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## Revised Quote – RFP #19119 / Task 5 (Period Extension)

July 21, 2023 (revised)

Lake County, Illinois Purchasing Division  
Attention: RuthAnne Hall and Krista Kennedy  
18 N. County Street, 9<sup>th</sup> Floor  
Waukegan, Illinois 60085-4350  
*Sent via email*

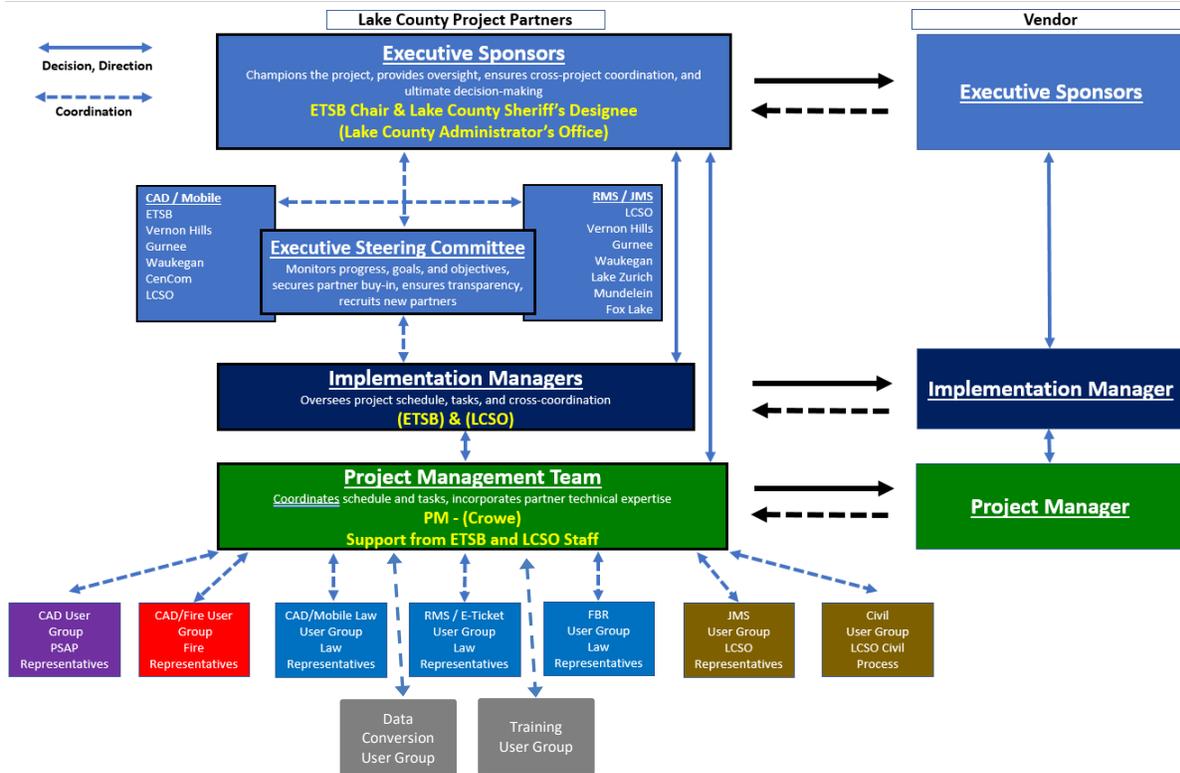
Dear Ms. Hall and Ms. Kennedy:

Thank you for the opportunity to continue to serve Lake County and the 9-1-1 Consortium as the *Consultant to draft and support RFP for shared, scalable, integrated enterprise CAD, mobile data, RMS, and JMS for Lake County* (RFP #19119). Lake County contracted Crowe LLP (Crowe) for RFP Tasks 1-Task 5. We are currently in process of Task 5: Implementation Project Management (PMO) and Organizational Change Management (OCM). The purpose of this revised quote is to request for a contract extension for our Task 5 services and continue our support through February 2025 to best align with the extended project schedule. The software vendor has also extended its implementation project schedule.

*This letter amends our Task 5 Amended Agreement executed June 27, 2023 (via Modification No. 3), with additional proposed details for the continuation of Task 5, to be included in a Contract Amendment.*

### **Task 5: Implementation Project Management & Organizational Change Management**

In Task 5, Crowe will continue to support the County / 9-1-1 Consortium throughout the software implementation of CAD / Mobile, RMS, Enforcement Mobile, Civil, and JMS. Crowe will work with the County to serve as the County's Project Manager, interfacing with Tyler Technologies (or "Tyler," the selected third-party software vendor), and establish a Project Management Office (PMO), serving as the "Project Manager" role within the Consortium's project structure – in the Project Management Team (see current version of organizational chart below).



