MOSSADAMS

OPPORTUNITY RISING

HUMAN RESOURCE & LEARNING MANAGEMENT SYSTEM ADVISORY AND IMPLEMENTATION SERVICES PROPOSAL FOR

CITY OF MADISON

Colleen Rozillis, Partner

Brett Addis, Director

Moss Adams LLP
999 Third Avenue, Suite 2800
Seattle, WA 98104
(206) 302-6500

MOSSADAMS

September 1, 2023

Purchasing and Human Resources Department

City of Madison
City-County Bldg, Room 407
210 Martin Luther King, Jr. Blvd.
Madison, WI 53703-3346

Dear Purchasing and Human Resources Departments:

We're extremely pleased to submit our proposal to the City of Madison (City). We understand the City is in search of a consultant who can evaluate the City's software requirements and aid in crafting a solicitation for a Human Resources Management (HRM) software platform. We are confident our team is the best fit for the City because we offer the following:

- **Professionals who communicate effectively with government leaders.** Because we're hired by public sector clients to solve challenging oversight and business practice problems at the highest levels, we're well versed at dealing with all levels of government. Your proposed team reports to councils, finance and audit committees, and senior management on a regular basis.

- **An established, reputable firm with extensive resources and expertise**. We are one of the 15 largest accounting and consulting firms in the United States and serve our clients with a staff of over 4,400 professionals in more than 30 locations around the country. As a result, we have substantial resources across the firm to draw upon as needed.

- **Change management expertise.** We're experts in change management and organizational assessments. Governments are always evolving, moving through different phases in their lifecycles, and their culture changes along with them. That's why our team is dedicated to helping clients make the necessary organizational changes to effectively put strategies and tactics into action, creating real shifts in people, processes, and systems.

Within our proposal, we've provided more information on our firm, team, and qualifications. We think you'll find our firm highly qualified to provide these services, and we firmly believe we offer the kind of special dedication, continuity, and commitment that inspires mutual trust and confidence in projects of this type.

We look forward to the possibility of working with you on this important undertaking. Thanks very much for your consideration.

Sincerely,

Colleen Rozillis
Partner
(206) 302-6795
colleen.rozillis@mossadams.com

Brett Addis
Director
(206) 834-8789
brett.addis@mossadams.com

Table of Contents

Background Questions 1

Question 1: Description of Company 1
Question 2: Key Staff 5
Question 3: Past Experience 9
Question 4: Examples 10

Project Plan and Proposed Approach 14

Question 5: Approach to the Software RFP Development Project 14
Question 6: Approach to the Software Implementation Project 16
Question 7: Change Management & Facilitation 18

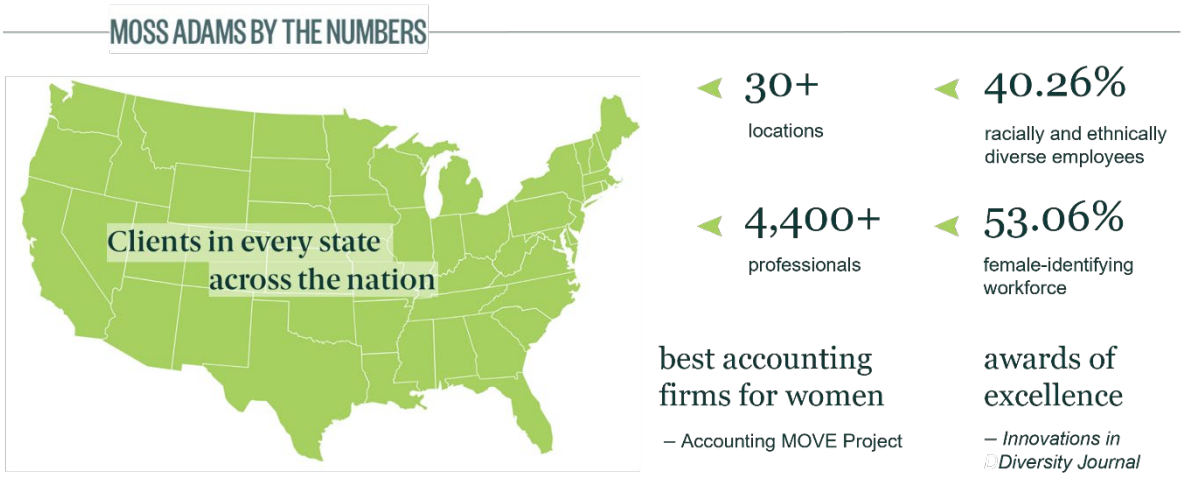
Exceptions 20

Required Forms 21

1) Form A – Signature Affidavit 21
2) Form B – Receipt Forms and Submittal Checklist 22
3) Form C – Vendor Profile 23
4) Form E – References 24

Background Questions

QUESTION 1: DESCRIPTION OF COMPANY



At Moss Adams, we believe in the power of possible. As a business and personal advisory firm with 4,400 professionals across more than 30 locations, we work with clients to meet the rising challenges and opportunities of tomorrow. Through a full spectrum of accounting, consulting, and wealth management services, we bring the deep industry specialization and unconventional thinking our clients seek.

Since we put down roots in the Pacific Northwest over 100 years ago, we've steadily expanded to serve clients across the nation. Our full range of services includes consulting (strategy & operations, IT, transactions, and specialty), accounting (assurance and tax), and individual and institutional wealth management.

Moss Adams is one of the 15 largest US accounting and consulting firms and a founding member of Praxity, a global alliance of independent accounting firms providing clients with local expertise in the major markets of North America, South America, Europe, and Asia. Moss Adams has more than 30 locations as listed below.

- Phoenix, AZ
- El Segundo, CA
- Fresno, CA
- Healdsburg, CA
- Napa, CA
- Orange County, CA
- Pasadena, CA
- Sacramento, CA
- Salinas, CA
- San Diego, CA
- San Francisco, CA
- Santa Rosa, CA
- Silicon Valley, CA
- Stockton, CA
- Walnut Creek, CA
- Woodland Hills, CA
- Denver, CO
- Kansas City, KS
- Albuquerque, NM
- Eugene, OR
- Medford, OR
- Portland, OR
- Dallas, TX
- Houston, TX
- Salt Lake City, UT
- Bellingham, WA
- Everett, WA
- Issaquah, WA
- Seattle, WA
- Spokane, WA
- Tacoma, WA
- Tri-Cities, WA
- Wenatchee, WA
- Yakima, WA

Our Government Services Practice

Our Government Services Practice is grounded in the expertise of over 340 Moss Adams professionals who specialize in serving tax-exempt entities, including governments, higher education institutions, not-for-profits, tribal and gaming entities, energy and utility entities, and federal contractors.

We recognize government organizations are accountable to many constituencies—oversight agencies, audit committees, elected officials, taxpayers—all with different expectations and demands. That's why we commit significant personnel and resources to this Practice, building technical expertise in all areas of government.

Our experienced partners and senior managers lead engagements for over 360 government entities across the United States including state agencies; cities and counties; public colleges and universities; special purpose governments including ports, utility districts, and transit agencies; public retirement funds; and others.

Our significant government experience means we're more likely to help you spot potential problems and create effective solutions. You'll receive more effective services from our specialized professionals who have a deep understanding of the pressures you face like the need for greater efficiency and transparency under tight budget constraints. Listed below are some municipal governments our firm serves.

