



CRYSTAL RUIZ, MAYOR
CLARISA SANCHEZ, MAYOR PRO TEM
PHIL AYALA, COUNCILMEMBER
ALONSO LEDEZMA, COUNCILMEMBER
VALERIE VANDEVER, COUNCILMEMBER

REGULAR MEETING AGENDA
CITY COUNCIL OF THE CITY OF SAN JACINTO
TUESDAY, SEPTEMBER 1, 2026
5:30 PM CLOSED SESSION
6:30 PM OPEN SESSION

COMMUNITY CENTER
625 S. PICO AVENUE
SAN JACINTO, CA 92583
951-487-7330

In compliance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please contact the office of the City Clerk at 951-487-7330 ext. 339. Notification 48 hours prior to a meeting will enable the City to make reasonable arrangements to ensure accessibility to that meeting [28 CFR 35.102.35.104 ADA Title II].

The City Council meeting may be observed virtually by accessing <https://horizon.agendalink.app/engage-v2/sanjacintoca/agendas> and selecting the "Watch" button next to the corresponding agenda for the meeting date, or in person at the San Jacinto Community Center.

Public Comments will only be accepted in person during the meeting or in writing to the City Clerk no later than 3:00 PM on the day of the meeting.

Watch the Meeting (Official Livestream)

The official way to watch and listen to the City Council meeting is through the City's AgendaLink livestream by selecting the "Watch" option for the applicable meeting on the City's website.

Provide Live Public Comment by Telephone

Members of the public wishing to provide live public comment may participate by telephone using the Microsoft Teams dial-in information below. The telephone line is intended **only** for individuals who wish to address the City Council during the designated Public Comment period.

Dial in by phone:

+1 (951) 465-7684

Conference ID: 706 805 861#

Public Comment Workflow

When the Mayor opens the Public Comment portion of the meeting, the process will be as follows:

- Members of the public will call the Teams dial-in number and wait in the Teams lobby.
- Callers should remain in the Teams lobby until the applicable Public Comment period opens. They should not be admitted before the Mayor opens Public Comment.
- The Clerk will admit one caller at a time from the lobby as they are ready to speak. If multiple callers are waiting, they should remain in the lobby until it is their turn.
- Once admitted, callers should be able to speak. If necessary, the Clerk can unmute the caller.
- The Mayor will recognize the caller, and the caller should first state their name for the record before providing their public comment.
- Each caller will have up to three (3) minutes to speak.
- After completing their comments, callers may either hang up, or the Clerk may remove them from the meeting before admitting the next speaker.

Written public comments may only be submitted via email to comments@sanjacintoca.gov or by hard copy to the Office of the City Clerk at 595 S. San Jacinto Ave., San Jacinto, CA 92583, no later than 3:00 p.m. on the day of the meeting. Comments via text and social media (Facebook, Twitter, etc.) will not be accepted. Please identify the agenda item number and “PUBLIC COMMENT” in the subject line of the email or hard copy document. All written correspondence received by the 3:00 p.m. deadline will be distributed to the legislative body prior to the meeting and retained with the official meeting record. All email comments shall be subject to the same rules as would otherwise govern in-person speaker comments at the Council meeting.

Reading of Public Comments: The City Clerk will read all email comments, provided that the reading shall not exceed three (3) minutes or such other time as the Council may provide, consistent with the time limit for speakers at a Council meeting. The email comments submitted shall become part of the record of the Council meeting.

1. ORGANIZATION

1.1 Public Comments on Closed Session Items

1.2 Closed Session

— 1.2.1. PUBLIC EMPLOYEE PERFORMANCE EVALUATION/APPOINTMENT/EMPLOYMENT Title: City Manager

1.3 Closed Session Report

1.4 Roll Call

1.5 Invocation

1.6 Pledge of Allegiance

1.7 Mayor/Council Member Reports

1.8 Late Items

2. PUBLIC COMMENTS

3. CONSENT CALENDAR

A. City Council

A1. Waiver of Full Reading of Ordinance(s), and Reading by Title Only

A2. Letter of Support for the City's FY 2026-27 CalRecycle Beverage Container Recycling Grant Application

RECOMMENDATION:

Staff recommends that the City Council RATIFY the Letter of Support for the City's FY 2026-27 CalRecycle Beverage Container Recycling Grant Application.

A3. Financial Management and Utility Billing Needs Assessment

RECOMMENDATION:

Staff recommends that the City Council:

— 1. AWARD a Professional Services Agreement to SDI Presence to provide Financial Management and Utility Billing Needs Assessment, and Procurement Support in an amount not to exceed \$102,625.00;

— 2. AUTHORIZE the City Manager to execute the agreement and any related documents necessary to implement the agreement, subject to review and approval as to form by the City Attorney; and

— 3. AUTHORIZE the City Manager to approve amendments or change orders, as necessary, provided sufficient appropriations are available and such amendments are consistent with the authority granted under the City's applicable procurement policies and municipal code.

A4. Adopt Public Participation and Outreach Policy

RECOMMENDATION:

Staff recommends that the City Council ADOPT Resolution No. 4148, adopting a Public Participation and Outreach Policy pursuant to Government Code section 54953.4(b)(3)(C).

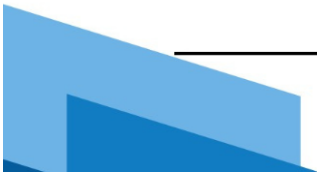
4. FUTURE REQUESTS FROM CITY COUNCIL TO CITY MANAGER

5. ADJOURNMENT

DOCUMENTS RELATED TO OPEN SESSION AGENDAS (SB343) - Any public record, relating to an open session agenda item, that is distributed within 72 hours prior to the meeting is available for public inspection at the public counter located in the Administration Building of City Hall, 595 S. San Jacinto Avenue, San Jacinto, CA 92583.

I, Julia Espinoza, City Clerk of the City of San Jacinto, do hereby certify that I caused to be posted the foregoing agenda this August 27, 2026 as requested by law.

*Julia Espinoza, City Clerk
Posted Date: August 27, 2026*



Date Posted: August 27, 2026

September 1, 2026

TO: City Council

REQUESTED BY: Preston Sullens, Public Works Superintendent

APPROVED BY: Travis Randel, Interim City Manager

SUBJECT: Letter of Support for the City's FY 2026-27 CalRecycle Beverage Container Recycling Grant Application

RECOMMENDATION:

Staff recommends that the City Council **RATIFY** the Letter of Support for the City's FY 2026-27 CalRecycle Beverage Container Recycling Grant Application.

DISCUSSION:

On January 16, 2024, the City Council adopted Resolution No. 4005, authorizing the City Manager, or designee, to submit applications to CalRecycle for all grant and payment programs for which the City is eligible. This authorization is effective for five years from the date of adoption.

The City is applying for the FY 2026-27 CalRecycle Beverage Container Recycling Grant to fund the purchase and installation of 17 outdoor water bottle filling stations with ADA-compliant drinking fountains at City parks and recreational facilities. The project will replace aging infrastructure, improve access to drinking water, promote the use of reusable bottles, and reduce single-use beverage container waste.

The proposed project locations are within seven Census Tracts, four of which are designated as Disadvantaged Communities (DACs). Because the project includes locations within DACs, CalRecycle requires a letter of support from a community stakeholder, such as the Mayor or a City Councilmember.

Staff is requesting City Council authorization for the Mayor, or a designated Councilmember, to provide the required letter of support. Resolution No. 4005 already provides the City Manager, or designee, with authorization to submit eligible CalRecycle grant applications; therefore, no additional authorization to apply is being requested.

FISCAL IMPACT:

There is no fiscal impact associated with providing the requested letter of support. Resolution No. 4005 provides the existing authorization to apply for eligible CalRecycle grant programs.

Attachments

[Resolution No. 4005](#)

[Application Certification_signed](#)

[Beverage Container Recycling Grant Program Letter.pdf](#)

Resolution No. 4005

STATE OF CALIFORNIA)
COUNTY OF RIVERSIDE) ss
CITY OF SAN JACINTO)

RESOLUTION NO. 4005

**RESOLUTION OF THE CITY COUNCIL OF THE CITY OF
SAN JACINTO AUTHORIZING SUBMITTAL OF
APPLICATION(S) FOR ALL CALRECYCLE PAYMENT
PROGRAMS FOR WHICH THE CITY OF SAN JACINTO IS
ELIGIBLE.**

WHEREAS, the City of San Jacinto ("City") is a municipal corporation organized and operating under the laws of the State of California with the City Council of the City of San Jacinto ("City Council") acting as the governing body of the City; and

WHEREAS, Public Resources Code sections 48000 et seq., 14581, and 42023.1(g), authorize the Department of Resources Recycling and Recovery (CalRecycle) to administer various grant and payment programs in furtherance of the State of California's (state) efforts to reduce, recycle and reuse solid waste generated in the state thereby preserving landfill capacity and protecting public health and safety and the environment; and

WHEREAS, in furtherance of this authority, CalRecycle is required to establish procedures governing the administration of the payment programs; and administration of the application, awarding, and management of the grant programs; and

WHEREAS, CalRecycle's procedures for administering payment and grant programs require, among other things, an applicant's governing body to declare by resolution certain authorizations related to the administration of the payment and grant programs; and

NOW, THEREFORE, THE CITY COUNCIL OF THE CITY OF SAN JACINTO, DOES HEREBY RESOLVE, DETERMINE, AND ORDER AS FOLLOWS:

SECTION 1. That the City of San Jacinto authorizes the submittal of application(s) to CalRecycle for all grant and payment programs for which the City of San Jacinto is eligible; and

SECTION 2. That the City Manager or his designee is hereby authorized and empowered to execute in the name of the City of San Jacinto all documents, including but not limited to, applications, agreements, amendments, and requests for payment, necessary to secure funds and implement the approved grant or payment project; and

SECTION 3. That these authorizations are effective for five (5) years from the date of adoption of this resolution.

SECTION 4. This resolution shall take effect immediately upon its adoption.

Resolution No. 4005

PASSED, APPROVED, AND ADOPTED at a regular meeting of the City Council on the 16th day of January 2024 by the following vote:

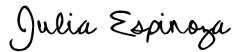
AYES: Vandever, Ledezma, Ruiz, Hawkins, Ayala
NAYS: None
ABSENT: None
ABSTAIN: None

CITY OF SAN JACINTO:



Phil Ayala, Mayor

ATTEST:



Julia Espinoza, City Clerk

APPROVED AS TO FORM:
BEST BEST & KRIEGER LLP



Craig Hayes, City Attorney

Resolution No. 4005

CERTIFICATION

**STATE OF CALIFORNIA)
COUNTY OF RIVERSIDE) SS
CITY OF SAN JACINTO)**

I, Julia Espinoza, duly appointed City Clerk of the City of San Jacinto, do hereby certify that the foregoing Resolution No. 4005 was introduced at a regular meeting of the City Council of the City of San Jacinto on the 16th day of January 2024. Resolution No. 4005 was passed, approved, and adopted by the City Council of the City of San Jacinto, California, at a regular meeting of the City Council held on the 16th day of January 2024:

AYES: Vandever, Ledezma, Ruiz, Hawkins, Ayala
NAYS: None
ABSENT: None
ABSTAIN: None

WITNESS MY HAND AND SEAL this 16th day of January 2024.

Julia Espinoza

Julia Espinoza, City Clerk
City of San Jacinto



Application Certification

Application Information

Applicant: City of San Jacinto

Cycle Name: Beverage Container Recycling Grant Program

Application Due Date: 08/11/2026

Cycle Code: RBC38

Secondary Due Date: 09/10/2026

Grant ID: 34101

Grant Funds Requested: \$93,500.00

Matching Funds: \$0.00 (if applicable)

Contacts

Name	Title	Prime	Second	Auth	Cnslt	Prtcpt. Auth
Ruth Montoya	Administrative Analyst	X				
Preston Sullens	Public Works Superintendent		X			
Travis Randel	Interim City Manager			X		

Budget

Category Name	Amount
Admin Costs	\$0.00
Education	\$0.00
Equipment	\$93,500.00
Personnel	\$0.00

Site Information

Name	Type
Julian Park	Parks/Recreational Areas
The Cove Park	Parks/Recreational Areas
Pomegranate Park	Parks/Recreational Areas
Hafliger Park	Parks/Recreational Areas
Tamarisk Park	Parks/Recreational Areas
Terrazo Park	Parks/Recreational Areas
Stallions Crossing Park	Parks/Recreational Areas
Haugen Park	Parks/Recreational Areas
Cutting Park	Parks/Recreational Areas
Aaron J. Ward Park	Parks/Recreational Areas
Sallee Park	Parks/Recreational Areas
Mistletoe Park	Parks/Recreational Areas
Durango Park	Parks/Recreational Areas
Warneke Park	Parks/Recreational Areas

<https://secure.calrecycle.ca.gov/Grants/Grant/Grant.aspx?GrantID=34101>

Date Generated: August 6, 2026 3:57 PM

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Application Certification

Documents	Document Title	Received Date
Required		
Application Certification		
Budget	Budget	8/6/2026
Narrative Proposal	Narrative Proposal	8/6/2026
Work Plan	Work Plan	8/6/2026
Required By Secondary Due Date		
Resolution/Letter of Commitment	Resolution No. 4005	7/28/2026
Other Supporting Document(s)		
Bids, Quotes, Estimates, Equipment Details	Quote	8/6/2026
Joint Powers Agreement		
Letter of Authorization/Resolution		
Letter of Designation		
Letter of Support		

Resolution

Check the following, as applicable. See Application Guidelines and Instructions for more information and examples.

- ☒ Applicant acknowledges that a Resolution is uploaded in the application. The Resolution must be approved by its governing body, which authorizes submittal of the application and designates a signature authority. If applicable, applicant has uploaded a Letter of Designation (LOD) designating an additional signature authority(ies).

EPPP

Does your organization and any participants have an Environmentally Preferable Purchasing and Practices (EPPP) Policy?

- ☒ No, our organization and any participants do not have an EPPP Policy. We acknowledge that our organization and any participants will adopt one by the respective cycle secondary due date or our application will be disqualified.

Program Questions

California Labor Code section 1782 prohibits a charter city from receiving state funding or financial assistance for construction projects if that charter city does not comply with Labor Code sections 1770-1782. If any applicants or participating jurisdictions are charter cities or joint powers authorities that include charter cities, the lead applicant must certify that Labor Code section 1782 does not prohibit any included charter city from receiving state funds for the project described in this application. If it is determined after award that a participating jurisdiction is a charter city prohibited from receiving state funds for this grant project, the grant will be terminated and any disbursed grant funds shall be returned to CalRecycle.

If any applicant or participating jurisdiction is a charter city or a joint powers authority that contains one or more charter cities, does Labor Code section 1782 prohibit those charter cities from receiving state funding for the project described in this grant application? Check the following, as applicable.

- ☒ Not Applicable. This application does not include any charter cities.

Have you prohibited the siting of a supermarket site?

(Yes) (x No)

Have you caused a supermarket site to close its business?

(Yes) (x No)

Have you adopted a land use policy that restricts or prohibits the siting of a supermarket site within your jurisdiction?

(Yes) (x No)

Application Certification

Conditions and Certification

Condition of Application Submittal: Acceptance of Grant Agreement Provisions

In the event the Applicant is awarded a grant, the submittal of this Application constitutes acceptance of all provisions contained in the Grant Agreement, which may consist of the following:

- Executed Grant Agreement Cover Sheet and any approved amendments
- Exhibit A - Terms and Conditions
- Exhibit B - Procedures and Requirements
- Exhibit C - Application with revisions, if any, and any amendments

Environmental Justice:

In the event Applicant is awarded a grant, submittal of this Application constitutes acceptance of the following; that in the performance of the Grant Agreement, Applicant/Grantee shall conduct their programs, policies, and activities that substantially affect human health or the environment in a manner that ensures the fair treatment of people of all races, cultures, and income levels, including minority populations and low-income populations of the State. (see Govt. Code §65040.12(e) and Pub. Resources Code §71110(a))

Certification:

I declare under penalty of perjury under the laws of the State of California, that funds have been allocated for the project(s)/activities identified in the grant application and that sufficient funds are available to complete the project(s)/activities identified in the grant application, that I have read the Application Guidelines and Instructions and that all information submitted for CalRecycle’s consideration for award of grant funds is true and correct to the best of my knowledge, and that on behalf of the Applicant I accept the above conditions of submittal.

X <i>Travis Randel</i>	8/11/2026
<i>Signature of Signature Authority (as authorized in Resolution or Letter of Commitment) or Authorized Designee (as authorized in Letter of Designation, submitted with this Application)</i>	Date

Travis Randel	Interim City Manager
Print Name	Print Title

IMPORTANT! Applicant must print out this document, have the Signature Authority sign it, upload signed document to the application system, and retain the original hard copy document in your cycle file.



CITY OF SAN JACINTO

CRYSTAL RUIZ, MAYOR
CLARISA SANCHEZ, MAYOR PRO TEM
PHILLIP AYALA, COUNCILMEMBER

ALONSO LEDEZMA, COUNCILMEMBER
VALERIE VANDEVER, COUNCILMEMBER
TRAVIS RANDEL, INTERIM CITY MANAGER

September 1, 2026

California Department of Resources Recycling and Recovery (CalRecycle)

Beverage Container Recycling Grant Program

RE: Letter of Support for the City of San Jacinto Outdoor Water Refill Station Project

Dear CalRecycle Grant Review Committee:

On behalf of the City of San Jacinto, I am pleased to provide this letter of support for the City's proposed project to purchase and install 17 outdoor water bottle fillers with ADA compliant drinking fountains at City parks and recreational facilities.

The project will replace aging drinking water infrastructure with modern, accessible equipment that provides residents and visitors with reliable access to drinking water while encouraging the use of reusable beverage containers. By providing convenient locations to refill reusable bottles, the project will help reduce reliance on single-use beverage containers and support CalRecycle's waste reduction goals. The project is expected to reduce plastic pollution by diverting an estimated 310,250 single-use plastic bottles from the waste stream annually, providing a significant and measurable environmental benefit to the community.

The proposed improvements will also promote accessibility and equitable access to public amenities. The ADA-compliant drinking fountains will ensure that individuals of all abilities can access the new water refill stations. Project activities will include the purchase of equipment, removal of existing drinking fountains, and installation of the new units, including necessary plumbing connections and site modifications. City staff will complete the installations using existing resources and their experience with similar projects.

The project will address existing infrastructure gaps while providing long-term environmental, public health, and community benefits. The proposed improvements will be located at City-owned parks and recreational facilities within Census Tracts 6065042745, 6065043523, 6065043517, 6065051300, 6065043602, 6065043601, and 6065043513. Four of these census tracts are designated as Disadvantaged Communities (DACs), ensuring that the project will provide direct benefits to underserved neighborhoods while improving access to safe drinking water and supporting waste reduction efforts.

