

December 20, 2024

Mr. Aaron Guske  
Director of Technology  
Harlem School District 122  
8605 North 2<sup>nd</sup> Street  
Machesney Park, IL 61115

**Re: Proposal for E-Rate Fiber RFP**

Dear Mr. Guske:

Please accept this letter as our proposal for a fiber optic design and E-Rate-based fiber optic RFP for Harlem School District 122. We value the confidence you have placed in us. ClientFirst will review site conditions and develop necessary RFP documents to create an E-Rate-eligible RFP for submission through the E-Rate platform.

This is the final year of an E-Rate five-year cycle funding cycle and the District has \$214,562 in E-Rate eligible funds for this project. E-Rate-eligible fiber optic components from the bid will be reimbursed at a rate of 80% by the E-Rate program.

We believe that ClientFirst Technology Consulting has the breadth of knowledge and experience to provide high-quality voice and data design services that will provide significant benefits to the District. Our recommendations and implementation philosophy will provide for current technology needs and room for expansion for other future technologies. Based on our recent discussions, we are presenting this engagement letter outlining our proposed involvement in this project.

## Background

The District desires to contract for materials and installation services to replace enhanced fiber optic cabling to connect District facilities. This proposal includes the consulting time to work with the District to develop an E-Rate-eligible RFP for equipment and services related to this upgrade. It provides a recommended scope of work for the fiber optic network, including installing new cabinets and cabling as necessary.

## Project Work Steps

Our project work steps for this important endeavor are as follows:

### Phase 1 – Bid Documents and Procurement Assistance

Our work will be focused on determining final design requirements, preparing bid documents, managing the RFP process, and guiding the District to a final design selection.

**Provide Cost Alternatives for Wall Cabinets** – We will work with District IT staff to provide cost-effective wall cabinet recommendations for fiber optic equipment.

**Prepare RFP Documents** – Create bid documents for the Structured Cabling System. Include the following:

- Develop floor plan diagrams to share with contractors during building walk-throughs
- Coordinate additional requirements for building pathways
- Locate new network cabinets or rooms, including providing electrical and mechanical requirements

- Develop specification documents
  - ◆ District to combine the RFP documents templates with ClientFirst prepared specifications
  - ◆ Determine fiber lengths per E-Rate requirements

**Provide the RFP Document to the District for Review** – We will send the document to the District to review and provide edits. We will participate in a review meeting, edit the document as needed, and finalize it for distribution.

**Post RFP to E-Rate Site** – As a part of our E-Rate consulting scope of work, we will review the RFP and post it to the E-Rate site.

**Conduct Pre-Proposal Meeting and Walk-Through** – We will conduct a pre-proposal meeting with all interested contractors.

**Answer Contractor Questions** – We will assist the District with responding to vendor technical questions during the RFP process. We will advise the District on items required for the addendum. Any addenda will be posted on the E-Rate site for contractor review.

**Review Contractor Bids** – Work with the District to review all bids, conduct a bid validation meeting with the low bidder, and will be responsible for all bid analysis.

## Work Plan

The District has requested that ClientFirst provide technical assistance for a fiber optic network RFP that conforms to E-Rate requirements and should be subsidized by the E-Rate program.

| Steps   | E-Rate Fiber RFP  | Total     | Tom       | Craig     | CAD<br>Drafting | Comments   |
|---|---|-----------|-----------|-----------|-----------------|--|
| <b>Phase 1: Design, RFP Documents, and Procurement Assistance</b> |   |           |           |           |                 |  |
| 1   | Advise the District on cost options for wall cabinets.  | 2         |           | 2         |                 |  |
| 2   | Create an RFP drawing set using the District's diagrams   | 12        |           | 4         | 8               | District to provide ClientFirst with telecom room locations, rack/cabinet types, and areas with unique ceiling conditions. |
| 3   | Add symbols, keys, and notes to floor plans   | 8         |           | 4         | 4               |  |
| 4   | Develop specification documents   | 12        | 10        | 2         |                 |  |
| 5   | Merge District Terms and Conditions with specifications, drawing set  | 7         | 4         | 1         | 2               | District to provide Terms and Conditions document to issue with E-rate Form 470  |
| 6   | Determine fiber lengths for E-rate Form 470   | 4         |           | 1         | 3               |  |
| 7   | Provide the Request for Proposal documents (specifications and drawings) to the District for review, including one review conference call | 3         | 2         | 1         |                 |  |
| 8   | Incorporate final changes from the review meeting   | 5         | 2         | 1         | 2               |  |
| 9   | Participate in pre-proposal meeting (and walk-through)  | 4         | 4         |           |                 | District IT print drawings sets and accompanies ClientFirst and contractors on tour.                                       |
| 10  | Assist the District with answering contractor questions and addenda preparation   | 6         | 4         | 2         |                 |  |
| 11  | Work with the District to review contractor proposals and conduct proposal validation with selected contractor.                           | 5         | 4         | 1         |                 |  |
| <b>Phase 1 Hours</b>  |   | <b>68</b> | <b>30</b> | <b>19</b> | <b>19</b>       |  |