### Implementation Project Management Scope

Crowe's PMO scope is to provide ongoing project management throughout the project. The specific activities may vary throughout phases of the project, but ongoing expectations include:

1. Serve as a resource that will represent Lake County Sheriff, Lake County ETSB, (and other stakeholder agencies joining during this implementation) during the transition, implementation, and post-implementation of the following, selected Tyler systems:
  - a. Enterprise Public Safety – CAD, RMS and CAD Mobile (formerly New World Public Safety)
  - b. Enforcement Mobile (e.g., e-citations, formerly Brazos)
  - c. Civil Process (formerly Softcode)
  - d. Tyler Corrections – JMS
2. Assist in the development and maintenance of the Project Plan and Resource Plan in conjunction with representatives from Tyler.
3. Assist with the various stakeholders to understand the functional requirements of each system. Engage subject matter experts as appropriate throughout various phases of the implementation (configuration, data conversion, testing, training, etc).
4. Propose and implement an information sharing/management platform and document repository to keep all stakeholders engaged and informed of the project status.
5. Assist in managing the project scope, deliverables, and timeline with assistance from the Lake County Implementation Managers and Tyler.
6. Manage the project team to keep team members engaged, informed, focused, and on tasks so that the project can stay on track.

7. Assist as requested with project tasks with the internal project team and representatives from Tyler (e.g., assist in organizing data conversion activities, assist in organizing training, etc)
  - a. Note – the Crowe team will not perform system configuration or execute technical tasks on behalf of the County but will help advise and guide.
8. Function as the primary point of contact for the Tyler Project Manager(s).
9. In coordination with the Lake County Implementation Managers, coordinate quarterly meetings with the Executive Sponsors and/or Executive Steering Committee as appropriate to update project status, budget status, and to research a verdict on any escalated process decisions.
10. Assist the Lake County Implementation Managers in the management of the implementation of the contract including the project budget, cost control, and change orders.
11. Monitor and escalate as needed per the contract and its exhibits, aiming to keep on schedule of the approved project plan, with deliverables received in a timely and complete manner.
12. Optional: Review and check vendor invoices for completion of the project milestones prior to payment or as needed
  - a. Note – Crowe will not authorize payment or singlehandedly approve milestones. Crowe will review progress per milestones and their descriptions according to the SOW. Crowe will report to the appropriate sponsor and sponsor will initiate approvals and payment as appropriate.
13. Document workflow processes.
14. Provide subject matter assistance to assist the aspects of the data conversion
  - a. Note – Crowe will not execute the mapping or script development for data conversion, but will manage, advise, guide, and provide subject matter expertise as requested by the County.
15. Supervise and manage aspects of the software integrations
  - a. Note – Crowe will not script or execute software integrations, but will manage, advise, guide, and provide subject matter expertise as requested by the County.
16. Assist the aspect of the change management. (see next section for more details below)
17. Assist the aspect of risk management.
18. Provide a tracking report on the following on a monthly or as needed basis:
  - a. Status and performance against scope, schedule, contract, service level agreements and other key performance indicators
  - b. Compliance with requirements
  - c. Resource time and utilization

Revised and Extended Timeline (as of July 2023):

The initial and previously revised Task 5 Timeline was duration-based on the overall project timeline as originally proposed by Tyler. The original go-live date for all software was to launch together in May 2023, with Crowe post go-live support to end as of July 2023. During Executive Sponsor re-planning sessions, the decision was made to de-couple the systems for several reasons. The revised and confirmed go-live dates are as follows:

- Civil Process – September 18-22, 2023,
- Enterprise Public Safety (CAD/RMS and CAD Mobile) – April 16, 2024,
- Enforcement Mobile – aligned to Enterprise Public Safety dates, and
- Tyler Corrections (JMS) – October 14, 2024.

**Accordingly, we propose extending our support services beyond November 2023 through November 2024 for Enterprise Public Safety and Enforcement Mobile and through February 2025 for JMS only.**

Organizational Change Management

Crowe will leverage our Organizational Change Management (OCM) Framework throughout this engagement to support a successful implementation. This Framework, further described in the table below, is based on our successful track record of planning and implementing change management initiatives in the public sector. Within each Project Management Lifecycle Phase (i.e., Concept, Initiating, Planning, Executing, and Closing), the OCM Framework provides activities, tasks, recommended practices, tools, and stylized templates as a guide. The table below provides specific scope of OCM for this project and incorporates the County’s requested OCM activities.