The City of San Jacinto strongly supports this project and its goals of reducing beverage container waste, improving access to drinking water, enhancing accessibility, and investing in sustainable public infrastructure.

We respectfully request CalRecycle's favorable consideration of the City's grant application. Thank you for your consideration and for supporting projects that promote waste reduction, sustainability, accessibility, and healthier communities throughout California.

Sincerely

Crystal Ruiz, Mayor

City of San Jacinto

September 1, 2026

TO: City Council

REQUESTED BY: Derek Williamson, Chief Innovation Officer

APPROVED BY: Travis Randel, Interim City Manager

SUBJECT: Financial Management and Utility Billing Needs Assessment

RECOMMENDATION:

Staff recommends that the City Council:

1. **AWARD** a Professional Services Agreement to SDI Presence to provide Financial Management and Utility Billing Needs Assessment, Procurement Support, and Project Implementation Management Services in an amount not to exceed \$102,625.00;
2. **AUTHORIZE** the City Manager to execute the agreement and any related documents necessary to implement the agreement, subject to review and approval as to form by the City Attorney; and
3. **AUTHORIZE** the City Manager to approve amendments or change orders, as necessary, provided sufficient appropriations are available and such amendments are consistent with the authority granted under the City's applicable procurement policies and municipal code.

DISCUSSION:

The City of San Jacinto currently relies on financial management and utility billing systems that have been in place for many years. The City's financial management solution is more than 25 years old, while the City's utility billing solution has been in use for more than 10 years. While these systems have supported the City's operations for an extended period, their age presents increasing challenges related to functionality, integration, reporting, automation, security, system support, and the ability to meet the City's evolving operational needs.

As the City's operations, technology environment, regulatory requirements, and customer expectations have evolved, there is a growing need to modernize the City's existing systems and business processes to effectively support current and future requirements. Modern financial management and utility billing platforms offer expanded capabilities for workflow automation, electronic transactions, real-time reporting, data integration, customer self-service, mobile access, and improved information sharing across departments.

Rather than proceeding directly to the selection of replacement systems, the City determined that a comprehensive needs assessment should first be completed. This approach will allow the City to evaluate its existing business processes, identify opportunities for improvement, establish long-term operational requirements, and develop a clear understanding of the functional and technical capabilities needed from a financial management and utility billing solution. The assessment will also help ensure that the city does not simply replace existing systems without addressing underlying business processes or opportunities for greater efficiency and automation.

The City issued a Request for Proposals seeking a qualified consultant to provide financial management and utility billing needs assessment, procurement support, and project implementation management services. The scope of the current agreement includes the needs assessment, development of functional and technical requirements, and assistance with the procurement and evaluation a financial management and utility billing solution. These services are intended to guide the City through the assessment and software selection process and establish a clear road-map for the eventual implementation of the selected solutions.

Following the City's competitive procurement process, the city received ten proposals from qualified consulting firms. The proposals were reviewed and evaluated using the scoring matrix and criteria identified in the request for proposal, including relevant experience and qualifications, project approach and methodology, project team experience, understanding of municipal operations, cost, and references. Based on the results of the evaluation, SDI Presence received the highest overall score and was determined to be the most qualified consultant to perform the required services. SDI Presence demonstrated strong experience and qualifications, a comprehensive approach to the project, and a clear understanding of the City's needs and objectives throughout the assessment and procurement process.

SDI Presence will serve as an independent advisor to the city throughout the project, providing expertise to help clearly define the city's business and technical requirements and evaluate potential solutions based on the city's operational needs. This approach will help ensure that system recommendations are driven by the city's requirements and long-term objectives, rather than being based solely on vendor capabilities or product features. The independent expertise and oversight provided by SDI Presence will help the city make informed decisions as it undertakes this significant enterprise technology modernization effort.

The initial phases of the project will focus on understanding the city's current environment, identifying opportunities for improvement, developing functional and technical requirements, and assisting the City with the procurement and evaluation of potential financial management and utility billing solutions. The findings and recommendations developed through these phases will provide the foundation for the selection and implementation of the software.

Actual implementation management and oversight services for the selected financial management and utility billing solutions are not included in the initial contract award. Should the City determine that additional implementation management services from SDI Presence are needed following the selection of the new systems, those services may be considered and brought forward for separate authorization at that time.

The proposed agreement with SDI Presence is for an amount not to exceed \$102,625.00 for the initial phases of the project. This investment will provide the City with the professional expertise necessary to establish a well-defined road-map for modernization, conduct a thorough and objective software procurement process, and reduce the risks associated with replacing two critical enterprise systems.

FISCAL IMPACT:

The proposed Professional Services Agreement with SDI Presence is in an amount not to exceed \$102,625.00 for the initial phases of the Financial Management and Utility Billing modernization project. Funding for these services were included within the City's FY26/27 adopted budget.

The current agreement covers the needs assessment, development of functional and technical requirements, and procurement support associated with the evaluation and selection of future Financial Management and Utility Billing solutions. The agreement does not commit the City to the purchase of any software, hardware, implementation services, or other related technology expenditures.

Attachments

[San Jacinto RFP - Financial Management and Needs Assessment](#)

[SDI Response San Jacinto Needs Assessment RFP](#)

CITY OF SAN JACINTO

REQUEST FOR PROPOSALS (RFP)

Needs Assessment and Project Implementation Management Services Financial Management and Utility Billing Systems

1. NOTICE INVITING PROPOSALS

The City of San Jacinto (“City”) is soliciting proposals from qualified consulting firms to provide professional consulting services for a comprehensive needs assessment, procurement support, and project implementation management services related to the replacement and modernization of the City’s Financial Management and Utility Billing systems.

The selected consultant shall assist the City in evaluating current business processes, documenting functional and technical requirements, facilitating software selection, supporting contract negotiations, and providing independent project management and implementation oversight through deployment of the selected solutions.

The City intends to select a consultant with demonstrated experience assisting local government agencies with enterprise resource planning (ERP), financial management, and utility billing system modernization projects.

2. BACKGROUND

2.1 About the City

The City of San Jacinto is a growing municipality located in Riverside County, California. The City is committed to modernizing its technology infrastructure and improving operational efficiency, transparency, customer service, and data-driven decision making.

The City currently utilizes separate financial management and utility billing solutions that support core business operations including:

- General Ledger
- Accounts Payable
- Accounts Receivable
- Budgeting

- Purchasing and Procurement
- Payroll and Human Resources
- Cash Receipting
- Fixed Assets
- Utility Billing
- Customer Service
- Meter Reading Integration
- Online Payments
- Reporting and Analytics

The City seeks to evaluate current operational needs and future technology requirements in order to implement modern, integrated, cloud-based solutions that support scalability, cybersecurity, automation, and improved service delivery.

3. PROJECT OBJECTIVES

The primary objectives of this project include:

1. Conduct a comprehensive assessment of the City's current financial and utility billing business processes, workflows, systems, integrations, and operational challenges.
 2. Identify opportunities for process improvement, automation, standardization, and operational efficiencies.
 3. Develop detailed functional, technical, reporting, security, integration, and data migration requirements.
 4. Assist the City with preparation of software procurement documents and vendor evaluation.
 5. Facilitate a transparent and objective software selection process.
 6. Provide independent project management and implementation oversight services during software deployment.
 7. Help ensure the selected solutions are implemented on time, within budget, and aligned with City objectives.
 8. Support organizational change management, training coordination, testing oversight, and go-live readiness.
-

4. SCOPE OF SERVICES

The consultant shall provide all labor, materials, tools, equipment, and supervision necessary to perform the services described below.

Phase 1 – Project Initiation and Discovery

The consultant shall:

- Conduct project kickoff meetings
- Develop a project management plan and communication plan
- Identify key stakeholders and governance structure
- Review existing systems, documentation, contracts, and integrations
- Conduct interviews, workshops, and stakeholder engagement sessions
- Assess current business processes and workflows
- Evaluate operational pain points and future needs
- Review current reporting and analytics capabilities
- Assess cybersecurity, compliance, and disaster recovery considerations
- Evaluate current architecture and infrastructure dependencies

Deliverables

- Project Management Plan
 - Stakeholder Engagement Plan
 - Current State Assessment Report
 - Business Process Documentation
 - Gap Analysis
-

Phase 2 – Needs Assessment and Requirements Development

The consultant shall:

- Facilitate future-state business process discussions
- Identify desired functionality and process improvements
- Develop detailed business and technical requirements
- Define integration requirements
- Define reporting and dashboard requirements
- Define data migration requirements
- Identify implementation risks and mitigation strategies
- Develop evaluation criteria and scoring methodology

Deliverables

- Future State Business Process Documentation
 - Functional Requirements Matrix
 - Technical Requirements Matrix
 - Integration Requirements Documentation
 - Data Migration Requirements
 - Reporting and Analytics Requirements
 - Evaluation Criteria and Scoring Matrix
-

Phase 3 – Procurement Support and Vendor Selection

The consultant shall:

- Assist the City in preparing software procurement documents
- Develop RFP/RFQ technical specifications
- Support vendor question and answer process
- Evaluate proposals and vendor responses
- Facilitate software demonstrations and workshops
- Conduct reference checks
- Assist with total cost of ownership analysis
- Assist with contract review and negotiations
- Prepare vendor evaluation summaries and recommendations

Deliverables

- Software Procurement Documents
 - Vendor Evaluation Reports
 - Demonstration Scripts and Scoring Tools
 - Final Recommendation Report
 - Contract Negotiation Support Documentation
-

Phase 4 – Project Implementation Management

The consultant shall provide independent project management and implementation oversight services, including:

- Implementation project governance support
- Schedule and milestone monitoring
- Budget tracking and risk management
- Coordination between City staff and software vendor

- Data migration oversight
- Integration oversight
- Configuration and customization review
- Testing oversight and quality assurance
- Change management support
- Training coordination
- Go-live readiness assessment
- Post-implementation stabilization support

Deliverables

- Implementation Governance Framework
 - Risk Register
 - Status Reports
 - Testing and Quality Assurance Plans
 - Change Management Plan
 - Go-Live Readiness Assessment
 - Post-Implementation Review
-

5. DESIRED SYSTEM CHARACTERISTICS

The City is interested in modern solutions that may include:

- Cloud-hosted SaaS architecture
 - Secure remote access capabilities
 - Mobile-friendly functionality
 - Workflow automation
 - Role-based security
 - Open APIs and integration capabilities
 - Advanced reporting and dashboards
 - Electronic document management integration (Laserfiche)
 - GIS integration capabilities
 - Customer self-service portal
 - Online payment processing
 - Automated notifications and communications
 - Scalability for future growth
 - Disaster recovery and business continuity capabilities
 - Compliance with applicable regulatory requirements
-

6. CONSULTANT QUALIFICATIONS

Proposing firms shall demonstrate:

- Experience with local government ERP and utility billing system projects
- Experience with California municipalities preferred
- Experience conducting business process assessments
- Experience with ERP and utility billing procurements
- Experience providing independent project management services
- Knowledge of public sector finance and utility operations
- Experience with cloud-based enterprise solutions
- Experience managing data migration and integrations
- Availability of qualified personnel assigned to the project

The City prefers firms with demonstrated experience supporting projects involving:

- Tyler Technologies
 - CentralSquare
 - Springbrook
 - Oracle
 - SAP
 - Workday
 - Other comparable municipal ERP and utility billing platforms
-

7. PROPOSAL REQUIREMENTS

Proposals shall include the following sections:

7.1 Cover Letter

Include:

- Firm name and address
- Primary contact information
- Brief statement of understanding
- Authorized signature

7.2 Firm Overview

Include:

- Company history
- Organizational structure

- Office locations
- Public sector experience
- Relevant certifications

7.3 Project Approach and Methodology

Describe:

- Proposed approach to the project
- Methodology for needs assessment
- Stakeholder engagement strategy
- Procurement support methodology
- Project management methodology
- Risk management approach
- Change management approach

7.4 Project Team

Include:

- Organizational chart
- Key personnel resumes
- Relevant project experience
- Roles and responsibilities
- Availability of personnel

7.5 Relevant Experience and References

Provide:

- At least three (3) comparable municipal projects
- Client name and contact information
- Project scope and outcomes
- Project timeline and budget
- Description of consultant role

7.6 Project Schedule

Provide:

- Proposed timeline
- Major milestones
- Estimated duration for each phase

7.7 Cost Proposal

Include:

- Detailed fee schedule
- Hourly rates
- Estimated hours by task
- Reimbursable expenses
- Optional services pricing

7.8 Exceptions

Identify any exceptions to the requirements contained in this RFP.

8. EVALUATION CRITERIA

Proposals may be evaluated using criteria including, but not limited to:

Criteria	Weight
Relevant Experience and Qualifications	25%
Project Approach and Methodology	25%
Project Team Experience	20%
Understanding of Municipal Operations	15%
Cost Proposal	10%
References	5%

The City reserves the right to conduct interviews and request additional information from shortlisted firms.

9. TENTATIVE PROJECT SCHEDULE

Milestone	Date
RFP Release	June 25, 2026
Questions Due	July 14, 2026
Responses to Questions	July 20, 2026
Proposal Due Date	August 3, 2026
Interviews (Optional)	August 10 - 11, 2026
Consultant Selection	August 17, 2026
City Council Approval	September 1, 2026

Milestone

Date

10. SUBMISSION REQUIREMENTS

Proposals shall be submitted electronically in PDF format.

Submission Address

finance@sanjacintoca.gov

Proposal Deadline

August 3, 2026 @ 2:00pm

Late submissions may not be accepted.

11. QUESTIONS REGARDING THE RFP

All questions regarding this RFP shall be submitted in writing to:

Email: finance@sanjacintoca.gov

Subject: Financial Management / Utility Billing RFP

Questions submitted after the deadline may not be answered.

12. GENERAL TERMS AND CONDITIONS

12.1 Right to Reject

The City reserves the right to reject any or all proposals, waive informalities, and accept the proposal deemed in the best interest of the City.

12.2 Costs Incurred

The City shall not be liable for any costs incurred by proposers in preparation of proposals.

12.3 Insurance Requirements

The selected consultant shall maintain insurance coverage meeting City requirements.

12.4 Public Records

All proposals submitted may become public records subject to disclosure under applicable law.

12.5 Contract Negotiations

The City reserves the right to negotiate contract terms with the selected consultant.

12.6 Conflict of Interest

Consultants shall disclose any potential conflicts of interest.

12.7 Independent Consultant

The consultant shall act as an independent contractor and not as an employee of the City.

14. ANTICIPATED PROJECT OUTCOMES

The City anticipates that completion of this project will result in:

- Clearly documented operational and technology requirements
- Improved business processes and operational efficiencies
- Selection of modern and scalable enterprise solutions
- Reduced manual processes and redundant data entry
- Improved reporting and analytics capabilities
- Enhanced customer service capabilities
- Improved cybersecurity and system reliability
- Better integration across City departments
- A successful and well-managed implementation process

15. CITY RESERVATION OF RIGHTS

The City reserves the right to:

- Modify or cancel this RFP at any time
 - Request clarification or additional information
 - Conduct investigations regarding proposer qualifications
 - Negotiate scope and fees
 - Award contracts in whole or in part
 - Issue addenda to this RFP
-

END OF REQUEST FOR PROPOSALS



Proposal Prepared For:

City of San Jacinto

Needs Assessment and Project
Implementation Management

August 10, 2026



Respectfully Submitted By:



Patrick Griffin

Managing Director

pgriffin@sdipresence.com

714-975-4150

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7.1 Cover Letter

August 10, 2026

Mr. Derek Williamson, Chief Innovation Officer
City of San Jacinto
595 S San Jacinto Ave
San Jacinto, CA 92583

Re: RFP for Needs Assessment and Project Implementation Management Services

Dear Mr. Williamson,

SDI Presence LLC (SDI), through its Advisory & Consulting Practice, respectfully submits this proposal to the City of San Jacinto (City) for the provision of advisory and project management services to support the City's Financial Management and Utility Billing System modernization initiative, including needs assessment, requirements development, procurement support, and project implementation management services.

SDI brings more than 30 years of experience supporting public sector agencies with complex technology initiatives. Since 1996, we have partnered with over 200 government entities to plan, procure, implement, and optimize enterprise systems. In alignment with the City of San Jacinto's requirements, SDI has successfully delivered ERP advisory and implementation services for more than 70 cities and public agencies of similar size and complexity. Our recent and ongoing engagements include:

City of Riverside	City of Downey	City of Torrance
City of Lincoln	City of Manhattan Beach	City of Merced
City of Scottsdale, AZ	City of Redlands	City of Monterey
City of Rialto	City of Vernon	City of Yucaipa

Through these engagements, SDI has provided comprehensive services spanning project planning, business process analysis, ERP needs assessments, requirements development, procurement strategy, vendor evaluation, contract negotiation, and implementation project management—directly aligning with the scope outlined in this RFP.

To complete this project, SDI will apply a proven and structured project delivery methodology that integrates project management, business process assessment, requirements development, procurement support, and implementation oversight to help the City successfully modernize its ERP environment while minimizing project risk and disruption to daily operations. During new system implementation, SDI will apply proven project management protocols to help ensure that new system features and functionality are fully vetted, implemented, and adopted in accordance with best business practices, maximizing the value of the City's investment.

SDI confirms that we have reviewed this RFP in its entirety and will comply with all requirements, terms, and conditions set forth by the City of San Jacinto. We are confident that our experience, qualified personnel, and disciplined approach position us to deliver high-quality results aligned with the City's objectives and project requirements. Our response is valid for 120 days.



SDI is prepared to begin work upon execution of an agreement approved by the City Council. As Chief Financial Officer of SDI, I am authorized to bind the company. Should you have any questions or require additional information, please contact Managing Director Patrick Griffin at pgriffin@sdipresence.com or 714-975-4150. Mr. Griffin is authorized to negotiate terms and is responsible for the contents of this proposal.

Thank you for your consideration.

Sincerely,

A handwritten signature in black ink that reads 'Shoma Meyer'.

Shoma Meyer
Chief Financial Officer
SDI Presence LLC
200 E. Randolph Street, Suite 3550 Chicago, IL 60601

7.2 Firm Overview

SDI Presence LLC (SDI)

SDI Presence LLC (SDI) is a technology consulting and services firm with more than 30 years of experience supporting public and private sector organizations and helping clients advance to a secure digital enterprise. SDI is a certified Minority Business Enterprise (MBE) providing strategic consulting, advisory, managed services, and technology solutions to clients that include state and local government agencies and some of the nation's largest airports, utilities, and commercial real estate portfolios.

The services proposed to the City will be delivered through SDI's **Advisory & Consulting Practice**, which specializes in independent, vendor-neutral consulting for public agencies. The practice supports ERP strategy and procurement, business and technology assessment, implementation advisory, organizational readiness, governance, data planning, cybersecurity, and related modernization initiatives.

