Proposal: Kahua PMIS Governance & Optimization

Prepared for: Dekalb County Watershed Management

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This proposal is organized into the following sections:

1. Executive Summary

DeKalb County Watershed has invested in Kahua as an enterprise Project Management Information System (PMIS) to support transparency, governance, and effective delivery of its 10 year, $4.6B capital program. The value of Kahua depends not only on the technical configuration of the platform, but also on how governance, roles, reporting, data integrations, and staff capability are defined and sustained over time.

DeKalb County Watershed has requested independent support to confirm that:

- PMIS governance and approval authority are structured correctly and defensibly for a public owner.
- Roles and responsibilities, including separation of duties are appropriately configured and followed.
- Business processes are configured in alignment to Dekalb County Watershed policies/procedures and follow industry standards.
- Dashboards and reports are uniform, optimized, and aligned to Kahua capabilities and leadership needs.
- Key Performance Indicators (KPIs) accurately measure capital program health and decision quality.
- Integration with other systems preserves data integrity and supports one version of the truth.
- DeKalb County Watershed staff are capable and self-sufficient and not dependent solely on embedded external consultants.

SG Contracting proposes a phased engagement that assesses the current state, audits findings, defines future recommendations, and provides a practical implementation path forward. The engagement is designed to ensure DeKalb County Watershed has the right level of governance and transparency while ensuring you maximize the value of the Kahua investment.

2. Dekalb County Watershed Objectives and Key Concerns

Based on our preliminary discussions, the objectives of this engagement include:

- Confirm Kahua governance is aligned to DeKalb County Watershed policies, ethics expectations, and audit requirements.
- Understanding that Kahua is being optimized in its use.
- Standardize and optimize dashboards and reporting to improve decision-making and oversight.

- Validate roles, permissions, and approval workflows to ensure appropriate authority and separation of duties.
- Define a KPI framework that measures program health (cost, schedule, risk, change, performance, and predictability).
- Assess integrations and data flows to maintain data integrity and a single system of record.
- Build internal staff capability through training, mentoring, and documented standard procedures.

3. Scope of Services (Phases A–D)

Phase A — Current State Assessment

Objective: Develop an independent understanding of how Kahua is configured, used, and governed across the capital program.

Key Focus Areas

- PMIS governance structure and system-of-record practices
- Dashboards, reports, and KPI usage (current state)
- Roles, responsibilities, permissions, and approval paths
- Processes, workflows, data fields, and mail merges
- System integration and data flow mapping (ERP/finance and other systems)
- Staff capability and dependency on external consultants

Deliverable

- Current State Assessment Memorandum (observations, strengths, risks, and areas for deeper audit)

Phase B — Audit of Findings (Governance, Transparency, and System Use)

Objective: Evaluate whether Kahua, as configured and used, provides defensible transparency, ethical controls, and reliable reporting appropriate for Dekalb County Watershed on a program of this scale.

Audit Areas

- Governance and approval audit (approval lineage, workflow consistency, exception handling)
- Dashboard and KPI audit (definitions, calculation logic, thresholds, and data reliability)
- Roles and ethics audit (separation of duties, consultant authority, permission design)

- Integration and data integrity audit (synchronization, reconciliation, system-of-record confirmation)
- Operational dependency audit (business continuity, documentation, institutional knowledge risks)

Deliverable

- PMIS Governance & Transparency Audit Report (findings, risks, and prioritized issues)

Phase C — Future Recommendations (Target State)

Objective: Define a clear and achievable target state for governance, reporting, roles, integrations, and staff enablement.

Recommendation Areas

- Target governance model and decision/approval authority definitions.
- Optimized, uniform dashboards and reporting aligned to DeKalb County Watershed oversight needs.
- KPI framework for program health and predictability.
- Roles, permissions, and ethical safeguards (including separation of duties).
- Integration and data strategy to support one version of the truth.
- Staff enablement plan (training, mentoring, SOPs, and knowledge transfer).

Deliverable

- Future State PMIS Governance & Optimization Roadmap.

Phase D — Path Forward & Implementation Support

Objective: Provide a practical plan and advisory support to implement recommendations with minimal disruption and measurable progress.

Implementation Elements

- Sequenced implementation plan with priorities (near, mid & long term).
- Governance documentation and standard operating procedures (SOPs).
- Configuration and reporting validation (owner side oversight; no vendor administration).
- Change management support and adoption checkpoints.
- Internal staff mentoring and knowledge transfer.

Deliverable

- Implementation Plan & Governance Playbook (tasks, owners, timelines, success measures).

