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555 Lakeshore Blvd. Painesville Twp., OH 44077

## RFP Comprehensive IT Strategic Plan Pre-Proposal Meeting Minutes July 27, 2022

Attached to the meeting minutes is the attendance list from the meeting.

### Background on Laketrans and our IT infrastructure

- Laketrans's IT Department was formed in 2020. It is a department of one.
- Transit software and hardware is unique to the transit industry and is proprietary.
- Laketrans has invested over a million dollars in hardware and software to operate our transit system.
- Cornerstone IT has been contracted as the MSP for many years.
- Each bus is effectively a server room and requires hands on for upgrades. Remote is not feasible.
- Laketrans has four remote locations.
- Laketrans operates niche transit hardware and software, proprietary apps, and Microsoft products. Includes SQL server and mirrored servers.
- There are opportunities to improve network security.

### About the IT Strategic Plan

- Laketrans has never performed an IT Strategic Plan before; we don't know what we don't know.
- Develop a list of action items for short term and long term implementation. Identify low hanging fruit.
- Identify best practices.
- Ground up review of IT systems and the IT Department.
- We are keeping an open mind to the outcomes of this plan and are looking the vendors to provide their expertise and knowledge to help improve Laketrans's IT.
- Identify the number of employees to effectively run IT for Laketrans. Identify how contractors can or should be utilized to run IT for Laketrans.
- The main deliverable is a comprehensive product that will spell out 1 year, 3 year and 5 year goals, strategies, and upgrades.
- Present the comprehensive plan to Laketrans's Board of Trustees.

There is no DBE goal associated with this project. If there are subcontracting opportunities on this contract, vendors are expected to demonstrate good faith efforts to hire DBEs. Laketrans's agency-wide DBE goal is 5%.

Project budget is \$125,000



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Annual IT Budget is roughly \$500,000 in annual license fees for transit specific software and \$500,000 for IT contracts, telecommunications, and hardware. Laketrans also receives grant funding for hardware.

This contract will be funded using grant funds from the Federal Transit Administration.

Address all questions in writing to [aaaby@laketrans.com](mailto:aaaby@laketrans.com) so that all answers can be received the pool of potential proposers.

Attachments A – I are mandatory and a condition of responsiveness. Do not hesitate to reach out with questions about how to complete the forms.

Questions:

Q1. Is there an inventory of hardware, software etc. to cut down on the winning vendor's time spend on information gathering?

A1. Yes, Cornerstone MSP has a list of all the licenses, servers, etc. Hardware is listed in another report that can and will be provided.

Q2. Is evaluation of software included in the scope?

A2. Both yes and no. Laketrans generally uses transit industry specific software in managing our operations. A lot of money has been invested in these technologies. The vendor will not be expected to evaluate transit specific software for upgrade or replacement as we are not interested in making changes. However, there are other aspects of Laketrans's business that could benefit from software improvements such as document management, ERM, asset management.

Q3. Clarify the last bullet point in Section 3.2 "Identify workflow processes to ensure efficient service management and delivery to business units and the public."

A3. This section refers to non-transit related processes such as document management. Laketrans's proprietary front end hardware/software integrates on the backend with IT industry standards such as SQL server.

Q4. Is there a roadmap?



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A4. Not a formal document. There are proposed upgrades such as implementing wifi on buses, there are a lot of needs and desires, but we need this strategic plan to help organize and rank the projects.

Q5. Talk more about wifi on buses.

A5. Currently, Laketrans does not have customer facing wifi on the buses. It is something that we are investigating for feasibility. Additionally, we would like to implement wifi on the buses so when they return to the garage there is seamless integration with our network for downloading data and information from bus operations and analytics.

Q6. Is there a timeline for the completion of the IT Strategic Plan.

A6. We would like the vendors to propose a timeline for completion in their proposal.



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**STRATEGIC PLANNING SERVICES  
 PRE-PROPOSAL MEETING  
 7/27/2022**

**Print Information or Attach Business Card**

Company	
Attendee's Name/Title	
Address	
City, State, Zip	
Phone	
E-mail	
Company	
Attendee's Name/Title	
Address	
City, State, Zip	
Phone	
E-mail	



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**IT STRATEGIC PLANNING SERVICES  
PRE-PROPOSAL MEETING  
7/27/2022**

**Print Information or Attach Business Card**

Company	Concord Technology Group
Attendee's Name/Title	Brian Tommasone Service Manager
Address	7890 Forest Valley Drive
City, State, Zip	Concord Twp, OH 44077
Phone	(440) 210-3200
E-mail	brian@thectgllc.com
Company	
Attendee's Name/Title	
Address	
City, State, Zip	
Phone	
E-mail	

## **Andrea Aaby**

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**From:** Masson, Tom <Tom.Masson@xerox.com>  
**Sent:** Wednesday, July 27, 2022 11:11 AM  
**To:** Andrea Aaby  
**Subject:** RFP - COMPREHENSIVE INFORMATION TECHNOLOGY STRATEGIC PLAN - Contact Info

Good morning,

As requested during the Zoom event, below is my contact information for ongoing updates and communication.

