



CITY OF MENIFEE

SUBJECT: Agreement with Info-Tech Research Group Service for Information Technology Department Research and Advisory Services

MEETING DATE: August 16, 2023

TO: Mayor and City Council

PREPARED BY: Antonio Chavez, Management Analyst I

REVIEWED BY: Ron Puccinelli, Chief Information Officer

APPROVED BY: Armando G. Villa, City Manager

RECOMMENDED ACTION

1. Approve and authorize the City Manager to execute an Agreement with Info-Tech Research Group for Information Technology research and advisory services for three years, extending through Fiscal Year 2025/2026 for a total amount not-to-exceed \$192,776; and
2. Authorize the purchase to be made under the Cooperative Purchasing (piggyback) Agreement as permitted under the Meniffee Municipal Code Section 3.12.070(6) through California Multiple Award Schedules (CMAS) No 3-19-70-3685A.

DISCUSSION

As the Information Technology (IT) Department continues to grow and expand, there is a need to seek out advisory services to ensure that the department continues to manage day-to-day operations efficiently and effectively, as well as prepare for future threats, operations, expansions, and continued growth in the years to come. Info-Tech Research Group ("Info-Tech") is a globally recognized research and advisory firm specializing in providing practical IT research, actionable advice, and tools to help organizations optimize their technology resources. They are the world's fastest growing information technology research and advisory company, which serves over 30,000 IT professionals. They have a diverse clientele ranging from government bodies to Fortune 500 companies with a proven track record of delivering high-quality, valuable resources and support.

In addition to providing draft policies and procedures which the IT Department currently uses extensively, an Info-Tech membership provides best practice research across five key areas

related to IT operations. They provide tools and templates, step-by-step methodologies, benchmarking and diagnostic programs, training and executive coaching, and insights and advice from 30,000 peers.

The IT Department aims to streamline and optimize our IT functions, improve efficiency, and bolster cybersecurity across all City departments. Given the continuous evolution in the field of technology, external research and advisory support from an organization like Info-Tech is pivotal to remain updated and proactive.

A membership, if the Info-Tech Agreement is approved, includes access for up to four (4) people with the following access levels:

- **Counselor Membership**
 - For the Chief Information Officer, this includes all the benefits of Team, Reference, and Workshop Memberships listed below as well as \$10 Million per year in price benchmarking and technology contract negotiation support services, two dedicated working sessions, and one-on-one support with a seasoned IT Executive.
- **Team Membership**
 - For two managers/supervisors, this includes all the benefits noted below in the Reference and Workshop Memberships plus project plan blueprints, Info-Tech Academy training courses, and on-line leadership training.
- **Reference Membership**
 - For one additional staff member, this includes all the benefits noted below in the Workshop Membership as well as Info-Tech Academy training courses, software selection content, tools, and template library.
- **Workshop Membership**
 - The Department has the option to engage Info-Tech staff to assist with a deep-dive on a specific topic and development of strategies, policies, or assessments. The Workshop Membership format was previously used by the IT Department for the development of the City's IT Strategic Plan.

These membership services in the Info-Tech Agreement will help our IT Department manage and improve core IT processes, complete technology projects faster and more effectively, train and develop the IT leadership team, build a data-driven IT strategy, and understand and capitalize on industry insights and trends. With this membership, the IT Department will have access to a library of best practice tools, templates, training materials, and step-by-step methodologies that over the years have been proven to accelerate projects and transform IT departments.

Benefits of an Info-Tech Membership

- Strategic Insights
 - Info-Tech provides access to in-depth research papers, benchmarks, and trend analyses that can help us make strategic decisions about our IT infrastructure, software adoption, digital transformation, and cybersecurity.
- Practical Tools and Templates
 - Info-Tech's vast collection of templates, policy documents, and toolkits can streamline our processes, save time, and increase compliance.
- Expert Advisory
 - Info-Tech's experienced consultants provide personalized advice and guidance that can help us effectively implement IT strategies, mitigate potential risks, and resolve complex issues. In particular, the Counselor Membership which includes access to an IT Executive is particularly beneficial for the Chief Information Officer in the development of policies, priority setting, and other high-level departmental goals.
- Continuous Learning
 - The membership includes webinars, seminars, and training sessions that can enhance our team's knowledge and skills, keeping us abreast with the latest trends and best practices in the IT world.

Info-Tech provides their services through a competitively bid State of California Multiple Award Schedule (CMAS) Contract (No. 3-19-70-3685A). Purchases subject to a CMAS agreement require a contractor such as Info-Tech and agencies such as the City to comply with the extensive terms and conditions of the CMAS. These CMAS agreements, which the City regularly uses when available, expedite purchases and ensure the best available pricing that the City would not otherwise receive. Therefore, it is recommended that the City Council approve and authorize the City Manager to execute the agreement with Info-Tech and issue a Purchase Order to Info-Tech based on the agreement. Cooperative purchases are allowed pursuant to the Menifee Municipal Code Section 3.12.070(6).

STRATEGIC PLAN OBJECTIVE

Regular City Business

FISCAL IMPACT

The total fiscal impact of the proposed three-year agreement with Info-Tech Research Group would be \$192,776. The annual amounts listed in Table 1: Annual Costs below represent a not-to exceed (i.e., maximum) amount, assuming every possible workshop and membership option is used. Should the City use the full annual membership amounts, corresponding budget transfers from Account No. 110-4115-52211 (Training) would be transferred in each respective year to cover the total costs.

Table 1: Annual Costs

Term Number	Fiscal Year	Memberships & Dues 110-4115-52200	Training 110-4115-52211	Annual Cost
1	2023/2024	\$32,000	\$19,496.21	\$51,496.21
2	2024/2025	\$33,600	\$37,039.79	\$70,639.79
3	2025/2026	TBD	TBD	\$70,639.79
	TOTAL:	\$65,600	\$56,536	\$192,775.79

The increase from year one to year two is due to a discount in the amount of \$19,143.58 offered for the first year of the agreement. Otherwise, there is no increase in annual costs. Info-Tech will invoice the City once annually for the cost of services not to exceed \$51,496.21 for year one, \$70,639.79 for year two, and \$70,639.79 for year three.

Funding for the services identified in the proposed agreement is provided for in the adopted FY 2023/2024 and FY 2024/2025 operating budget, within Account No. 110-4115-52200 (Membership & Dues) and Account No. 100-4115-52211 (Training). Funding for FY 2025/2026 would be budgeted as part of that year's budget. The adopted budgets for FY 2023/2024 and FY 2024/2025 include an allocation for this purpose so no additional appropriation is needed.

ATTACHMENTS

1. InfoTech Research Group Service Proposal/Agreement
2. CMAS No. 3-19-70-3685A
3. CMAS No. 3-19-70-3685A Terms and Conditions