

# Cost Proposal for Comprehensive Records Assessment Consulting Services



January 13, 2020

Presented by:  
**Contoural, Inc.**

335 Main Street, Suite B  
Los Altos, CA USA 94022

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## Cover/Title Page

**RFP Subject: Comprehensive Records Assessment Consultant  
Solicitation Number: CRFP STO2000000002**

Vendor Name: Contoural, Inc.

Business Address: 335 Main Street, Suite B, Los Altos, CA 94022

Telephone Number: 650/390-0800

Fax Number: 650/390-0303

Contact: Judy Gum, CFO

Email: jgum@contoural.com

By signing below, I certify that I have reviewed this Request for Proposal in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship ; and that, bidder will, upon contract award, properly register with any State agency that may require registration.

Contoural, Inc. \_\_\_\_\_  
(Company)

Judy Gum, CFO \_\_\_\_\_  
(Printed/Typed Representative Name, Title)

  
Signature

650/390-0800 \_\_\_\_\_  
(Contact Phone/Fax Number)

1/2/20 \_\_\_\_\_  
(Date)

## Proposal Overview

See Technical Proposal for details.

Project Description	Project Summary	Client Resource Impact	Estimated Consulting Hours	2020 Incentive Pricing/ \$277/hour	Approximate Time to Complete (Work Weeks)
Project 1 - Information Governance Assessment and Strategic Roadmap	Provides an independent, objective evaluation of Information Governance program status, including identification of program gaps, recommended maturity level, and the development of a Strategic Roadmap for closing gaps and recommended investment in people, process and technology to reach anticipated outcomes.	Medium	182	\$50,414	5 to 7
Project 2 - Records Retention Schedule and Policy Update	Provides an updated, compliant, and legally defensible record retention Policy and Schedule enabling an organization to meet its retention obligations. The development of the schedule serves to build consensus across stakeholders and business groups on what information should be saved for how long, and equally important, what information can be deleted. Also offers U.S. Legal and Regulatory High-Water Mark Citations Research and Documentation.	High	228	\$63,156	7 to 9
Project 3 - Change Management, Communications and Training	Provides development of Change Management, Communications and Training program elements for introducing the Information Governance Program to users. A successful change management program provides sufficient communications to increase user awareness, and a range of training and educational materials to ensure users understand how to comply with IG requirements. Also provides an Executive presentation on Information Governance Strategy and developing an IG program and educating staff.	Medium	130	\$36,010	6 to 8
OPTIONAL Project 4 - Technology Requirements Definition for Technology Improvements	Provides an independent review of Agency's technology needs and develops specific technical and functional requirements for related software, as required. Also provides a short list of potential vendors capable of meeting the technical and functional requirements.	Low	tbd	tbd	tbd
<b>Estimated Project Totals</b>			<b>540</b>	<b>\$149,580</b>	

## Cost Proposal

These services are being offered on a Time and Material basis<sup>1</sup>, as follows:

Project	Estimated Consulting Hours	2020 List Rate \$395/hr.	2020 Incentive Rate \$277/hr <sup>2</sup>
<b>Project 1 - Information Governance Assessment and Strategic Roadmap</b>	182		\$50,414
<b>Project 2 - Records Retention Schedule and Policy Update</b>	228		\$63,156
<b>Project 3 - Change Management, Communications and Training</b>	130		\$36,010
<b>OPTIONAL Project 4 - Technology Requirements Definition for Technology Improvements</b>	tbd		tbd
<b>Estimated Project Totals</b>	<b>540</b>		<b>\$149,580</b>

<sup>1</sup> These services are offered on a "Straight Time and Material" pricing model. This is Contoural's least expensive pricing model. Under this model we develop a list of tasks for the engagement and total hours anticipated for those tasks. Usually most of the tasks are completed in the target hours, a few tasks take longer, and more take, on average, a little less time. We continuously monitor, forecast and report during the project if we are on track, running under or running over on completing all the tasks and deliverables in the time allocated. In the event that during a project we are running a little over we often make some small, mid-course corrections. Overall, our projects for time-and-material priced projects are completed within or in fewer hours than forecasted 98% of the time.

<sup>2</sup> Incentive Rate applies for services delivered within 12 months of signing. Specifically, hours purchased under a given rate may be used anytime within the next twelve months.

The fees illustrated in this document represent net fees to Contoural. Any required third-party administration fees, such as client-required payment processing fees, agency fees, vendor set-up fees, et al will be in addition to the rates quoted herein.

## Attachment A: Cost Sheet

Milestone/Progress Payments -Agency will consider milestone/progress payments for the services to be provided when at least 50% of the work has been completed for each Item/Category total listed below; however, no more than two progress payments per Item/Category will be considered. With such payments, retainage of 10% will be withheld from each invoice until the project has been completed. Otherwise, all contract services and deliverable items will be paid upon completion of the final project acceptance, and training by the Agency. Vendor shall provide all required itemization/details on its invoice to support a payment request. If no indication is made below, it will be presumed that the vendor will not request milestone/progress payments.

xx Vendor intends on requesting milestone payments. Once the project is completed, a final invoice must be submitted by the Vendor for the total retainage amount withheld.

Fee Categories	
Item 1: Assessment and Discovery	Total: \$ 56,785
Item 2: Reports and Documentation	Total: \$ 56,785
Item 3: Training	Total: \$ 36,010
	TOTAL Cost: \$149,580