



Purchasing Division
18 North County Street, 9th Floor
Waukegan, Illinois 60085-4350
Phone 847-377-2992
Fax 847-984-5889
purchasing@lakecountyil.gov

Award Information – 2/13/2018

Contract Information

Purchase Description: **Finance & Administrative Services Operations Assessment**

Contract Start Date: **February 14, 2018**

Initial Term: **Phase One – 2/14/2018 – 6/8/2018**

Term Dates: **N/A**

Renewals: **Phase Two – TBD**

Vendor Information

Company Name: **Bronner Group**

Address: **120 N. LaSalle Street, Suite 1300**

Street Address

Suite/Unit #

Chicago

City

IL

State

60602

ZIP Code

Contact Name: **Don Davis**

Funding Account

Description: **General Fund- Consultants-Finance and Administrative**

Budget Information: **Was included in the FY18 Budget and service is within budget expectations.**

Department: **County Administrator**

Department Contact: **Paul Fetherston**

Award Amount: **\$86,285**

Bid / RFP Information

Registered Vendors: **Insert # 25 (0 Local; 25 Non local)** Responses Received: **Insert # 8 (0 Local; 8 Non local)**

Intent:

Lake County Administrator's Office (County) is seeking a highly experienced firm specializing in performing evaluations of local government operations to conduct a comprehensive organizational and operational assessment (assessment) of its Finance and Administrative Services Department (LCFAS). The assessment, anticipated to be completed in two phases as described below, is intended to identify the best principles and opportunities to maximize the organization and operation of the functions and divisions contained within LCFAS.



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Phase One: conduct an objective organizational and operations assessment to understand the current state of the department to determine what is being done well and what are the opportunities for improvement within LCFAS' organizational structure, operations and management.

Phase Two: intended to be a deeper assessment and provide recommendations of the areas agreed upon between the Consultant and County.

Since the current structure of LCFAS is diverse and includes typical functions such as budgeting, finance and purchasing and unique functions such as facilities and construction and the specialty of certain components of such, the County invites Consultants to submit proposals that encompass the following options:

Option A Assessment of:	Option B Assessment of:	Option C Assessment of:
All LCFAS functions and divisions: <ul style="list-style-type: none">• Finance/ Accounting• Budget• Construction• Purchasing• Facilities• Support Services	<ul style="list-style-type: none">• Finance/ Accounting• Budget• Purchasing• Support Services	<ul style="list-style-type: none">• Construction• Facilities

Scope of Work:

The primary objective of this assessment is to ensure that LCFAS is appropriately structured to meet the current and future needs of the County and to maximize its efficiency, effectiveness and use of best principles as a department and within each individual division. The Consultant will first conduct an organizational and operational assessment of LCFAS. Once Phase 1 is completed, the Consultant and the County will work collaboratively to develop a scope and timeframe for a Phase 2. Phase 2 is intended to be a deeper assessment and recommendations of the areas agreed upon between the Consultant and County. This will allow the County to respond to the findings and recommendations in Phase 1 and receive feedback to ensure that the County can achieve the desired and optimal improvements suggested in Phase 2. Additionally, this will give the County administration a chance to independently measure progress against the initial goals defined at the conclusion of Phase 1.

1.1 PHASE 1 is intended to be an objective operations and organizational assessment to understand what is working operationally and organizationally and what could be improved within LCFAS' operations, organizational structure and management. This overview should provide impartial insight into – but not be limited to – the following:

- a) Organizational structure and reporting relationships
- b) Service delivery structure and functions within each division
- c) Workflow processes and workforce planning
- d) Existing technology, available technology, technology gaps, and technology needs
- e) Management and administrative policies
- f) LCFAS' relationships and collaboration with other County departments, agencies and unites of government
- g) Internal controls
- h) Availability and use of resources
- i) Employee, vendor and other stakeholder service level satisfaction
- j) Centralization or decentralization of specific functions



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- k) Operations and/ or functions that could be consolidated with other internal service departments such as Information Technologies and Human Resources
- l) Current performance measures and those based on industry standards within each Division of LCFAS, for purposes of informing a county-wide performance measurement project which will be a separate County project

1.2 PHASE 2 – While the scope, timeline and cost of Phase 2 will be jointly agreed upon between the County and the Consultant, it is the County's intent that the findings and recommendations should address and/or be based upon – but not limited to – the following:

- a) Best-management practices and industry standards
- b) Optimal organizational structure model
- c) Streamlining procedures and processes
- d) Staffing requirements by division, both current and future, including specific benefits and outcomes with adding and/ or reducing staff
- e) Initiatives, goals and objectives of the Department and its individual Divisions, respectively
- f) LCFAS' service demands and quality of service delivery
- g) The efficiency and effectiveness of LCFAS' organization and operations relating to staffing, workload distribution, scheduling, productivity, technology, policy, and supervisory structure
- h) Operations and/ or functions that could be consolidated with other internal service departments such as Information Technologies and Human Resources
- i) Employee perceptions, understandings and morale
- j) Organizational location and reporting structure for the Construction and Facilities functions, respectively
- k) Organizational location and reporting structure for the Payroll function, which is currently in the Human Resources Department
- l) Best principles and performance measures for LCFAS and its respective divisions, for purposes of informing a county-wide performance measurement project which will be a separate County project
- m) Training needed to maximize operations and support succession planning

Evaluation of Proposals:

Lake County evaluated the Proposers response and the extent to which it meets the requirements delineated in this RFP. All proposals submitted in response to this RFP were scored based on the ability to meet or exceed the following evaluation factors:

- Expressed understanding of and ability to achieve RFP objectives
- Work plan for achieving RFP objectives, including capacity to apply and commit resources necessary to complete required services on a successful and timely basis
- Qualifications of the Consultant and its project team personnel
- Completeness, thoroughness and detail of response (i.e., discussion and coverage of all elements of work listed in the RFP)
- Cost/ Value in relation to the level of service to be provided

Department Recommendation:

Based on the criteria set forth in the Request for Proposal, the Evaluation Committee comprised of representatives from Finance & Administrative Services, County Administrators, Public Works, Human Resources, Emergency Management, and Division of Transportation selected Bronner Group as the most favorable proposal for Lake County.