LOWER MINNESOTA RIVER
WATERSHED DISTRICT

Executive Summary for Action
Lower Minnesota River Watershed District Board of Managers Meeting
Wednesday November 20, 2019

Agenda Item
Item 5. B. LMRWD Data Management

Prepared By
Linda Loomis, Administrator

Summary
Della and I have been looking to move LMRWD records to the cloud for storage. This would benefit the District in that access to the records can be shared with consultants working for the District. LMRWD records are currently stored in one of two formats; hard copies in the LMRWD office in Chaska or digitally on the LMRWD laptop computer. The laptop is backed up weekly on to a separate hard drive.

Attached is a proposal from DRB Consulting, LLC to help make all records digital and then stored in the cloud which can be accessed by all consultants for the LMRWD. Access can also be given to Managers if the Board determines that would be of benefit.

We have also attached information about the consultant Deb Brisk, principal at DRB Consulting, LLC.

Attachments
Proposal for data management assistance from DRB Consulting, LLC
DRB Consulting , LLC overview

Recommended Action
Motion to accept proposal and authorize staff to begin upgrading LMRWD data management/storage

October 31, 2019

Linda Loomis
12 5th Str. E. Suite 102
Chaska, MN 55318

DRB Consulting provides to you and your team a proposal to support analysis and an evaluation of options to support document management for the Lower Minnesota River Watershed District.

BACKGROUND: The Lower Minnesota River Watershed District (District) produces, receives, maintains and retains a number of documents. These documents are placed in various places, including network drives and physically stored in offices as hard copies. Based on the organizational structure, board member agencies also have documents related to the District. Publicly available documents (plans, board minutes) are available and accessed via http://lowermnriverwd.org/.   All other documents retained by the District are stored at the District as paper or digital formats. These latter documents are reviewed, created and / or modified by District staff, vendors and other stakeholders while in progress of review and comment and ultimately retained for reference.

CHALLENGE / OPPORTUNITY: Documents stored at the District have limited accessibility.   Paper documents require travel to the District office and requires staff time to copy or scan. Access to digital documents requires the administrator to locate and produce a copy (paper or electronic) of the requested document to the requestor.

OPPORTUNITY / SOLUTION: The DRB team will facilitate an assessment with the District to provide a solution that will provide a single electronic repository. The repository will be phased and implemented based on the District's recommended prioritization of documents. This proposal is to provide facilitation and knowledge of options to address the goal of maintaining the integrity of the District's documents and providing ease of searching and access of the documents to stakeholders.

OUTCOMES INCLUDE:

- Analysis and documentation of the types of documents and identifying District meta data (Searchable terms)
- Identifying optional systems and providing recommendation to the District on the pros / cons of systems to support document management.
- Implementation of document management software
- District will have a host site that is accessible and searchable for documents
- District staff will receive training and documentation to support the system (a system that is useable and functional for the District)

APPROACH:

The following tasks illustrate the approach to meet the outcomes.

> **Task 1** - Determine and validate the current document and anticipated growth factor for documents (current storage capacity and future capacity) (6 hours)

* Dependent on document volume
** Because of the non-sensitive nature of documents, several low-cost solutions for document management software are available. In addition to Google and Microsoft, open source options exist.

The beginning of Task 1 is is to have an understanding of the paper and electronic documents that the District has. The hours listed are a dependent on the number and types of documents.

Task 2 – Identify document types, categories, tags (meta data) (30 hours) *

Receive affirmation from the District on the document types, categories and tagging terms (meta data).

Task 3 - Identify stakeholders and access (4 hours)

Receive affirmation on accessibility and number of stakeholders / partners / individuals who will use the system.

Task 4 - Host and software research, prepare options and recommendation. ** (32 hours)

Provide to District options and pros / cons of the options. District responds with a recommendation.

Task 5 - Technology Implementation (20 hours)

Provide support to the implementation of the recommended and approved technology for deployment to the District.

Task 6 – Training and user documentation (22 hours)

Task 7 - Project Management Task – includes oversight and monthly invoicing. (5 hours)

ASSUMPTIONS

- Documents do not contain confidential or sensitive information
- Solution does not provide functionality to create or modify documents
- All documents are in nonproprietary formats
- Solution will support .pdf and Microsoft office generated documents
- ***Solution does not contain cost of document management system, hosting, imaging or uploading of the documents into the system***

Thank you for the opportunity to provide this proposal to you.

Debra R. Brisk

Debra R. Brisk, P.E.

* *Dependent on document volume*
** *Because of the non-sensitive nature of documents, several low-cost solutions for document management software are available. In addition to Google and Microsoft, open source options exist.*