SDI Snapshot:

- Headquartered in Chicago
- 30+ Years IT Consulting/Systems Integration/Implementation Experience
- 400+ Business Professionals
- 87% Customer Satisfaction Rating / 89 Promoter Score
- Continuously awarded the "Best Places to Work" Recognition since 2018
- Financial Stability:
 - 2025 Revenue - \$99.18M
 - Backed by Private Equity Firm - Abry Partners with \$5B under management

SDI Core Services

SDI offers a broad technical skill set to our clients, offering deep expertise in each stage of the traditional or cloud-based systems lifecycle. SDI brings a well-rounded team of professional business consultants, certified technicians and years of mission-critical IT experience to each of our client engagements.



Advisory & Consulting

Expert guidance to help organizations navigate complexity, drive strategy, and achieve operational excellence.



IT Managed Services

Comprehensive IT support ensures reliable operations, enhanced security, and scalable performance through expert management.



Enterprise Data & AI

Transforming enterprise data into actionable insights with AI-driven solutions that accelerate innovation and decision-making.



Public Safety

Mission-critical technology solutions that empower public safety agencies to respond faster, collaborate better, and protect communities.



ServiceNow

Streamlining workflows and boosting productivity with tailored ServiceNow solutions that unify systems and drive digital transformation.



Enterprise Asset Management

Optimizing asset performance and lifecycle management to reduce downtime, control costs, and drive operational efficiency.

Organizational Structure

The firm is organized into four Strategic Business Units (SBUs) aligned to key public-sector and regulated industry markets:

- **SLED West** – State, Local, and Education clients west of the Rocky Mountains
- **SLED East** – State, Local, and Education clients east of the Rocky Mountains, with additional support for municipal utilities in western regions
- **Utilities** – National investor-owned and municipal utility clients
- **ACORE** – Aviation, Commercial, and Real Estate sectors

SDI's corporate leadership provides enterprise-wide governance, resource coordination, and strategic direction to ensure consistency, compliance, and alignment with client objectives. This organizational structure enables SDI to deliver responsive, high-quality ERP consulting services while maintaining the governance, quality assurance, and scalability required to successfully support public-sector ERP modernization projects.

The City's project will be delivered by SDI's Advisory & Consulting Practice, which is managed out of the SLED West SBU.

Office Locations

SDI is headquartered in Chicago, Illinois with regional offices in Anaheim and Sacramento, California; Atlanta, Georgia; and Dallas/Fort Worth, Texas.

Public Sector Expertise and Experience

SDI has extensive experience assisting local government agencies with ERP modernization and related technology advisory initiatives. To date, SDI's Advisory & Consulting Practice has supported more than 70 public agencies—including municipalities, counties, water districts, fire districts, and utility districts—with ERP assessments, business process evaluations, cybersecurity assessments, requirements development, procurement, vendor selection, implementation project management, and organizational change management. These engagements have enabled SDI to help clients strengthen business processes, technology governance, cybersecurity, and enterprise operations while successfully planning, procuring, and implementing modern ERP solutions.

The following table identifies our representative ERP clients, past and present.

- | | | |
|--------------------------|-----------------------|--------------------------------|
| • City of Alameda | • City of Benicia | • City of Burlingame |
| • Camrosa Water District | • City of Carson | • City of Carson City (NV) |
| • City of Chino | • City of Chino Hills | • Chino Valley Ind. Fire Dist. |
| • Coachella Valley Water | • Consumnes CSD | • Cucamonga Valley Water |
| • City of Davis | • Douglas County (NV) | • City of Downey |

- City of Dublin
- City of Fresno
- City of Half Moon Bay
- City of Hawaiian Gardens
- Las Virgenes Water District
- City of Merced
- Moulton Niguel Water
- Placer County
- City of Rancho Cucamonga
- City of Rialto
- City of Rohnert Park
- San Benito County
- City of San Ramon
- Sonoma County
- City of Torrance
- City of Vernon
- East Bay Regional Park
- City of Gilroy
- City of Indio
- City of La Quinta
- City of Lincoln
- City of Millbrae
- City of Ontario
- City of Pleasant Hill
- City of Redlands
- Riverside Co. Trans. Comm.
- Sacramento Metro. Fire
- City of Seal Beach
- City of Scottsdale AZ
- South Lake Tahoe PUD
- City of Walnut Creek
- City of Yuba City
- City of Fremont
- City of Glendale
- Inland Empire Utilities
- Lakeside Fire Protection
- City of Manhattan Beach
- City of Monterey
- City of Paso Robles
- City of Poway
- City of Redwood City
- City of Riverside
- Santa Clara Valley Water
- San Joaquin COG
- Silicon Valley Clean Water
- City of Sunnyvale
- City of Vacaville
- City of Yucaipa

What Sets SDI Apart from Other Advisory Firms

SDI's Advisory & Consulting Practice has been partnering with local government clients for more than 30 years, providing technology advisory services to assist organizations increase efficiency by maximizing the use of technology to support best business practices. Our advisory team has worked with more than 200 local government clients to complete technology plans, implement new technology, and maximize the use of existing technology systems. The practice maintains a vendor-neutral approach and does not receive commissions, referral fees, reseller compensation, implementation incentives, revenue-sharing arrangements, or other compensation from ERP software vendors related to our consulting recommendations. SDI has no financial interest in the selection of any specific ERP solution and is committed to providing objective guidance that supports a transparent, defensible procurement process and enables the City to make informed decisions that are in the City's best interest.

While our list of satisfied clients is a testament to our success, one of the most compelling aspects that sets SDI's advisory team apart from other consulting firms is the history and background of the team members. Our advisory consultants are seasoned local government professionals: former CIOs, IT Directors, Finance Directors, and City Executives who have experienced the challenges local governments face and who apply their real-world experience to meet the needs of today's clients. This experience is an essential component of the SDI advisory team's success with local government customers.

The following table summarizes how SDI's qualifications align with the City's priorities.

San Jacinto Qualification / Priority	SDI Qualifications
1. Independent, vendor-neutral advisory services	Vendor-neutral advisory practice with no reseller relationships, commissions, referral fees, or implementation incentives tied to any ERP software provider.
2. Local government ERP and utility billing system experience	More than 70 local government ERP assessment, procurement, selection, and implementation engagements, including ERP and utility billing system projects for public agencies.
3. California municipal experience	Extensive experience serving California cities, counties, and special districts on ERP modernization, procurement, implementation, and technology advisory engagements.
4. Business process assessment expertise	Extensive experience facilitating stakeholder workshops, documenting current- and future-state business processes, conducting gap analyses, and developing comprehensive business and technical requirements.
5. ERP and utility billing procurement expertise	Proven methodology for preparing procurement documents, developing evaluation criteria and scoring methodologies, facilitating demonstrations, evaluating proposals, conducting reference checks, supporting total cost of ownership analyses, and assisting with contract negotiations.
6. Independent project management services	Independent project management and implementation oversight focused on governance, quality assurance, risk management, issue resolution, testing oversight, and successful ERP implementation.
7. Public sector finance and utility operations knowledge	Project team includes former Finance Directors, CIOs, IT Directors, and other public-sector executives with practical experience supporting municipal finance, utility billing, enterprise operations, cybersecurity, and technology governance.
8. Cloud-based enterprise solutions, data migration, and integrations	Extensive experience evaluating cloud-based ERP solutions, defining integration strategies, planning data migration activities, and documenting technical requirements, including technology architecture, cybersecurity, compliance, and disaster recovery considerations as part of ERP planning engagements.
9. Qualified personnel assigned to the project	Experienced project team of former local government executives and ERP consultants with specialized expertise in procurement, implementation, project management, organizational change management, and public-sector technology modernization.

Collectively, these capabilities enable SDI to provide independent guidance throughout the City's ERP modernization initiative—from initial assessment and requirements development through procurement, implementation oversight, and organizational readiness.

Relevant Certifications

SDI's employee population of over 400 professionals possess a number of certifications in a variety of areas including cybersecurity, change management, project management, ethical hacking, and other technology related areas. Specific to the Advisory & Consulting Practice team, the following information is provided:

Certification / Former Job Title	Advisory Count
Project Management Professional	3
Chief Financial Officer (CFO)	2
Chief Information Officer (CIO)	7
Professional in Human Resources (PHR)	1

7.3 Project Approach and Methodology

Project Approach

SDI has been delivering successful IT planning, procurement, and project management services to public sector clients since 1996. We have assisted over 70 local agency clients with ERP-related services and possess the knowledge, skills, and abilities to assist the City with this important project.

SDI offers our clients proven methodologies and tools designed specifically to meet the unique needs of public sector agencies. Since our inception, we have invested in and developed methodologies, tools, and supporting processes designed specifically for the unique needs and requirements of local government agencies. SDI constantly reviews and updates the knowledge base included in these toolkits based on experience with our clients. SDI will utilize project management processes and standards to ensure the City's objectives are met. SDI's approach will include the following:

- Use of a structured, proven approach to ensure a comprehensive understanding of the City's requirements and needs
- Fully identifying and disclosing potential risks and realistic risk mitigation strategies
- Managing the expectations of users and stakeholders throughout the process to ensure a realistic level of expectation upon implementation of the enterprise ERP system
- Minimizing disruption to daily City operations
- Establishing solid project management practices including schedule, time, and resource management; communications management; issues management; risk management; and quality management

We recognize that the City is interested in more than simply procuring a new ERP system—you require the expertise of a proven, independent advisor with significant experience and knowledge of local government operations, ERP solutions, and public-sector technology projects. The City is seeking a consultant that can successfully guide the organization through business process assessment, requirements development, procurement, vendor evaluation, and implementation project management while providing practical recommendations to improve business processes, organizational efficiency, and operational effectiveness. SDI is prepared to support the City with a proven team of dedicated professionals who have extensive experience helping local government agencies successfully plan, procure, and implement modern ERP solutions.

SDI's project management framework was developed to help minimize project risk, increase opportunities for operational efficiencies, and support the successful completion of complex ERP modernization initiatives. Our approach is to remain flexible, focus on the City's priorities, and work collaboratively with City staff to ensure we are maximizing the use of available resources throughout the engagement. We recognize that project priorities may evolve as the needs assessment, procurement, and implementation activities progress, and SDI is prepared to adjust our level of effort and focus accordingly to best support the City's objectives.

Project Methodology to the City's Scope of Work

SDI's approach to enterprise system procurements and implementations is designed to address the City's operational, technical, governance, and implementation objectives in a practical and disciplined manner.

Our methodology, as shown in Figure 1, reflects SDI's proven ERP advisory approach while aligning with the City's stated expectations and desired project outcomes related to governance, business process analysis, organizational readiness, risk management, procurement strategy, implementation readiness, and long-term ERP success. While SDI's task structure and methodology may differ in organization or terminology from the RFP, our approach is specifically designed to address the services requested and achieve the City's desired project outcomes. SDI will collaborate closely with the City to support a successful ERP selection and position the City for a disciplined implementation.

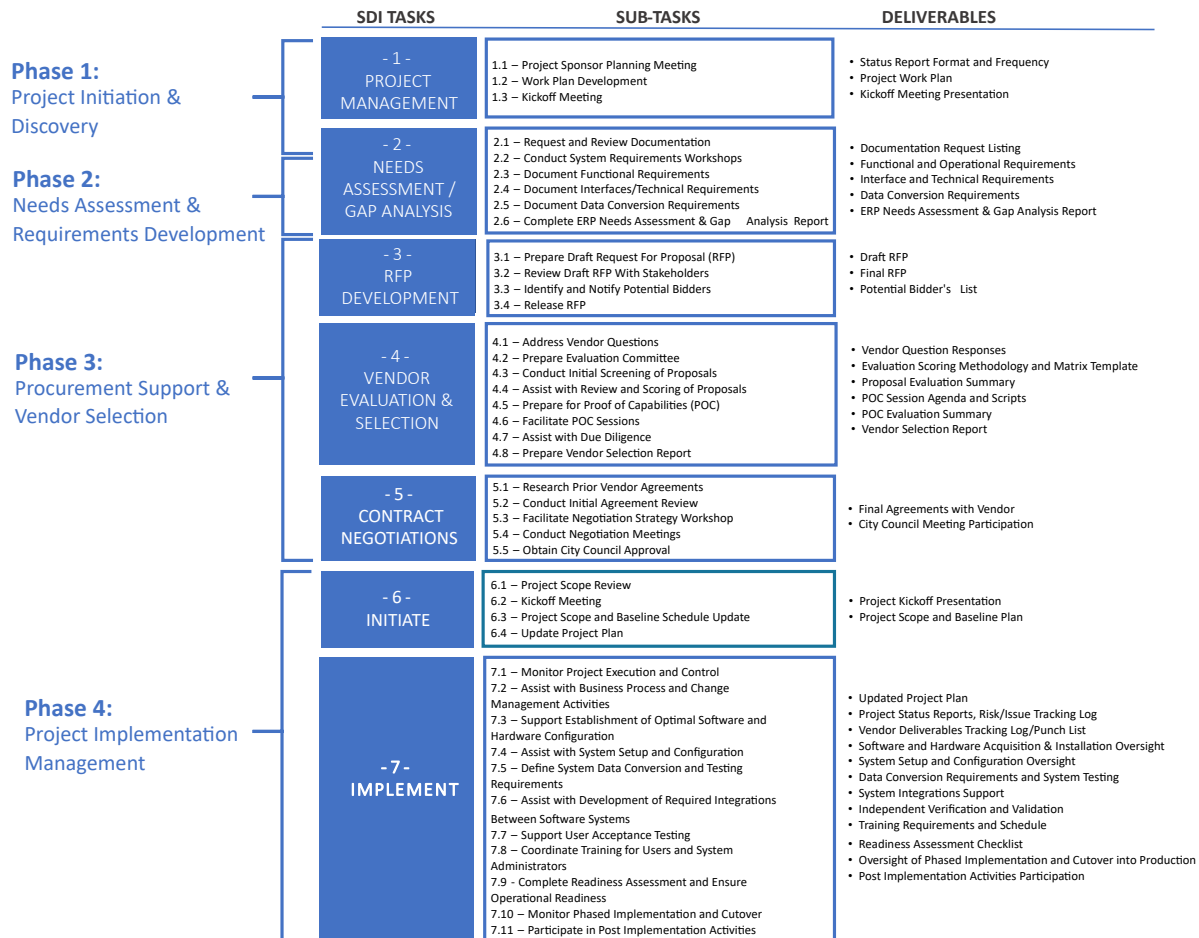


Figure 1 – SDI Methodology for New System Procurement and Implementation

Alignment of the City's Project Scope with SDI's Proven Project Delivery Methodology

The following table summarizes SDI's project approach and illustrates how our proven ERP Project Delivery Methodology aligns with the City's phased project approach. It is important to note that SDI's **Needs Assessment / Gap Analysis** methodology spans both the City's **Project Initiation & Discovery** phase and **Needs Assessment & Requirements Development** phase, providing a logical progression from understanding the current operating environment to defining the future-state business and technical requirements necessary to support a successful ERP procurement.

City of San Jacinto Project Phase	Corresponding SDI Project Delivery Tasks	Representative SDI Deliverables
Phase 1 – Project Initiation & Discovery	Task 1 – Project Management Task 2 – Needs Assessment / Gap Analysis (<i>Discovery and Current-State Assessment</i>)	Project Management Plan, Stakeholder Engagement Plan, Current-State Business Process Documentation, Needs Assessment, Gap Analysis
Phase 2 – Needs Assessment & Requirements Development	Task 2 – Needs Assessment / Gap Analysis (<i>Future-State Requirements Development</i>)	Future-State Business Process Documentation, Functional Requirements Matrix, Technical Requirements Matrix, Integration Requirements, Data Migration Requirements, Reporting & Analytics Requirements
Phase 3 – Procurement Support & Vendor Selection	Task 3 – RFP Development Task 4 – Vendor Evaluation & Selection Task 5 – Contract Negotiations	Software Procurement Documents, Evaluation Criteria & Scoring Matrix, Vendor Evaluation Reports, Demonstration Scripts & Scoring Tools, Final Recommendation Report, Contract Negotiation Support Documentation
Phase 4 – Project Implementation Management	Task 6 – Initiate Task 7 – Implement	Project Status Reports, Risk & Issue Logs, Implementation Oversight, Testing & Training Oversight, Readiness Assessment, Go-Live and Post-Implementation Support

The information on the following pages is organized into two major sections: **1. New System Procurement** and **2. New System Implementation Support**. This structure is intended to clearly distinguish the base procurement advisory work from the implementation support services requested in the RFP.

1. Methodology for New System Procurement (SDI Tasks 1 – 5)

The following work plan describes SDI’s approach to supporting the City through the ERP procurement process, including project governance, business process and requirements analysis, organizational readiness considerations, procurement strategy development, vendor evaluation, and contract negotiation support.

- **Task 1 – Project Management** – establishes the foundation for effective project governance, communication and the successful completion of the project.
- **Task 2 – Needs Assessment / Gap Analysis** – encompasses a thorough discovery of the City’s specific objectives and needs to ensure all the features, functions, and requirements necessary are defined and documented and communicated through the resulting documents for inclusion in the RFP.
- **Task 3 – Procurement Strategy & Request for Proposal Development** – recommends the procurement strategy and develops of the Request for Proposal and supporting documents to meet the procurement requirements of the City.

- **Task 4 – Vendor Evaluation & Selection** – provides the structure for a fair and organized means to complete the review and decision process to select the best solution presented.
- **Task 5 – Contract Negotiations** – results in formal completion of agreements with the selected ERP solution vendor and the City.

Please note that the 2. New System Implementation Support section follows the discussion of our new system procurement approach and methodology. Our methodology for Tasks 6 and 7 covers the implementation project management services requested by the City. SDI has been successfully providing related implementation advisory and support services with many of our clients.

The following Figure 2 provides a graphic of the tasks, sub-tasks, activities, and deliverables for our proposed methodology related to the New System Procurement activities. Immediately following the graphic, we provide a detailed work plan detailing the tasks and the associated deliverables for each phase of the ERP procurement activities. Throughout all project phases, SDI will incorporate governance, organizational readiness, stakeholder alignment, communication planning, and risk management activities to help support successful project execution and long-term ERP adoption.



Figure 2 – Project Tasks, Activities, and Deliverables for New System Procurement

Task 1 – Project Management

The purpose of the Project Management task is to prepare for, initiate, and manage the project under a well-defined and communicated work plan. This stage includes confirming our understanding, as well as the understanding of the stakeholders, regarding the scope of work and the process for accomplishing the overall project objectives.

