

# COMPREHENSIVE BUSINESS SOLUTIONS, LLC.

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TO: Members of Livingston Parish Counsel  
FROM: Comprehensive Business Solutions, LLC  
RE: Request for Proposals – Multi-disciplined Professional Service Company  
Date: March 15, 2010

Dear Members of the Livingston Parish Council:

## 1. INTRODUCTION

As pointed out in our cover letter, this reply will not look like a typical response to a Request for Proposals, primarily because your solicitation and the services you seek are not typical of those normally found in a request for proposals. Your request, and the thought process that went into your efforts, is unique. The RFP is an excellent example of what can come about when a group of talented people recognize a problem and "think outside the box" in order to resolve the problem. Comprehensive Business Solutions ("CBS") is another example of what can occur when innovation is given an opportunity. CBS was created because our parent company needed the services of a multi-disciplined services company. As important as their services were to us, it made no sense to hire professionals, experts and consultants whose expertise would be need for 2 hours a day, or two days a week or once a month. Even in cases in which an expert or professional was needed on a three month project or a six month project, hiring such a person and putting them on our payroll just didn't make sense.

Outsourcing to fill our needs was an obvious answer but we have a strong belief in longevity, dedication and in people or companies who take a personal interest in the success of their clients. We have found that persons who have a long-time relationship in their particular industry and with their current employers were the people most likely to fit the mould of the skilled professionals with whom we wanted to associate. These are the experts with dependability, experience, an innovative way of approaching problems and a vested interest in the outcome of projects and the success of their clients. These people are true assets to companies needing the services of experts, professionals, consultant and advisors (*for the sake of readability, to avoid redundancy, we will refer to this group of people as Consultants*) and aligning with the right group can make the difference between success and failure. However, we were still left with the problem of the amount of work we would have for each such expert, advisor, professional and consultant. Clearly, not many people having the qualifications we were seeking are interested in quitting a \$150,000.00 per year job for a \$50,000.00 per year job. Determined to find a solution, we began to form a plan, using our own needs as a template.

The first step in the process was to identify the types of Consultants that we would reasonably expect to need. Certainly, accountants, CPA's and bookkeepers would be needed often. But the business world has demonstrated to us on more than one occasion that financial records can be altered, destroyed and even lost over time. Sadly, it is not uncommon for

individuals with selfish motivations to alter, destroy or loose documents in order to cover their tracks. Having gone through such an experience we were able to identify a unique group of accountants, known as forensic accountants. These accountants, working closing with our IT personnel, who will be described later, can recreate documents lost or destroyed and identify documents with have been altered or modified. Depending upon your business, having access to such Consultants can be invaluable. Accounting is a particularly important function in government and is a discipline which is involved in most every element of government. This is particularly true of the legislative branch of government, the branch of government that controls the "purse strings" of government, approves the governmental budget and any modifications to the budget and is responsible for the yearly audit of the government as well any one or more departmental audits that it may decide are appropriate.

Engineering is another profession from which we draw many Consultants. Much like doctors and lawyers, engineers have become more and more specialized as technology continues to develop. The following is just a sampling of the types of Engineers available:

**Transportation Engineers-** Plan and build railroads, airports, and the things that are needed to keep them in operation.

**Highway Engineers -** Construct the network of highways.

**River and Harbor Engineers-** Control the flow of rivers, build and maintain harbors and do flood control projects.

**Sanitary and Environment Engineers -** Plan and build dams, reserves, aqueducts, pipelines, and purification plants. They also control pollution.

**Structural Mechanical and Electrical Engineers-** Design the main parts of buildings.

**Extractive Metallurgist Engineers-** Separate the metal bearing ores from rock and other minerals and then extract the metal from the ore.

**Aeronautical Engineers-** Mechanical engineers with special training.

**Electric Power Engineers-** Design circuits and make the devices for communication.

**Computer Engineers-** Design computers.

Livingston Parish uses many of these engineering specialists in its day to day operations, Aeronautical being one of the exceptions.