DRB CONSULTING, LLC

Watershed District Proposal (document & data management)   October 31, 2019

TASK / ACTION	DESCRIPTION	Debra Brisk, P.E. (Project Sponsor)	Sandy Hvizdos (Analyst)	Mariah Helgeson (Administrative Support)	TOTAL HOURS	ASSUMPTIONS
TASK 1	**Host requirements**					
	Determine and validate the current document and storage growth factor and space requirements – short - long term storage needs	0	6	0	6	
Task 1 Subtotal		0	6	0	6	
TASK 2	**Meta data**					
	Identify document types, categories, tags and indices	0	30	0	30	Dependent on document volume
Task 2 Subtotal		0	30	0	30	
Task 3	**Access definitions**					
	Identify stakeholders and access	0	4	0	4	
Task 3 Subtotal		0	4	0	4	
Task 4	**Recommendations / Report**					
	Host and software research, prepare options and recommendation	2	20	10	32	
Task 4 Subtotal		2	20	10	32	
Task 5	**Implementation**					
	Implement technology	0	20	0	20	
Task 5 Subtotal		0	20	0	20	
Task 6	**Training and Documentation**					
	Training and user documentation	2	10	10	22	
Task 6 Subtotal		2	10	10	22	
Task 7	**Project Management**					
	Oversite and invoicing	5	0	0	5	
Task 7 Subtotal		5	0	0	5	
	TOTAL HOURS	9	90	20	119	
Hourly rates are loaded with base rate, estimated OH rates and 10% profit.	Hourly Rates	$156.00	$140.00	$45.00		
	Total Cost	$1,404.00	$12,600.00	$900.00	$14,904.00	
	Expenses	*Mileage - estimated*	*200.00*	*$0.59*	*$117.00*	
		Parking			*$25.00*	
		Printing / Misc.			*$100.00*	
					$242.00	
			Total Expenses		$242.00	
			TOTAL		$15,146.00	
	I certify that this cost estimate is that of DRB CONSULTING, LLC					
	Debra R. Brisk	*Drbra R. Brisk, PeE. On Behalf of DRB CONSULTING*				
		Date	October 31 2019			

DRB Consulting, LLC

Certified DBE (state of Minnesota & Arizona)

Providing

Project, Program Management

Project Outreach & Engagement

Project Controls & Documentation

Project Monitoring & Reporting

Technical Review and Process Improvement

Partnering Facilitation

Strategic Planning & Business D

Project Delivery (concept to operations)

Project Quality Control Management

Agency Compliance & Monitoring

DEBRA R. BRISK, P.E.
(Az. & Mn.)

Bachelor of Science, Civil Engineering.

Masters of Arts, Organizational Management

Certified Facilitator, Mediator (AZ)

Value Methodology Associate (SAVE, International)

Trained and experienced Project Manager

Leadership—Professional

1302 Bellavista Drive
Buffalo, MN. 55313

763 257 7872
deb.brisk@outlook.com

Over 35 years of public and private transportation experience including civil engineering, project and program management.

Collaborate and coordinate multi-modal transportation projects from concept thru environmental documentation, design, construction and operations.

Provide public works leadership to technical teams including transit, roads, bridges, economic development, waste management and environmental stewardship. Implement policies, plans and strategies embracing the various technical areas for common good of the agency and / or firm.

Apply various revenue sources to successfully deliver project and programs including federal, state, local and private funding.

Utilize reporting tools and metrics to illustrate regulatory, fiscal and quality management for programs, projects and services.

Implement strategies to support public and stakeholder engagement and outreach for various phases within a project.

Embrace a partnership with stakeholders (public and private) to meet mutually agreed upon goals and objectives including safety, profit and communication.

Support environmental stewardship and compliance.

Facilitate complex project resolutions and conflict management.

Advocate and utilize the principles of partnering and context sensitive solutions to strengthen team building, issue resolution and proactive communication.

DRB CONSULTING, LLC

CERTIFIED DBE (STATE OF MINNESOTA & ARIZONA)

Providing

Project, Program Management	Partnering Facilitation
Project Outreach & Engagement	Strategic Planning & Business
Development Project Controls	Project Delivery (concept to operations)
Project Monitoring & Reporting	Project Quality Control Management
Technical Review and Process Improvement	Agency Compliance & Monitoring

**DEBRA R. BRISK, P.E.
(AZ. & MN.)**

Certified DBE—Minnesota and Arizona

TMP—City of Minneapolis

CERT—Saint Paul

TGB—State of Minnesota

**National Research Board—Transportation
Alternative Delivery—AFH15
Construction Management—AFH 10, former chair and current Member of Committee**

President—DRB Consulting, LLC
- Local Agency program management, procurement development, contract services for targeted providers, monitoring and reporting.
- State Agency—Statewide program management—Transit agency strategic planning (capital and operational).
- Local Agencies, Supporting agencies for environmental documentation, compliance and monitoring.

Executive Leadership
- Local Agency, Assistant County Administrator—public works supporting multiple programs including all modes of transportation, environmental stewardship and community development.
- State Agency, Deputy Director / Commissioner, District Engineer—providing supportive services to agency including program, project management, controls and reporting, agency outreach and engagement and strategic development for capital, operational and resource (human, natural and environmental) management.
- External and internal facilitation and partnership builder, aligning with agency relationships and outcomes.
- Advanced Agency policies and directives to deliver projects and programs, over $2B including transit, roads and bridges, economic development.

Construction Management —State and Local Agency
- Contract manager for projects varying in value, type and environment, monitoring compliance, project documentation bid documents, quality control, schedule, staffing (internal and consultant).
- Evaluating constructability, operational interests and stakeholder, partner needs.

Senior Manager —Private Consulting
- Alternative Delivery of projects, programs and services.
- Environmental Documentation (transit, multi-modal station, road and bridge projects).
- SHRP 2—National research for complex project delivery, expert panel member and training instructor.
- Marketing and client management.
- Project controls, metrics and compliance monitoring, aligning with company strategies and goals.
- Support to public—private project programming and development.
- Initiated asset management for infrastructure, enhanced project and program management tools and practices across the departments, integrated metrics including fiscal management.