as servers go, we just did answer that for Council and the number's in my head, but I am not certain of it. It was close to the 59 mark, though, if I remember right. The reason the number was wrong was that there were a couple of servers that were being staged but haven't been deployed yet. And, Rick, I believe that the formal answer to that went back to Council Member Mensinger based on that written list of questions

that he had, so you can pull that and give the gentleman back an exact number from that document.

As far as the MDCs are concerned, roughly 88. Of those, of course, the vast majority are in squad cars. They are using MW800s from Motorola. There are a few laptops that are out there that lieutenants use, but the vast majority of them are MW800 MDCs.

Q: As part of that question, are those included in the workstations' total provided in the RFP or are those in addition to?

Rick: They were in addition to. The workstation number is approximately 400. With the layoffs that we have incurred, a few of those have come back as spares. With the age of the machines, a few of those are turned in to spare parts cabinets so the exact count at the moment would be under 400, but 400 is a good working number.

Q: This question is about the study that the Management Partners is performing of the 3 cities – Costa Mesa, Newport Beach, and Huntington Beach. Was there a response from Management Partners in regards to the CAD and RMS system, or is it the City of Costa Mesa.

Rick: I don't have that information.

RA: What he is referring to, so that you understand what's happening, is there's also an agreement with Management Partners with the City of Costa Mesa, Newport Beach, and Huntington Beach. What they're looking at is sharing services. That information will be provided in addition to the RFP process. So that would be in addition alternative to what we are trying to achieve here.

Q: Just to clarify what you just said - so it's going to be either this way or the Management Partners way for the City. Is that correct? Is that what you're saying?

RA: Yeah, there's a study currently going on. Whether that's acceptable to the three Councils, which is where there are 3 cities getting together and exploring their services and sharing them. They may not decide to do that and look at these RFPs being a better alternative.

Rick: They may also choose to do something along the lines of tri-City public safety and with the rest of it up for bid. And the reason I say that, the most obvious reason to me anyway, is that how many of you would be set up to do 9-1-1 dispatch, yet we are. We're in the middle. Would we host it here and have broadcast capability in Costa Mesa, Newport Beach, and Huntington Beach? There are a number of iterations there that might make sense but it all depends on getting everyone to agree to the process. They're going to have to break all that down first.

Q: Just one follow-on on your terminals in your police cars, et al, are those handled by the PD, or do you actually have people that put the terminals in the cars in service and helping out the vendor?

Rick: It's a combination of a couple of approaches. There's an outside firm that does provide assistance when we need it, specifically building mounts, and initial wiring of vehicles. If we're doing something in large quantity, we farm that out. We had one individual who is responsible out of the 9-1-1 dispatch group, and I say that because they only recently went from being part of what was called Telecommunications to being part of the Police Department. They were transferred over late last year. So right now, the technical answer to you is that the Police Department takes care of that. They have a technical person who does it. It does not mean my staff never gets involved, but they had one person, who recently left the City to go to work for Tustin. So I'm not certain at this instant exactly how they are handling it over there.

Q: **So we understand that if the terminal is down in the car, police will call somebody in the Police Department or a person to swap them out or deal with the problem and it wouldn't result in a callout for your staff.**

Rick: Because the support person who works directly for dispatch is not there 24x7, my team usually gets the first call. The other day, all of them dropped at once. It was a server that was causing the problem, and my team got the callout. My team is on 7 days a week, 24 hours a day on standby. We rotate that between two of my staff members. They are the two who aren't here today and they are more specifically trained for the public safety side to Motorola.

Adam: It will be safe to say that the hardware aspect of MDCs the Police Department takes care of. As far as the operating system, we do have input on how the OS is configured and how it is implemented out. And then also networking wise, we take care of the networking.

Jim: There are also applications running on the MDC and when there is an upgrade or there's a new application to be added on, we will rebuild that image and pass it on to the designated person in Telecommunications. He will put it into the cars, but we will build the initial image first and test it out to make sure it works and then pass it along to that technician to do the installation. The IT department will do the setup for our new applications and the updates for the applications on MDC.

Rick: And to get ahead of someone who might think of this one, No, we do not roll that out en masse. It's done by USB. We call them in, we upload it, and we put them back in the field. The motor officers have absolutely nothing except their radio.

Q: **On the PeopleSoft, I believe I understood that that is the one application that is currently not under a support agreement?**

Rick: There is a support agreement. Understand that there is support, and there is support. I'll defer this to Bill for a short answer. We have the standard Finance modules. Those are still running an older version that, technically, doesn't qualify under the lifetime support. Do we get support from them? Yes! Will they help us? Yes! If we had to do an upgrade, could we get help from them? To some degree, but I'll defer that back to Bill. We have Payroll, which is fully supported, and we have the HR applications, as well as a couple of things they refer to as eApps. Those are all fully supported.

Bill: But the short answer is: We still have support available to us, whether or not it helps us to fix all of our problems is situational, I think. *But we have rarely had to call for any support.*

Rick: And part of what Bill is saying there is that they no longer patch the version that we are currently on. So if they can give us a workaround, they give us a workaround. But if it's you have to go up to a higher level, then we're stuck.

Q: Related question is: First of all, is PeopleSoft working for the City now and meeting your needs, and if so, have you done an estimate and a cost estimate for the upgrade that is required to get current?

Rick: The last couple of upgrades that have been done have been done in house with in-house staff with no external support. We did have experience prior to that, several releases and years ago with having PeopleSoft staff and a third party staff that were trying to help us out.

As far as whether or not PeopleSoft is meeting the current need, you can ask 15 people and get 15 separate opinions on that. We believe that it is.

As far as the Finance applications, I believe they're meeting the need. I don't know of any major open issues right now. I managed to find a way to train all these people and most of the issues went away.

I'm unaware of any major issues right now within the application or within the user base.

Q: Related to the same PeopleSoft platform, my understanding is that Oracle may allow you to renew the annual maintenance, if the underlying PeopleSoft code is not changed, has there been any customization?

Bill: No customization to the base code, but keep in mind that because they gave us all the programming tools, we can generate anything we want. So the technical verbiage, if you will, of the support contract is not in question whatsoever, and it's a case of anything we've developed in house, either on the financial side or on the HR side, since we're the ones who developed that, that we know how to fix it.

Rick: That raises another point. Maybe we should have spoken to, and it wasn't in the RFP, as a practice we don't get inside the can and mess around. So if we purchased the package, for the most part we don't go in and play with their code at all. We don't make any requests of the vendor that require changes to their code that don't go through production cycle I alluded to sometime ago, but that doesn't mean we don't write secondary applications, that we don't do report customization. That, certainly, is in place.

RA: All right, are there any more questions? If you have additional questions, go ahead and give them to me in writing, and I will answer those questions that you did not hear today by January 30. I will try to get something out earlier than that on the questions that were asked here before the posting on the 30th. So you'll see two sets of questions.

Again, go back to that e-mail notification, make sure you're registered on that to get an e-mail back to you so that any time we get that RFP page, you will get notified.