SDI TASKS	SUB-TASKS	DELIVERABLES
- 1 - PROJECT MANAGEMENT	1.1 – Project Sponsor Planning Meeting 1.2 – Work Plan Development 1.3 – Kickoff Meeting	• Status Report Format and Frequency • Project Work Plan • Kickoff Meeting Presentation
Sub-Task 1.1 - Project Sponsor Planning Meeting		
TASK DESCRIPTION: SDI will meet with the City’s Project Sponsor and other key staff to complete a detailed review of the scope of work, project timeline, deliverables, project status methods, project participants (i.e., sponsor, subject matter experts, technical resources, etc.), and other items to ensure a well-planned project. During this meeting, SDI will discuss the tools and templates that will be leveraged.		
DELIVERABLE: Status Report Format and Frequency		
Sub-Task 1.2 - Work Plan Development and Review		
TASK DESCRIPTION: SDI will develop a Work Plan that identifies the project approach, methods, tasks, activities, resources, schedule, budget, deliverables, issue and risk management, and major milestones.		
DELIVERABLE: Project Work Plan		
Sub-Task 1.3 – Kickoff Meeting		
TASK DESCRIPTION: Since the project will have an enterprise-wide impact, it is important to proactively communicate with all impacted staff to ensure a clear understanding of project goals and objectives, roles and responsibilities, approach, tasks, and timeline. The Kickoff Meeting also provides the opportunity to introduce the SDI team to City staff and should involve senior level management and project sponsors to provide an introduction of this Citywide endeavor. It is important that all City staff that will be involved in the project, regardless of their role, participate in the project kickoff.		
DELIVERABLE: Kickoff Meeting Presentation		

Task 2 – Needs Assessment & Gap Analysis

During Task 2, SDI will develop an accurate and clear understanding of the current environment, as this provides the initial baseline from which to begin defining the desired future state of the new ERP system. During this task it is necessary to identify and prioritize future system features and functions, and to consider potential changes to current processes through the adoption of best business practices and implementation of a modern Enterprise Resource Planning system. A key success factor to implementing a best fit solution is having a comprehensive understanding of the City’s true needs and requirements.

SDI TASKS	SUB-TASKS	DELIVERABLES
- 2 - NEEDS ASSESSMENT / GAP ANALYSIS	2.1 – Request and Review Documentation 2.2 – Conduct System Requirements Workshops 2.3 – Document Functional Requirements 2.4 – Document Interfaces/Technical Requirements 2.5 – Document Data Conversion Requirements 2.6 – Complete ERP Needs Assessment & Gap Analysis Report	• Documentation Request Listing • Functional and Operational Requirements • Interface and Technical Requirements • Data Conversion Requirements • ERP Needs Assessment & Gap Analysis Report
Sub-Task 2.1 – Request and Review Documentation		
TASK DESCRIPTION: SDI understands that City staff have limited time to dedicate to this project. Consequently, we will make every effort to be as prepared as possible before asking for staff time. To accomplish this, SDI will request documentation to familiarize ourselves with the current environment, processes, procedures, policies, transaction levels, organizational responsibilities, reports, technical documentation, etc. It is not SDI’s intent to create work for the staff with this task - if requested documentation does not exist, then it should not be created now. DELIVERABLE: Documentation Request Listing		
Sub-Task 2.2 – Conduct System Requirements Workshops		
TASK DESCRIPTION: SDI will conduct workshops with the City’s functional subject matter experts in all City departments. For the Finance Department interviews, the workshops will occur at a functional level (i.e., general ledger, budget, fixed assets, accounts receivable, inventory, purchasing, accounts payable, grant and project accounting, treasury, etc.). For other City departments, typically a single workshop per department will provide the information necessary to complete an analysis of potential ERP applicability for those department functions. Outcomes of the workshops will include discussions of current processes, practices, policies, and procedures related to the City’s use of the ERP system. The workshops will also explore unmet needs and focus on identifying new features and functions that can improve existing operations. SDI’s approach to conducting the requirements workshops involves more than just gathering information from the City’s subject matter experts. It includes educating and/or collaborating with staff on best practices and how evolving technology capabilities (i.e., workflow, reporting, integration, dashboards, document management, etc.) can be applied to the future environment.		
Sub-Task 2.3 - Document Functional Requirements		
TASK DESCRIPTION: SDI will utilize the information gathered during Task 2.2 above to document the City’s existing and desired functional requirements so that the RFP provides a comprehensive description of the City’s requirements. DELIVERABLE: Functional and Operational Requirements		
Sub-Task 2.4 - Document Interfaces / Technical Requirements		
TASK DESCRIPTION: During our work efforts in the prior tasks, SDI will identify required or desired interfaces and integration opportunities between the ERP system and other data repositories. This helps ensure that an integration point or interface is not missed. SDI will also work with City staff to identify any interface standards that should be included in the RFP (i.e., City preferred interface methods). In addition, SDI will work with the City to develop other technical requirements as necessary. DELIVERABLE: Interface and Technical Requirements		

Sub-Task 2.5 – Document Data Conversion Requirements

TASK DESCRIPTION: SDI will document the City’s data conversion requirements so that proposers can include the costs and approach for completing data conversion in their proposals. SDI will meet with the City’s technical and business subject matter experts to identify and document these requirements.

DELIVERABLE: Data Conversion Requirements

Sub-Task 2.6 – Complete Needs Assessment & Gap Analysis Report

TASK DESCRIPTION: SDI will utilize the results of prior data gathering activities to develop a Needs Assessment & Gap Analysis report. The report will document our observations regarding the City’s current business practices and areas in which current needs are not being met by the current ERP solution.

DELIVERABLE: ERP Needs Assessment & Gap Analysis Report

Task 3 – Request for Proposal (RFP) Development

The efforts in this task will consolidate all relevant information gathered in the prior tasks to create an RFP that clearly defines the requirements and objectives of the City. The quality and accuracy of vendor responses are significantly improved using a well-organized, accurate, and clear RFP. A strong RFP is critical as it provides the foundation for evaluating the vendor and ultimately provides the basis for a solid agreement between the City and the successful vendor.

SDI TASKS	SUB-TASKS	DELIVERABLES
- 3 - RFP DEVELOPMENT	3.1 – Prepare Draft Request For Proposal (RFP) 3.2 – Review Draft RFP With Stakeholders 3.3 – Identify and Notify Potential Bidders 3.4 – Release RFP	• Draft RFP • Final RFP • Potential Bidder's List
Sub-Task 3.1 – Prepare Draft Request for Proposal (RFP)		
TASK DESCRIPTION: SDI will prepare a draft RFP for review by the Project Stakeholders and identified key staff. If the City has an existing preferred RFP template, SDI will conduct a review and compare the City templates to SDI’s proven ERP RFP template. In addition, if necessary, SDI will meet with the City’s purchasing and/or legal resources to verify RFP terms and conditions. At a minimum, an RFP should include the following components: purpose and objectives, background, evaluation criteria and selection process, timeline, submission requirements (including forms and templates), RFP terms and conditions, current environment descriptions, business, and operational metrics, functional requirements, technical requirements and standards, and pricing proposal submission requirements.		
DELIVERABLE: Draft RFP		
Sub-Task 3.2 – Review Draft RFP with Stakeholders		
TASK DESCRIPTION: SDI recommends that the draft RFP be distributed to the City project team and subject matter experts for careful review. After staff has had the opportunity to review the RFP, SDI will conduct a meeting to address any changes, questions, or concerns.		

Sub-Task 3.3 – Identify & Notify Potential Bidders

TASK DESCRIPTION: While online vendor portal sites provide a valuable channel for making an RFP publicly available, SDI believes it is in the City’s best interest to alert qualified vendors of the upcoming RFP release. SDI will compile a comprehensive list of public sector ERP solution vendors that provide potential solutions and will review the listing with the City and assist the City in creating a notification message that can be distributed via email.

DELIVERABLE: Potential Bidder’s List

Sub-Task 3.4 – Release RFP

TASK DESCRIPTION: SDI will incorporate any recommended modifications to the draft RFP into a final document and will assist with distribution of the RFP.

DELIVERABLE: Final RFP

Task 4 – Evaluation & Vendor Selection

The process for selecting a suitable, best fit ERP solution vendor requires the City to follow a structured methodology. The goal of this task is to ensure that the vendor that is the “best fit” for the City is selected. Up to this point in the project, the City will have invested heavily in establishing the foundation upon which a best fit selection will be made. The sub-tasks during this task are focused on ensuring a careful and detailed review of information provided in response to the RFP are conducted, as well as independent research, validation, and verification of content.

SDI TASKS	SUB-TASKS	DELIVERABLES
- 4 - VENDOR EVALUATION & SELECTION	4.1 – Address Vendor Questions 4.2 – Prepare Evaluation Committee 4.3 – Conduct Initial Screening of Proposals 4.4 – Assist with Review and Scoring of Proposals 4.5 – Prepare for Proof of Capabilities (POC) 4.6 – Facilitate POC Sessions 4.7 – Assist with Due Diligence 4.8 – Prepare Vendor Selection Report	• Vendor Question Responses • Evaluation Scoring Methodology and Matrix Template • Proposal Evaluation Summary • POC Session Agenda and Scripts • POC Evaluation Summary • Vendor Selection Report

Sub-Task 4.1 – Address Vendor Questions

TASK DESCRIPTION: Release of a clear and well-structured RFP will dramatically reduce the number of vendor questions. However, due to the complex nature of ERP procurements, the City should anticipate that vendors will submit questions that must be addressed to ensure quality proposals are received. In this task, SDI will assist the City in responding to vendor questions.

DELIVERABLE: Vendor Question Responses

Sub-Task 4.2 – Prepare Evaluation Committee

TASK DESCRIPTION: SDI will work with the City to identify the evaluation team and prepare an evaluator’s packet that includes clear descriptions and direction of the evaluation methodology. The packet will also include a scoring template to assist the evaluator in tabulating their results.

DELIVERABLE: Evaluation Scoring Methodology and Matrix Template

Sub-Task 4.3 – Conduct Initial Screening of Proposals

TASK DESCRIPTION: SDI will conduct a screening evaluation of all proposals to determine which vendors and proposals meet the mandatory RFP requirements and minimum qualifications. SDI will present the results of our screening evaluation to the City. The City can use this information as a guide to determine which proposals require a detailed review.

DELIVERABLE: Proposal Evaluation Summary

Sub-Task 4.4 – Assist with Review and Scoring of Proposals

TASK DESCRIPTION: The evaluation team will review and rate the proposals per the evaluation criteria. In addition, SDI will review proposals to identify issues, concerns, questions, or clarifications that should be addressed, and will provide this information to the evaluation team and be available to the evaluators for consultation. SDI will assist the City in arriving at a preliminary evaluation scoring matrix that identifies a short list of preferred vendors.

Sub-Task 4.5 – Prepare for Proof of Capabilities (POC)

TASK DESCRIPTION: Conducting proof-of-capabilities (POC) sessions with short-listed vendors is a key component of the selection process. This provides the vendors with the opportunity to fully demonstrate their solutions using City provided demonstration scenarios and scripts. As part of this task, SDI will develop the POC meeting agenda, scenarios, and scripts for the City to review. In addition, SDI can facilitate interaction between the City and the vendors to help ensure the vendor is adequately prepared to complete the POC. The POC provides valuable input into contract negotiations and helps clarify risk areas for special consideration.

DELIVERABLE: POC Session Agenda and Scripts

Sub-Task 4.6 – Facilitate POC Sessions

TASK DESCRIPTION: SDI will facilitate the POC sessions to keep vendors on schedule and ensure all POC scripts are completed. At the conclusion of each vendor POC session, SDI will facilitate a debrief meeting with the evaluators to capture feedback and update the evaluation scoring matrix accordingly. This information will be used in the Vendor Selection Report (Task 4.8).

DELIVERABLE: POC Evaluation Summary

Sub-Task 4.7 – Assist with Due Diligence

TASK DESCRIPTION: SDI will assist the City in planning for and completing reference checks and site visits (if desired by City). While SDI is available to conduct the reference checks, it has been our experience that these are best performed by City staff because of the information exchange and opportunity to further network.

Sub-Task 4.8 – Prepare Vendor Selection Report

TASK DESCRIPTION: Using all the information and work products created to date, SDI will draft a Vendor Selection Report that outlines the process followed and the results of the evaluation. SDI will provide the City the opportunity to review a draft report and provide feedback. SDI will then publish a final Vendor Selection Report, which can be utilized as part of the City's written recommendation for City Council presentation.

DELIVERABLE: Vendor Selection Report

Task 5 – Contract Negotiations

Key terms, conditions, scope, and pricing terms must be fully resolved before concluding a final agreement. The purpose of the Contract Negotiations task is to formalize and implement a negotiation strategy to ensure the City obtains a favorable contract and all outstanding issues are resolved. SDI brings significant experience in contract negotiations that will help ensure an agreement that fully protects the City while supporting a successful implementation.

SDI TASKS	SUB-TASKS	DELIVERABLES
- 5 - CONTRACT NEGOTIATIONS	5.1 – Research Prior Vendor Agreements 5.2 – Conduct Initial Agreement Review 5.3 – Facilitate Negotiation Strategy Workshop 5.4 – Conduct Negotiation Meetings 5.5 – Obtain City Council Approval	• Final Agreements with Vendor • City Council Meeting Participation
Sub-Task 5.1 – Research Prior Vendor Agreements		
TASK DESCRIPTION: SDI will seek out and review available agreements. The review will include evaluating terms and conditions, pricing, payment terms, milestones, and more. The information gathered will be compared to that which was submitted with the RFP with the goal of identifying any gaps or more favorable terms and conditions.		
Sub-Task 5.2 – Conduct Initial Agreement Review		
TASK DESCRIPTION: SDI will perform a review and provide feedback on the proposed agreement templates. Based on our experience, the City should expect multiple agreements (i.e., software licensing, maintenance and support, professional services, third-party software, etc.). SDI will provide the City guidance and assistance on the agreement review to help prepare for subsequent negotiations.		
Sub-Task 5.3 – Facilitate Negotiation Strategy Workshop		
TASK DESCRIPTION: SDI will facilitate a workshop with key City staff to develop the negotiation strategy. The workshop will focus on outstanding issues and questions, as well as areas of high risk that need to be addressed. A well-planned negotiation strategy reduces the negotiation timeline, reduces frustration among the parties, ensures the City presents a unified front, and reduces the risk that items will be overlooked.		
Sub-Task 5.4 – Conduct Negotiation Meetings		
TASK DESCRIPTION: SDI will assist the City in preparing for negotiation meetings and will attend to support City staff. If the City desires, SDI is available to facilitate the negotiation meetings. SDI will take the lead in recording the minutes from the meetings to capture outstanding items, next steps, and critical dates.		
DELIVERABLE: Final Agreements with Vendor		
Sub-Task 5.5 – Assist in Obtaining City Council Approval		
TASK DESCRIPTION: SDI will attend and/or participate in the City’s presentation of the vendor agreements to the City Council for approval. SDI’s level of participation will be at the City’s direction.		
DELIVERABLE: City Council Meeting Participation		

2. Methodology for New System Implementation (SDI Tasks 6-7)

As mentioned earlier, the **New System Implementation** section follows the discussion of our new system procurement approach and methodology.

SDI's project management framework was developed to help minimize risk, increase opportunities for efficiencies, and ensure that the implementation project remains on schedule. Our approach to these projects is to remain flexible, focus on tasks that the City directs us to complete, and work collaboratively with the City to ensure that we are maximizing the use of available resources. SDI is open to modifying and/or adjusting the proposed tasks and is flexible about where our efforts are directed over the course of the project.

SDI is prepared to provide comprehensive project management and related advisory services to the City during this important project. Management of the project can best be described in the three major project management categories below:

Plan – coordinating future project activities in conjunction with various project participants

- Review the successful ERP vendor's Statement of Work and coordinate the project kickoff
- Develop implementation project plan in coordination with the City and the vendor's project manager

Communicate – disseminating project activities and information to project participants

- Attend project meetings, Executive Steering Committee meetings, and other related meetings
- Complete regular project status reports (frequency TBD as directed by City Project Manager)
- Update SharePoint information
- Review and distribute vendor project meeting agendas
- Review vendor site reports
- Review project issues log regularly with vendor's project manager, work to resolve issues, and communicate issues status with project team
- Monitor and report on potential project risks

Execute – completing or overseeing specific tasks associated with the project

- Coordinate scope change requests
- Process product enhancement requests
- Coordinate software development requests
- Assist with establishment of training accounts for users
- Coordinate software installation
- Coordinate staff training
- Coordinate user acceptance training
- Plan go-live activities in conjunction with vendor project manager

- Work with staff on change management efforts
- Coordinate final acceptance process

As project management professionals, SDI will complete each of these activities and will offer and provide additional project activities based on our significant experience with prior ERP implementation projects.

SDI's project management framework includes two major tasks: **Task: 6 Initiate** and **Task 7: Implement**. The graphic in Figure 4 below presents the tasks and deliverables to be completed during new system implementation, with additional detail regarding SDI's project management approach following.

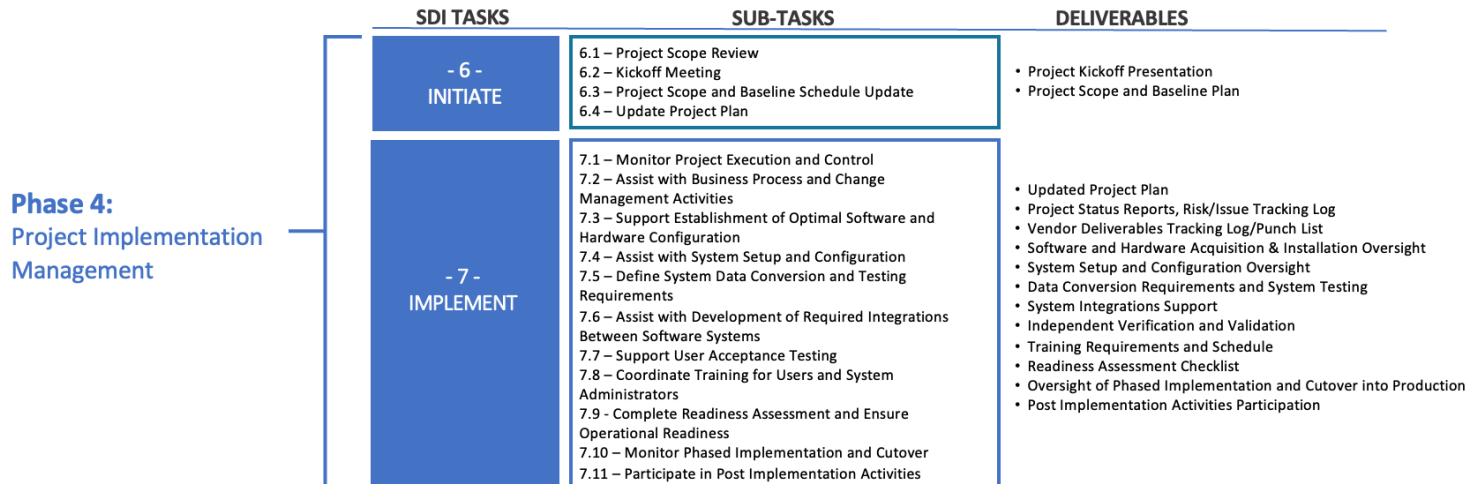


Figure 4 – Project Tasks, Activities, and Deliverables for New System Implementation

The sub-tasks associated with each task, along with the associated deliverables coming out of each sub-task, are described in detail below.

