



Due Process, Due Diligence: A Real Life Experience

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Agenda

- Background
- The process we went through
- What was unique about Prairie Village
- Was it worth it?
- Pointers/lessons learned

Background

- Beginning: 2007 Budget Process
 - City Administrator said, “We can’t do another budget that way. Find some budget software.”
- Looked at CPM software and developed a proposal for the 2008 Budget
 - Council supportive of the concept = \$
- New City Administrator = New Vision
 - New scope: Replace entire financial software system
 - Recognized we needed help if going to be successful

Process

- Council supportive of the scope change
- Needs Analysis
 - All departments met with Barry and discussed needs
- Scope Increase
 - Include licensing and permitting as options because tied into current system
 - Include work orders as an option – current vendor no longer supporting
 - Include code enforcement as an option – wanted to move away from home grown access database

Process

- Barry drafted the RFP
- Barry and his staff analyzed the responses received and recommended which vendors to invite for demos
- City Administrator appointed a cross-functional evaluation team – the “Marthas”
- Held demos at PV City Hall
 - All day demos, one week
 - Demo script sent to vendor in advance
 - Daily wrap up sessions with vendor and without vendor

Process

- Narrowed to 2 vendors – consensus of the eval team
- Customer Reference Checks
 - Called the person listed in the RFP response
 - Went one layer deeper – counterparts talking to counterparts
- Site Visits/Corporate HQ Visits
 - A 6-day, coast-to-coast journey
- One vendor clearly stood out as the right choice

What was unique about Prairie Village?

- We entered the market at a time of technology transition – the cusp of new technology
 - Leap of faith with any vendor because none of them had all of their product line in the new technology
- Who drove our decision – we had some “tail wagging the dog” moments
 - On-line payments/processes
 - Permits vs Financials

What was unique about Prairie Village?

- We spent a lot of time up front working out every detail that we could
 - Several month process
 - Gaps identified during the eval process and verbal commitments put in writing
 - Business Process Study
 - All departments involved
 - All departments reviewed/revised document

Was it worth it?

- YES
- “Adequate Due Process” what does that mean?
 - Methodical, objective way to cover all the bases and make a decision
- What does “Due Diligence” mean?
 - Did I do everything I could to ensure a good outcome?
 - “kick the tires”
- Defensible

Was it worth it?

- Site Visits/Corporate HQ Visits
 - Should we/shouldn't we?
 - Is this the time to take a trip – what will the Council/public think?
 - Best money ever spent
 - What you can't see in a phone call
 - Face to face with current client
 - What the corporation is really like
 - See more than the sales guy

Pointers/Lessons Learned

- Inclusive process – the way to go
 - Not necessarily the fastest or least frustrating
- Keep eye on scope
- Go to the next layer on customer references
- Remember your focus – why did we get into this in the first place?
- Plan for it to take longer than you want and cost more than you think

Questions?

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