



April 4, 2019

Lake County Purchasing Division  
18 N. County Street  
Waukegan, IL 60085

Beth Malloy & Associates is pleased to submit this proposal for project consulting services to Lake County.

We are grateful for the opportunity to serve the County on this important project. Please let me know if you have any questions or require additional information regarding our proposal. I can be reached at 773-209-9235 or, by e-mail at [beth@bethmalloy.com](mailto:beth@bethmalloy.com).

Sincerely,

A handwritten signature in cursive script that reads 'Elizabeth Malloy'. The signature is written in black ink on a light-colored, slightly textured background.

Beth Malloy President



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## A. INTRODUCTION AND EXECUTIVE SUMMARY

Beth Malloy & Associates provides Lake County with decades of experience in solving public and private management challenges, with a strong focus on local government.

Huy Nguyen will provide project consultation services and post-implementation support for the tax and assessment team. Huy's expertise in managing large, complex projects for government agencies spans nearly 20 years. Huy has delivered large multi-million-dollar software implementation projects including property tax, enterprise resource management, and human services systems.

He will validate that all business requirements that are planned for post-cutover have been met in the base system, third party applications or modifications; that Tyler milestones have been met in full; and the test process provides clear evidence that the requirements were met.

## B. COMPANY BACKGROUND

### **Beth Malloy & Associates**

Proposing Firm: Beth Malloy & Associates, LLC  
Address: 900 N Kingsbury St. suite 846  
Chicago, IL 60610  
Telephone: (773) 209- 9235

### **Overview and History**

Beth Malloy & Associates offers the following professional services:

- Project, Program, and Portfolio Management
- IT strategic planning
- Business case and return on investment (ROI) analyses
- "As Is" and "To Be" business process mapping and analysis
- Feasibility and alternative solution studies
- Needs assessment and requirements definition studies
- Development of requests for proposal and other procurement documents
- Assistance in evaluation and selection of enterprise software and implementation services
- Contract negotiations
- Independent project management and/or oversight
- Organizational change management services

- IT sourcing advisory services
- Communication of strategy and process to stakeholders, including the public, as desired by the County

Ms. Malloy has two decades of experience, both consulting to and working for state and local government. Before her work with the state of Illinois Department of Revenue, she was a co-founder of Premis Consulting Group, spending nearly a decade assisting state and local government improve the delivery of services, often with innovative technology solutions. The entirety of BM&A's business is with state and local government.

### C. SCOPE OF SERVICES

The purpose of this phase is to ensure that the County receives onsite hands-on support of the new system during mission-critical business operations of the property assessment and tax collections departments. Huy will provide consistency and a knowledge of the decisions made during the implementation phase. His assistance will include:

- ✦ Continue a monthly project governance cadence at the County; prepare documentation that outlines risks and mitigation, assess the health of the project, report on any scope changes. Make recommendations to the Executive Steering Committee and County Executive Office. Obtain decisions and sign-off for changes. Escalate missed contract agreements by Tyler to Sponsor and Executive Committee; provide an early warning system when the risk of a missed contract agreement is likely.
- ✦ Resolve system issues with users onsite as they arise and escalate to Tyler implementation consultants if needed
- ✦ Identify and help resolve software bugs and issues between the County and Tyler
- ✦ Coordinate additional testing and training of new software functionality releases
- ✦ Monitor the test environment to ensure that changes to screens, data and modifications have been properly updated by Tyler so that the County is always testing a complete set of updates. Request, as needed, test guides for each tester so that it is clear what has been updated and what has not.
- ✦ Ensure a smooth transition from Tyler Implementation Services to Customer Support;
- ✦ Maintain supporting documentation and a timeline of requests, escalations and outcomes for each part of the project in an easily understandable format. As needed, prepare background, evidence, timeline and materials for the County Administrator, States' Attorney or County Board on project progress
- ✦ On request: Schedule and conduct meetings, follow up on all outstanding items, review Tyler's biweekly status, update the County project site, ensure Tyler has updated

versions of its deliverables uploaded in a timely fashion. Provide input into newsletters or other updates to stakeholders and interested parties

## D. PRICE AND PAYMENT MILESTONES

### PRICE

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Our proposal includes a team consisting of one senior consultant at an hourly rate of \$193 per hour.

