

**FIRST AMENDMENT TO COUNTY OF MENDOCINO
PURCHASING AGENT AGREEMENT NO. PA# 21-132**

This Amendment to Agreement No. PA# 21-132 is entered into this _____ day of _____, 2020, by and between the COUNTY OF MENDOCINO, a political subdivision of the State of California, hereinafter referred to as "COUNTY" and CLIENTFIRST CONSULTING GROUP, LLC, DBA, CLIENTFIRST TECHNOLOGY CONSULTING, hereinafter referred to as "CONTRACTOR".

WHEREAS, Agreement No. PA# 21-132 was entered into on February 22, 2021; and

WHEREAS, upon execution of this document by the Chair of the Mendocino County Board of Supervisors and the Contractor, this document will become part of the aforementioned contract and shall be incorporated therein; and

WHEREAS, it is the desire of CONTRACTOR and COUNTY to extend the termination date set out in the original Agreement No. PA# 21-132, from June 30, 2021 to June 30, 2022; and

WHEREAS, it is the desire of CONTRACTOR and COUNTY to amend the original Agreement No. PA# 21-132 to include the addition of services provided for post go-live activities attached to this amendment as Exhibit A; and

WHEREAS, it is the desire of CONTRACTOR and COUNTY to increase the total contract amount set out in the original Agreement No. PA# 21-132 by \$111,500 for the addition of services defined and attached to this amendment as Exhibit A, for a new total contract amount of \$161,460.

NOW, THEREFORE, we agree as follows:

1. The termination date set out in the original Agreement No. PA# 21-132 will be extended from June 30, 2021 to June 30, 2022.
2. Exhibit A set out in Agreement No. PA# 21-132 will be hereby amended to include the services defined and attached to this amendment as Exhibit A.
3. The total contract amount set out in Agreement No. PA# 21-132 will be increased by \$111,500 for a new total contract amount of \$161,460.

Exhibit A Definition of Services

All other terms and conditions of Agreement No. PA# 21-132 shall remain in full force and effect.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the day and year first above written.

DEPARTMENT FISCAL REVIEW:

[Signature] 08/20/2021
DEPARTMENT HEAD DATE

Budgeted: Yes No

Budget Unit: 0717

Line Item: 862239-IT038

Grant: Yes No

Grant No.: N/A

COUNTY OF MENDOCINO

By: _____
JOHN HASCHAK, Chair
BOARD OF SUPERVISORS

ATTEST:

CARMEL J. ANGELO, Clerk of said Board

By: _____
Deputy

I hereby certify that according to the provisions of Government Code section 25103, delivery of this document has been made.

CARMEL J. ANGELO, Clerk of said Board

By: _____
Deputy

INSURANCE REVIEW:

By: [Signature]
Risk Management
08/20/2021

CONTRACTOR/COMPANY NAME:

By: [Signature]

NAME AND ADDRESS OF CONTRACTOR:

ClientFirst Consulting Group, LLC

980 Montecito Drive, Suite 209

Corina, CA 92879

By signing above, signatory warrants and represents that he/she executed this Agreement in his/her authorized capacity and that by his/her signature on this Agreement, he/she or the entity upon behalf of which he/she acted, executed this Agreement

COUNTY COUNSEL REVIEW:

APPROVED AS TO FORM:

CHRISTIAN M. CURTIS,
County Counsel

By: Matthew Kiedrowski
Deputy

EXECUTIVE OFFICE/FISCAL REVIEW:

APPROVAL RECOMMENDED

By: [Signature] 08/20/2021
Deputy CEO

Signatory Authority: \$0-25,000 Department; \$25,001-50,000 Purchasing Agent; \$50,001+ Board of Supervisors
Exception to Bid Process Required/Completed _____
Mendocino County Business License: Valid
Exempt Pursuant to MCC Section: _____

EXHIBIT A

DEFINITION OF SERVICES

PROJECT BACKGROUND

CONTRACTOR has been assisting the COUNTY with the implementation of the Aumentum software since March 2019. The system is officially in production as of Friday, February 12, 2021. Continued assistance between Aumentum application vendor and key County stakeholders with pre and post Go-Live implementation tasks and project coordination are critical during the final phase of GoLive preparation, during Go Live data conversion issues resolution, and as the departments define their new processes within Aumentum in preparation for the 2021 tax roll.

In addition, several items have been deferred beyond Go Live, requiring continued coordination to ensure full-system implementation. Coordination needs are expected to continue through the 2021 calendar year.