| Steps   | E-Rate Fiber RFP  | Total     | Tom       | Craig     | CAD<br>Drafting | Comments  |
|---|---|-----------|-----------|-----------|-----------------|---|
| <b>Phase 2: Construction Observation (Optional)</b> |   |           |           |           |                 |   |
| 1   | Project Management  | 8         | 6         | 2         |                 |   |
| 2   | Project Kick-Off Meeting, Tour, and Scope Review - Initiate Project   | 5         | 4         | 1         |                 |   |
| 3   | Revise Documents from Kick-off Tour and Contractor Comments   |           | 2         |           | 2               |   |
| 4   | Review Submittals   | 6         | 4         | 2         |                 |   |
| 5   | Project Coordination and Scheduling - Attend virtual semi-weekly during 3 months of construction              | 8         | 6         | 2         |                 | Includes meeting action items   |
| 6   | Construction Observation Visits   | 8         | 8         |           |                 | Four site visits  |
| 7   | Respond to Contractor Requests for Information (RFIs)   | 10        | 8         | 2         |                 |   |
| 8   | Punch Walk-Throughs - Review punch list items with contractor (including correspondence)                      | 18        | 16        | 2         |                 | Sixteen hours of walk-throughs, eight hours of documentation/coordination             |
| 9   | Close Project - Review cable testing, as-built documentation, warranties, operations, and maintenance manuals | 6         | 4         | 2         |                 | Review as-built drawings, warranty, cabling test results, and any other documentation |
| <b>Phase 2 Hours</b>                                |   | <b>73</b> | <b>58</b> | <b>13</b> | <b>2</b>        |   |

# Craig Williams, RCDD, NTS

## Director, Infrastructure Consulting Services

Craig Williams has over 25 years of experience in the IT profession, focused primarily on providing visionary consulting and support for education and other public-sector organizations. A former school CIO, Craig emphasizes a balanced perspective of improvement in all areas of IT, from internal infrastructure to public-facing technologies. He is an articulate consensus-builder with executives, departments, staff, and the public. Craig leverages his extensive master planning, infrastructure design, application implementation, and project management experience to provide districts with effective, lasting results in utilizing technology to fulfill their educational mission.

### Highlights

- Full Wireless replacement RFPs for school districts
- Building security replacement for Illinois school district
- Numerous E-Rate network equipment RFPs
- E-Rate WAN RFPs
- Point-to-point WAN for Illinois school district
- Fiber replacement for mid-sized K-12 school district
- Selected as one of 16 technology directors nationally for HP and Intel Profiles in Leadership through Tech and Learning Magazine
- Directed technology support and operations at Illinois' second-largest public school district, serving 40,000 students. Led technical staff of 71. Increased customer satisfaction from 87.7% to 95.2% rate
- National award from the Help Desk Institute as one of Elite 50 organizations for customer support across all industries

### Agency Experience

Algonquin SD 158  
 Arie Crown Hebrew Day School  
 Batavia SD 101  
 Bloomingdale SD 13  
 Bunker Hill SD 8  
 Butler SD 53  
 Carpentersville CUSD 300  
 Central CUSD 301  
 Chicago International Charter Schools  
 Community High School District 99  
 DeKalb CUSD 428  
 Durand CUSD 322  
 Elmhurst SD 205  
 Forest Ridge SD 142  
 Geneva CSD 304  
 Glen Ellyn SD 41  
 Harlem SD 122  
 Harvard SD 50  
 Harvey SD 152  
 Hinsdale HSD 86  
 Hononegah SD 207  
 Huntley SD 158  
 Indian Prairie CUSD 204  
 J. Sterling Morton HSD 201  
 Joliet PSD 86  
 Lake Zurich SD 95  
 Maine Township HSD 207