Task 6 - Initiate

As project management professionals, SDI recognizes the importance of applying a formal project management framework to ensure that the project meets objectives and is delivered on time and on budget. The purpose of Task 6 - Initiate is to prepare for, and initiate, the project under a well-defined project plan. This task includes confirming our understanding, as well as the understanding of the stakeholders, regarding the scope of work and the process for accomplishing the overall objectives of the project. The following table presents the specific sub-tasks, activities, and deliverables that will be undertaken during the Project Initiation task.

SDI TASKS	SUB-TASKS	DELIVERABLES
- 6 - INITIATE	6.1 – Project Scope Review 6.2 – Kickoff Meeting 6.3 – Project Scope and Baseline Schedule Update 6.4 – Update Project Plan	• Project Kickoff Presentation • Project Scope and Baseline Plan

Sub-Task 6.1 – Project Scope Review

TASK DESCRIPTION: SDI will meet with the City’s Project Sponsor to review the scope of work, project timeline, deliverables, and other procurement documentation to confirm project details before formal kickoff.

Sub-Task 6.2 – Kickoff Meeting

TASK DESCRIPTION: SDI will develop a Microsoft PowerPoint presentation that will describe the project. SDI will lead a Project Kickoff Meeting which will be scheduled by the City to include all anticipated project participants. The primary goal of the Project Kickoff Meeting is to ensure that all project participants have a common understanding of the process and project objectives.

DELIVERABLE: Project Kickoff Presentation

Sub-Task 6.3 – Project Scope and Baseline Schedule Update

TASK DESCRIPTION: SDI will finalize and deliver the project scope and plan, along with communication and status reporting plans and a baseline schedule, as agreed with by the City’s Project Sponsor.

DELIVERABLE: Project Scope and Baseline Plan

Sub-Task 6.4 – Update Project Plan

TASK DESCRIPTION: SDI will work with the software vendor’s Project Manager to update the Project Plan, including the following basic elements that will be defined for the system implementation activities:

- Tasks and Subtasks
- Milestones and Deliverables
- Detailed Project Schedule

DELIVERABLE: Updated Project Plan

Task 7 - Implement

The cornerstone of success for the system implementation portion of the project will be how well it is managed. This will include thorough planning, execution, and monitoring of the plan, corrective action when required, and final close-out of the project. SDI’s project management services will enable the City to manage the big picture, keep stakeholders informed, ensure successful planning, oversight, and completion of the project while mitigating project risk. In the table beginning on the next page, SDI has identified the activities and deliverables to be completed as part of Task 7 - Implement. It should be noted that many of the sub-tasks in Task 7 will be repeated for the individual implementation of specific modules within the software suite (i.e. – Payroll, Accounts Payable, etc.).

SDI TASKS	SUB-TASKS	DELIVERABLES
- 7 - IMPLEMENT	7.1 – Monitor Project Execution and Control 7.2 – Assist with Business Process and Change Management Activities 7.3 – Support Establishment of Optimal Software and Hardware Configuration 7.4 – Assist with System Setup and Configuration 7.5 – Define System Data Conversion and Testing Requirements 7.6 – Assist with Development of Required Integrations Between Software Systems 7.7 – Support User Acceptance Testing 7.8 – Coordinate Training for Users and System Administrators 7.9 – Complete Readiness Assessment and Ensure Operational Readiness 7.10 – Monitor Phased Implementation and Cutover 7.11 – Participate in Post Implementation Activities	• Updated Project Plan • Project Status Reports, Risk/Issue Tracking Log • Vendor Deliverables Tracking Log/Punch List • Software and Hardware Acquisition & Installation Oversight • System Setup and Configuration Oversight • Data Conversion Requirements and System Testing • System Integrations Support • Independent Verification and Validation • Training Requirements and Schedule • Readiness Assessment Checklist • Oversight of Phased Implementation and Cutover into Production • Post Implementation Activities Participation
Sub-Task 7.1 – Monitor Project Execution and Control		
TASK DESCRIPTION: Working with the software vendor’s Project Manager, SDI will monitor the project execution using all the plans, schedules, procedures, and standards prepared for the project. This will include ensuring that regular status reports are provided and discussed at project review meetings with the Project Sponsor and appropriate participants. These reviews will include performance measures for the completion of tasks and activities in accordance with the project plan, communication plan, risk management plan, and quality assurance plan.		
DELIVERABLE: Project Status Reports, Risk/Issue Tracking Log, Vendor Deliverables Tracking Log / Punch List		
Sub-Task 7.2 – Assist with Business Process and Change Management Activities		
TASK DESCRIPTION: SDI will assist the City with identification of areas where a business process change may result in improved efficiencies. SDI will provide suggestions and recommendations for business process improvements in conjunction with the City’s project team and utilizing the best practices recommendations documented previously.		
Sub-Task 7.3 – Support Establishment of Optimal Software and Hardware Configuration		
TASK DESCRIPTION: SDI will assist the City in defining the technical system software and hardware environments required for the new system’s operation including licenses for development, testing/training, and production environments. SDI will provide oversight for identifying, procuring, and installing the software and hardware configurations to ensure the system is properly sized to meet the City’s requirements. This activity will also include coordinating the installation of required application, database, and web servers as well as necessary network architecture and infrastructure components.		
DELIVERABLE: Software and Hardware Acquisition and Installation Oversight		
Sub-Task 7.4 – Assist with System Setup and Configuration		
TASK DESCRIPTION: SDI will assist the City to ensure that the new system is set up to support the City’s unique operating requirements. This activity will include establishing security protocols for users along with specific workflow processes for the new system and setting configuration options and customizing parameters for system upload/download processes to Microsoft products such as Excel, Word, Access, and Outlook, and other third-party products.		
DELIVERABLE: System Setup and Configuration Oversight		

Sub-Task 7.5 – Define System Data Conversion and Testing Requirements

TASK DESCRIPTION: SDI will assist in defining conversion and testing requirements for items that must be converted into the new system, including financial data from the existing system and in-house developed applications. SDI will work directly with the software vendor’s conversion team to ensure that data extracted from the City’s existing system is properly mapped to the new system.

SDI will also assist the City in developing a test/training environment which will allow for separate testing of release software by City staff prior to production installation.

DELIVERABLE: Data Conversion Requirements and System Testing

Sub-Task 7.6 – Assist with Development of Required Integrations Between Software Systems

TASK DESCRIPTION: SDI will work with the various software entities to develop integration points between the various systems. SDI will oversee development of the desired data integration points and will ensure testing is completed to validate the integrations are operating properly and accurately.

DELIVERABLE: System Integrations Support

Sub Task 7.7 – Support User Acceptance Testing

TASK DESCRIPTION: SDI will verify and validate acceptance test results for implementation of the new system that will include:

- System documentation
- Stress tests
- Access control capabilities
- User acceptance test results
- Functional tests
- Security tests
- Backup, restore and restart tests

DELIVERABLE: Independent Verification and Validation

Sub-Task 7.8 – Coordinate Training for Users and System Administrators

TASK DESCRIPTION: SDI will assist the City in identifying training requirements and creating schedules for both users and technical personnel. Training should be sufficiently detailed and comprehensive to ensure that City staff will be able to effectively use the system and support the system after implementation.

DELIVERABLE: Training Requirements and Schedule

Sub Task 7.9 – Complete Readiness Assessment and Ensure Operational Readiness

TASK DESCRIPTION: SDI will develop a checklist to be used to assess the City’s operational readiness for the new system implementation, including:

- Staffing plan
- Operational procedures
- Change requests
- Refresher training
- Technology refreshment
- Preventive maintenance
- System maintenance procedures
- Disaster backup recovery plan
- Modifications or enhancements
- Software license renewal
- Hardware replacement

DELIVERABLE: Readiness Assessment Checklist

Sub-Task 7.10 – Monitor Phased Implementation and Cutover

TASK DESCRIPTION: SDI will oversee a phased cut-over where different modules are implemented and moved into production on a staggered schedule.

DELIVERABLE: Oversight of Phased Implementation and Cutover into Production

Sub-Task 7.11 – Participate in Post Implementation Activities

TASK DESCRIPTION: SDI will assist with post implementation activities after system implementation. These can include revisiting specific modules that may not have been fully implemented with all feature and functionality, assisting with evaluation and modification of workflows, and other related activities to help ensure the City is receiving maximum benefit from the new system. SDI can also provide assistance developing any post-implementation reports and/or presentations about the new system implementation, including documenting the success of the project and the reasons for that success, along with areas the City may wish to revisit in terms of full implementation of all modules, related features, and functionality.

DELIVERABLE: Post Implementation Activities Participation

Additional Information About SDI’s Project Approach

This section summarizes and highlights the key aspects of SDI’s service delivery approach that position us to serve as the City’s trusted advisor and consulting partner for this important project.

1. Proactive Communication and Flexible Client Engagement

SDI’s approach to project management is to maximize client engagement throughout the process, and we believe this is best achieved through active communication and meaningful participation by project stakeholders. Active communication means ensuring that our clients are provided regular project updates utilizing scheduled written status reports, along with ongoing discussions regarding project risks, issues, and decision points through meetings, telephone, email, and in-person communication as appropriate.

SDI believes onsite participation often enhances collaboration and project momentum; however, we have also successfully managed projects remotely through the use of collaborative tools including Microsoft Teams, SharePoint sites, and related resources. Since each organization approaches work activities differently, SDI remains flexible in balancing onsite and remote participation based upon the City’s preferences and project needs.

Throughout the project, the SDI Project Manager will keep the City informed through both oral and written communications, including project status reports, risk and issue discussions, and schedule updates. The reporting schedule and communication protocols will be established during Task 1 – Project Management activities. We are skilled at managing communication with our clients and quickly adapt to each client’s preferred methods of engagement. The key to a successful project is open two-way communication.

2. Tailored Project Leadership and Shared Accountability

Ensuring clear delineation of roles and responsibilities of the SDI team and the City participants is an essential component to project success. As part of Task 1: Project Management activities, SDI works collaboratively with the City’s Project Sponsor and project stakeholders to establish project governance, communication expectations, and clearly defined roles and responsibilities that support efficient decision-making and project coordination.

SDI recognizes that every organization brings different operational knowledge, staffing capacity, skill sets, and organizational strengths to a project. Rather than applying a one-size-fits-all approach, SDI tailors project participation and support responsibilities to align with the City's needs and desired level of involvement.

Our role is to provide focused leadership and support in the areas where additional assistance is needed while promoting shared accountability and maintaining alignment with project objectives and City priorities.

3. Trusted Advisor Leadership and Project Success Focus

SDI's approach to project management is to serve as our client's trusted advisor during implementation. We view our presence on the project to be that as an extension of the City's team, thus representing the City and acting in the best interests of the organization. Our goal is to minimize disruption to the organization as much as possible and mitigate issues and concerns quickly and efficiently, while ensuring the City's interests are prioritized and addressed.

Maintaining open lines of communication, monitoring risks & providing risk mitigation strategies, and keeping the software vendor team on task are all essential components to help ensure project success. We have a successful track record of working with software vendor project teams and their implementation and data conversion teams; this gives SDI a unique advantage in terms of the City's project. SDI is prepared to provide these services through our professional and dedicated project team.

4. Practical Change Management and Organizational Readiness

SDI has been conducting assessments of enterprise systems for over 25 years and have developed a proven methodology for information gathering and identifying organizational needs. We recognize the importance of utilizing a measured approach when introducing an organization to potential change, and we are sensitive to the fact that staff may be averse to such change. Our consultant team consists of professionals who have worked in the public sector, have experienced the changes that come with business process analysis and new system implementations, and are well versed on managing expectations, concerns, and potential roadblocks to the implementation of new business practices.

SDI approaches our business process workshops with an understanding that not all participants may be knowledgeable about the most current software systems available. A key component of our workshops is to help educate the City's staff on available software systems and functionality, and to explore staff's thoughts regarding potential positive outcomes of implementing this functionality. The goal of our workshops is to gather information about existing processes and functions, introduce staff to the most current software functionality available, and then discuss the potential benefits of adopting the more contemporary functionality. This process serves the function of introducing staff to the latest software features and functions, along with beginning the process of building buy-in to the adoption of new business processes.

In terms of change, a critical component to managing change successfully is to help staff throughout the organization understand the positive outcomes of business process improvements. Helping staff understand these positive outcomes is essential to getting their buy-in to the change, and our consultants are skilled at helping explain the positive outcomes to all levels of staff in the organization. For example, we can help explain to the Buyer how electronic workflow of a purchase requisition reduces paperwork and time to process and can also explain to a Department Director or the City Manager how a system dashboard can provide immediate access to critical data for decision making. Having worked in all aspects of the public sector environment, our project team is highly qualified to address the topic of change and the requisite benefits of adopting best business practices.

5. Business Process Insight and Best Practice Planning

Understanding the City's current business processes helps ensure that adoption of new or modified business processes (to align with best business practices) includes any and all the City's requirements. Current business processes must be fully understood, analyzed, and cataloged so as not to miss or drop a critical business process when suggesting a new best practice.

SDI utilizes a structured approach to documenting our data gathering activities to ensure that all information shared with the project team is recorded. The information gathered about current business processes will also be reviewed by the City's project team to ensure it is accurate. Subsequent to this, SDI will map current business processes to suggested best business practices. In some cases, existing business processes will be recommended to remain in place, while others may be mapped to a more efficient business process.

SDI approaches all of our projects with a holistic view of the needs of the organization. When developing requirements for software systems, we ensure that we explore all of the organization's needs, including business processes and practices and data reporting and analytics. Too often, organizations do not focus on the output needs for a new system – i.e. how staff is able to extract data and perform analytics on that data. SDI recognizes the importance of this aspect of our work and places emphasis on the need for data extraction and reporting.

6. Organizational Depth and Scalable Technical Support

SDI is a national organization with over 400 IT professionals. Our focus is on serving local governments in the provision of technology in their organizations. Our West Coast operational unit includes consultants who are adept at **data extraction, data conversion, system interface development, and complex report development**. These resources are readily available to assist in the event the City needs additional support during the project.

7.4 Project Team

Project Team Organization and Roles

SDI recognizes that successful project management requires sufficient leadership capacity, disciplined staffing practices, and active resource oversight. Project Managers are assigned based on project complexity, schedule requirements, and resource availability to help ensure appropriate management attention, responsiveness, and continuity throughout each engagement.

Project assignments are actively monitored by firm leadership, and workloads are managed to maintain service quality, responsiveness, and successful project delivery. While assignment levels may vary depending upon project size and phase, SDI maintains internal oversight of project and client assignments to avoid overextension and support effective project execution. This disciplined approach to project and program management staffing has been an important contributor to SDI's successful delivery of numerous local government ERP acquisition and advisory engagements.

For the City of San Jacinto, SDI is proposing a team of highly qualified and experienced municipal professionals with demonstrated success delivering municipal ERP projects on time and within budget. The proposed team includes municipal ERP specialists with significant depth and expertise across project management, business process analysis, procurement support, vendor evaluation, organizational readiness, and implementation advisory services. We believe this combination of experience, technical knowledge, and understanding of municipal operations positions SDI to provide comprehensive and practical support to help ensure project success.

All proposed team members are SDI employees; no subcontractors are proposed for this engagement. The project team presented below is the team committed to performing the proposed services. Individual biographies follow, and full resumes for all proposed team members are provided in Appendix D of this proposal.



Project Key Personnel

Patrick Griffin, Managing Director

Delivery Executive

Role: Mr. Griffin will serve as the Delivery Executive on the City of San Jacinto project, bringing his years of experience working with public agencies to support the organization and the project team on this important project. Mr. Griffin will provide management oversight and support to the SDI project team and will interact with the City team on contractual and business-related items. Mr. Griffin is readily available to support the SDI team, and to provide subject matter expertise as needed throughout the project.

Biography: Mr. Griffin has over 40 years of experience in California local government. His municipal experience includes serving in a variety of positions including Controller, Finance Director, Community Development Director, and Assistant City Manager, with the last position including responsibility for citywide budget, information technology, and public communications and outreach. After retiring from the public sector in 2012, Mr. Griffin began a consulting career with NexLevel Information Technology, which merged with SDI in 2017. During his consulting career, Mr. Griffin has been responsible for the procurement and implementation of several ERP and land management systems for local agencies.

Related Experience: Mr. Griffin has assisted several public sector organizations with ERP projects including the cities of Chino Hills, Indio, La Quinta, Ontario, Vernon, Carson, Santa Ana, Glendale, Torrance, Downey, Hawaiian Gardens, and Manhattan Beach, along with the Cucamonga Valley Water District, Camrosa Water District, and Coachella Valley Water District.

Leanne Hart, Senior Project Manager *Project Consultant / Subject Matter Expert*

Role: Ms. Hart will serve as the project manager, providing project oversight and hands on subject matter expertise throughout both the procurement and implementation.

Biography: Prior to joining SDI, Ms. Hart built a distinguished career spanning more than 30 years in technology consulting, project management, business process analysis, and organizational change initiatives. She has served in leadership and consulting roles with technology services firms including KPMG Peat Marwick, ACS/Xerox, and G3G Solutions, where she conducted needs assessments, facilitated stakeholder workshops, documented business and technical requirements, reviewed business processes, developed strategic plans, and supported software implementation projects for numerous public sector organizations. Her experience includes working with city, county, transportation, education, and public service agencies throughout California and the western United States.

Related Experience: Since joining SDI, Ms. Hart has provided project management and implementation support for several major public sector technology initiatives. She is currently project managing implementation activities for the City of Downey's core financials project and is also providing project management support for the final phase of the Riverside County Transportation Commission's ERP project.

Ms. Hart has conducted business process reviews, needs assessments, requirements development, and system evaluation projects for numerous local government organizations, including the City of Long Beach, City and County of San Francisco, City of Pasadena, City of Rialto, City of Vacaville, City of Palo Alto, City of Beverly Hills, City of Orange, City of Chino, and other municipal agencies.

Rita Conrad, Senior Project Manager

Project Consultant / Subject Matter Expert

Role: Ms. Conrad will provide focused subject matter expertise in finance functionality and processes for both ERP procurement and project implementation activities.

Biography: Prior to joining SDI in 2022, Ms. Conrad retired from a 27-year career in the public sector with a focus on municipal finance for the cities of San Bernardino, Hemet, and La Quinta. In addition to her hands-on expertise as a Finance Director, Ms. Conrad also has significant experience supervising both Human Resources and Information Technology in her role as Deputy City Manager for the City of Hemet. With combined experience in both the areas of Finance and Human Resources, Ms. Conrad has unique understanding of the integrations of finance functions with other systems.