*OCM Activities and Recommended Practices by Project Management Lifecycle Phase*

Project Phase	Activities	Recommended Practices
<b>Concept</b> 	<ul style="list-style-type: none"> <li>Define the Magnitude of the Change</li> <li>Identify the Project Sponsor and Team Organization</li> <li>Identify governance approach and change structure, change network</li> </ul>	<ul style="list-style-type: none"> <li>Begin OCM Efforts Early</li> <li>The Right Project Sponsor is Critical to Project Success</li> </ul>
<b>Initiating</b> 	<ul style="list-style-type: none"> <li>Develop the OCM Schedule</li> <li>Identify and Assess Leaders as Change Supporters / Stakeholder Assessment</li> <li>Change Impact Assessment</li> </ul>	<ul style="list-style-type: none"> <li>Define Project Team Guidelines</li> <li>Focus OCM Efforts on Activities and Actions</li> <li>Develop Active and Sustained Executive Support for Project Success</li> </ul>
<b>Planning</b> 	<ul style="list-style-type: none"> <li>Determine and Plan for OCM Activities</li> <li>Develop the Communication Management Plan (by stakeholder group)</li> <li>Develop Training Plan (by stakeholder group)</li> <li>Deliver Planning Process Phase Communications</li> <li>Support and Assist the Project Sponsor</li> <li>Support Executive Leadership</li> <li>Conduct Team Guidelines Session</li> </ul>	<ul style="list-style-type: none"> <li>Identify the Training Method and Approach</li> <li>Utilize Practices to Foster Two-Way Communication</li> <li>First Build a Communication Strategy, then Focus on Tactics</li> <li>Align Executive Leaders to Project Goals and Objectives</li> <li>Establish Personal Accountability for the Project Team</li> <li>Don't Underestimate the Training Effort Needed</li> </ul>
<b>Executing</b> 	<ul style="list-style-type: none"> <li>Determine and Plan for OCM Activities</li> <li>Assess Organizational Change Readiness</li> <li>Develop the OCM Plan</li> <li>Execute and Monitor the Effectiveness of OCM Activities (as directed)</li> <li>Assess Stakeholder Communication Needs</li> <li>Update the Communication Management Plan</li> <li>Deliver Project Communications</li> <li>Support Managers and Supervisors</li> <li>Conduct Team Guidelines and Team Effectiveness Surveys</li> <li>Update the Stakeholder Management Plan</li> <li>Identify and Engage Stakeholder Group Representatives</li> <li>Go-Live Readiness Preparation</li> </ul>	<ul style="list-style-type: none"> <li>Identify and Engage OCM Super Users</li> <li>Provide Guidance for Identifying and Mitigating Resistance</li> <li>Plan, Develop, and Conduct Training</li> <li>Garner Management and Supervisor Support throughout Implementation</li> <li>Provide Opportunities for People to Feel Heard</li> <li>Be Repetitive and Consistent with Communications</li> <li>Recognize the Need for Celebrating Project Team Successes</li> <li>Recognize that Resistance is a Natural Part of the Change Process</li> <li>Set Realistic Training Goals</li> </ul>
<b>Closing</b> 	<ul style="list-style-type: none"> <li>Close Out the OCM Project</li> <li>Communicate Details on Operational Support</li> <li>Evaluate and Lessons Learned</li> <li>Coordinate Transition to Support / Maintenance</li> </ul>	<ul style="list-style-type: none"> <li>Recognize Post-Deployment has Ongoing OCM Needs</li> <li>Take Lessons Learned Seriously</li> <li>Communications are Equally as Important after Implementation</li> <li>End Users and Stakeholders Need Access to Additional Training</li> </ul>

Pricing:

Revised Pricing for Task 5 is based on the provided scope and overall fees will not exceed:

1. For the period June 2021 through November 2023: **\$608,125**,
2. For the period December 2023 through November 2024: **\$300,000**, and
3. For the period December 2024 through February 2025: **\$19,200** (both line items 2-3 represent additional funds for extended timeline)

Together, this results in Task 5 overall fees June 2021 through February 2025 not to exceed: **\$927,325**

Crowe will invoice Lake County directly, with billing detail provided that allows the County to allocate costs between the ETSB and Lake County Sheriff, respectively.

Our fees are based on the following:

*A) Implementation Project Management and Organizational Change Management*

Crowe will invoice the County and ETSB for both project management and organizational change management services based on actual hours worked across team resources. The Crowe project management team, includes the following resources and their engagement rates (unchanged):

- Partner / Executive (\$400)
- Senior Manager / Project Manager (\$200)
- Business / Technical Analysts (\$150)
- Organizational Change Management Specialists (\$200)

Based on the average monthly fees to date, Crowe estimates 100-150 hours per month of support team members, or an estimated monthly fee of \$25,000 through November 2024. This supports implementation efforts across all systems.

Following November 2024, Crowe will provide JMS-only support. We estimate 25-50 hours per month of support team members, or an estimated fee of \$6,400 from December 2024 through February 2025. This is consistent with support required thus far and aligned with the various project activities per the vendor's schedule.

*B) Travel Expenses*

Based on the need to support onsite sessions with the vendor and public sector agencies, Crowe anticipates incurring travel expenses for any team members not local to the Chicago area including airfare, hotel accommodations, car rental, and per diem. We estimate travel related expenses to not exceed **\$25,000** and is included within the overall not to exceed amount noted above. We will seek pre-approval from the Implementation Managers before booking travel arrangements. We will not invoice for any travel related to Chicagoland-based team members (Jill Willis and Susannah Heitger).

We look forward to the opportunity to discuss this proposed extension and for continuing to serve the 9-1-1 Consortium in this important project. Should you have any questions regarding our proposal, please contact me at 312.899.5316 or by email at [susannah.heitger@crowe.com](mailto:susannah.heitger@crowe.com).

Sincerely,

Susannah Heitger  
Principal