Representative Local Government Clients		
• Carson City	• City of Fairfield	• City of Roseville
• Culver City	• City of Gardena	• City of Salem
• City of Abilene	• City of Hermosa Beach	• City of San Bernardino
• City of Albuquerque	• City of Hillsboro	• City of San Diego
• City of Beaumont	• City of Huntington Park	• City of San Jose
• City of Bellevue	• City of Industry	• City of Santa Fe
• City of Bellingham	• City of Laguna Niguel	• City of Santa Monica
• City of Bothell	• City of Lakewood	• City of Santa Rosa
• City of Bradbury	• City of Los Angeles	• City of Seattle
• City of Calexico	• City of Lynnwood	• City of Shoreline
• City of Cerritos	• City of Modesto	• City of Stockton
• City of Chula Vista	• City of Monterey Park	• City of Tacoma
• City of Clearlake	• City of Mount Vernon	• City of Tucson
• City of Clovis	• City of Normandy Park	• City/County of San Francisco
• City of Corona	• City of Oxnard	• Clark County
• City of Corvallis	• City of Patterson	• Douglas County
• City of Culver City	• City of Phoenix	• King County
• City of Edmonds	• City of Portland	• Lane County
• City of Encinitas	• City of Redmond	• Maricopa County
• City of Eugene	• City of Redondo Beach	• Pierce County
• City of Everett	• City of Riverside	• Sonoma County

Human Capital Assessment and Optimization

Our team focuses on helping public sector entities improve their organizational performance through the evaluation of their Human Resource (HR) department and program effectiveness. We're well versed in reviewing HR strategies, management practices, organizational structures, policies, processes, internal controls, staffing, technology, and communication. We're deeply familiar with the complex landscape of government operations and the unique demands of public agencies and their diverse stakeholders. Our extensive experience includes a wide array of organizational consulting projects for various government agencies, including organizational assessments, HR and management reviews, audits, policy development, and systems implementation.

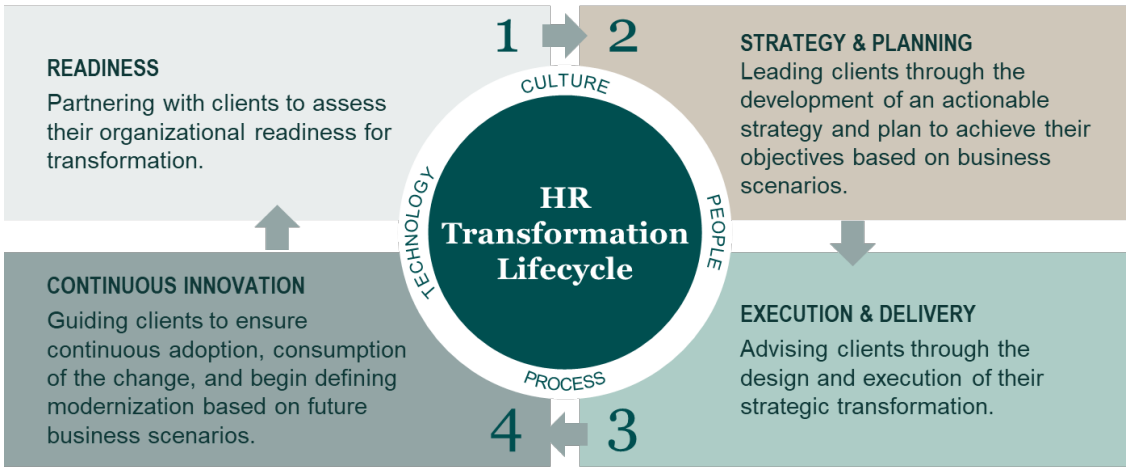
Human Capital Advisory Services
Human capital management is an integral part of every organization, and its workforce is a top priority for management and executives across all industries.

Human Capital Advisory Differentiator
First and foremost, it's our people; expertise in your industry; global and regional knowledge; a trusted name; Whatever you and your organization need to succeed, our professionals have the experience and technical know-how to help**.**

Human Capital Advisory Approach
We offer a personalized approach to support growing and established organizations. Our scalable engagements allow us to meet our clients where they are and provide actionable recommendations that will lead them to successful outcomes.

Core to our approach is the "Transformation Lifecycle," specifically designed with to address our clients' distinct transformation needs and scale based on specific areas of expertise. The Transformation Lifecycle consists of the following four areas:

1. **Readiness:** Partnering with clients to assess their organizational readiness for transformation.
2. **Strategy & Planning:** Leading clients through the development of an actionable strategy and plan to achieve their objectives based on business scenarios.
3. **Execution & Delivery:** Advising clients through the design and execution of their strategic transformation.
4. **Continuous Innovation:** Guiding clients to ensure continuous adoption, consumption of the change, and begin defining modernization based on future business scenarios.



Human Capital Advisory Capabilities

We offer a personalized approach to support growing and established organizations. Our scalable engagements allow us to meet our clients where they are and provide actionable recommendations that will lead them to successful outcomes. Below, we've listed some of our capabilities:

Culture	People	Program & Process	Technology
Future of Work	HR Strategy	Talent Acquisition	Implementation & Deployment Planning
Employee Engagement & Experience	HR Organization Design	Talent Management	Solution Selection
Employee Retention	HR Operating Models	Total Rewards	Partner Selection
Diversity, Equity, & Inclusion	HR Skills & Capabilities	Learning & Development	Technology Support Structure
M&A Assimilation	HR Value Management	Payroll, Wellness, & Benefits	Quality Assurance
HR Governance			
Change Management			

Change Management Expertise

Public sector agencies like the City tend to be dynamic, constantly changing and transitioning to the next phase in their life cycles with organizational culture evolving alongside continual change. That's why our team focuses on helping our government clients make the organizational changes required to successfully implement strategies and tactics that fundamentally impact people, processes, and systems.

Our change management approach provides a framework to guide the change path, build resilience, and overcome resistance. We help our clients become more effective, efficient, and transparent in their change efforts which ultimately leads to increased stakeholder engagement and adoption.

Our consultants merge substantial industry experience with a unique blend of behavioral and organizational expertise, addressing the multifaceted nature of organizational change. Our objective is to foster greater effectiveness, efficiency, productivity, financial success, and overall job satisfaction within our clients' workplaces.

QUESTION 2: KEY STAFF

Colleen Rozillis, PMP, *Partner*

Professional Experience

Since 2005, Colleen has advised local, state, and tribal governments; K-12 and higher education institutions; utilities; private companies; and not-for-profit organizations to improve organizational and program operations and efficiency, facilitate strategic leadership and planning, and cultivate more effective governance. She works collaboratively with clients to understand their goals and objectives and define organizational and programmatic changes to better equip and position them to achieve those goals. Colleen serves as the firm's public sector, not-for-profit, and tribal consulting industry group leader and leads ESG consulting for the firm.

Her government experience includes planning, policy, and financial analysis for local and state agencies in Alaska, Arizona, California, Colorado, Hawaii, Michigan, Montana, Nevada, Ohio, Oregon, Pennsylvania, Texas, Utah, and Washington. Before joining Moss Adams, she managed the Performance Reporting Branch of the Washington State DOT and authored the 2011-2015 WSDOT Strategic Plan.