As time marches on and business continue to grow, one of the more difficult issues to manage is document control. If you are like most businesses, you have walls of filing cabinets, filled with document dating back to your inception in February of 1832. Of course, there are probably few, if any documents dated that far back and that is a symptom of inadequate

document maintenance. That, however, is not the fault of the Livingston Parish Government. Paper will only last so long. Years of handling old papers will further reduce its life. We have found that this is a common problem and although document deterioration is by far a more serious problem, the first problem to be noticed is the space that these old files take up. We had the same problem but we not only resolved the problem of storage, but also the problem of degeneration of documents and another issue we haven't mentioned yet; finding documents. It is inevitable that the document or file you need is on someone's desk, or on the backseat of someone's car, or was re-filed in the wrong place, creating lost time and productivity, and a potentially embarrassing situation. We utilize two programs to assist us with document control and they have been a God-send. First, we established a document retention policy which is nothing more than a schedule that we follow that makes us dispose of old documents that we know we will not need again, yet we fear throwing the old documents away. The period of time you elect to keep documents is up to you. Typically, political subdivisions within the State of Louisiana must keep most documents for a period of three years. However, and depending on the nature of the document a longer retention period may be required. The important thing is to have a written retention policy and follow it. Certainly, exceptions can be made for any documents which you believe should be retained for a longer period.

The second part of the solution to document control is digital scanning and indexing. With a high speed digital document scanner, you can scan between 45 and 65 pages per minute, color or black and white. The best buy (or lease) in our view is a high speed digital black and white/color printer/scanner/copier that can be connected to your office network. Imagine sitting at your desk and having immediate access to all of your documents, right at your fingertips. A digital copier/scanner takes a digital "picture" of the document, either as a copier or a scanner. If you are scanning, you simply drop the stack of documents that you want to scan into the machine, select the destination that you want the documents scanned to, and push start. The scanning is unbelievably quick even when there are color pages mixed in with the black and white. As to where you want the documents scanned, there are a multitude of options. In a business of your size, the most common thing is to scan the documents to a server. Options exist there too. You can purchase a new server or add additional hard drives to your existing server. You can also plug in an external hard drive. Technology has advanced to the point that these storage options hold vast amounts of data and are inexpensive. To give you some idea of the storage space you will need, one 500MB internal hard drive will hold approximately 797,700 pages of 8 1/2 x 11 typed material. You can also set up the server to scan the document to each user's desk. The user can then decide if this document is something that should be saved to the server or something that should reside on the desktop. As you might guess, there are many ways to add security to this feature or restrict access. One important consideration in this phase of the process is the need for backing up and storing at least one copy, if not two, of everything saved.

Using this scanning technology, every document that the Council wants to retain is scanned and put into electronic "files" or "electronic file folders." Now that you have all that data at your fingertips, how do you find it? Most importantly, the days of getting up and going from filing cabinet to filing cabinet, to other offices, to offsite storage facilities, the attic or the trunk of your car are over. Simply find the index of electronic file folders that has been created, use your mouse to take you to the electronic folder, and use the internal index (if one exists) or

just flip through the electronic "pages" until you find what you are looking for. It's a very simple task and is much, much faster than the old way. However, there is an even better way, depending on your budget. When the document scanner is obtained, you can purchase one of several type of document indexing software packages which literally "captures" each word that is scanned as the scanning occurs. Once the scanning is done, you will have the ability to do a word search to find all of the documents containing a specific work. For instance, enter the word "Livingston" and watch as a hundred thousand documents are identified as containing that word. Obviously, that big of a response is not particularly helpful. But type in the word "multi-disciplined" and your search results drop to a very manageable level. The word index and search function is even more helpful when you know the electronic file or electronic file folder which contains the document you are seeking. The search function will quickly locate what you are looking for and productivity soars.