4. Deliverables Summary

- Current State Assessment Memorandum.
- PMIS Governance & Transparency Audit Report.
- Future State PMIS Governance & Optimization Roadmap.
- Implementation Plan & Governance Playbook.
- Optional: KPI Dictionary and Dashboard Standardization Guide.
- Optional: Training materials and role-based quick reference guides.

5. Schedule and Assumptions

A typical schedule is shown below and will be refined during kickoff based on DeKalb County Watershed priorities and availability.

- Phase A: 10-12 weeks.
- Phase B: 8–10 weeks.
- Phase C: 6–8 weeks.
- Phase D: Authorized as needed.

Assumptions:

- DeKalb County Watershed provides timely access to Kahua environments, documentation, and key stakeholders.
- DeKalb County Watershed identifies integration points (ERP/finance, scheduling, document management, etc.) and available technical contacts.
- Workshops and interviews may be conducted virtually unless otherwise requested.
- Recommendations are designed to be practical and implementable within DeKalb County Watershed policies and constraints.

6. Hourly Rate–Based Pricing & Staffing Model

6.1 Pricing Philosophy

SG Contracting proposes an hourly, time-and-materials pricing structure to provide transparency, flexibility, and fiscal control for DeKalb County Watershed. Client may authorize work incrementally by phase and maintain clear visibility into level of effort and cost. All services will be provided based on approved hourly rates.

6.2 Hourly Rate Schedule

Role	Description	Hourly Rate*
Principal / Engagement Lead	Executive oversight, governance authority,	$290/hr

	quality control, leadership coordination	
Senior PMIS & Governance Advisor	Primary analysis lead; workflows, dashboards, KPIs, integrations, roles, and governance	$270/hr
PMIS Analyst	Data review, reporting validation, documentation support under senior direction	$240/hr

*Hourly rates are fully burdened and include overhead and standard reporting. Travel (if required) billed at cost in accordance with DeKalb County Watershed policies.

Phase A — Current State Assessment
Scope Summary:

- Stakeholder interviews and document review.
- Review of Kahua governance, workflows, dashboards, roles, and permissions.
- Integration and data flow mapping (high-level).
- Staff capability and training gap assessment.
- Current State Assessment Memorandum.

Phase B — Governance, Transparency & PMIS Audit
Scope Summary:

- Workflow and approval lineage review (cost, change, commitments).
- Dashboard and KPI definition/logic validation.
- Roles & separation-of-duties evaluation.
- Integration and data integrity sampling/reconciliation approach.
- PMIS Governance & Transparency Audit Report.

Phase C — Future State Recommendations
Scope Summary:

- Target governance model and standard workflow recommendations.
- Uniform dashboard and KPI framework with definitions.
- Role/permission and ethical control recommendations.
- Integration strategy and system-of-record alignment.
- Staff enablement plan and knowledge transfer approach.
- Future State Roadmap deliverable.

6.5 Staffing Model

- Principal / Engagement Lead: Strategic oversight, governance authority, executive communications, and quality control.
- Senior PMIS & Governance Advisor: Primary day-to-day lead for analysis, recommendations, and client coordination.
- PMIS Analyst: Data review, dashboard/KPI validation support, and documentation under senior direction.

6.6 Cost Controls & Transparency

- Invoices will itemize hours by role and task with clear linkage to scope.
- Regular progress check-ins will confirm scope alignment and remaining authorized hours.
- Work is advisory and oversight-focused to preserve independence.

7. Transition to Long-Term Advisory Support

Upon completion of Phases A–C (and initiation of Phase D), DeKalb County Watershed may elect to continue with ongoing PMIS Governance Advisory services to sustain benefits over the life of the capital program.

- Quarterly PMIS health checks and compliance reviews.
- Dashboard/KPI validation and refinement as program needs evolve.
- Independent participation in governance or steering meetings.
- Integration oversight and data integrity monitoring.
- Support during audits, leadership transitions, and public inquiries.
- Continuous improvement recommendations and lessons learned.

8. Why SG Contracting

- Owner-focused, independent perspective aligned to public accountability.
- Construction management experience paired with PMIS governance expertise.
- Practical recommendations grounded in how projects are delivered and how programs are managed.
- Commitment to enabling internal staff and reducing dependency on external consultants.
- Clear documentation, repeatable standards, and audit-ready outcomes.

9. Terms, Invoicing, and Acceptance

- Billing: Monthly invoicing based on actual hours at agreed rates; supported by detailed time reporting.
- Meetings: Regular weekly status calls and milestone reviews at phase completion.
- Travel: Only as requested/authorized; billed at cost per DeKalb County Watershed policy.
- Confidentiality: All data handled in accordance with DeKalb County Watershed requirements.

10. Next Steps

- Confirm procurement approach and contract.
- Conduct kickoff meeting and issue information request list.
- Begin Phase A — Current State Assessment.