Colleen has recently provided organizational development and performance consulting services to public sector clients, including the 32nd District Agricultural Association, Ben Franklin Transit, Boulder County, Cities of Berkeley, Boise, Carson City, Culver City, Cupertino, Eugene, Issaquah, Modesto, Newport Beach, Portland, Redondo Beach, Salem, Santa Monica, and Stockton; Delta Diablo, Douglas County, El Camino Health District, Homes for Good, Housing Authority of Yamhill County, Jefferson Public Utility District, King County Metro, Marion County, NoaNet, Pierce County, Seattle Public Schools, Sonoma County, Spokane Regional Health District, and West Valley Housing Authority.

Professional Affiliations and Certifications

- Chair, Board of Trustees, Humanities Washington
- Member, Society for Corporate Governance
- Member, Project Management Institute
- Member, International City & County Management Association
- Member, Institute of Internal Auditors
- Member, Association of Local Government Auditors
- Project Management Professional (PMP)

Education

- MS, public policy and management, Carnegie Mellon University
- BA, English and political science, University of Michigan
- Diversity and Inclusion Certificate, Cornell University

Brett Addis, *Director*

Professional Experience

Brett has worked in HR, including human capital management consulting, since 1997. Over the course of his career, he's leveraged his extensive human capital experience to consult with organizations across multiple industries to transform their people, processes, and technology.

Brett focuses on helping organizations implement scalable strategies to help optimize their human capital and business operations through planning, designing, and executing innovative solutions. Brett's areas of expertise include, but are not limited to, strategic planning, organization design and operating models, governance, change management, technology planning, value realization, and continuous innovation. He has a proven track record for helping organizations drive their digital transformations resulting in improved HR efficiency, effectiveness, and alignment and achievement of business outcomes.

Brett's current clients include Otis Collage of Art and Design, Confederated Tribes of the Umatilla Indian Reservation, San Manuel Band of Mission Indians, Benchmade Knife Company, and Seneca Real-Estate Group.

Prior to joining Moss Adams, Brett held the role of Global Vice President, HCM Transformation with SAP, HCM Practice Leader, Appirio/Knowledge Infusion, HCM Managing Consultant at Korn/Ferry, and Vice President of Human Resources and Talent Acquisition at Washington Mutual Bank.

Professional Affiliations

- Founding Member, Executive Council Network
- Member, Human Capital Institute
- Member, SHRM Executive Network

Education

- BS, pre-law, Fairmont State University
- Strategic Workforce Planning Certificate, Human Capital Institute
- Organization Design Certificate, University of Southern California

LeeAnn Stivers, *Senior Manager*

Professional Experience

LeeAnn has worked in the not-for-profit sector since 2004 and specializes in organizational change management, strategic planning, and business process optimization. She's skilled in technology implementation; budget development and maintenance; diversity, equity, and inclusion (DEI); governance; compliance; risk management; and human resources.

LeeAnn's areas of expertise also include executive and senior leadership coaching and development, executive and board engagement, and critical decision-making.

Professional Affiliations and Certifications

- Member, Project Management Institute
- Member, Grant Professionals Association
- Prosci's Change Management Certification, 2022

Education

- BS, human services and community development, Springfield College

Magdalena Tucker, *Manager*

Professional Experience

Magdalena has worked in organizational consulting, including human capital management, for over a decade and has extensive experience as an organizational development/change management consultant and instructional designer. Her experience includes advising clients across multiple industries on change management, communications strategy, and human resources information system (HRIS) implementations. She has also consulted on workforce analytics and workforce planning.

Magdalena focuses on helping her clients address change management, communications strategy, and the unique training development needs when implementing new programs. She works closely with stakeholders to align leadership development initiatives with learning and organizational performance goals. Her experience spans numerous HRIS programs including Workday and SuccessFactors.

Education

- BA, German literature and language; special honors curriculum with focus on psychology, Hunter College, CUNY
- MS, human resources education/organizational development, Fordham University

K.C. Fike, *Senior Manager*

Professional Experience

K.C. has worked in consultancy and data analytics since 2004. With his data and advanced analytics experience, he has led companies in developing analytic strategies, utilizing data to achieve business objectives, implementing business model changes that reduce costs, developing continuous auditing processes, and architecting data warehouses.

He combines strong leadership and effective project management to oversee complex initiatives and produce measurable results.

Professional Affiliations and Certifications

- Domo Professional Services Certification
- Domo Technical Certification
- AWS Big Data
- Certified Data Management Professional

Education

- BA, computer science, mathematics, Lewis and Clark College
- MBA, University of Utah

Morgan Mondello, *Staff*

Professional Experience

Morgan has worked with Moss Adams since 2021 and provides operational, accounting, and consulting services for clients in the public and private sectors. She works closely with her clients to provide ongoing support and problem resolution throughout each engagement.

Morgan takes a collaborative approach to understanding current business practices and identifying opportunities for improvement. She also helps clients define new processes and develop updated policies and procedures

Education

- BA, communication, University of Arizona

QUESTION 3: PAST EXPERIENCE

CITY OF GLENDALE, AZ

1

Key Contact: **Michael Kingery**, *Internal Audit Program Manager*
(623) 930-2103, mkingery@glendaleaz.com

Moss Adams was engaged by the City of Glendale to conduct a Process Review of its Workers' Compensation program within the Risk Management Division. Identifying the key priorities and needs of the Division, the review focused on three specific areas: 1) claims processing, 2) supplemental pay, and 3) regulatory reporting. Moss Adams undertook process walk-throughs for each of these areas and executed comprehensive testing to verify the completeness and accuracy of Workers' Compensation claim files and calculations related to supplemental pay.

CITY OF SANTA MONICA, CA

2

Key Contact: **Gigi Decavalles-Hughes**, *Chief Financial Officer*
(310) 458-8281, gigi.decavalles@smgov.net

The HR Department at the City of Santa Monica has faced significant challenges in its work environment, such as lacking standardized policies, limited technological support, changes in leadership, and recent job cuts due to COVID-19-related budget constraints. All these factors have highlighted the need for the HR Department to operate with maximum efficiency and effectiveness.

To address these issues, the City enlisted Moss Adams LLP to perform an organizational assessment of the HR function. The purpose was to identify areas where operations could be improved to enhance the quality of HR services provided throughout the City. This assessment involved interviews with employees, focus groups with different departments, reviews of documents, and studying best practices in similar cities across the nation. The study took place from February to August 2020 and encompassed four main phases: project initiation and management, gathering of information, analysis, and reporting.