D1. The proposal assumes:

- An average of 110 hours each, for the month of May and June, estimated at \$21,230 per month.
- The number of billable hours will fluctuate higher or lower this period depending on client demand and requirements. It is expected that the average will be higher in the month of May and beginning of June when to support the busy season of tax billing, collections, and distribution.
- This is a time and materials agreement. Only expended hours are billed; work will end when the hours are depleted or on November 30<sup>th</sup>, 2019, whichever comes first. Not-to-exceed pricing includes all costs (labor, material, overhead, administration, profit, travel, etc.).

D1. This proposal also sets aside a group of 400 hours, to be expended on services for which the County may request assistance beyond June, which is approximately the end of the implementation of the final Tyler modifications.

- These services will only be performed as needed to support rollout of new/additional system functionality during mission-critical business operations (i.e., monthly distributions, tax sale, end-of-year settlement reporting)
- These services will only be performed at the request of the Treasurer, CCAO, and Clerk Offices.
- This is a time and materials agreement. Only expended hours are billed; work will end when the hours are depleted or on November 30<sup>th</sup>, 2019, whichever comes first.
- Not-to-exceed pricing includes all costs (labor, material, overhead, administration, profit, travel, etc.).

Total	Assumptions
<b>Not to exceed \$42,460 through June 30, 2019</b>	Senior project consultant for activities outlined in section C: Scope of Services and section D1

**Not to exceed \$77,200 through  
November 30, 2019**

Senior project consultant for activities outlined in section  
C: Scope of Services and section D2

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## E. ATTACHMENT 1: RESUMES

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# Huy Nguyen Beth Malloy & Associates

## PROFILE

Huy Nguyen specializes in IT market research and assisting local governments in the evaluation and acquisition of enterprise software solutions. He possesses substantial knowledge in the areas of property tax administration, financial management, purchasing, personnel administration, payroll, and student administration functions. Huy has lead and managed a number of technology procurement consulting projects, including Fairfax County, VA; City of Newport, RI; Montgomery County, MD; Polk County, IA; City and County of San Francisco, CA; City of Des Moines, IA; and Leon County School District, FL. These consultations involved the areas of needs assessment/business case analysis, RFP/business requirements development, business process mapping, proposal assessment, and market research.

## PROFESSIONAL OVERVIEW

### Independent Managing Consultant

10/2008-present

Contract with multiple public sector consulting firms to serve as lead consultant or project manager on consulting engagements. Services provided include software implementation project management, market research, business process mapping, requirements development, RFP development, software evaluation, and contract negotiations in the areas of Enterprise Resource Planning (ERP), property tax, Citizen Relationship Management (CRM), and Human Services systems (HSS).

A sample of clients includes:

- Polk County, Iowa
- Linn County, Iowa
- City of Des Moines, Iowa
- City of Omaha, Nebraska
- City of Carlsbad, San Diego

### Government Finance Officers Association (GFOA)

Manager/Senior Consultant

10/2003-10/2008

Provided consulting and implementation advisory services in the implementation of transformational information software systems, including, finance, HR, payroll, property tax, and CRM.

- Managed project staff, deliverables, reports, and client relations.
- Mapped and analyzed hundreds of client's "As Is" business processes.
- Assisted local governments and K-12 school districts procure integrated information systems.
- Assisted dozens of cities, counties, and K-12 school districts select large-scale ERP systems such as SAP, SunGard Bi-Tech, Oracle EBS, and Lawson.
- Developed Needs Assessments/Business Cases, RFPs, and business requirements.
- Developed over 3,000 unique business requirements for dozens of clients such as the City/County of San Francisco, CA; Humble Independent School District, TX; Montgomery County, MD.
- Performed detailed assessments and comparisons of vendor proposals.
- Facilitated vendor software demonstrations at client sites, including Oracle EBS, SAP, Lawson, etc.
- Researched technology issues and authored articles relating to government organizations in the GFOA's Government Finance Review (GFR) and online market research reports.

- Developed and implemented an innovative business case development methodology.
- Conducted market research projects regarding the effectiveness of industry leading ERP solutions.

## Huy Nguyen Beth Malloy & Associates

### AWARDS AND HONORS

Phi Eta Sigma Honor Society

National Scholars Honor Society

Dean's List

### ARTICLES

"Beyond ROI: A New Framework for Measuring the Value of Technology Investments" in the Government Finance Review. Vol. 20, No. 6, December 2004.

"Planning and Evaluating Technology Investments" a chapter in Capital Project: Planning and Evaluation. 2007.

### CREDENTIALS

Masters of Public Administration, Concentration in Information Technology Management University of Illinois at Chicago 2005

Bachelor of Science in Economics

University of Illinois at Urbana-Champaign 2003