Another distinct advantage of the electronic scanning is the retrieval and copying of a document. Suppose that, as you are currently structured, you need a copy of page 37 of a 45 page file. So, you pull the file, slide off the metal binder clasp holding the file together, pull out all of the pages until you get to page 37, take it to the copy machine and make a copy, go back to the file and put it back together and re-file. That takes way too long. Once scanned, if you need that same page 37 of that same file, you scroll through the index with your mouse to the file, click open the file, type "37" into the page number box, and click. Page 37 instantly pops up, at which point you click print and you quickly have an identical copy of the document. Unlike conventional copying where, every time you copy a copy, it's less sharp and less readable, with digital copies, every copy is an original. In addition, you are not restricted by the number of users at any one time, except with respect to scanning, where only one person can scan at a time. In addition to the black & white and color laser digital copies and scans, some machines also function as high speed color and black & white laser printers which can be set to collate, to staple, to print double sided, to print multiple copies, to reduce, enlarge and use different size paper, all right from your desktop. The printing feature is particularly handy when you have large print jobs, since it will hold more paper, print faster and is quieter.

While one the subject of computers, anyone who has been in business for any length of time knows how frustrating it can be to have a computer go out in the middle of a project with a fast approaching deadline. We felt that having excellent Information Technology personnel available to us 24 hours a day, 7 days a week was necessary and would be a benefit to our customers as well.

Until several years ago, lawyers could not go into business with none lawyers. With that change came about many innovative concepts. Consider the times that you have required legal services as well as the services of other professionals, whether they be accountants, consultants or other professionals. Like the engineering field, the practice of law is very specialized. A lawyer who specializes in insurance defense may be little help with contract negotiations. A lawyer with expertise in governmental law may have little understanding of estate planning. For that reason, we have selected several attorneys who are available to our clients when legal advice is required.

There are a great many areas requiring some type of governmental compliance, whether it be waste water treatment and DEQ environmental compliance or the Department of Health and Hospitals water quality compliance, EPA requirements related to restricted emissions and Corps of Engineers restrictions on developments in lands considered to be wetlands. Our engineers and consulting experts closely monitor compliance deadlines and obligations for all sources, whether state or federal, and where necessary work with our legal counsel to be certain that compliance obligations are met. We recognize that what appears to be a minor deficiency can result in a multi-million dollar fine and it's just not a risk that should be taken.

One of the truths about governing bodies is that they must work with other governing bodies in order to be successful. When deal with intergovernmental relationships, the law often dictates how a project will go forward or what authority is assigned to each party. It is important to have a good relationship with the state and federal legislature in order to be able to speak with state and federal legislators and their staff in order to get the help you might need with project in the Parish. Driving through the Parish, it is obvious that there are some serious, costly projects that need to be done in order to accommodate the tremendous growth this parish has experienced. Infrastructure improvements are needed throughout the area. We have lobbied the state and federal legislatures for years to help the people of Louisiana and we are confident that we can do the same for Livingston Parish

The scope of your RFP indicates that the council may wish to seek input on personnel matters. We recognize that a mistake in hiring can lead to the loss of clients and the downfall of a business. For this reason, we have carefully prepared interview processes, tailored to the nature of the job you are seeking to fill. We have relationships with drug and alcohol testing companies and we perform extensive background checks on employment applicants. We also have private investigators available to dig as deep as we need to go

The budgeting process is without a doubt one of the most import processes entrusted to the Council. While it is the Parish President's obligation to prepare the draft budget, it is the Council's responsibility to review that draft, make whatever changes that the council believes are necessary and then vote on the budget. The council is aware that the budget, once adopted, is an ordinance. An ordinance which allocates funds is a legal grant of power to spend those funds. Absent a budget amendment, money can be spent in a manner that the council did not intend. For this reason, it is crucial that the budget be carefully monitored and that the Parish's revenues and expenditures are kept in line with the money budgeted. We have found that in many political subdivisions, budgets essentially remain the same year after year with small percentage increases to address inflation. While this is a common way to the draft a budget, it is not the best way, since people tend to spend what you give them. The concept is quite simple. If you as the council gives my department \$100,000 this year, chances are pretty good that I know what I really need or what was budgeted that I can do without, thereby creating some unbudgeted extra cash to use it for whatever I want. There is no way that I'm going to tell you that the budge is too much, and there is no way that I'm not going to spend every dime of what you give me. That's because I've been taught to believe that if I don't spend what I'm given, Next year I'm going to get less