Related Experience: Since joining SDI in 2022, Ms. Conrad has provided subject matter support for the Riverside County Transportation Commission (RCTC), and the cities of Rancho Cucamonga, Monterey, Downey, Torrance, and Hawaiian Gardens. Additionally, she has provided finance department/division assessments for the cities of Chino and Rancho Cucamonga.

Kelli Ganley, Senior Consultant

Project Consultant / Subject Matter Expert

Role: Ms. Ganley will provide focused subject matter expertise in the areas of Human Resources (HR) functionality and processes, along with integrations of HR functions with other systems / modules including payroll.

Biography: In 2024, Ms. Ganley retired from a career in the public sector focused on HR and Payroll functions for the cities of Burbank and Santa Clarita. Ms. Ganley's primary focus during her municipal career was in the financial and human resources areas, providing over 25 years of experience. In addition to her hands-on expertise in these areas, Ms. Ganley possesses significant technology-related skills, providing her with the ability to analyze and extract data from enterprise systems. She is also well-versed working with clients to identify reporting needs and then developing and generating custom reports to meet client-specific needs.

Related Experience: Since joining SDI, Ms. Ganley has provided Human Resources, Financial, Land Management, and Utility Billing analysis and reporting support for the cities of Fremont, Indio, and Benicia. She has also been on the ERP procurement project teams for the cities of Downey, Torrance, and Hawaiian Gardens.

7.5 Relevant Experience and References

Knowledge of Enterprise Resource Planning (ERP) Products and Modules

Advisory & Consulting Practice

SDI's Advisory & Consulting Practice has worked with more than 200 state and local government agencies across eight states to complete IT Assessments, IT Strategic Plans, GIS Strategic Plans, Network Assessments, IT Service-Level Assessments, Policy/Procedure Documentation, Project Management Organization implementations, Feasibility Studies, and Request for Proposal (RFP) Development and Procurement Management efforts. Since 1999, SDI has completed over 100 IT Strategic / Master Plans. In addition to our California local government experience, SDI also has significant planning, project management, and procurement experience working with the State of California for agencies such as California Highway Patrol, Department of Justice, Department of Motor Vehicles, Department of Corrections and Rehabilitation, Department of Child Support Services, and more.

SDI is recognized by the State of California for our services supporting public sector agencies with IT strategic planning activities. This is evident not only by the number of successful projects and client references, but also because we are commonly asked by organizations such as California Society of Municipal Financial Officers (CSMFO) and Municipal Information Systems Association of California (MISAC) to present at their annual conferences and regional chapter groups. SDI has co-presented day long pre-conference sessions dedicated to IT Strategic Planning and ERP procurement and implementation and has also presented on the topics of IT sustainability, IT governance, and Cloud Computing. SDI has presented more than a dozen times to CSMFO and MISAC. The fact that we are regularly invited to present at these important organizations' events speaks to our expertise and experience.

ERP Market and Integration Experience

One of the greatest values to utilizing SDI for the City's engagement is our significant experience with ERP products on the market. We have a comprehensive understanding of the ERP marketplace and the various products available to local government agencies.

It is important to note that SDI's Advisory & Consulting Practice has been, and will continue to be, **100% independent from any ERP solution provider**. We pride ourselves on this independence and recognize that it is a critical attribute during the software vendor procurement process. While we remain independent from any ERP solution provider, we are knowledgeable and current on enterprise software vendors and products in the marketplace. Our consultant team has participated in selection processes that have included:

Cogsdale, Harris, Tyler Incode, Tyler Munis, Tyler New World, Superior, Accela, Oracle, Workday, SAP, CGI, Agresso, Microsoft Dynamics, Caselle, Infor, PeopleSoft, JD Edwards, Springbrook, and others.

SaaS, Data Conversion and Implementation Experience

Our recent and relevant experience with ERP procurements and implementations has also exposed our project managers to working with third-party vendors to integrate ERP systems with these third-party systems. For example, SDI regularly encounters the need for integration points between ERP systems and standalone timekeeping, cashiering, utility billing, land management, and work order systems. These integration points require our project managers to navigate the often-complex

relationships between the ERP system and the standalone software providers, so that we can help ensure our clients achieve the desired level of integration and reduce data entry into multiple information silos. Managing the development of integrations between providers and ensuring the City's goals for the integration points are met, is one of our core competencies.

With regard to data conversion from the City's existing system to the new ERP platform, SDI has participated in or performed this activity at numerous public agencies during our project management activities. SDI resources are skilled in this area and are familiar with the nuances of data conversion, including initial data cleansing in the legacy system, data mapping between systems to ensure data integrity, and data validation to verify that the information has been accurately transferred. This final step can include multiple data passes after correction of data transfer errors and requires a resource with the knowledge and understanding to complete the data conversion process accurately.

Similar ERP Procurement and Technology Advisory Projects

SDI's Advisory & Consulting Practice has partnered with hundreds of public-sector organizations throughout the western United States, providing strategic technology planning, IT governance, ERP procurement and implementation advisory, project management, cybersecurity, AI readiness, organizational assessments, and other technology consulting services. This extensive portfolio enables SDI to bring proven methodologies, practical lessons learned, and current knowledge of public-sector best practices to every engagement. Our broad experience across municipalities, counties, special districts, utilities, and other public agencies allows us to tailor our approach to each client's unique operational, organizational, and technology environment.

A complete list of SDI's Advisory & Consulting Clients and the services provided is included in Appendix C.

Project References

SDI has provided detailed reference information from three recent projects similar in scope to that of the City. We encourage you to contact our listed references or any other of our clients.

Reference No. 1

Name of Organization	City of Hawaiian Gardens, CA	
Location	21815 Pioneer Boulevard Hawaiian Gardens, CA 90716	
Project	ERP Procurement and Implementation Project Management Services	
Name of Contact	Linda Hollinsworth, Finance Director	
Telephone and Email	562-420-2641 ext. 236 lindah@hgCity.org	
Project Dates	July 2025 - Present	
Project Budget	\$591,600	
Project Description and SDI Role	ERP Procurement: SDI is supporting the City with the final stages of vendor selection activities for replacing its existing ERP system Tyler Fund Balance. ERP Implementation Project Management: Once a contract is executed with the selected ERP vendor, SDI will be providing project management services during new system implementation.	

Reference No. 2

Name of Organization	City of Downey, CA	
Location	11111 Brookshire Ave. Downey, California 90241	
Project	ERP Procurement and Implementation Project Management Services	
Name of Contact	Vaniah De Rojas, Asst. City Manager	
Telephone and Email	562-904-7284 vderojas@downeyca.gov	
Project Dates	November 2024 - Present	
Project Budget	\$868,505	
Project Description and SDI Role	ERP Procurement: SDI recently completed supporting the City with the selection of a new ERP system to replace the City’s existing Tyler Eden system. SDI took the City through a needs assessment, requirements development and RFP, vendor evaluation and selection, and contract negotiations with the selected software vendor. ERP Implementation Project Management: SDI is currently providing project management services during new system implementation of the Tyler EERP system.	

Reference No. 3

Name of Organization	City of Monterey, CA	
Location	735 Pacific Street, Ste. A Monterey, CA 93940	
Project	ERP Procurement and Implementation Project Management Services	
Name of Contact	Rafaela King, Finance Director	
Telephone and Email	831-646-3724 king@monterey.org	
Project Dates	May 2024 - Present	
Project Budget	\$609,610	
Project Description and SDI Role	ERP Procurement: SDI assisted with the selection of a new ERP system to replace the City’s existing Tyler Eden system. SDI took the City through a needs assessment, requirements development and RFP, vendor evaluation and selection, and contract negotiations. ERP Implementation Project Management: SDI is currently providing comprehensive project management services for the implementation of the Tyler EERP system, including assisting with the adoption of best business practices, training staff on the new system, providing general oversight and quality assurance services, interfacing with and managing the software vendor during all project activities.	

7.6 Project Schedule

Based on information contained in the City’s RFP and our past experience with system procurements and implementations, we provide the following estimates for the completion of the City’s project.

1. New System Procurement (Phases 1-3)

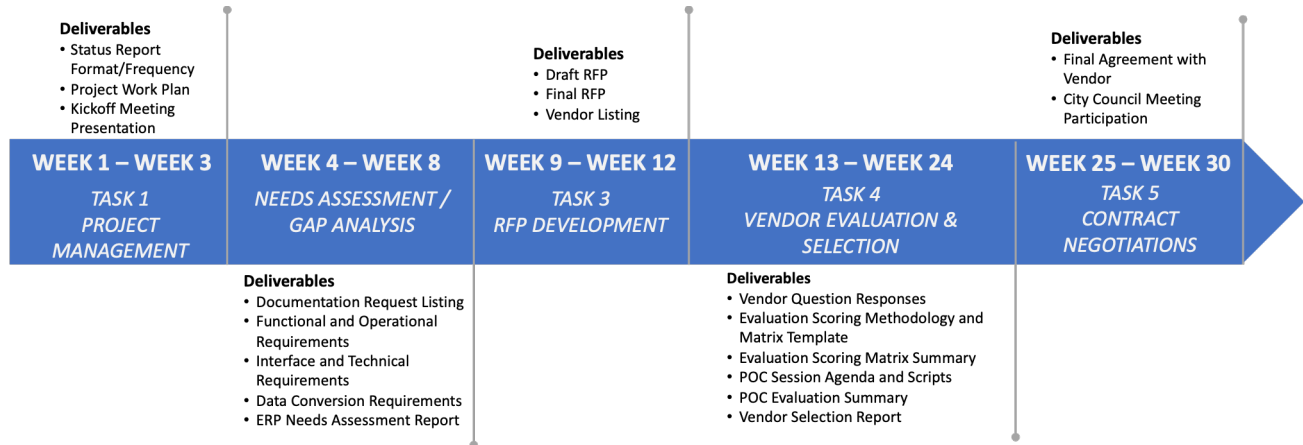


Figure 5 – New System Procurement Project Schedule

The ability to meet this project timeline will be dependent upon City staff availability throughout the various activities in Phases 1- 3. The timeline above does not include an estimated four-to-six-week period when the City’s RFP is posted for software vendors to respond to.

2. New System Implementation (Phase 4)

The duration and sequencing of ERP implementation activities cannot be determined with certainty until the City has selected its ERP solution and implementation partner. The implementation schedule will be influenced by several factors, including the selected vendor's implementation methodology, project staffing, module deployment strategy, data conversion requirements, systems integration complexity, testing and training activities, and the City's desired implementation approach.

Based on SDI's experience supporting local government ERP implementations of similar size and complexity, implementation projects typically require approximately 30 to 36 months following contract execution. However, the actual schedule will ultimately be established by the City in collaboration with the selected ERP vendor and implementation team.

Following contract award, SDI will work collaboratively with the City and the selected ERP vendor to develop a detailed implementation work plan that identifies project phases, key milestones, decision points, resource assignments, and dependencies. The schedule will be actively monitored and updated throughout the project to reflect progress, manage risks, and support the successful delivery of the new ERP system.

7.7 Cost Proposal

SDI developed its cost proposal based on our experience delivering ERP advisory services for local government agencies of similar size and complexity. The proposed pricing reflects the City's requested scope of services and SDI's proven project delivery methodology. As described below, SDI proposes a fixed-fee, not-to-exceed amount for the ERP procurement phases and a time-and-materials approach for implementation project management to provide the flexibility needed to support the selected ERP solution and implementation approach.

New ERP Procurement (Phases 1 – 3)

Based on the City's RFP, our understanding of the City's organization and project objectives, and our experience with comparable ERP procurement engagements, SDI estimates that the procurement portion of the project will require approximately 461 hours to complete for a fixed-fee, not-to-exceed amount of \$102,625. SDI's all-inclusive hourly rates (inclusive of travel and related expenses) are \$240 per hour for the Engagement Manager, \$225 per hour for the Project Manager, and \$215 per hour for Project Consultants. The table below summarizes the proposed level of effort and cost by City project phase and corresponding SDI project delivery task.

City of San Jacinto RFP Phases	Corresponding SDI Project Delivery Tasks	Project Hours	Cost
Phase 1 – Project Initiation and Discovery	Task 1: Project Management	14	\$3,175.00
Phase 2 – Needs Assessment and Requirements Development	Task 2: Needs Assessment & Gap Analysis	208	\$45,585.00
Phase 3 – Procurement Support and Vendor Selection	Task 3: RFP Development	34	\$7,680.00
	Task 4: Vendor Evaluation & Selection	169	\$38,055.00
	Task 5: Contract Negotiations	36	\$8,130.00
	Sub-Total	461	\$102,625.00

The following assumptions were incorporated into the cost proposal:

- SDI will conduct a maximum of two (2) multi-day Proof of Capabilities sessions with the two vendor finalists.
- City staff and project sponsorship team will be readily available to review and return draft documents (Requirements; RFP; POC Scripts and Schedule).

SDI typically invoices clients monthly, with each invoice summarizing the project activities completed during the prior billing period. Supporting documentation identifying the SDI resources involved and the associated level of effort is available upon request. This approach provides the City with regular visibility into project progress while ensuring completion of the agreed-upon scope of services. The proposed fee represents SDI's fixed-fee, not-to-exceed amount for Phases 1 through 3 of the ERP procurement engagement.

New ERP Implementation – Project Management (Phase 4)

The following assumptions were utilized to develop our cost proposal for project management services during new system implementation:

- 2.5-year (130 weeks) implementation timeline for Financials, Human Resources, and Utility Billing
- 20 hours per week of Project Manager services
- 1 hour per week of Delivery Executive oversight
- Hybrid of onsite and offsite work during Project Management activities

Based on these assumptions, the estimated total number of hours to complete the implementation portion of the project is 2,730 hours for project management and oversight. Utilizing the same rates as provided in the Procurement portion of the project (\$225 per hour for Project Manager and \$240 for Delivery Executive) yields a total cost of \$616,200 for project management services during the estimated 30-month implementation period.

As mentioned in the Project Timeline section, the actual duration and level of effort required during ERP implementation is influenced by factors that cannot be fully determined until the City has selected its ERP solution and implementation partner.

Accordingly, SDI recommends establishing an implementation management budget and billing monthly based on actual services performed. This approach provides the flexibility to scale project management resources as implementation activities evolve while ensuring the City receives the appropriate level of advisory and oversight services throughout the implementation. SDI invoices only for actual hours worked, and travel time associated with onsite project activities is not billable.

Under this arrangement, SDI will only invoice the City for actual hours worked in the prior month, with details outlining the SDI resource, time spent, and on which project activities. SDI does not charge for travel time to attend onsite activities at our client sites. This arrangement provides the City maximum flexibility to focus SDI's efforts on the areas of most importance to the City.

7.8 Exceptions

SDI does not have any exceptions.

Appendix A Conflict of Interest

SDI does not have any financial, business or other relationships with the City that may reflect any financial interest in this RFP or contract. We also do not have any current clients who may have a financial interest in the outcome of this contract.

Appendix B Insurance Requirements

SDI understands and accepts the City of San Jacinto's insurance requirement. Certificates of insurance can be provided upon request and are subject to the terms, conditions, exclusions, and endorsements of the applicable policies.

Appendix C SDI Advisory & Consulting Clients

	IT Strategic Plans	IT Assessments	IT Policies & Procedures	Project Management	IT Governance	Disaster Recovery	System Selection & Procurements	Other Management
Municipalities								
Alameda, CA	✓	✓					✓	✓
Alhambra, CA			✓					✓
Anaheim, CA	✓			✓			✓	✓
Arcadia, CA	✓		✓					✓
Arroyo Grande, CA	✓	✓						
Belmont, CA	✓							
Benicia, CA				✓				✓
Beverly Hills, CA	✓	✓						✓
Branson, MO	✓	✓						✓
Brentwood, CA	✓	✓						
Burbank, CA	✓	✓					✓	
Burlingame, CA				✓			✓	
Carson, CA				✓				
Carson City, NV	✓	✓					✓	✓
Chino, CA				✓			✓	✓
Chino Hills, CA				✓			✓	✓
Chula Vista, CA								✓
Clovis, CA	✓	✓			✓			
Concord, CA				✓				✓
Coronado, CA			✓	✓			✓	✓
Costa Mesa, CA								✓
Cupertino, CA	✓	✓						
Daly City, CA							✓	
Davis, CA							✓	✓
Downey, CA				✓			✓	
Eastvale, CA							✓	
El Segundo, CA	✓	✓						✓
Fairfield, CA	✓	✓	✓		✓	✓	✓	✓
Fontana, CA		✓						
Folsom, CA	✓	✓			✓			
Fremont, CA				✓			✓	✓
Fresno, CA	✓	✓					✓	✓
Galt, CA	✓	✓	✓	✓	✓	✓	✓	✓
Gilroy, CA	✓	✓		✓			✓	✓
Glendale, CA	✓	✓		✓			✓	✓
Glendora, CA			✓					✓
Half Moon Bay, CA				✓			✓	

	IT Strategic Plans	IT Assessments	IT Policies & Procedures	Project Management	IT Governance	Disaster Recovery	System Selection & Procurements	Other Management
Hanford, CA				✓				✓
Hawaiian Gardens, CA				✓			✓	
Hayward, CA				✓				✓
Hercules, CA	✓	✓						
Huntington Beach, CA	✓	✓			✓			✓
Indio, CA				✓			✓	✓
Industry, CA				✓				
Irvine, CA		✓		✓	✓	✓		✓
La Quinta, CA				✓			✓	✓
Laguna Beach, CA	✓	✓						
La Verne, CA			✓					✓
Lincoln, CA				✓				
Long Beach, CA				✓			✓	✓
Los Altos, CA				✓				
Los Angeles, CA				✓				✓
Los Banos, CA	✓	✓						
Malibu, CA	✓	✓		✓	✓		✓	✓
Manhattan Beach, CA	✓	✓			✓		✓	✓
Manteca, CA	✓	✓		✓	✓			✓
Merced, CA			✓				✓	✓
Millbrae, CA							✓	
Monterey, CA				✓			✓	
Moreno Valley, CA			✓					✓
Napa, CA	✓	✓			✓			✓
Newport Beach, CA					✓		✓	✓
Norco, CA							✓	✓
Novato, CA	✓	✓			✓			✓
Ontario, CA		✓		✓			✓	
Orange, CA	✓	✓			✓		✓	✓
Oxnard, CA	✓	✓						
Palmdale, CA	✓	✓						
Palm Springs, CA	✓	✓						✓
Pasadena, CA							✓	✓
Paso Robles, CA				✓			✓	✓
Petaluma, CA							✓	
Pico Rivera, CA							✓	
Pismo Beach, CA	✓	✓					✓	
Placentia, CA	✓	✓						✓
Pleasant Hill, CA							✓	
Pomona, CA	✓	✓			✓			
Port Angeles, WA	✓	✓						