Marmion Academy  
 Mt. Prospect SD 57  
 Naperville CUSD 203  
 Niles Township HSD 219  
 Posen-Robbins SD 143.5  
 Prairie Grove SD 46  
 Salt Creek SD 48  
 Sunset Ridge School District  
 Thornton Fractional HSD 215  
 Township HSD 214  
 TrueNorth Educational Cooperative  
 West Aurora SD 129  
 Wheaton Warrenville CUSD 200  
 Winnetka SD 39  
 Worth SD 127  
 Yorkville SD 115  
 City of Azusa  
 City of Calabasas  
 City of Cedar Hill  
 City of Glendora  
 City of Joliet  
 City of Manassas Park  
 City of Newark  
 City of Pacific Grove  
 City of Piedmont  
 City of Pismo Beach  
 City of Rancho Cucamonga

City of Rancho Mirage  
 City of Riviera Beach  
 City of San Pablo  
 City of South San Francisco  
 City of University Park  
 City of Vacaville  
 City of West Covina  
 City of West Des Moines  
 Town of Groton  
 Village of Lincolnwood  
 Village of Northfield  
 Village of Orland Park  
 Village of Park Forest  
 Village of River Forest  
 Village of Riverside  
 Village of Wheeling  
 County of Davie  
 County of Mariposa  
 County of Mendocino  
 County of Tuolumne  
 Champaign County  
 Forest Preserve District  
 Forest Preserve District of Lake County  
 Hayward Area Recreation and Park District  
 Norridge Park District

Four Rivers Sanitation Authority  
 San Bernardino Municipal Water District  
 Joliet Public Library  
 Northbrook Public Library  
 Rancho Cucamonga Library  
 Rockford Public Library  
 Steppenwolf Theatre



### CREDENTIALS, DEGREES, AND AFFILIATIONS

- Bachelor of Science in Architecture — University of Illinois
- BICSI Registered Communication Distribution Design (RCDD)
- BICSI Network Technology Systems (NTS) Designer
- MBA, North Central College (Concentration in Management Information Systems)

### SPECIALTY AREAS

- Infrastructure — Low Voltage Systems/Cabling
- Data Center/Networking
- Wireless
- Project Management
- Business and Human Resources Systems
- CIO Advisory
- Public-Facing Web Technology
- Staff Support/Customer Service




Craig, you were instrumental in the successful completion of this project all along the way, but especially as we... needed a push in "crossing the last beachhead."

—Superintendent of Schools  
 IL School District

I appreciated Craig's knowledge of IT issues, as well as his ability to convey them in a manner that made sense to me.

—Library Director  
 IL School District



# Tom Weiman

## Practice Leader, Enterprise Communications Consulting

Tom Weiman has provided IT and telecommunications consulting for over 30 years. He has experience consulting in telecommunications, data networks (LAN/WAN), and cable infrastructure.

Tom's unique combination of voice, data, and infrastructure experience provides our clients with years of design, selection, and implementation experience with all facets of IT and telecommunications. Tom has direct experience in the detailed design of contact centers, IVR operations, and the integration of voice and data services for multi-location clients.

## Highlights

- Lead Project Manager, State of Wisconsin, saving the state over \$90 million in telecommunications service costs
- Former Partner and National Telecom Consulting Project Leader for RSM McGladrey, the nation's fifth-largest CPA and consulting firm
- Call Center Campus Instructor at Purdue University, Center for Customer-Driven Quality
- Provided telecommunications consulting services to nearly 300 public agencies throughout the United States, including government agencies, non-profit organizations, healthcare and financial institutions, and educational institutions at the K-12 and higher education levels

