

Transitioning to New CUPA Data Management System - Lessons Learned

Panel Discussion
2025 CUPA Conference

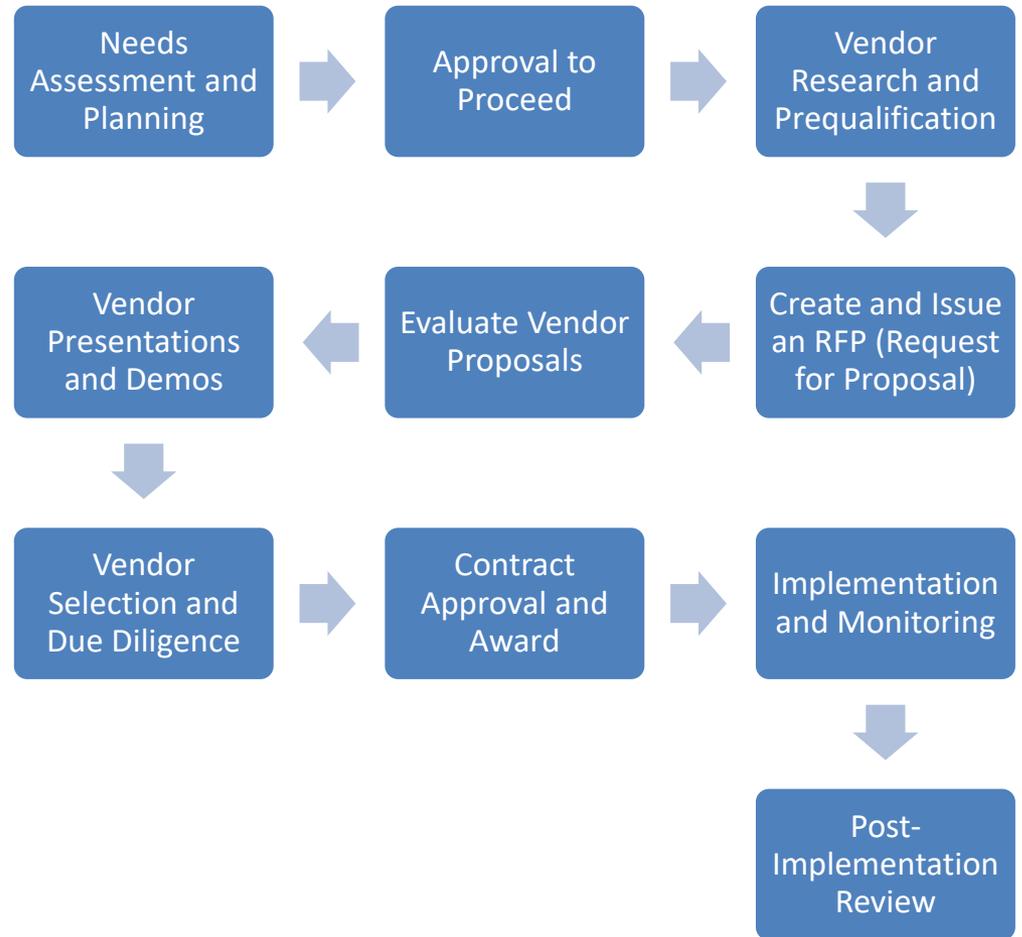
Agenda

Overview of Process
Steps (10 Steps)

Discussion Format

Q&A Structure

10 Steps to Consider



Step 1: Needs Assessment and Planning

1

Define Objectives:
Stakeholder
collaboration,
service
enhancements

2

Determine Budget:
Procurement,
implementation,
maintenance

3

Define
Requirements:
Technical,
compliance, and
regulatory alignment

Step 2: Approval to Proceed



INTERNAL APPROVALS: DEPARTMENT HEADS,
BUDGET OFFICERS, CITY/COUNTY BOARDS



DEVELOP PROCUREMENT PLAN: ALIGN WITH
COUNTY PROCUREMENT POLICIES

Step 3: Vendor Research and Prequalification

Market Research:

Identify experienced vendors
Cast a wide net (i.e., look beyond your jurisdiction and state for vendors)

Prequalification Criteria:

Financial stability
Licenses & certifications
Government contract experience
References

Step 4: Create and Issue an RFP



Develop RFP Document:

Scope, deliverables, evaluation criteria

- Being overly specific is better than generic. The RFP will be the basis for any contract, so without specifics, it will be difficult to keep your vendor accountable.