CITY OF STOCKTON, CA

3

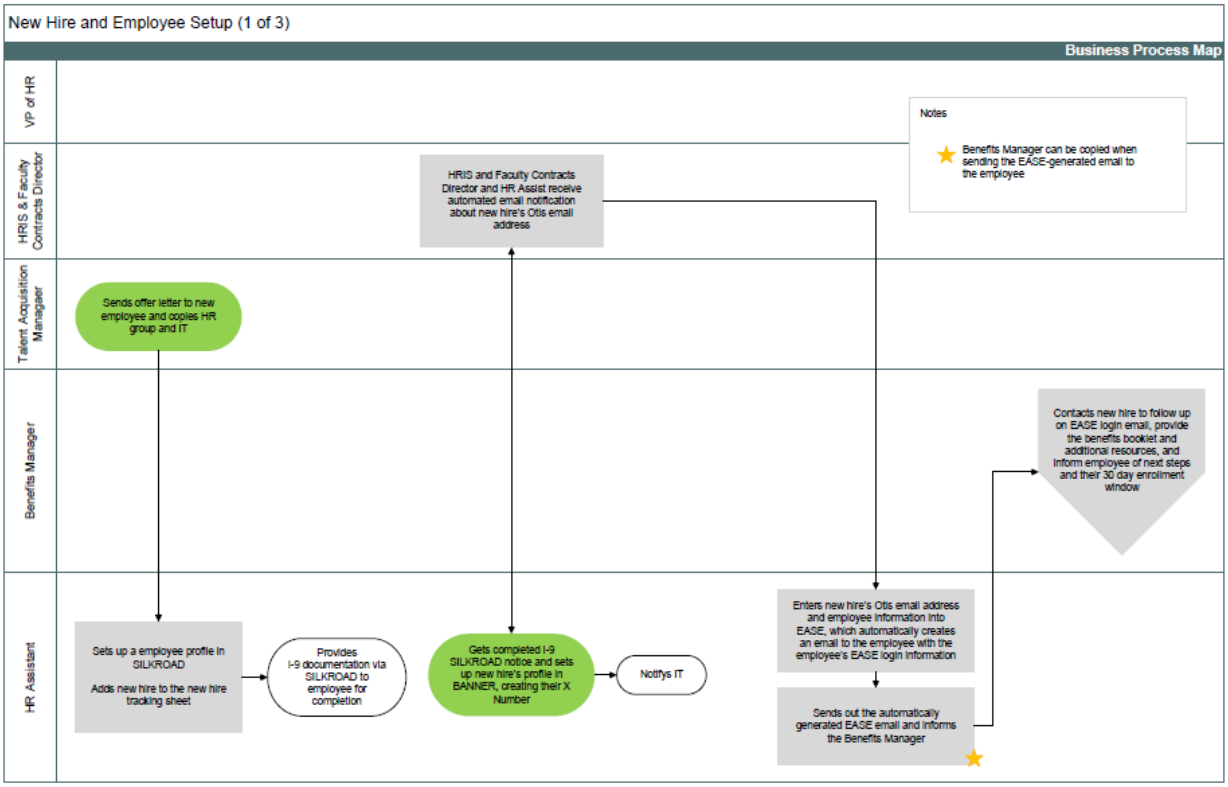
Key Contact: **Courtney Christy**, *Deputy City Manager*
(209) 937-8205, courtney.christy@stocktonca.gov

The HR Department of the City of Stockton provides comprehensive HR support to 1,725 full-time employees within the City. However, the Department faces challenges in achieving efficient operations, including frequent turnover among leadership and staff, isolated divisions, and reduced employee engagement. In addition to these internal challenges, the Department must also address new factors such as the hiring of a new Director, the introduction of a new ERP system, and the impacts of the COVID-19 pandemic.

To address these issues, the City enlisted Moss Adams to conduct an operational review of the HR Department. This review aimed to identify opportunities to enhance the Department's efficiency and effectiveness, ultimately improving the quality of HR services provided throughout the City. The assessment was based on a variety of sources, including interviews with employees and stakeholders, a survey of managers, examination of documents, and research into best practices employed by similar cities across the nation.

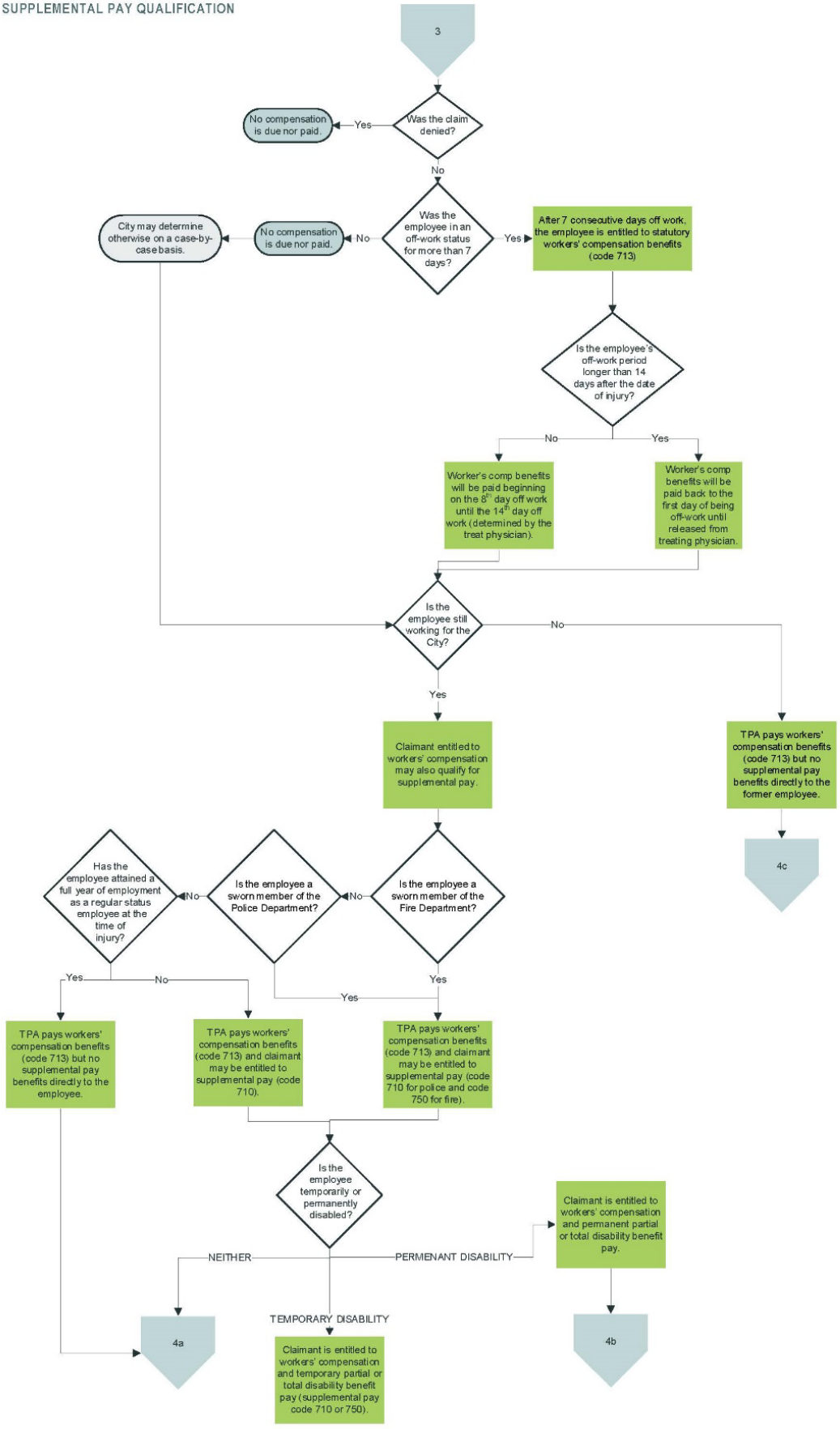
QUESTION 4: EXAMPLES

Business Process Mapping Report



Supplemental Pay		
2.	**Observation**	Administering supplemental pay is a time-consuming and resource-intensive manual process prone to error due to reliance on manual calculations.
	Recommendation	A. In the short term, the templates used by the Division to calculate supplemental pay should be simplified to reduce manual entry and calculations to the extent possible. B. In the long term, the Division should explore opportunities to automate the supplemental pay calculation within the Origami system. C. Implement standardized communication materials to the employee to support worker understandability of workers' compensation statutory and supplemental pay rates. D. Implement regular supplemental pay audits to serve as an additional internal control for accuracy.