## Agency Experience

|  |   |                             |
|--|---|-----------------------------|
| Civitas Schools                            | Orland Park CHSD 230                      | City of Eau Claire          |
| Consolidated SD 158                        | Oswego CUSD 308                           | City of Escondido           |
| Algonquin CUSD 300                         | Oswego Public Library District            | City of Fort Lauderdale     |
| Arlington Heights Township                 | PACE Suburban Bus Division                | City of Foster City         |
| HSD 214                                    | RTA                                       | City of Kinston             |
| Assumption Catholic High School, Davenport | Park District of Highland Park            | City of La Habra            |
| Batavia SD 101                             | Park Ridge-Niles CCSD 64                  | City of La Puente           |
| Burlington Central CUSD 301                | Port Byron Central School Districts       | City of Laguna Niguel       |
| Castaic Lake Water Agency                  | Rapid City Area Schools                   | City of Lake Forest         |
| Cedar Rapids Community School District     | Riverdale CUSD 100                        | City of Mason City          |
| Davenport Community Schools                | Riverside SD 96                           | City of Matteson            |
| Davenport School District                  | Rockford Public Library                   | City of Miami Springs       |
| DeKalb CUSD 428                            | Salisbury-Rowan Utilities (SRU)           | City of Moline              |
| Diocese of Davenport Catholic Schools      | San Bernardino Municipal Water Department | City of Mount Airy          |
| Diocese of Madison Catholic Schools        | San Jose/Evergreen Community College      | City of Mount Dora          |
| Dubuque Community School District          | Schaumburg Township District Library      | City of Murrieta            |
| Eastern IL University                      | Sherrard Community Schools                | City of Naperville          |
| Elgin School District                      | Shorewood School District                 | City of New Hampton         |
| Forest Preserve District of Will County    | South Florida Water Management            | City of New Haven           |
| Geneva Community Unit SD 304               | St. Ambrose University                    | City of Oakbrook Terrace    |
| Glenview Schools                           | St. Charles CUSD 303                      | City of Orland Park         |
| Gower School District 62                   | Sunset Ridge SD 29                        | City of Palm Desert         |
| Hampton SD 29                              | University of Chicago                     | City of Palmdale            |
| Harlem SD 122                              | University of Michigan                    | City of Piedmont            |
| Harrison SD 36                             | University of Notre Dame                  | City of Pompano Beach       |
| Harvard CUSD 50                            | Wahlert Catholic High School              | City of Port St. Lucie      |
| IL Action for Children                     | Washington County School District         | City of Prospect Heights    |
| Illinois State University                  | West Allis School District                | City of Rancho Cucamonga    |
| Indian Prairie CUSD 204                    | West Aurora SD 129                        | City of Rancho Mirage       |
| Irvine School District                     | Wheaton-Warrenville SD 200                | City of Redlands            |
| Knoxville Community School District        | Whitnall School District                  | City of Rock Island         |
| Livermore Area RFD                         | City of Bettendorf                        | City of Rockford            |
| Madison School District                    | City of Bloomington                       | City of Sacramento          |
| Mason City School District                 | City of Brentwood                         | City of Salisbury           |
| Mount Prospect SD 57                       | City of Burbank                           | City of San Clemente        |
| Naperville CUSD 203                        | City of Calabasas                         | City of San Gabriel         |
| Newhall County Water District              | City of Camarillo                         | City of San Rafael          |
| Norridge Park District                     | City of Cape Coral                        | City of Sierra Madre        |
| North Scott School District                | City of Chino                             | City of Sioux Falls         |
| Oak Park Public Library                    | City of Corona                            | City of South Pasadena      |
| Ohlone Community College                   | City of Countryside                       | City of South San Francisco |
| Omaha Public Power District (OPPD)         | City of Deerfield Beach                   | City of St. Charles         |
|  | City of Downey                            | City of Upland              |
|  | City of Dunedin                           | City of Waukegan            |
|  |   | City of Wauwatosa           |
|  |   | City of West Allis          |
|  |   | City of West Covina         |
|  |   | City of West Des Moines     |

City of West St. Paul  
 County of Buncombe  
 County of Cabarrus  
 County of DuPage  
 County of Milwaukee  
 County of Montgomery  
 County of Orange  
 County of Peoria  
 County of San Bernardino  
 County of Sangamon  
 County of Tazewell  
 County of Tuolumne  
 County of Will  
 County of Winnebago  
 County of Yolo  
 Town of Danville  
 Town of Truckee  
 Village of Arlington Heights  
 Village of Cary  
 Village of Lincolnwood  
 Village of Northfield  
 Village of Oak Brook  
 Village of Oak Park  
 Village of Palos Park  
 Village of River Forest  
 Village of Riverside  
 Cedar Falls Utilities  
 Central Illinois Power  
 Church of Our Savior