There are ways to properly budget manage so as to prevent, or at least reduce the chances of this time of misuse of funds. By using the term, "misuse," we do not mean to insinuate that any illegal is occurring. We only mean that funds which could be better used in other ways are being used in some instances, simply to make sure that the funds are used. We would want to begin a process of quarterly budget examinations to have a better idea of how Parish money is being used and the manner in which the use is occurring. By doing this analysis, we believe that we could make some budget adjustments next year that would be more realistic and leaves less money for discretionary spending. Careful wording of the budget is another area where spending can be addressed. Since money can only be spent if approved by budget, a budget written broadly provides a great deal of latitude in purchase. On the other hand, if your budget is written well and specifically, it becomes more difficult to get around the prohibitions.

Well written, specific instructions are crucial if the council's intent is to be followed. It is the Council's job to write, deliberate and vote on proposed ordinances and resolutions. We have the expertise to work with the council to insure that an ordinance says what it is supposed to say and that it achieves what it is supposed to achieve. We also understand the difference between an ordinance and a resolution. We are aware that an ordinance is a law and may be vetoed and we know equally well that a resolution cannot be vetoed. Although a resolution is not a law carefully drafted resolutions can be nearly as good as a law and we have the expertise needed to prepare such resolutions.

Revenue is always an issue for government, and local government is no different. From our review of the Parish Charter and the Parish Code of Ordinance, we are of the opinion that the Parish is not collecting the revenue it should be collecting, either because of a lack of understanding of the law, the absence of enforcement of the law or because laws which can be enforced so that additional revenue is generated have not been adopted. We believe that one of the first major undertakings that needs to occur is a review of the Parish Code of Ordinances and a comprehensive revision of the Code be performed. In our review of the Code, we have seen numerous instances where unenforceable laws remain on the books, where ordinances conflict with each other and where Parish law conflicts with State law. These deficiencies must be addressed quickly, as should the addition of new laws that will generate additional funds for the Parish.

The Council is charged with redistricting itself after the 2010 census has been complete. Our Consultants can aid in this task and help the council reach a redistricting which is fair and equitable to the citizens as well and the members of the council. Redistricting is never popular and is often very difficult to achieve. Having our company handle the process can make the process more progressive, fair and balanced to all concerned. We must acknowledge that Louisiana remains under the Voting Rights Act and that anything we do will be subject to the approval of the U.S. Department of Justice.

Another authority granted exclusively to the Council is the authority to conduct investigations into the affairs of the Parish Government and the conduct of Parish officials, employees and agencies and departments. We have the ability to assist the council in conducting

any such investigations, handling protocol, arranging for court reporters and making certain that due process is afforded to anyone who is subject to a Council investigation.

The Council has very little staff. We read a comment in one of the local papers, apparently offered by a citizen which was critical of the Council's proposal to retain consultants. The comment suggested that two of the councilmen should resign if they cannot make decisions for themselves. Another Councilman commented that the RFP seeks to pay people for what the Council is hired to do and another seems to suggest that the RFP is contrary to the separation of powers concept of government. At present, the Council has three employees, all clerical. I suggest to you that the Parish President has quite a few more. The Parish President has a high school education. And he is running a multimillion dollar business. How is he able to do so? He does so because he has surrounded himself with smart, talented people. People who are professionals, experts, consultants and advisors. Now, consider the reason that this Parish is not a dictatorship, i.e., the Parish President runs everything. It's because of the separations of powers concept that goes back to the fathers of this country. They decided we would have a president, but not one with absolute powers. The President takes his ideas and his programs and he puts them before congress and asks for approval. This is the same way that the Livingston Parish Government is supposed to work. Now, when the President of the United States hands a Representative or Senator a bill that would cap the amount of sulfur that fossil fuel burning power plants may belch into the air, does anyone think that those congressmen pull out a book and read up on sulfur emissions? No. That congressman has someone on his staff who specializes in energy issues take the bill, analyze it, and tell the congressman what expert thoughts are. And all around the Capital, there are 100 Senators and 435 Representatives, each asking their staff member who is an expert on energy what their opinion is on the president's bill. Debate begins at some point and the differences in opinion are aired and ultimately, a vote is taken on the issue. But the one thing that is certain is that the men and women of congress you voted into office, don't simply take the President's word for what the bill says. They exercise due diligence and consult with experts who know about such things.