SUPPLEMENTAL PAY QUALIFICATION



Needs Analysis/Requirements Gathering Report

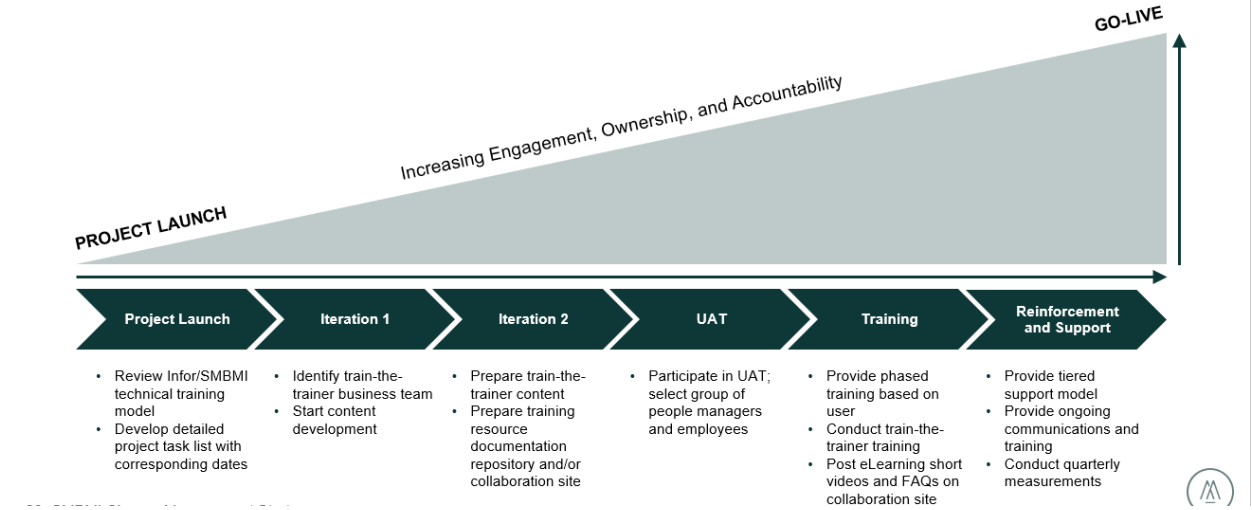
		Requirement Ranking			
#	Requirement Description	Must Have	Nice to Have	Future Consideration	Response
CHR 1	Ability to define personnel action types and reasons	x			
CHR 2	Ability to accommodate and track name changes, address changes, status changes, position changes, salary changes, location changes, payroll changes, benefit changes, supervisor changes and organizational changes	x			
CHR 3	Ability to handle and track an unlimited number of person types (e.g., active employees, inactive, beneficiaries, contingent workers).	x			
CHR 4	Ability to track EEO information for all personnel transactions.	x			
CHR 5	Ability to maintain the following personnel information: • Name • Name changes • Prefixes (i.e., Mr. Ms. Dr.) • Suffixes (i.e., Jr., III) • Multiple addresses • Social Security Number • Marital status • Employee number • birth date • gender • ethnicity	x			
CHR 6	Ability to store prior names for an employee and lookup history by old names or automatically connect with new name when looking up by name.	x			
CHR 7	Ability to enter multiple phone numbers/types and email addresses, pager numbers, etc.	x			
CHR 8	Ability to show and track military and veteran information	x			
CHR 9	Ability to show, enter, and report on educational information.	x			
CHR 10	Ability to enter/edit gender	x			
CHR 11	Ability to maintain multiple addresses/types (P.O. box, street address, work address)	x			
CHR 12	Ability to associate Full Time Equivalency (FTE) to an employee.	x			
CHR 13	Ability to track employee job data history, including total length of service.	x			
CHR 14	Ability to indicate an employee's supervisor	x			
CHR 15	Ability to specify union codes at the employee level.	x			3 Unions
CHR 16	Ability to report on all or user-defined personnel actions (e.g., upgrades, demotions).	x			
CHR 17	Ability to track and mange annual leave/PTO	x			
CHR 18	Ability to capture citizenship, country and visa information	x			25 Countries
CHR 19	Ability to track passport/visa information and expiration dates	x			
CHR 20	Ability to maintain driver's license data	x			
CHR 21	Ability to capture disability status and information at the employee level	x			
CHR 22	Ability to store various dates such as hire, service, acquisition, bridged and seniority dates	x			

Change Management Plan

Change Activities within the Framework

	Initiate	Drive	Enable	Activate
Sponsorship and Vision	• Define vision and scope of the change	• Develop the vision and change narrative	• Communicate the vision and expectations	• Communicate the vision and expectations
Stakeholder Engagement	• Host discovery sessions • Identify change champions • Identify change champion team	• Change champion team management and tasks	• Activate change network	• Activate change network
Change Support and Tooling	• Discovery summary • Conduct discovery ADKAR score • Change management strategy	• Detailed change management plan and tasks (incorporated into project plan) • Understanding survey and ADKAR score	• Readiness survey and ADKAR score	• Diagnose post-implementation gaps and issues • Closing retrospective
Communication	• Assess and support immediate communication needs • Identify SMBMI's communication preferred channels and collaboration spaces • Identify internal communication's lead	• Detailed communication plan and tasks • Identify SMBMI ongoing feedback opportunities • Lunch and learns	• Communication material development (not to exceed eight)	• Socialize and cascade message per communication plan
Resistance Management & Reinforcement	• Assess risk of change fatigue, capacity constraints, and conflicting initiatives and priorities through survey feedback	• Resistance management plan and feedback channels (if needed)	• Collect and integrate feedback	• Continue to collect and analyze feedback post launch • Adoption scorecard
Learning and Change Readiness	• Explore and learn more about Infor's training details and where we can supplement support • Define how SMBMI will implement train-the-trainer model	• Develop detailed training plan in partnership with Infor and SMBMI • Learning needs assessment	• Training material development and delivery • Train-the-trainer preparation	• Train-the-trainer delivery

Training Model



Project Plan and Proposed Approach

QUESTION 5: APPROACH TO THE SOFTWARE RFP DEVELOPMENT PROJECT

We understand the City is seeking a consultant to help analyze and document "map" current state processes, define key technology requirements, develop future state process and technology requirements, draft request for proposal (RFP), be the key subject matter expert through the selection, support as the project manager for the implementation, and provide change management and training to ensure process and technology adoption. The ideal Human Resource Management (HRM) platform would not only improve integration but enhance HR processes and also include a robust learning management system, serve as a centralized employee performance management system, and facilitate virtual spaces for employee groups and recognition.

Our team is well-equipped with the essential expertise and resources to conduct a comprehensive assessment of the current HR processes, collect software requirements, and put forth workable future processes. We are dedicated to actively involving the diverse stakeholders within the City and, as a result, drafting the necessary request for RFP for the program you've selected.