## CREDENTIALS, DEGREES, AND AFFILIATIONS

- Bachelor of Arts in Communications — St. Ambrose University
- Ongoing training from Avaya/Cisco/ShoreTel/Nortel/Mitel/NEC, and others
- Past President and current member of the Iowa Telecommunications Users Group (ITUG)
- Member, All Major Vendor Consultant Programs
- Member, Association of Communications Technology Professionals in Higher Education (ACUTA)
- Member, Building Industry Consulting Services, International (BICSI)
- Member, Healthcare Information and Management Systems Society (HIMSS)
- Member, Society of Telecommunications Consultants (STC)
- Member, Institute of Electrical and Electronics Engineers (IEEE)

## SPECIALTIES

- Billing Audits and Cost Reviews
- Carrier Services Cost Analysis
- Competitive Hardware and Services RFP Development and Evaluations
- Implementation Project Management
- Operational Assessment and Workflow
- Strategic Telecommunications Planning
- VoIP Readiness Assessments and Review



I would like to thank both of you, especially Tom, for all the hard work you did for us. We could not have done this RFP process successfully without your help.

—IS Manager  
 CA Municipality

## Fee Summary

Our professional fees are based on the scope and approach outlined in this proposal, plus expenses not to exceed the costs shown. Our standard billing rates for these types of services reflect the levels and skill sets of the consultant(s) assigned to specific aspects of the project. Our involvement in some tasks, such as the exact number of questions, may vary. This proposal will be invoiced for time and materials up to the project total. For instance, should fewer questions be submitted, we will only invoice for the necessary time spent responding to them.

| E-Rate Fiber RFP  |  | Total     | Tom    | Craig  | CAD Drafting |
|---|--|-----------|--------|--------|--------------|
| <b>Phase 1: Design, RFP Documents, and Procurement Assistance</b> |  |           |        |        |              |
| Phase 1 Hours   |  | 68        | 30     | 19     | 19           |
| Rates   |  |           | \$ 225 | \$ 225 | \$125        |
| Fees  |  | \$13,400  |        |        |              |
| Expenses  |  | \$170     |        |        |              |
| Cost Phase 1  |  | \$13,570  |        |        |              |
| <b>Phase 2: Construction Observation (Optional)</b>               |  |           |        |        |              |
| Phase 2 Hours   |  | 73        | 58     | 13     | 2            |
| Rates   |  |           | \$ 225 | \$ 225 | \$ 150       |
| Fees  |  | \$ 16,275 |        |        |              |
| Expenses  |  | \$ 170    |        |        |              |
| Cost Phase 2  |  | \$ 16,445 |        |        |              |

## Project Start

We can begin the initial activities related to this project, such as project coordination and scheduling, within 1-2 weeks of finalizing an agreement regarding this proposal.

## Scope Changes and Management

Alternative scope changes and fee adjustments are possible and are dependent on specific project needs and staff resources and capabilities. Minor changes to the scope and methodology stated above will not result in a change in our fees.

If the nature or scope of our work should change significantly during the project, we will discuss such matters and their effect on our fees and obtain written approval before proceeding.

## Payment Terms

We invoice monthly as work proceeds. ClientFirst will provide a detailed accounting of all consulting time and expenses on the invoice. Payments are due within 30 days of receipt via check or ACH.

## Additional Services/Purchases by Other Seeking Public Agencies

ClientFirst acknowledges that other public agencies may seek to "piggyback" under the same terms and conditions of a resulting similar services contract and/or purchases being offered in this contract or proposal. ClientFirst has the option to agree or disagree to allow contract piggybacks on a case-by-case basis. ClientFirst agrees to extend the same pricing, terms, and conditions as stated in this contract or proposal to each political entity, special district, and related non-profit. It is understood that other entities shall make purchases in their name, make payments, and be liable directly to ClientFirst. The agency shall in no way be involved or responsible to ClientFirst for other entities' purchases.

## Acceptance

If this proposal is in accordance with the District's understanding of the services to be performed by ClientFirst, please sign and date this letter and return it, physically or electronically.

If you have any questions, feel free to contact me at 630.656.7366 or via email at [cwilliams@clientfirstcg.com](mailto:cwilliams@clientfirstcg.com) for additional information. We appreciate the continued opportunity to serve Harlem School District 122.

Sincerely,



**Craig Williams, RCDD, NTS**

*Director*

Infrastructure Consulting Services



**Tom Jakobsen**

*Partner*

IT Infrastructure and Operations Practice Leader

Accepted by

**Harlem School District 122**



Signature

Date

Name and Title (print)