Thanks,

**Tom Masson**  
**Solution Architect**  
**IT Managed Services**

Xerox Corporation  
Las Vegas, NV  
p 702-419-3664

## Andrea Aaby

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**From:** Andy Wakefield <wakefield@intueor.com>  
**Sent:** Wednesday, July 27, 2022 11:06 AM  
**To:** Andrea Aaby  
**Cc:** Mike Bown  
**Subject:** Laketrans IT Strategic Plan - Preproposal Attendee

Hello,

Attending from Intueor Consulting, Inc. are the following:

Andy Wakefield – Director, Transit Operations Management Consulting Practice  
Mike Bown – Senior Consultant

Intueor Consulting, Inc., is a business strategy and technology consulting firm dedicated to enabling public and private sector organizations to create and maximize business value. Intueor provides independent and objective business improvement and project management services in the areas of strategic planning, organizational structuring, business operations, business process re-engineering, and technology planning/deployment.

[www.intueor.com](http://www.intueor.com)

Regards,  
Andy Wakefield, PMP



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## Andrea Aaby

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**From:** Emily Whicker <Emily.Whicker@tncg.com>  
**Sent:** Wednesday, July 27, 2022 11:05 AM  
**To:** Andrea Aaby  
**Subject:** RFP - Comprehensive IT Strategic Plan Pre-Proposal

Hi Ms. Aaby,

Please know that True North Consulting Group attended the Pre-Proposal Conference.

**Emily Whicker**  
**True North Consulting Group**

Thanks,

**Emily Whicker**  
True North Consulting Group  
Inside Sales Consultant  
O: 254.266.6424 | M: 254.716.0423  
[Click to IM Me](#) | [emily.whicker@tncg.com](mailto:emily.whicker@tncg.com)



*Exceptional service is our goal! Please let us know how we are doing [here](#).*

## Andrea Aaby

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**From:** pcroswell@croswell-schulte.com  
**Sent:** Wednesday, July 27, 2022 11:05 AM  
**To:** Andrea Aaby  
**Subject:** Participation in IT Plan RFP Pre-proposal meeting

Andrea:

This is to confirm my remote participation a the pre-bid meeting.

--Pete

Peter Croswell, PMP, GISP, CMS

President

Croswell-Schulte IT Consultants

406 Winners Circle

Frankfort, KY 40601 USA

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## Andrea Aaby

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**From:** Stacey Mansker-Young <Stacey.Mansker-Young@plantemoran.com>  
**Sent:** Wednesday, July 27, 2022 11:39 AM  
**To:** Andrea Aaby  
**Subject:** RE: Pre-Bid Attendance

Stacey Mansker-Young | Senior Manager | Government Technology Consulting ([I am on Central Time](#))  
Plante Moran  
10 S. Riverside Plaza, 7<sup>th</sup> Floor  
Chicago, IL 60606  
Direct Dial: 312.602.3654 | Fax: 248.327.8786  
[Plante Moran](#) | [Twitter](#) | [Facebook](#) | [LinkedIn](#) | [Learn from Leaders](#) | [Manage Your Email Subscriptions](#)  
[Celebrating 24 Consecutive Years on Fortune's "100 Best Companies to Work For®" List as a Great Place to Work "Legend."](#)

**From:** Stacey Mansker-Young  
**Sent:** Wednesday, July 27, 2022 10:32 AM  
**To:** aaby@laketrans.com  
**Subject:** Pre-Bid Attendance

Good Morning,

I was in attendance of the Laketrans Pre-Bid Conference

Stacey Mansker-Young | Senior Manager | Government Technology Consulting ([I am on Central Time](#))  
Plante Moran  
10 S. Riverside Plaza, 7<sup>th</sup> Floor  
Chicago, IL 60606  
Direct Dial: 312.602.3654 | Fax: 248.327.8786  
[Plante Moran](#) | [Twitter](#) | [Facebook](#) | [LinkedIn](#) | [Learn from Leaders](#) | [Manage Your Email Subscriptions](#)  
[Celebrating 24 Consecutive Years on Fortune's "100 Best Companies to Work For®" List as a Great Place to Work "Legend."](#)

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