Throughout the software proposal evaluation phase, we will assume the role of subject matter experts, responsible for evaluating the proposals and engaging in negotiations with the chosen software vendor. Our goal is to ensure a seamless and efficient software implementation process. Below, we have outlined our comprehensive approach to providing these services.

Our Approach

Phase 1 **PROJECT MANAGEMENT AND PLANNING**

Project initiation (kick off) consists of collaborative discussion with the City's project team to align on the project scope, engagement approach, activities, deliverables, timeline/schedule, milestones, assumptions, and communications protocols. During the session we will review the project management and governance process, tools, communication of status frequency, and introduction of resources. To prepare for the engagement we will discuss and review the request of specific documentation and discuss discovery approach and identification of discovery stakeholders

Phase 2 **CURRENT STATE EVALUATION AND ANALYSIS**

We will undertake a series of discovery interviews involving the City's project team and functional experts who oversee HR policy and procedure, processes, and system/data management. This includes areas such as records management, onboarding, learning, performance management, social collaboration (virtual community spaces), and more. These interviews are aimed at understanding the City's current state.

During this phase we will review all existing documentation pertaining to the current state. This will include a review of HR current state process maps and information, HR policies and procedures, inventory and architecture of the HRM system platform, HR organization structure, HRM system support structure, HR/HRM system service delivery approach, and any other relevant information.

We will also perform an analysis of the information gathered from the discovery sessions and review the assets provided. This analysis aims to identify operational gaps and opportunities for enhancement and improvement.

Phase 3 FINDINGS DEVELOPMENT AND REVIEW

We will develop a written analysis of our discovery findings and gap analysis based on the current state of the City's HR policies, procedures, processes, and technology. Upon completion of the finding's development, we will review the findings analysis with the HR Division executives.

Phase 4 RECOMMENDATIONS DEVELOPMENT AND REVIEW

Based on the detailed findings, we will develop the written recommendations highlighting opportunities/decisions to improve current policy, procedure, and process efficiency. We will also begin to outline the initial HRM system requirements. These recommendations and decisions will be key input into process design and requirements gathering. Upon completion of the recommendations development, we will review the findings analysis with the HR Division executives.

Phase 5 PROCESS DESIGN (MAPPING) AND DETAILED REQUIREMENTS

We will conduct a series of working sessions with the City's project team and functional experts to design (map) the current state processes. During these sessions we will gather requirements to support the HRM system.

Upon completion of the initial process mapping, we will conduct a series of review sessions to finalize the process maps and HRMS requirements. The system requirements will be defined and categorized based on "must have" and "nice to have" to make sure all requirements are being considered. The output of this session will be a final set of process maps and requirements to be used in the Fit/Gap analysis and Request for Proposal.

Phase 6 SYSTEM SELECTION (REQUEST FOR PROPOSAL AND SELECTION)

We will conduct a series of sessions with the City's project team to develop and finalize the Human Resource Management System RFP. Upon completion, the RFP will be shared with the City's procurement team for review and finalization. We will partner with the City's project team to conduct an initial analysis of the vendor responses to down select the final three to five solutions. The output of these sessions will allow the City to down select the top technology vendors for demonstration. To maintain alignment with the City's timing expectations, all prior phases including RFP development will be completed during the fourth quarter of 2023 or the first quarter of 2024.

We will support the City's project team to develop a demo script and scoring structure to ensure consistency and fairness in the process. During the demonstrations, we will guide and oversee the sessions to make sure that the vendors are following the expected standards, timing, and other requirements. Upon completion of the demonstrations, we will gather all the scoring forms to analyze and provide the final scoring results. The output of the demonstrations will provide The City's project team with the best solution to meet its current and future needs.

We will support the City's project and procurement team in the review, analysis, and negotiation of the final HRM system providers contracts and pricing.

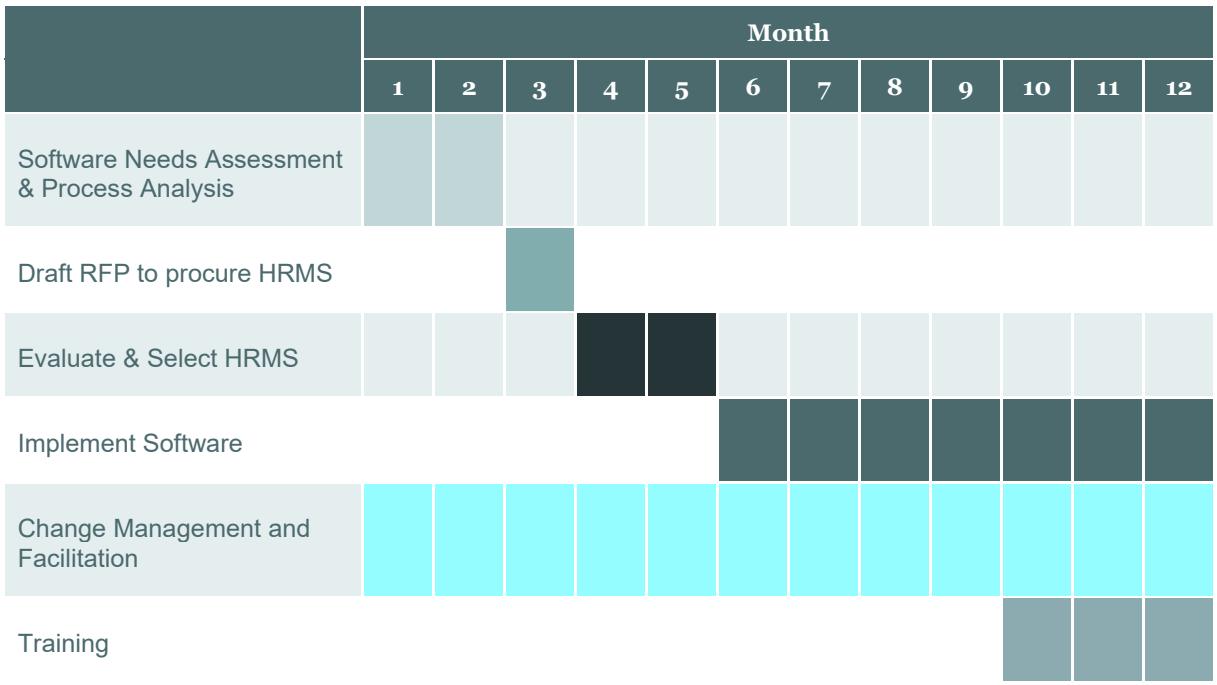
DELIVERABLES
• Timeline for the software vendor selection process • Strategic communications plan • Documentation of current business process workflows with visual process maps • HRM system requirements document • RFP to be issued by the City • Recommended scoring criteria for evaluating software suggested scripts for product demonstrations

QUESTION 6: APPROACH TO THE SOFTWARE IMPLEMENTATION PROJECT

Following the software platform selection, we're prepared to then serve as the City's Software Implementation Project Manager. Our role will involve close collaboration with both the City Project Team and the software vendor's Implementation Team. This role will include the traditional project management support, incorporating project coordination, milestone management, progress reporting, governance, decision, tracking, and vendor management. It will also bring expertise to the City on the implementation of the HRM system, including process and configuration, role-based security, integration strategy, data management / dictionary, and areas to streamline transactions through automation or process modernization. We will guide the project towards achieving a well-defined timeline, while also offering a comprehensive change management program and plans to ensure stakeholders are informed and engaged throughout the process. Additionally, we will work with the software vendor and City Project Team to create training materials and coordinate training sessions for City employees on the newly adopted software and the associated processes developed.