	IT Strategic Plans	IT Assessments	IT Policies & Procedures	Project Management	IT Governance	Disaster Recovery	System Selection & Procurements	Other Management
Poway, CA							✓	
Rancho Cordova, CA	✓	✓						✓
Rancho Cucamonga, CA							✓	✓
Rancho Palos Verdes, CA	✓	✓					✓	✓
Redlands, CA							✓	✓
Redondo Beach, CA		✓						
Redwood City, CA	✓	✓		✓			✓	
Rialto, CA				✓				✓
Ridgecrest, CA	✓	✓			✓			
Riverside, CA							✓	
Rocklin, CA	✓	✓						✓
Rohnert Park, CA	✓			✓			✓	✓
Sacramento, CA	✓	✓			✓			✓
San Bernardino, CA		✓						✓
San Clemente, CA	✓	✓						
San Luis Obispo, CA	✓	✓					✓	✓
San Rafael, CA	✓	✓		✓	✓		✓	✓
San Ramon, CA	✓	✓		✓			✓	
Santa Ana, CA				✓			✓	
Santa Barbara, CA				✓				
Santa Clara, CA	✓	✓	✓	✓	✓		✓	✓
Santa Cruz, CA	✓	✓	✓		✓			✓
Santa Monica, CA								✓
Santa Rosa, CA								✓
Santee, CA				✓			✓	
Scottsdale, AZ				✓			✓	
Seal Beach, CA				✓				
Sonoma, CA				✓				
Stockton, CA	✓	✓		✓	✓			✓
Suisun City, CA				✓			✓	
Sunnyvale, CA							✓	✓
Temecula, CA	✓	✓						
Torrance, CA							✓	
Truckee, CA	✓	✓						
Tustin, CA				✓			✓	
Upland, CA	✓	✓		✓				
Vacaville, CA							✓	
Ventura, CA	✓	✓			✓			✓
Vernon, CA				✓				
Visalia, CA	✓	✓			✓			
Vista, CA	✓	✓	✓		✓			✓

	IT Strategic Plans	IT Assessments	IT Policies & Procedures	Project Management	IT Governance	Disaster Recovery	System Selection & Procurements	Other Management
Walnut Creek, CA	✓	✓			✓			✓
Watsonville, CA	✓	✓		✓				✓
West Covina, CA			✓				✓	✓
West Hollywood, CA	✓	✓			✓		✓	
Westminster, CA								✓
Yorba Linda, CA				✓				
Yuba City, CA				✓			✓	
Yucaipa, CA				✓				
Special Districts								
Camrosa Water District							✓	
Central Contra Costa Sanitary District	✓	✓	✓	✓	✓			✓
Central Utah Water Conservation District				✓			✓	
Chino Valley Independent Fire District				✓			✓	✓
Citrus Heights Water District								✓
Coachella Valley Water District				✓			✓	✓
Cosumnes Community Services District				✓			✓	
Cucamonga Valley Water District				✓			✓	
Delta Diablo Sanitation District	✓	✓						✓
East Bay Regional Park District				✓			✓	
East Valley Water District	✓	✓						
Eastern Municipal Water District							✓	
Elsinore Valley Municipal Water District	✓	✓				✓		
Encina Wastewater Authority					✓			
Fresno Irrigation District	✓	✓						
Helix Water District	✓	✓			✓	✓		✓
Inland Empire Utilities Agency	✓	✓		✓			✓	✓
Lake Arrowhead Community Services							✓	
Las Virgenes Municipal Water District	✓	✓				✓	✓	
Monterey Regional Water P.C.A.	✓	✓						
Moraga – Orinda Fire District								✓
Moulton Niguel Water District	✓	✓	✓	✓	✓		✓	✓
North Tahoe Public Utilities District	✓	✓						
Port of Los Angeles	✓	✓						
Rancho California Water District	✓	✓			✓			✓
Riverside County Transp. Commission				✓				
Sacramento Area Sewer District								✓
Sacramento Metropolitan Fire District		✓					✓	
Sacramento Municipal Utility District								✓
San Bernardino County Fire								✓
San Diego Community College District	✓	✓						
San Joaquin Council of Governments							✓	

	IT Strategic Plans	IT Assessments	IT Policies & Procedures	Project Management	IT Governance	Disaster Recovery	System Selection & Procurements	Other Management
San Jose Water								✓
Santa Clara County Fire Department		✓						✓
Santa Clara County Housing Authority	✓	✓						
Santa Clara Valley Water District							✓	
Silicon Valley Clean Water							✓	
Silicon Valley Power	✓			✓			✓	✓
Solano County Transit (SolTrans)								✓
South Tahoe Public Utility District	✓	✓			✓	✓	✓	
Southern CA Association of Governments								✓
Stockton Port District	✓	✓						
West Basin Municipal Water District	✓	✓			✓			
Zone 7 Water Agency	✓	✓						
Counties								
Douglas County, Nevada		✓						✓
El Paso County, Texas	✓	✓						
Lane County, Oregon	✓	✓						
Los Angeles County Employees							✓	
Los Angeles County Office of Education				✓				
Orange County, CA – John Wayne Airport		✓						
Placer County, CA							✓	✓
Riverside County, CA				✓				✓
San Benito County, CA				✓				✓
San Diego County, CA				✓				✓
Santa Clara County, CA				✓				✓
Sonoma County, CA				✓				✓
Tulare County, CA	✓	✓			✓			✓
State of California								
Assoc. of Regional Center Agencies				✓			✓	
CA Correctional Health Care Services				✓				✓
CA Dept. of Child Support Services				✓				✓
CA Dept. of Corrections				✓				✓
CA Dept. of Fish and Game				✓				✓
CA Dept. of Health Care Services				✓				✓
CA Dept. of Justice				✓				✓
CA Dept. of Motor Vehicles				✓				✓
CA Dept. of Public Health				✓				✓
CALPERS				✓			✓	✓
California Highway Patrol	✓	✓	✓	✓	✓	✓	✓	✓

Appendix D Resumes

SDI is pleased to provide the resumes of the key personnel assigned to the City of San Jacinto's Financial Management and Utility Billing Systems modernization initiative. Our proposed team brings extensive experience in California local government operations, ERP and utility billing system assessments, procurement support, independent project management, implementation oversight, business process improvement, finance, human resources, and enterprise technology modernization. The enclosed resumes for Patrick Griffin, Leanne Hart, Rita Conrad, and Kelli Ganley demonstrate the team's qualifications, relevant municipal project experience, and ability to successfully support the City's needs assessment, software selection, and implementation management objectives.



Patrick Griffin
Managing Director



Experience Summary

Senior public sector executive and consulting leader with over 31 years of experience in local agency management, municipal operations, and advisory services. Brings deep expertise across finance, information technology, community development, strategic planning, operational assessments, and enterprise system procurement and implementation, with a strong record of supporting elected officials, managing budgets, leading complex initiatives, and guiding stakeholder-driven decision-making. Recognized for combining hands-on municipal leadership experience with consulting oversight to help public agencies evaluate operations, define requirements, develop practical strategies, and deliver effective business and technology outcomes.



Professional Experience

SDI

(01/2012 - Present)

Managing Director

- Oversees the Advisory & Consulting practice, leading consulting engagements for public sector clients.
- Directed technology service delivery assessments and strategic planning projects for numerous agencies, including reviews of technology operations, identification of business needs, project prioritization, and development of implementation roadmaps.
- Led major enterprise system procurement initiatives for ERP and Land Management System projects across city, water district, and utility agency environments.
- Served as project manager for multiple enterprise application implementations, including ERP and Land Management System deployments for municipal clients.
- Advises local government organizations on operational assessments, strategic planning, requirements definition, RFP development, proposal evaluation, and contract negotiations.

Various Local Government Agencies

(01/1981 - 12/2011)

Finance Director / City Treasurer / Assistant City Manager

- Managed broad municipal operations over a 31-year local government career, with responsibility for annual budgets, public information, elected official support, and information technology.
- Held leadership responsibility for the day-to-day operations of Finance, Information Technology, and Community Development functions within a full-service city.
- Directed staff management, strategic planning activities, and the development and oversight of operating and capital budgets.
- Provided executive-level support in municipal management, with comprehensive knowledge of local government operations and public agency requirements.



AREAS OF EXPERTISE

- Project Management
- Requirements Definition
- Business Process Analysis
- Project Plan Development
- Local Government Operations
- Strategic Planning
- Initiative Development
- Operational Assessments
- Workshop Facilitation
- IT Outsourcing Evaluations
- Feasibility Studies
- RFP Development
- Proposal Writing
- Contract Negotiations
- Enterprise System Procurements
- ERP Implementations
- Land Management System Implementations
- Budget Development
- Public Sector Advisory Consulting
- Municipal Management



Education

California State Long Beach

Master of Arts, Public Administration

California State Fullerton

Bachelor of Arts, Psychology



Skills

- **Project Management**
 - Project management
 - Project plan development
 - Strategic planning
 - Initiative development
 - Workshop facilitation
- **Business Analysis & Assessment**
 - Requirements definition
 - Business process analysis
 - Operational assessments
 - Feasibility studies
 - IT outsourcing evaluations
- **Procurement & Contracting**
 - RFP development
 - Proposal writing
 - Contract negotiations
 - Enterprise system procurements
- **Public Sector & Municipal Operations**
 - Local government operations
 - Public sector local agency management
 - Annual budget development
 - Capital budget oversight
 - Elected official support
 - Public information dissemination
- **Enterprise Systems**
 - Enterprise Resource Planning (ERP)
 - Land Management Systems (LMS)
 - ERP implementation
 - Land management system implementation
- **Functional Leadership**
 - Finance operations
 - Information technology operations
 - Community development operations
 - Staff management



Leanne Hart
Senior Project Manager



Experience Summary

Senior Project Manager with extensive experience leading technology delivery, business analysis, and software implementation initiatives for public sector organizations, complemented by a long-standing clinical practice as a Licensed Marriage & Family Therapist. Brings deep expertise in needs assessments, business process reviews, records management, ERP and HCM implementations, and stakeholder engagement, with a track record of supporting local government agencies through complex system selection, implementation, and operational change. Recognized for combining structured project leadership, analytical problem-solving, and strong client service to deliver practical, business-focused outcomes across both technology and healthcare service environments.

Professional Experience

City of Downey, CA
(05/2025 - Present)

ERP Procurement and Implementation Project Management

- Supporting a comprehensive procurement process for replacement Enterprise Resource Planning software.
- Managing contract negotiations with the selected software provider.
- Providing project management support for the new system implementation.

Riverside County Transportation Commission (RCTC)
(05/2025 - Present)

ERP Implementation Project Management

- Supporting implementation of the organization's newly acquired Tyler ERP software.
- Providing project management oversight for ERP deployment activities.
- Assisting stakeholders through implementation planning and execution.

Inland Empire Utilities Agency
(05/2025 - 11/2025)

Human Capital Management (HCM) Implementation Project Management

- Supported implementation of the Agency's newly acquired HCM application, SAP SuccessFactors.
- Provided project management support throughout system deployment activities.
- Assisted the organization in coordinating implementation efforts for the new platform.

Leanne Hart, LMFT (Private Practice)
(07/2000 - Present)

Licensed Marriage & Family Therapist

- Provide individual and family therapy services in Spanish and English within a private practice setting.

AREAS OF EXPERTISE

- Project Management
- ERP Procurement
- ERP Implementation
- Human Capital Management Implementation
- Software Implementation
- Business Analysis
- Needs Assessment
- Business Process Review
- Functional Requirements Analysis
- Current State Systems Assessment
- Strategic Planning
- Contract Negotiation
- Change Management
- Test Planning
- Systems Documentation
- Records Management
- Technical Training
- Public Sector Technology Consulting
- Bilingual Client Services
- Behavioral Health Counseling

CERTIFICATIONS

- Licensed Marriage & Family Therapist



- Treat clients experiencing issues including marital and relationship challenges, domestic violence, child abuse, depression, anxiety, sexual abuse, grief and loss, trauma, and rape.
- Manage all aspects of operating a for-profit private practice, including billing and records management.
- Deliver EMDR, cognitive behavioral therapy, and other therapeutic modalities based on client needs.

G3G Solutions: City of Long Beach

(11/2013 - 03/2015)

Senior Business Analyst

- Developed needs assessments, current systems assessments, business process reviews, functional systems analyses, and system documentation for the City of Long Beach.
- Defined functional requirements for multiple municipal departments, including Police, Fire, Technical Services, and Building and Safety Administration.
- Produced technical user documentation for a citywide content management system and supported analysis and recommendations for operational process improvements.

Child Guidance Center, Child Abuse Program

(10/1999 - 03/2003)

LMFT

- Conducted individual and family therapy in Spanish and English.
- Performed intake assessments and treatment planning for Social Services Agency-referred clients involving domestic violence and child abuse.
- Provided supervision to MFT interns, testified in family and juvenile court, and taught parent education classes.
- Participated in group and individual supervision and multidisciplinary collaboration.

KPMG Peat Marwick

(08/1994 - 03/1998)

Senior Consultant

- Facilitated focus groups with management and user communities and conducted interviews to support needs assessments and problem resolution.
- Developed strategic plans, current systems assessments, and business process reviews for public sector clients.
- Coordinated transition planning activities, including test plan development.
- Led EDP audits and feasibility studies for public service agencies across municipal, county, and state environments.

ACS/Xerox

(06/1992 - 08/1994)

Project Manager

- Supervised and coordinated regional technical resource personnel.
- Managed multiple municipal projects across various client organizations.
- Led transformation activities for new system implementations, including procedural documentation.
- Interviewed agency and department leaders to support development of strategic long-range plans.

Paciolan Systems

(09/1989 - 06/1990)

Account Manager

- Performed on-site customer needs analyses and supported software implementations.
- Developed and delivered personalized and classroom-based training.
- Managed all aspects of assigned customer accounts.

McDonnell Douglas FSC

(07/1988 - 09/1989)

Programmer

- Designed, implemented, and programmed a budget system.



- Supported users across contracts and billing, accounts payable, general ledger, and fixed assets systems.
- Maintained financial and operational systems to support business operations.



Education

University of California, Irvine

Bachelor of Arts, Spanish

Emphasis in Bilingualism and English as a Second Language

Pepperdine University

Master of Arts, Clinical Psychology

Emphasis in Marriage, Family and Child Counseling



Skills

- **Project Management**
 - ERP implementation
 - ERP procurement
 - HCM implementation
 - Software implementation
 - Contract negotiation
 - Change request management
 - Transition planning
 - Test plan development
- **Business Analysis**
 - Needs assessments
 - Current systems assessments
 - Business process reviews
 - Functional systems analysis
 - Functional requirements development
 - Problem resolution
 - Feasibility studies
 - Strategic planning
- **Systems & Documentation**
 - System documentation
 - Procedural documentation
 - Technical user manuals
 - Records management
 - Project tracking systems
- **Enterprise Applications**
 - SAP SuccessFactors
 - Tyler ERP
 - CAD systems
 - Records management systems (RMS)
- **Audit & Evaluation**
 - EDP audits
 - Focus group facilitation
 - Management and stakeholder interviews
- **Therapeutic Practice**
 - Individual therapy
 - Family therapy
 - EMDR therapy
 - Cognitive behavioral therapy (CBT)
 - Intake assessment
 - Treatment planning
 - Parent education
 - Clinical supervision
 - Court testimony
- **Languages**
 - Spanish
 - English



Rita Conrad
Senior Project Manager



Experience Summary

Accomplished senior project and municipal finance leader with more than 20 years of experience delivering operational, financial, and enterprise initiatives within local government and consulting environments. Brings broad executive-level expertise across project management, budgeting and forecasting, procurement, human resources, labor negotiations, risk management, information technology, and customer service, with a strong record of advising city leadership, managing cross-functional teams, and driving complex programs to successful completion. Recognized for providing strategic and analytical support to executive stakeholders, strengthening financial and administrative operations, and delivering practical, value-focused solutions that support organizational performance and public-sector accountability.

Professional Experience

SDI Presence

(03/2022 - Present)

ERP Project Manager

- Lead ERP project delivery to ensure implemented solutions align with business requirements, contractual obligations, and client value expectations.
- Monitor scope of work, project plans, schedules, budgets, deliverables, and milestones to support on-time and within-budget execution.
- Drive project performance and client satisfaction through disciplined oversight of implementation progress and outcomes.

Misty Cheng & Associates: City of Upland

(11/2021 - 02/2022)

Finance Consultant

- Provided short-term consulting support to assist the City of Upland with American Rescue Plan Act (ARPA) funding compliance and reporting.
- Calculated the City's COVID-19-related revenue loss to determine eligible spending categories under ARPA.
- Categorized and labeled city revenues across all funds in accordance with U.S. Treasury requirements and submitted the first quarterly ARPA report detailing revenue loss, allowable expenditures, and obligations.

City of San Bernardino

(11/2019 - 05/2021)

Interim Deputy City Manager

- Served as a key member of the City Manager's executive team, providing technical, analytical, and management support to the City Manager and City Council across a broad range of municipal issues.
- Oversaw and supported the Finance Director on budget preparation and analysis and assisted with review and editing of staff reports.

AREAS OF EXPERTISE

- Project Management
- ERP Project Management
- Municipal Finance Management
- Budget Preparation and Management
- Financial Analysis and Forecasting
- Procurement and Contract Administration
- Human Resources Management
- Labor Negotiations
- Risk Management
- Information Technology Management
- Customer Service Operations
- Quality Assurance
- Administrative Policy Development
- Staff Leadership and Team Management
- Executive Advisory Support
- Public Sector Reporting and Presentations
- Audit Coordination
- Treasury and Investment Management
- Revenue and Fee Analysis
- Organizational Restructuring and Process Improvement



- Contributed to development of Measure S, including preparation of ballot initiative staff reports, expenditure policy, and policy for the Measure S Citizens' Oversight Committee.
- Coordinated a comprehensive user fee study and presented findings to the Mayor and Council.
- Prepared administrative policies for Council consideration, including Use of City Insignia and Seal, Elected Officials Interaction with Staff, and placement of items on the Council agenda.

City of San Bernardino

(01/2019 - 06/2019)

Interim Finance Director

- Served on the City Manager's executive team, providing technical and analytical support to the City Manager and Council on municipal finance matters.
- Managed a 23-person department spanning purchasing and contracting, budget preparation, accounting, payroll, accounts payable, accounts receivable, business license, TOT collections, treasury, and investments.
- Directed the City's overall fiscal management, including financial projections, operational analyses, budget preparation and management, and the annual audit.

City of La Quinta

(05/2014 - 07/2016)

Finance Director

- Provided executive-level financial leadership as a member of the City Manager's executive team, advising the City Manager and Council on municipal finance issues.
- Managed a six-person team responsible for purchasing, budget preparation, accounting, payroll, Successor Agency activities, accounts payable, accounts receivable, animal license, business license, and TOT collections.
- Directed citywide fiscal management, including financial projections, operational analyses, budget preparation and management, and the annual audit.
- Served as City Treasurer, overseeing investment activity and preparing quarterly investment and treasurer's reports for the Investment Advisory Board.
- Served as Treasurer to the Successor Agency to the Redevelopment Agency.