Submission instructions & deadlines



Distribute RFP:

Ensure competitive bidding and cast a wide net

Step 5: Evaluate Vendor Proposals

1

Form Evaluation Committee: Operations, IT, procurement, fiscal/admin

2

Review Proposals: Use predefined criteria such as:

- Compliance, technical expertise, cost-effectiveness, timeline, and reputation

3

Conduct Scoring: Rank vendors by predefined criteria

Step 6: Vendor Presentations and Demos



SCHEDULE
PRESENTATIONS

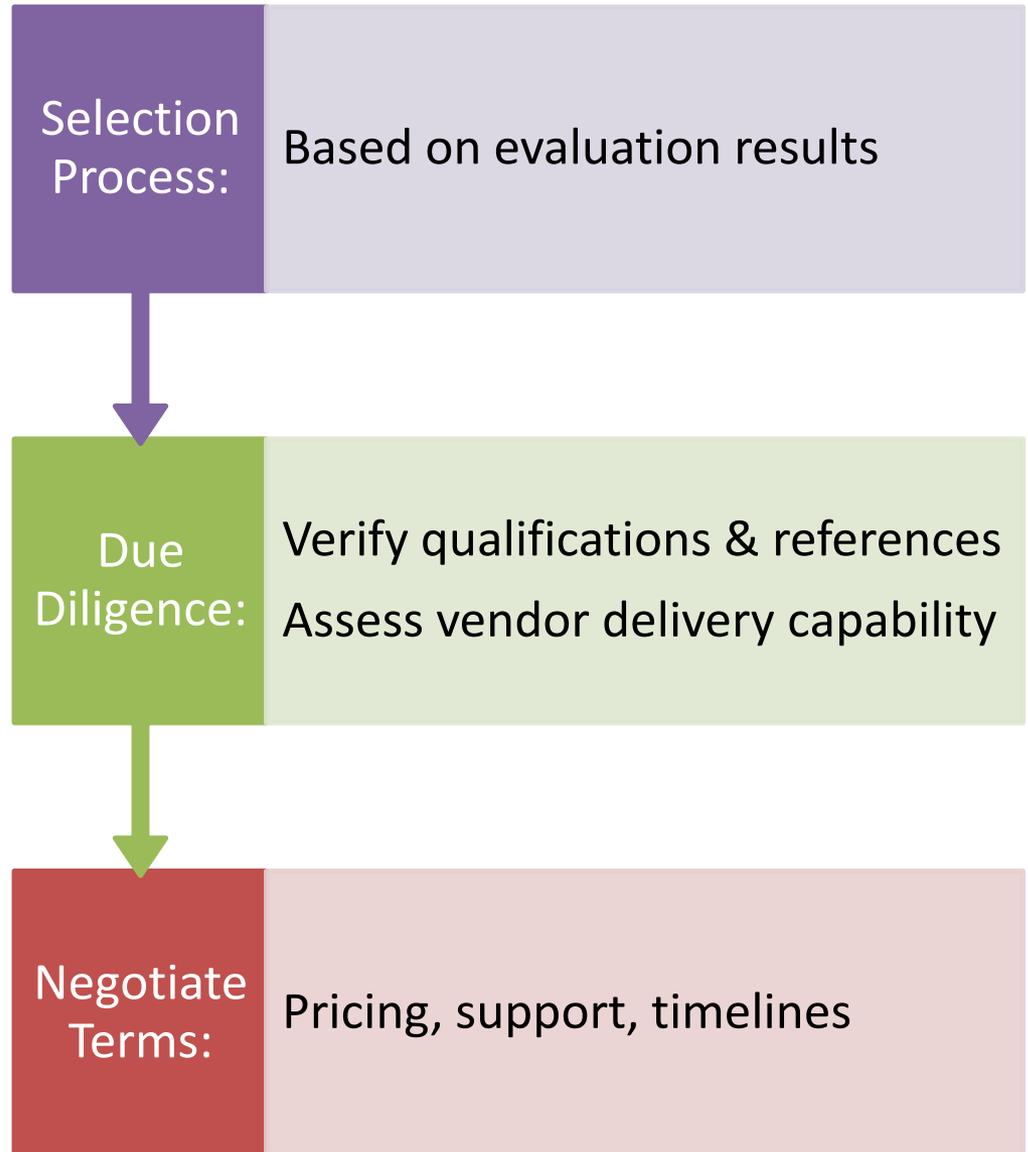


CONDUCT SYSTEM
DEMOS

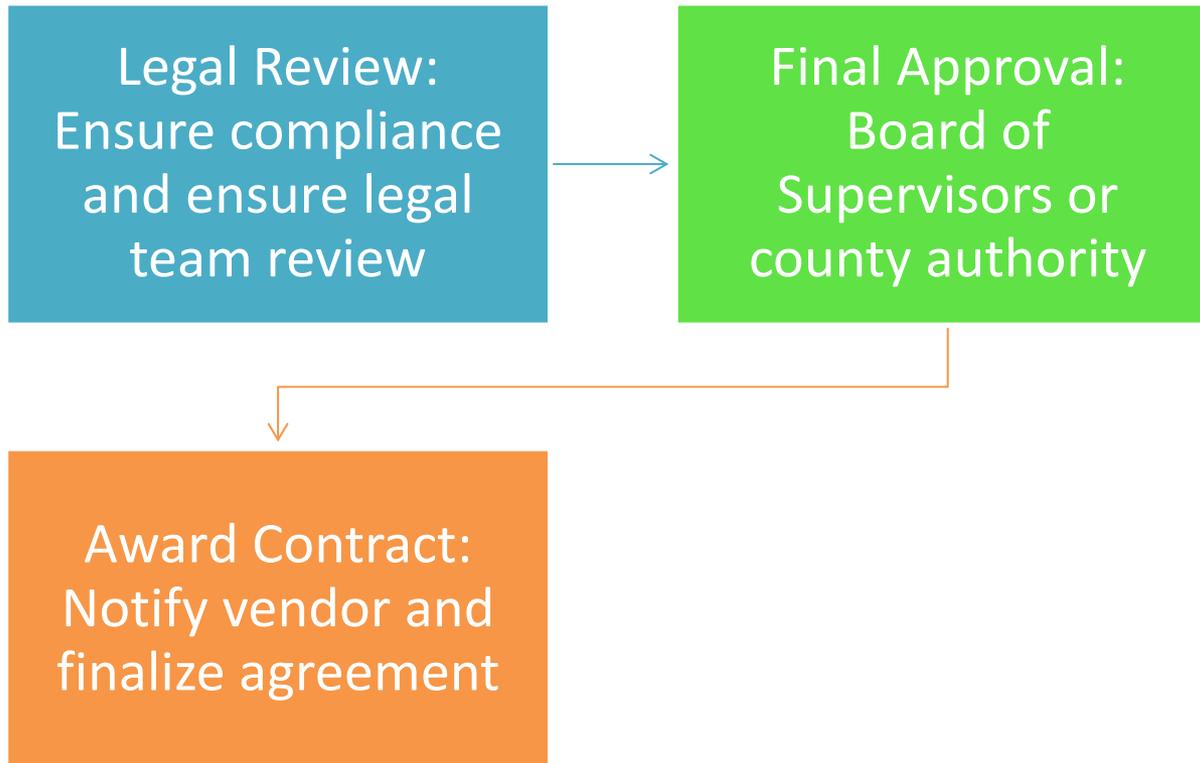


Q&A WITH EVALUATION
COMMITTEE

Step 7: Vendor Selection and Due Diligence



Step 8: Contract Approval and Award



Step 9: Implementation and Monitoring



Kick-Off Meeting:

Define milestones and expectations

Ensure that all parties understand and agree to expectations



Project Management Plan: Roles, deadlines, monitoring



Data Migration: Ensure accuracy and completeness

Clean-up efforts

How much data to carry over?



Workflow Review and Evaluation:

Ensure new workflows are understood



User Training: Comprehensive sessions for all staff



Feedback Loop: Address issues and adjustments

Include contractual obligation verification – Has the vendor provided everything they were supposed to?