Timeline

We anticipate that it will take 8 to 12 months to support the delivery of the pre-implementation and implementation services. Note, these dates may change based on increased project complexity, resource availability, selected system, etc. As detailed below, the implementation process will include several important milestones:



Milestone	Description
1	Project Readiness and Planning
2	Solution Design and Integration Planning
3	Solution Configuration and Review
4:	Data Migration, Integration, Solution Testing, and Cutover Planning
5	User Acceptance Testing, Cutover, and Go-Live

During the project implementation, we have the following expectations from the City:

- Executive sponsorship
- HMS strategy and plan
- Technical training (for implementation)
- Governance model and management
- Resource assignment and management
- Manage competing priorities'
- Data readiness, cleansing, and security
- Integration strategy
- Testing strategy
- Technical architecture, including third party management
- Change management
- Technical support model and service delivery

Our Approach

Phase 1 — SYSTEM IMPLEMENTATION PLANNING

In cooperation with the City and the chosen software vendor, we will develop a listing of key processes and functions, that will be operational upon completion of the implementation period, we will provide a clear implementation timeline detailing the rollout of the purchased software modules.

Phase 2 — PROJECT MANAGEMENT

Working with the City Project Team and the selected software vendor, we will create a comprehensive change management plan for stakeholders throughout the implementation process (Please see the Project Change Management Facilitation details in Question 7). We will also develop visual process maps illustrating workflows associated with each of the purchased modules as well as a listing of data fields and selections available in the new modules. Further, we will develop an integration data map to illustrate collection of existing City data and importing the data into new databases. A data dictionary with descriptions of data fields and information will be provided, as well as In-depth schematic illustrating the complete structure of data tables and connections used within the software platform.

Phase 3 — TRAINING PROCESS

In collaboration with the chosen software vendor we will create a comprehensive training plan. This plan will include developing training materials for staff and end users, including any process or configuration

documentation. These selection of included materials will be determined based on the software platform selection, available vendor-provided training and specific client needs.

DELIVERABLES	
	• Implementation timeline • List of key processes and functions • Comprehensive change management plan • Visual process maps • Compilation of data fields in the new modules • Detailed data map of existing City data and importing it into the new databases • Comprehensive data dictionary • In-depth schematic illustrating the complete structure of data tables and connections used within the software platform • Training plan • Training materials

QUESTION 7: CHANGE MANAGEMENT & FACILITATION

Achieving successful change management requires a combination of knowledge, discipline, purposeful planning, and effective leadership. At Moss Adams, our approach to change management is centered on people. We focus on guiding leaders, teams, and individuals through transitions using our focused change management framework:

INITIATE	By working closely with our clients, we assist in shaping and formalizing the change vision. To ensure a successful transformation, it's essential to have a thorough grasp of all stakeholder groups, and we'll evaluate your team's preparedness for the change. We also assess processes and tools to ensure seamless integration into the change management plan. Additionally, performance indicators for adoption and utilization, as defined by project leadership, are incorporated.
DRIVE	Our team develops customized, tactical change management plans to empower and actively involve stakeholders. These plans encompass the project's sponsorship vision, stakeholder engagement, communication strategies, resistance management, and change readiness. We also work alongside leadership teams to develop success metrics that align seamlessly with our client’s objectives.
ENABLE	We put change management plans into action, assessing the willingness to embrace the change, handling and escalating any resistance issues, and utilizing stakeholder groups and individuals to facilitate a successful transition. We also create personalized training plans that seamlessly integrate change management and adoption readiness approaches, while also supplying our clients with an adoption scorecard to track progress.
ACTIVATE	We implement established success metrics to outline the advantages of the change, that include best practices for change adoption and collaborate with stakeholders to acknowledge the journey.

Our team provides a framework to guide the change path, build resilience, and overcome resistance. We help our clients become more effective, efficient, and transparent in their changes efforts which ultimately leads to increased stakeholder engagement and adoption.

Approach

Phase 1 **DISCOVERY**

We will conduct a series of activities to discover more about the City's readiness for change. These could include discovery sessions, focus groups, and pulse surveys. Through these, we will identify the specific requirements of stakeholders in relation to how they will engage with and embrace the upcoming changes.

We will also conduct preliminary explorations, such as asset reviews, to establish the groundwork for stakeholder analysis and determining the potential impacts. This analysis will be crucial in shaping our approach to creating actionable plans for facilitating the adoption of the changes.

Phase 2 **CHANGE MANAGEMENT PLAN**

Here, we will formulate a comprehensive change management strategy and a set of plans crafted to support the success of these initiatives. Throughout the planning phase, we will establish sponsorship, change champion, communication, engagement, and training plans. This will ensure that we guide the organization effectively, equipped with the necessary tools, to facilitate the required level of adoption.

Phase 3 **TRAINING**

In the last phase, we will create training materials, guides, FAQs, videos, and other resources to aid in the effective use and integration of HR changes in policies, procedures, processes, and technology.

DELIVERABLES	
	• Readiness assessment • Comprehensive change management plan • Stakeholder analysis • Change management performance metrics • Change communication plan • Training plan • Training documentation and materials • Adoption scorecard

Exceptions

City of Madison
Exceptions for RFP 12022-0-2023-BP

This Proposal is contingent upon completion of the Moss Adams new client acceptance process and execution of a mutually acceptable contract. With regard to the terms and conditions set forth in the RFP, Appendix A Standard Terms and Conditions ("App A"), and Appendix B Contract for Purchase of Services ("App. B") , Moss Adams suggests: (1) deleting inapplicable provisions (including all purchase of goods terms and (App. A §§8, 14, 16, 18, 22, 27, 30, 34 ,App. B §29); (2) providing for representations in lieu of warranties (throughout); (3) clarifying City's ownership of final deliverables and Moss Adams' ownership (and retention) of working papers, intellectual property, works in progress, and general skills and know-how (App. A §15, App. B §28); (4) reviewing and incorporating, as an Exhibit, applicable policies (App. A §§20, 33(a)(b), App. B §§13, 31); (5) focusing and clarifying indemnification (App. A §23, App. B §26); (6) clarifying insurance requirements including non-ownership of vehicles, notification only goes to primary insured, and additional insureds added by blanket endorsement (App. A §24); addressing acceptance and satisfaction requirements to protect auditor independence (throughout); (7) access and audits focused on information pertaining to fees and expenses charged and access shall not include facilities or systems housing confidential information of Moss Adams or Moss Adams' other clients (App. A §29, App. B §19); (8) clarifying remedies available (App. B §24 A (6)); (9) providing for mutuality in termination rights (App. B §25).

We have successfully signed professional services agreements with thousands of clients, including many cities and municipalities, and we commit to working in good faith to successfully negotiate a mutually agreeable contract on a timely basis should we be awarded this work.

Form A: Signature Affidavit

RFP #: 12022-0-2023-BP Human Resource & Learning Management System Advisory and Implementation Services

This form must be returned with your response.

In signing Proposals, we certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise take any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit Proposals, that Proposals have been independently arrived at, without collusion with any other Proposers, competitor or potential competitor; that Proposals have not been knowingly disclosed prior to the opening of Proposals to any other Proposers or competitor; that the above statement is accurate under penalty of perjury.