City of Hemet

(02/2010 - 03/2014)

Deputy City Manager

- Served as a key member of the City Manager's executive team, providing technical, analytical, and management support on a broad range of municipal matters.
- Managed 19 employees across functions without department directors, including Human Resources, Risk Management, Information Technology, Water Billing and Customer Service, and Finance.
- Directed Human Resources operations covering recruitment, benefits administration, labor negotiations for seven bargaining units, workers' compensation, MOU administration, and personnel matters.
- Served as the City's Risk Manager, coordinating claims management with the third-party administrator, city departments, and city attorney.
- Oversaw Information Technology operations, including business applications, public safety applications and communications, GIS, networking, and data communications.
- Led Water Billing and Customer Service operations, including water, sewer, and storm drain billing and collections, customer service, and central cashing.
- Managed Finance functions including purchasing, budget preparation, accounting, payroll, assessment district administration, and business license activities.



City of San Bernardino
(12/2002 - 02/2010)

Deputy Director of Finance

- Provided technical and analytical support to the Director of Finance, City Manager, and Council on a wide range of municipal issues.
- Managed a 14-person team responsible for accounting, budget, purchasing, payroll, and print shop operations.
- Held primary responsibility for coordinating the citywide budget process under the direction of the Finance Director.
- Provided ongoing financial and analytical support to the City Manager, including review of agenda items.
- Served as a member of the City's labor negotiations team.

City of San Bernardino
(12/1993 - 05/2002)

Budget Manager & Administrative Analyst

- Held progressive finance and administrative roles over an extended tenure with the City of San Bernardino.
- Supported municipal budgeting, financial analysis, and administrative operations in service to city leadership.
- Contributed to the City's finance and management functions as part of a 15-year career with the organization.



Education

California State University / 1999
Masters in Public Administration

California State University / 1991
Bachelor of Arts in Economics



Skills

- **Project & Program Management**
 - Project management
 - ERP project management
 - Scope of work management
 - Project planning and scheduling
 - Budget management
 - Deliverables and milestone tracking
- **Finance & Accounting**
 - Budget preparation
 - Financial analysis
 - Financial projections
 - Fiscal management
 - Accounting
 - Payroll
 - Accounts payable
 - Accounts receivable
 - Treasury
 - Investments
 - Annual audit
 - Revenue analysis
 - Quarterly financial reporting
- **Procurement & Contracting**
 - Procurement
 - Purchasing
 - Contracting
 - Request for Proposal (RFP) development
 - Vendor evaluation
- **Government & Public Administration**
 - Municipal finance
 - Local government administration
 - Staff report preparation
 - Policy development
 - User fee studies
 - Ballot initiative support
 - Citizens' oversight committee policy support
 - Council and executive team support
- **Human Resources & Labor Relations**
 - Human resources administration
 - Recruitment
 - Benefits administration
 - Labor negotiations



Rita Conrad

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- Memorandum of Understanding (MOU) administration
 - Personnel administration
- **Risk, Compliance & Quality**
 - Risk management
 - Claims coordination
 - Regulatory reporting
 - Compliance with U.S. Treasury ARPA requirements
 - Quality assurance
- **Information Technology**
 - Information technology management
 - Business applications
 - Public safety applications and communications
 - Geographic Information Systems (GIS)
- Networking
 - Data communications
 - IT infrastructure upgrades
 - Novell to Microsoft migration
- **Customer Operations**
 - Customer service
 - Utility billing
 - Collections
 - Central cashiering
 - Water, sewer, and storm drain billing
- **Licensing & Revenue Administration**
 - Business license administration
 - Transient Occupancy Tax (TOT) collections
 - Assessment district administration
 - Development Impact Fee (DIF) fund cost allocation



Kelli Ganley
Senior Consultant



Experience Summary

Senior Consultant and public sector human resources leader with over 25 years of experience spanning HR, payroll, finance, and labor relations functions. Brings deep expertise in ERP and HCM selection, implementation, configuration, testing, data conversion, reporting, and process improvement across complex municipal environments. Combines strong operational leadership in benefits administration, workforce planning, budgeting, employee and labor relations, and classification and compensation with the ability to partner effectively with executives, department leaders, technology teams, and external consultants to deliver compliant, efficient, and business-aligned solutions.



Professional Experience

SDI Presence LLC
(10/2023 - Present)

Senior Consultant

- Delivered consulting services across multiple public sector client engagements spanning ERP/HCM procurements, data extraction and reporting, data governance, project management, and training plan development.
- Supported ERP/HCM procurement initiatives for the City of Downey and East Bay Parks District.
- Provided data extraction and reporting support for the City of Indio and City of Benicia, contributed to data governance work for the City of Sacramento, managed post-implementation ERP activities for the City of Benicia, and developed training plans for the City of Sacramento and Inland Empire Utilities Agency.

City of Santa Clarita
(01/2006 - 12/2022)

Labor Relations Administrator / Senior Human Resources Analyst / Senior Financial Analyst

- Planned, implemented, and oversaw the full scope of human resources programs for a city of 224,593, with leadership responsibilities across recruitment, benefits, leaves, workers' compensation, and classification and compensation functions.
- Partnered with Technology Services on ERP implementations of Finance Plus and Central Square, including needs assessment, business process review, data conversion and upload, HR/Payroll configuration, testing, implementation, and Cognos Analytics report development for Human Resources and Payroll.
- Directed recruitment and selection activities, partnering with hiring managers to develop effective strategies to fill organizational vacancies.
- Oversaw benefits administration for CalPERS pension, medical, dental, vision, life insurance, deferred compensation, and flexible spending plans,

AREAS OF EXPERTISE

- Human Resources Systems
- Benefits Administration
- Payroll Systems
- ERP Implementation
- Workforce Analytics
- HR Process Reengineering
- Public Sector Budgeting
- Data Extraction & Reporting
- ERP/HCM Procurement
- Data Governance
- Project Management
- Training Plan Development
- Recruitment & Selection
- Leave of Absence Administration
- Employee & Labor Relations
- Classification & Compensation
- Business Process Review
- Data Conversion & Validation
- HR/Payroll Reporting
- Team Leadership & Supervision

CERTIFICATIONS

- Professional Designation in Human Resources Management
- Certified Professional in Human Resources (PHR)



- and managed leave programs including FMLA, CFRA, Pregnancy Disability, and State Disability.
- Partnered with department managers and directors to prepare the citywide budget, including budget proposals, expenditure and revenue forecasts, and annual budget documents.
- Worked with managers and directors to investigate and resolve employee and labor relations matters, including poor performance, discrimination and harassment claims, hostile work environment issues, and policy violations.
- Conducted classification and compensation studies to identify strategic and financially prudent staffing approaches aligned to operational goals.

City of Burbank

(01/1999 - 12/2006)

Fiscal Operations Supervisor

- Managed fiscal operations teams responsible for payroll, accounts payable, and accounts receivable for a full-service city with over 100,000 residents, approximately 1,400 full-time employees, and seven bargaining units.
- Served as Project Administrator for a citywide Oracle ERP implementation, coordinating demonstrations, supporting vendor evaluation and selection, and leading configuration, testing, and implementation of Payroll and Accounts Payable modules.
- Administered CalPERS retirement, \$457 Deferred Compensation, \$125 Employee Benefit, and VEBA plans, including provider coordination, plan document updates to reflect IRS legislation, and employee and labor representative communications.
- Performed complex cost analyses for proposed benefits, salary enhancements, and financial programs.
- Implemented city policies, procedures, and programs to improve organizational efficiency and ensure compliance with federal and state laws and city MOUs.



Education

UCLA

BA in Business Economics

California State University, Northridge

Master of Public Administration (MPA)



Skills

- **Functional**
 - Human Resources Systems
 - Benefits Administration
 - Leaves of Absence Administration
 - Payroll Processing and Reporting
 - Recruitment and Selection
 - Employee and Labor Relations
 - Needs Assessment and Business Process Review
 - HR Process Reengineering
 - Workforce Analytics
 - Public Sector Budgeting
 - Data Extraction and Reporting
- **ERP Platforms**
 - Oracle
 - Finance Plus
 - Central Square
- **ERP Implementation**
 - ERP Implementation
 - Data Conversion and Validation
 - Configuration, Testing, and Implementation
- **Reporting Tools**
 - Cognos Analytics 11.1 Report Writing
 - SQL Server Reporting Services (SSRS) Report Writing

September 1, 2026

TO: City Council

REQUESTED BY: Craig Hayes, City Attorney

APPROVED BY: Travis Randel, Interim City Manager

SUBJECT: Adopt Public Participation and Outreach Policy

RECOMMENDATION:

Staff recommends that the City Council **ADOPT Resolution No. 4148**, adopting a Public Participation and Outreach Policy pursuant to Government Code section 54953.4(b)(3)(C).

DISCUSSION:

The Ralph M. Brown Act generally requires meetings of local agency legislative bodies to be open and public. Senate Bill 707 amended the Brown Act by adding Government Code section 54953.4, which establishes additional public access and participation requirements for certain eligible legislative bodies, including the City Council. These requirements became operative on July 1, 2026.

As part of these requirements, Government Code section 54953.4(b)(3)(C) requires the City Council to make reasonable efforts, as determined by the City Council, to invite groups that do not traditionally participate in public meetings to attend those meetings. These groups may include media organizations serving the City, including non-English-language media, as well as good government, civil rights, civic engagement, neighborhood, and community organizations, including organizations active in non-English-speaking communities. The statute provides the City Council with broad discretion in determining the reasonable outreach efforts it will undertake.

The proposed Public Participation and Outreach Policy establishes the City Council's framework for complying with this outreach requirement. The Policy directs City staff to identify groups that do not traditionally participate in City Council meetings and to make reasonable efforts to invite those groups to attend. Depending on the circumstances, outreach may include direct email communications, information posted on the City's website or social media platforms, coordination through City departments or community partners, and multilingual outreach where feasible.

The Policy authorizes the City Manager, City Clerk, communications staff, and their designees to implement the Policy on behalf of the City Council. City staff may update outreach lists and adjust administrative outreach methods and procedures consistent with the Policy and applicable law. Any material amendment to the Policy must be presented to the City Council for consideration and approval.

This Policy is limited to the public outreach requirement contained in Government Code section 54953.4(b)(3)(C). Other requirements imposed by Senate Bill 707 are outside the scope of the Policy and this staff report.

Staff recommends that the City Council adopt the proposed Resolution approving the Public Participation and Outreach Policy.

FISCAL IMPACT:

There is no direct fiscal impact associated with adopting the proposed Policy. Implementation will be performed using existing City staff and resources. Any future expenditures associated with particular outreach activities will be subject to the City's adopted budget and applicable purchasing requirements.

Attachments

[Resolution No. 4148 - Resolution Adopting City Public Participation and Outreach Policy](#)

STATE OF CALIFORNIA)
COUNTY OF RIVERSIDE) ss
CITY OF SAN JACINTO)

RESOLUTION NO. 4148

**A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF
SAN JACINTO, CALIFORNIA, ADOPTING A PUBLIC
PARTICIPATION AND OUTREACH POLICY PURSUANT
TO GOVERNMENT CODE SECTION 54953.4(b)(3)(C)**

WHEREAS, the City of San Jacinto is a general law city organized under the laws of the State of California; and

WHEREAS, the Ralph M. Brown Act (Government Code section 54950 *et seq.*) requires that meetings of local legislative bodies be open and public; and

WHEREAS, Senate Bill 707 amended the Brown Act to require an eligible legislative body to make reasonable efforts, as determined by the legislative body, to invite groups that do not traditionally participate in local public meetings to attend its meetings; and

WHEREAS, the requirements of Government Code section 54953.4 became operative on July 1, 2026; and

WHEREAS, the City Council desires to adopt a Public Participation and Outreach Policy and authorize City staff to implement the Policy consistent with the direction and framework established by the City Council.

NOW, THEREFORE, BE IT RESOLVED, determined, and ordered by the City Council of the City of San Jacinto, California, as follows:

SECTION 1. Recitals. The recitals above are true and correct and are incorporated into this Resolution as findings of the City Council.

SECTION 2. Adoption of Policy. The City Council hereby adopts the Public Participation and Outreach Policy attached to this Resolution as Exhibit "A" and incorporated herein by this reference.

SECTION 3. Implementation. The City Manager, City Clerk, communications staff, and their designees are authorized and directed to implement the Policy. City staff may update outreach lists and adjust administrative outreach methods and procedures consistent with the Policy and applicable law without further City Council action. Any

material amendment to the Policy shall be presented to the City Council for consideration and approval.

SECTION 4. Severability. If any provision of this Resolution or the Policy, or its application to any person or circumstance, is held invalid, the remaining provisions and applications shall remain in effect to the fullest extent permitted by law.

SECTION 5. CEQA. This Resolution constitutes general policy and procedure making and an organizational or administrative activity and thus is not a project under CEQA Guidelines section 15378, subdivision (b)(5). To the extent it is a project, it is exempt under CEQA Guidelines section 15061, subdivision (b)(3).

SECTION 9. Effective Date. This Resolution shall take effect immediately upon adoption.

PASSED, APPROVED, AND ADOPTED at a Regular Meeting of the City Council on the 1st day of September 2026, by the following vote:

AYES:

NAYS:

ABSENT:

ABSTAIN:

CITY OF SAN JACINTO

Crystal Ruiz, Mayor

ATTEST:

Julia Espinoza, City Clerk

APPROVED AS TO FORM:

Craig Hayes, City Attorney
Best Best & Krieger LLP

CERTIFICATION

**STATE OF CALIFORNIA)
COUNTY OF RIVERSIDE) ss
CITY OF SAN JACINTO)**

I, Julia Espinoza, City Clerk of the City of San Jacinto, DO HEREBY CERTIFY that the foregoing Resolution No. 4148 was passed, approved, and adopted at the Regular Meeting of the San Jacinto City Council held on the 1st day of September 2026, by the following vote:

AYES:

NAYS:

ABSENT:

ABSTAIN:

WITNESS MY HAND AND OFFICIAL SEAL on the 1st day of September 2026.

Julia Espinoza, City Clerk
City of San Jacinto

EXHIBIT A
CITY OF SAN JACINTO CITY COUNCIL
PUBLIC PARTICIPATION AND OUTREACH POLICY

City of San Jacinto City Council
Public Participation and Outreach Policy
(Gov. Code § 54953.4(b)(3)(C))

1. Background

Senate Bill 707 (2025) amended the Brown Act to require eligible legislative bodies to take certain actions to encourage residents, including those in underrepresented communities and non-English-speaking communities, to participate in public meetings.

2. Purpose

This Policy establishes the reasonable efforts the City of San Jacinto City Council (“City Council”) will take to invite groups that do not traditionally participate in public meetings to attend its meetings under the Brown Act (Government Code § 54953.4(b)(3)(C)). This Policy is intended to support inclusive public engagement while preserving the City Council’s discretion to determine and adjust appropriate outreach methods based on local needs, priorities, and available resources. By adopting this Policy, the City Council directs and authorizes designated City staff to implement and administer these outreach efforts consistent with the framework established by the City Council.

3. Identification of Outreach Recipients

Upon adoption of this Policy, City of San Jacinto (“City”) staff shall prepare and maintain a list of organizations, media outlets, and other entities that may assist in expanding awareness of the City Council’s meetings. This list may include, but is not limited to:

- a. Media organizations that provide news coverage in the City’s jurisdiction, including media organizations that serve non-English-speaking communities; and
- b. Community-based organizations such as good government groups, civil rights organizations, civic engagement organizations, neighborhood associations, and other community or cultural groups active in the City’s jurisdiction, including organizations active in non-English-speaking communities.

The list may be updated periodically as determined appropriate by the City Council or designated staff.

4. Outreach Methods

Using the above list, designated City staff shall make reasonable efforts to invite groups that do not traditionally participate in public meetings to attend City Council meetings by utilizing one or more outreach methods reasonably calculated to reach those groups. These methods may include direct distribution of meeting information through e-mail or other notification systems; posting of meeting information on the City's website or other digital platforms; use of social media or electronic communications; and coordination with media outlets or community organizations to share information about upcoming meetings.

Designated City staff may also consider partnerships with community-based organizations or other stakeholders to help disseminate information to broader or underrepresented audiences. Where feasible, outreach efforts may include the use of multilingual communications, culturally relevant messaging, or engagement through media outlets serving diverse communities.

Nothing in this Policy, however, requires the use of any particular outreach method or the provision of meeting information to every organization or group.

5. Role of Staff

The City Council hereby assigns responsibility for implementing and administering outreach efforts to appropriate City staff, including but not limited to the City Manager, City Clerk, communications staff, or their respective designees. Staff responsibilities may include maintaining or updating outreach contact lists, preparing and distributing outreach materials, coordinating with community organizations or media outlets, and recommending outreach strategies for consideration by the City Council. Staff may also assist in identifying opportunities to improve outreach based on experience, feedback, or changes in community needs.

Designated City staff may select and adjust specific outreach recipients, methods, communications, and administrative procedures without further City Council action, provided that those actions remain consistent with this Policy and applicable law. This delegation does not limit the City Council's authority or responsibility as the eligible legislative body under Government Code section 54953.4.

6. Documentation and Reporting

The City Council may request periodic summaries of outreach efforts for informational purposes. Such summaries may include general descriptions of outreach activities undertaken, categories of organizations or groups contacted, and observations regarding participation or engagement trends. Reporting may be provided on a periodic basis as determined by the City Council and is not intended to require detailed tracking of every outreach activity.

7. Evaluation and Adjustment

The City Council may periodically review its outreach practices and make adjustments as appropriate. In doing so, it may consider factors such as community feedback, participation levels, resource availability, and evolving communication practices. Designated City staff may make administrative adjustments to outreach practices without further City Council action, provided that those adjustments remain consistent with this Policy and applicable law.

8. Discretion and Limitation

This Policy implements the City Council's obligation to make reasonable outreach efforts under Government Code section 54953.4(b)(3)(C). The City Council has broad discretion in the choice of reasonable outreach efforts it makes. Consistent with Government Code section 54953.4(b)(3)(C), no action shall be commenced or maintained against the City Council arising from a failure to provide public meeting information to any specific group.

9. Additional Brown Act Public Access Requirements

In addition to the outreach efforts described in this Policy, the Brown Act establishes additional public access requirements intended to support broad participation in public meetings of eligible legislative bodies like the City Council. These requirements include, among other things: provisions related to the translation of meeting agendas into applicable languages (if applicable), the availability of a public meetings webpage with specified information in required languages (if applicable), systems for requesting agendas and meeting materials, and accommodations that facilitate public participation, including assistance for interpretation.

10. Review and Updates

This Policy may be amended by the City Council at a public meeting in open session. Designated City staff may revise outreach contact lists, methods, communications, and administrative procedures without a formal amendment to this Policy, provided that those revisions remain consistent with this Policy and applicable law.