Kick-Off Meeting:

Define milestones and expectations

Ensure that all parties understand and agree to expectations

- Objectives

- Priorities and timelines

- Vendor's development process

- Workflows

Project Management Plan: Roles, deadlines, monitoring

- Roles
- Expectations
- Deadlines
- Limitations
- Accountability
- Elevation process



Data Migration: Ensure accuracy and completeness

- Clean-up efforts
- Historical Data Import
- Data transfer

 Workflow Review and Evaluation: Ensure workflows are understood

- Current workflow needs
- New workflow identification
- Timing of workflow discussion



User Training: Comprehensive sessions for staff

- Who and when?
- Workflow changes
- Re-training



Feedback Loop: Address issues and adjustments

- Elevation of issues
- Contractual obligations
- Communication

Development Pitfalls



Lack of Flexibility



Communication



Differing
Stakeholders
Priorities



Re-Training



Changes Midway

Step 10: Post-Implementation Support and Review



Vendor Support:
Ongoing maintenance
and troubleshooting



Evaluate Performance:
Contract adherence
and service quality



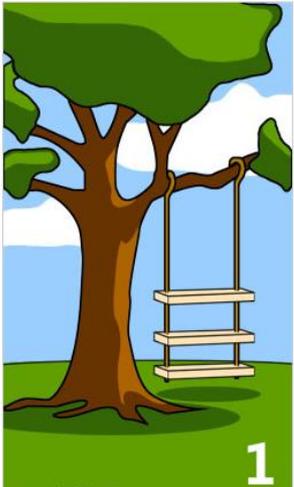
Document Lessons
Learned: Improve
future processes



Monitor Performance:
Software efficiency and
user feedback



Plan for Future
Upgrades



1

How the customer explained it



2

How the project leader understood it



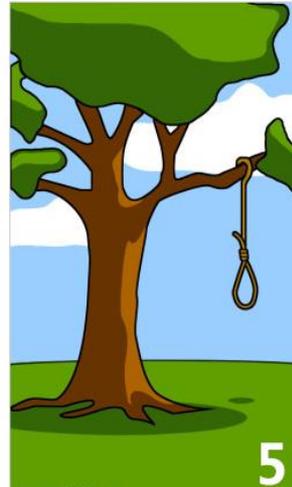
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How the analyst designed it



4

How the programmer wrote it



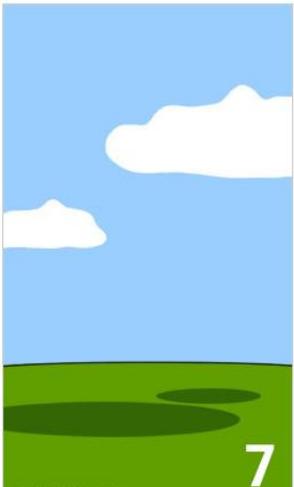
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What the beta testers received



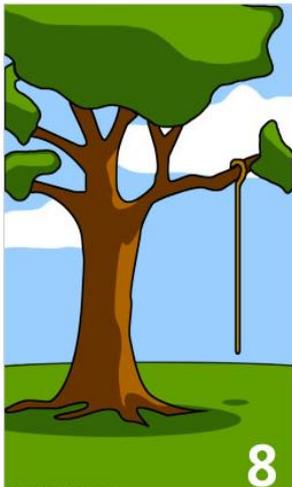
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How the business consultant described it



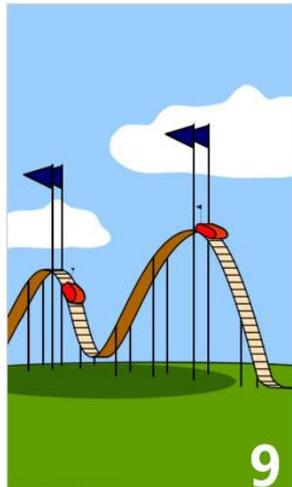
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How the project was documented



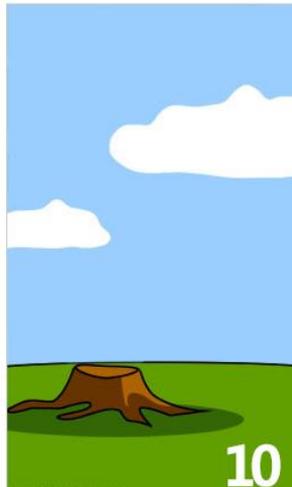
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What operations installed



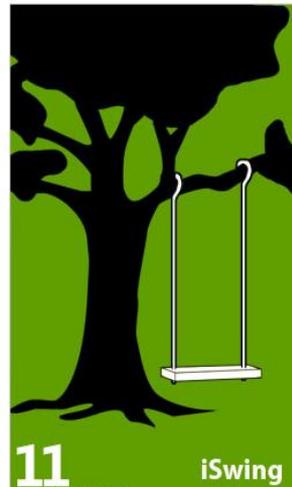
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How the customer was billed



10

How it was supported



11

iSwing

What marketing advertised



12

What the customer really needed

Contact Info



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Q&A