SCOPE OF WORK

The components of an Implementation Work Plan are variable, and, as a result, we have separated the Work Plan as summarized below. General scope includes

Project Monitoring, Controlling, and Reporting:

- Scope Management
- Work Plan/Production Monitoring and Management
- Budget Monitoring
- Quality Assurance Management
- Training and Knowledge Transfer
- Data Conversion Issues Resolution
- Reports, Queries, Forms, and Analytics
- Interfaces and Integrations
- Modifications and Enhancements
- Testing and Systems Validation – *In process and significant*
- Documentation Production
- Deliverables Assurance
- Risk Management and Mitigation
- Project Communication and Information Management
- Information Repository and Sharing
- Project Team Management
- Change and Issue Management
- Post-Implementation Support Readiness

- Organizational Change Management

Project Initiation/Coordination for the Tax Sale and Case Management Modules:

- Project Coordination and Planning – Work with the COUNTY Project Team to finalize the project management plan and arrange communications, logistics, and support
- Participate in Vendor Project Kick-Off Meetings – Participate and facilitate the Vendor Project Kick-Off Meeting with Vendor and COUNTY stakeholders and Project Team members

Recurring Project Management Assistance:

- Participate in Vendor Needs Assessment Process – Attend vendor module walkthroughs, assessment, analysis workshops, and assist with review of vendor deliverables
- Participate in Vendor Status Meeting – Participate in the vendor's periodic status meeting to ask questions, make suggestions, assist, and support the COUNTY in presenting their points, express points of interest or concern
- Review Vendor Status Reports – Review the vendor's post-status meeting report and provide comments
- Assist with Periodic Internal COUNTY Status Meetings – Prepare for and conduct the periodic internal COUNTY status meetings with Functional/Module Leads and any Project Team Staff as needed
- Facilitate Information Services Lead/CONTRACTOR Debrief – A post-Internal Status Meeting debrief between the COUNTY Information Services Lead(s) and CONTRACTOR to sync up on project status, upcoming tasks, activities, and responsibilities, as well as discuss options for risk mitigation and issues resolution
- Prepare Periodic Status Summary Report (Memo) – Prepare a Status Memo using the CONTRACTOR template, which will include a summary of observations and recommendations as an outcome of the Internal Status Meeting and post-Status Meeting Debrief
- Complete Weekly Project Management Assistance and Scheduling Activities – General, miscellaneous activities, and email communications, scheduling of internal and vendor-attended meetings
- Prepare Monthly Status Summary Report (Memo) – Provide the COUNTY with a monthly status report memo, including a list of critical milestones completed, status of the project schedule and budget, and comments and recommendations related to any observed anomalies, red flags, or obvious risks that may have a negative impact on the project schedule, the quality of project deliverables, or the budget

Approach to Recurring Project Oversight:

Ongoing Project Oversight activities represent an average weekly number of hours for post-implementation service deliverable activities. CONTRACTOR will bill for these weekly hours accumulatively on a monthly basis.

CONTRACTOR will continue in the role of COUNTY's Project Manager by monitoring and overseeing the project process. It is expected that project management will be required in the post Go Live phase through at least the remainder of FY2020-21. CONTRACTOR's responsibilities would include:

- Using CONTRACTOR's project management experience to assist, make recommendations, and counsel the COUNTY's Project Manager and Implementation Project Team as issues are resolved and the remaining items are implemented
- Monitoring major project activities and milestones to ensure they are achieved on time, within budget, and that all parties fulfill their responsibilities
- Observing and reporting any anomalies, risks, or red flags that may have a negative impact on the project schedule, project/system quality, or financial budget
- Providing recommended action plans to resolve or mitigate any of the above anomalies, risks, or red flags
- Guiding the project team in their communications with and requests of the vendor
- Negotiating revised progress payment terms and post-Go-Live support with the vendor
- Making any other observations or recommendations that may improve implementation
- Acting as an observer in any performance or acceptance testing

STAFFING, FEE SUMMARY, SCOPE CHANGES AND MANAGEMENT

This proposal is a time and materials proposal not to exceed \$111,500

Hourly Rates:

Project Manager/Consultant: \$160

Partner: \$205

Alternative scope changes and fee adjustments are possible and are dependent on specific project needs and staff resources and capabilities. Minor changes to the scope and methodology stated above will not result in a change in CONTRACTOR fees. If the nature or scope of work should change significantly during the project, CONTRACTOR would discuss such matters and their effect on CONTRACTOR fees and obtain written approval before proceeding.

[END OF DEFINITION OF SERVICES]