The undersigned, submitting this Proposals, hereby agrees with all the terms, conditions, and specifications required by the City in this Request for Proposals, declares that the attached Proposals and pricing are in conformity therewith, and attests to the truthfulness of all submissions in response to this solicitation.

Proposers shall provide the information requested below. Include the legal name of the Proposers and signature of the person(s) legally authorized to bind the Proposers to a contract.

Moss Adams LLP

COMPANY NAME

SIGNATURE

9/1/2023

DATE

Colleen Rozillis, Partner

PRINT NAME OF PERSON SIGNING

Form B: Receipt of Forms and Submittal Checklist

RFP #: 12022-0-2023-BP Human Resource & Learning Management System Advisory and Implementation Services

This form must be returned with your response.

Proposers hereby acknowledge the receipt and/or submittal of the following forms:

Forms	Initial to Acknowledge SUBMITTAL	Initial to Acknowledge RECEIPT
Description of Services/Commodities	N/A	CR
Form A: Signature Affidavit	CR	CR
Form B: Receipt of Forms and Submittal Checklist	CR	CR
Form C: Vendor Profile	CR	CR
Form D: Cost Proposal	CR	CR
Form E: References	CR	CR
Appendix A: Standard Terms & Conditions	N/A	CR
Appendix B: Contract for Purchase of Services	N/A	CR
Addendum # 1 (8/11/2023)	N/A	CR
Addendum #	N/A	
Addendum #	N/A	
Addendum #	N/A	

Moss Adams LLP

COMPANY NAME

Form C: Vendor Profile

RFP #: 12022-0-2023-BP Human Resource & Learning Management System Advisory and Implementation Services

This form must be returned with your response.

COMPANY INFORMATION

COMPANY NAME (Make sure to use your complete, legal company name.) Moss Adams LLP			
FEIN 91-0189318	(If FEIN is not applicable, SSN collected upon award)		
CONTACT NAME (Able to answer questions about proposal.) Colleen Rozillis	TITLE Partner		
TELEPHONE NUMBER (206) 302-6795	FAX NUMBER (206) 622-9975		
EMAIL colleen.rozillis@mossadams.com			
ADDRESS 999 Third Avenue Suite 2800	CITY Seattle	STATE WA	ZIP 98104-4057

AFFIRMATIVE ACTION CONTACT

If the selected contractor employs 15 or more employees and does aggregate annual business with the City of $50,000 or more, the contractor will be required to file an Affirmative Action Plan and comply with the City of Madison Affirmative Action Ordinance, Section 39.02(9)(e), within thirty (30) days contract signature. Vendors who believe they are exempt based on number of employees or annual aggregate business must file a request for exemption. Link to information and applicable forms: https://www.cityofmadison.com/civil-rights/contract-compliance/vendors-suppliers

CONTACT NAME Colleen Rozillis	TITLE Partner		
TELEPHONE NUMBER (206) 302-6795	FAX NUMBER (206) 622-9975		
EMAIL colleen.rozillis@mossadams.com			
ADDRESS 999 Third Avenue Suite 2800	CITY Seattle	STATE WA	ZIP 98104-4057

ORDERS/BILLING CONTACT

Address where City purchase orders/contracts are to be mailed and person the department contacts concerning orders and billing.

CONTACT NAME Colleen Rozillis	TITLE Partner		
TELEPHONE NUMBER (206) 302-6795	FAX NUMBER (206) 622-9975		
EMAIL colleen.rozillis@mossadams.com			
ADDRESS 999 Third Avenue Suite 2800	CITY Seattle	STATE WA	ZIP 98104-4057

LOCAL VENDOR STATUS

The City of Madison has adopted a local preference purchasing policy granting a scoring preference to local suppliers. Only suppliers registered as of the bid's due date will receive preference. Learn more and register at the City of Madison website.

CHECK ONLY ONE:

☐ **Yes,** we are a local vendor ***and*** have registered on the City of Madison website under the following category:_____ www.cityofmadison.com/business/localPurchasing

☑ **No,** we are not a local vendor or have not registered.

Form E: References

RFP #: 12022-0-2023-BP Human Resource & Learning Management System Advisory and Implementation Services

This form must be returned with your response.

Please list three references that are **NOT** from the City of Madison. If you wish to highlight any additional work experience for the City of Madison, please list it on a separate page.

REFERENCE #1 – CLIENT INFORMATION			
COMPANY NAME City of Glendale, AZ	CONTACT NAME Michael Kingery, Internal Audit Program Manager		
ADDRESS 5850 West Glendale Avenue	CITY Glendale	STATE AZ	ZIP 85031
TELEPHONE NUMBER (623) 930-2103	FAX NUMBER		
EMAIL mkingery@glendaleaz.com			
CONTRACT PERIOD 2020 to present	YEAR COMPLETED ongoing	TOTAL COST $50,000 to $150,000 annually	
DESCRIPTION OF THE PERFORMED WORK Moss Adams was engaged by the City of Glendale to conduct a Process Review of its Workers' Compensation program within the Risk Management Division. Identifying the key priorities and needs of the Division, the review focused on three specific areas: 1) claims processing, 2) supplemental pay, and 3) regulatory reporting. Moss Adams undertook process walk-throughs for each of these areas and executed comprehensive testing to verify the completeness and accuracy of Workers' Compensation claim files and calculations related to supplemental pay.			

REFERENCE #2 – CLIENT INFORMATION			
COMPANY NAME City of Santa Monica, CA	CONTACT NAME Gigi Decavalles-Hughes, Chief Financial Officer		
ADDRESS 1685 Main Street	CITY Santa Monica	STATE CA	ZIP 90401
TELEPHONE NUMBER (310) 458-8281	FAX NUMBER		
EMAIL gigi.decavalles@smgov.net			
CONTRACT PERIOD 2014 to present	YEAR COMPLETED ongoing	TOTAL COST $50,000 to $150,000 annually	
DESCRIPTION OF THE PERFORMED WORK The City enlisted Moss Adams LLP to perform an organizational assessment of the HR function. The purpose was to identify areas where operations could be improved to enhance the quality of HR services provided throughout the City. This assessment involved interviews with employees, focus groups with different departments, reviews of documents, and studying best practices in similar cities across the nation. The study took place from February to August 2020 and encompassed four main phases: project initiation and management, gathering of information, analysis, and reporting.			

REFERENCE #3 – CLIENT INFORMATION			
COMPANY NAME City of Stockton, CA	CONTACT NAME Courtney Christy, Deputy City Manager		
ADDRESS 425 N El Dorado Street	CITY Stockton	STATE CA	ZIP 95202
TELEPHONE NUMBER (209) 937-8205	FAX NUMBER		
EMAIL courtney.christy@stocktonca.gov			
CONTRACT PERIOD 2013 to present	YEAR COMPLETED ongoing	TOTAL COST $300,000 annually	
DESCRIPTION OF THE PERFORMED WORK The City enlisted Moss Adams to conduct an operational review of the HR Department. This review aimed to identify opportunities to enhance the Department's efficiency and effectiveness, ultimately improving the quality of HR services provided throughout the City. The assessment was based on a variety of sources, including interviews with employees and stakeholders, a survey of managers, examination of documents, and research into best practices employed by similar cities across the nation.			