

Executive Summary

Board of Governors Meeting, March 3, 2021

Lean, Agile, and Continuous Improvement Training Services

Topic

Citizens is requesting approval to enter into contracts with fourteen (14) vendors for Lean, Agile, and Continuous Improvement Training Services. These training services are needed to provide Citizens' employees across multiple roles and skill sets specific training from industry specialists and domain experts.

History

In 2019 and 2020, Citizens used twenty-one (21) vendors, procured by individual purchase orders, to provide twenty-eight (28) training courses for approximately 700 Citizens attendees (employees may have attended one or more trainings).

These training services are coordinated by Citizens' Enterprise Rhythm Team to connect Citizens employees to technical training needs in the spaces of Lean, Agile, and Continuous Improvement (practices designed to minimize waste and maximize value through modern methods for developing products and services). Specific examples include DevOps (set of practices that combines software development (Dev) and IT operations (Ops) aimed to shorten the systems development life cycle and provide continuous delivery with high software quality), Automated Testing, Agile Security, Agile Portfolio Management, Agile Leadership, Value Stream Engineering, and Agile Software Engineering. These investments are critical to Citizens' continuous learning strategy, one designed to help Citizens maintain pace with the rate of change in an ever-evolving technical industry. Success in this space protects Citizens from the risk and cost of going outside the organization for talent and, in-turn, better positions Citizens to attract and retain top talent.

The prior process of procuring and scheduling training services resulted in average lead time of approximately 90-days and did not result in the best pricing outcomes, or breadth of options, for Citizens. In an effort to streamline this process, reduce costs through improved pricing, and extend the breadth of training service options available, a Request for Proposal (RFP) was posted on October 25, 2020. Sixteen (16) vendors responded. Based on scoring by the evaluation team, fourteen (14) of the vendors were recommended for a contract award.

Work assignments will be made by Citizens staff over time based on each particular vendor's course contents, trainer capabilities, and price. Trainings may be provided on a live online basis, a pre-recorded basis, or an on-site basis (subject to CDC and State of Florida pandemic guidelines).

Trainings will be scheduled throughout each year, with a relatively even spread by quarter. Annual spend is expected to be consistent each year with the same number of trainings provided as previous years. As Citizens progresses through its Lean-Agile transformation, the

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trainings will evolve based on the evolving needs of the organization. It is expected that this investment will:

- Result in a reduction of Lead Time required to procure and schedule needed trainings from 90 days to 30 days or less.
- Improve course pricing by an average of 5% to 10% per course because of pricing discounts offered by each vendor.
- Exponentially expand the number of course offerings Citizens is available to choose from by creating an inventory of 200-plus collective training offerings from the vendors selected.

Recommendation

Citizens Staff proposes that the Board of Governors:

- a) Approve contracts with the fourteen (14) vendors identified in the Action Item for Lean, Agile, and Continuous Improvement Training Services for a base term of three (3) years, in an amount not to exceed \$300,000, as set forth in this Action Item; and,
- b) Authorize staff to take any appropriate or necessary actions consistent with this Action Item.

ACTION ITEM

New Contract

Contract Amendment

Other _____

CONSENT ITEM

Contract Amendment

Existing Contract Extension

Existing Contract Additional Spend

Previous Board Approval _____

Other _____

Action Items: Items requiring detailed explanation to the Board. When a requested action item is a day-to-day operational item or unanimously passed through committee it may be moved forward to the board on the Consent Index.

Move forward as Consent: This Action item is a day-to-day operational item, unanimously passed through committee or qualifies to be moved forward on the Consent Index.

Consent Items: Items not requiring detailed explanation to the Board of Governors. Consent items are contract extensions, amendments or additional spending authorities for items previously approved by the Board.

Purpose/Scope

The contracts will allow Citizens to procure and schedule training more rapidly, decrease average course pricing, and significantly expand the number of Lean, Agile, and Continuous Improvement training options available.

Specific examples include DevOps, Automated Testing, Agile Security, Agile Portfolio Management, Agile Leadership, Value Stream Engineering and Agile Software Engineering.

These investments are critical to Citizens continuous learning strategy, one designed to help Citizens maintain pace with the rate of change in an ever-evolving technical industry. Success in this space protects Citizens from the risk and cost of going outside the organization for this talent and, in-turn, better positions Citizens to attract and retain top talent.

Expected Benefits:

- Lead Time reduction to procure and schedule trainings from 90 to 30 days.
- Improve course pricing by an average of 5% to 10% per course.
- Expand training offerings to over 200-plus options.

Contract ID

Lean, Agile, and Continuous Improvement Training Services

Vendors:

- Agile Rising LLC: 21-20-0017-01
- Agile Transformation Inc. dba Agility Health: 21-20-0017-02

	<ul style="list-style-type: none"> • Cprime Inc. - Alten Company: 21-20-0017-03 • Eliassen Group LLC: 21-20-0017-04 • Erik Weber Consulting, Inc.: 21-20-0017-05 • IBEX Business Experts LLC: 21-20-0017-06 • Insight Direct USS, Inc. - Insight Enterprises Inc.: 21-20-0017-07 • Ken Pugh, Inc: 21-20-0017-08 • Alfred D. Neuweiler dba Multimedia Services Lite (aka MMS Lite): 21-20-0017-09 • Pivotal Resources, Inc: 21-20-0017-10 • Ryan Ripley (Agile for Humans): 21-20-0017-11 • The Madison Henry Group LLC: 21-20-0017-12 • The Murli Group: 21-20-0017-13 • Victorem Consulting LLC: 21-20-0017-14
Budgeted Item	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Procurement Method	On October 26, 2020 Citizens issued Request for Proposal No. 20-0017 for Lean, Agile, and Continuous Improvement Training Services. Vendor responses were due December 2, 2020 and sixteen (16) responses were subsequently received and evaluated. On January 12, 2021, the Evaluation Team recommended an award to the fourteen (14) vendors identified in the Contract ID Section above.
Contract Amount	The combined contract amount for all vendors, for the three (3) year base term, shall not exceed \$300,000.
Contract Terms	Each contract will have a three (3) year base term with an optional one (1) year renewal. Citizens' Staff is currently seeking approval for the three (3) year base term as a part of this Action Item and would seek future Board approval if there was a desire to exercise the optional one (1) year renewal.

Board Recommendation	Citizens' Staff proposes that the Board of Governors: a) Approve contracts with the fourteen (14) listed above for Lean, Agile, and Continuous Improvement Training Services for a base term of three (3) years, in an aggregate amount not to exceed \$300,000, as set forth in this Action Item; and, b) Authorize staff to take any appropriate or necessary actions consistent with this Action Item.
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