If anything, the Parish Council should be chastised for not retaining qualified experts earlier. Look at the Agenda from the November 2009 Council meeting. Item 10 is a change order to a governmental building. How do our council members know anything about this change order? None are architects. How can they determine whether the change order is justified? None are engineers. Without the education and without any expert assistance, they must rely on the representations of the Parish President and his experts and advisors. Now I certainly would not presume to suggest that the Parish President is not reliable. But if our forefathers did not want there to be educated debate on such issues, why create congress (or the council) at all? The same agenda has an approval of a contract with Shaw Environmental for a multi-jurisdictional Hazard Mitigation Plan. Are the Parish councilmen supposed to know about such things, or are they supposed to do whatever the President says, or should they have an expert to review that contract and explain its intricacies? The point of this is that the council should not be a rubber stamp for the Parish President. They should have qualified experts of their own, with whom they can consult, before engaging in public debate about a matter before them.

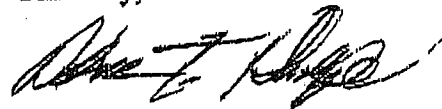
What we at Comprehensive Business Solutions plan is to be that group of experts that the council can call upon when it has a question concerning a matter that is before the council. This consultation in no way infringes on the rights of the Executive. The council has always had the right to vote down, or vote in favor of proposals of the Executive. This RFP proposal will only give the council an understanding of the issues under consideration. This proposal will give the Parish a much better council; one that is informed and that doesn't vote based on anything other than informed facts. The services offered in this proposal do not go beyond the separation of powers. That is not our interest. The services we offer to perform are those which the Council has the right to perform now, based upon the Charter.

A newspaper article which appeared to be opposed to the concept of a better educated and better prepared council had an obligation to the public to point out that the Louisiana Legislature uses experts, consultants and advisors and that the United States uses such professionals as well. There is no difference between the Parish President and the Parish Council than there is between the Governor and the Legislature. It would be wonderful if the Parish President could share his advisors and experts with the Parish Council, but it is a long held truth that a servant cannot serve two masters. Attempting to "share" would create an ethical dilemma that would keep the state Ethics Board busy for years.

While addressing the sarcasm and hysteria surrounding the Council's proposal, we would be remiss if we did not address the concerns voiced over the cost of the proposal. First and foremost, the RFP states that prices are negotiable. At this point, there have been no discussions over compensation. However, it is important to point out that the RFP doesn't seek to create any new positions, nor is CBS seeking any. We anticipate that our services will be used when needed. We have assumed that no individual councilman would have the authority to engage us on a project and that perhaps a committee of the Council would have to approve an engagement. We anticipate that, by and large, our services will be billed on an hourly basis, with the hourly amount dependent upon the outcome of the negotiations. We do envision some scenarios where work may be charged on a "flat rate" basis. The Parish would have a single point of contact with an assigned back-up. The cell phone and home phone number of the point of contact will be provided. Finally, the Parish will be billed monthly, in a single bill, that provides detail as to what work was done. A project number will be assigned to each project.

Thank you for entertaining this proposal. If there any ambiguities or should you have any questions or comments, feel free to contact our office.

Sincerely,



Patterson T. Phelps