January 14, 2019

Mr. Oscar A. Herrera
Technology Coordinator
Harvey School District 152
16001 Lincoln Avenue
Harvey, IL 60426

RE: Proposal for Structured Cabling System for Wireless - RFP Development

Dear Mr. Herrera:

CLIENTFIRST appreciates the opportunity to present our *Proposal for Structured Cabling System for Wireless – RFP Development.* We value the confidence you have placed in us. We propose the following services to design, provide RFP documents, administer bidding and assist with selection for the structured cabling system for wireless at the following schools:

- **Bryant Elementary School**
- **Holmes Elementary School**
- **Maya Angelou Elementary School**
- **Whittier Elementary School**
- **Brooks Junior High School**

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 provide new structured cabling systems for wireless in five schools. This proposal includes the consulting time to work with the District and provide a recommended design and bidding scope of work for the structured cabling system. The scope includes new pathway, patch panels in existing cabinets/network rooms, structured cabling, wireless access point installation, grounding, firestopping, labeling and testing.

Project Work Steps

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

Phase 1 – RFP Development

Our work will be focused on determining final design requirements, preparing RFP documents, managing the proposal process, and guiding the District to a final contractor selection. The RFP Development consulting services are referred to as Phase 1 in this proposal. Phase 2 - Construction Observation services will be proposed *only* if the District needs additional services during construction.

Design and RFP Preparation

Site Visit – We will review network rooms, wall/ceiling conditions, and pathway spaces above ceilings.

Gather Documentation – We will collect standard purchasing documents, including terms and conditions, insurance requirements and forms required by the District.

Draft RFP Language – We will prepare the RFP documents, incorporating technical specifications, terms and conditions, drawings, and E-rate requirements.

Review with District team and Finalize RFP – We will send the documents to the District to review and provide edits. We will participate in one review conference call, edit documents as needed, and finalize them for distribution.

Proposal Assistance

Create and Publish 470 – As part of our regular E-rate services, we will create E-rate Form 470 for District certification, including the RFP documents as attachments.

Mandatory Pre-Proposal Meeting – We will conduct the pre-proposal meeting and site tour with all interested contractors. Contractor attendance at the pre-proposal meeting will be a requirement for submitting a proposal for the project.

Answer Contractor Questions – We will assist the District with responding to vendor technical questions during the bid process. We will advise the District on items required for the addendum. District will be responsible for assembling any addenda and for questions related to contractual, insurance, and procurement issues. We will post the addendum to the E-rate site as part of regular E-rate services.

District to Receive Proposals – The District will receive proposals prior to the RFP due date, which is 28 days after posting the Form 470.

Contractor Selection

Review Proposals – We will work with the District to review proposals for completeness and assist with evaluation matrix scoring.

Finalize Proposals – We will review the highest-scoring proposal with its contractor

Develop Recommendations – We will Provide a recommendation suitable for inclusion in the School Board packet.

Create 471 – As part of our regular E-rate services, we will create the Form 471 for District certification.

Work Plan

The District has requested that *CLIENTFIRST* provide technical assistance for design, RFP preparation, proposal assistance and final contractor selection for the contract work to provide structured cabling systems for wireless in five schools.

Phase 1 – RFP Development

Step	Structured Cabling System for Wireless Request for Proposals Development	Total Hours	Tom J.	Craig W.	Doc Team
Design and RFP Preparation					
1	**Site Visit** - to review network rooms, wall/ceiling conditions, and pathway spaces above ceilings.	6		6	
2	**Gather Documentation** - including terms and conditions, insurance requirements and forms required by the District.	2		2	
3	**Draft RFP language** - incorporating technical specifications, terms and conditions, drawings, and E-rate requirements.	10		8	2
4	**Review with District Team and Finalize RFP**	3	1	2	
Proposal Assistance					
5	**Create and Publish 470**		Covered by regular E-Rate services		
6	**Mandatory Pre-Proposal Meeting** - for contractors, along with contractor site visit.	2		2	
7	**Answer Contractor Questions** - Assist District with technical responses to questions. District to create addendum. Client First to post addendum.	2		2	
8	**District to Receive Proposals**				
Contractor Selection					
9	**Review Proposals** - for completeness and assist with evaluation scoring.	4		4	
10	**Finalize Proposal Selection** - review highest-scoring proposal with contractor.	2		2	
11	**Develop Recommendations** - for inclusion in Board packet.		Not required		
12	**Create 471** - for District certification.		Covered by regular E-Rate services		
	Phase 1 - Hours by Consultant	**31**	**1**	**28**	**2**

Tom Jakobsen

Senior Partner – IT Infrastructure and Operations Practice Leader

Tom Jakobsen has over 30 years of experience in the information technology arena. His interdisciplinary experience has given him a unique understanding of the interrelationship between IT infrastructures and the applications they support. It has also afforded him firsthand experience demonstrating the benefits of project management and system development life cycles for infrastructure-related projects. Mr. Jakobsen's dual roles as a Virtual CIO and Consultant provide clients with a resource of tremendous experience who understands interdepartmental and vendor relationships and their management.

Highlights

- Former National IT Infrastructure Consulting Practice Leader for RSM McGladrey, the nation's fifth-largest CPA and consulting firm
- Ongoing Contract CIO for multiple agencies
- Former CIO at Frame Relay Corporation
- Interim CIO at AAA Colorado
- Interim CIO at AAA Arizona
- Two-time Interim CIO at Illinois Action for Children
- Managed hundreds of IT consulting projects with dozens of municipalities and local governments

> **Tom, I've been meaning to thank you for your expertise and guidance … assisting us in moving forward on all fronts.**
>
> —City Manager
> *IL Municipality*

Specialty Areas

- Network Design, Procurement, Implementation, and Oversight
- Cybersecurity
- Disaster Recovery
- IT Operations Management
- Interim CIO/IT Management
- Project Management
- Assessments, Strategy, and Planning

> **Know that I am extremely satisfied with the team we have assembled. It is comforting to have steady hands guiding us into the 21st century!**
>
> —City Administrator
> *CA Municipality*

Education, Credentials, and Affiliations

- Bachelor of Science in Mathematics and Economics from University of Iowa
- Member, Project Management Institute, Midwest Chapter
- Member, University of Iowa Graduate College, Advisory Board

Agency Experience

Batavia USD 101	Indian Prairie CUSD 204	San Jose Evergreen Community College	Village of Glencoe
Butler SD 53			Village of Homewood
Central CUSD 301	J. Sterling Morton HSD 201	San Marino USD	Village of Kenilworth
CHSD 230, Orland Park		West Covina USD	Village of Libertyville
Community CSD 158	Mount Prospect SD 57	City of Bloomington	Village of Lincolnwood
CUSD 300	Naperville CUSD 203	City of Joliet	Village of Northbrook
CUSD 308, Oswego	Riverside SD 96	City of Naperville	Village of Northfield
DeKalb CUSD 428	Salt Creek SD 48	City of Oakbrook Terrace	Village of Oak Brook
Durand CUSD 322	SD U-46, Elgin		Village of Oak Park
East Aurora SD 131	St. Charles CUSD 303	City of Rockford	Village of Palos Park
Geneva CUSD 304	Township HSD 214	City of St. Charles	Village of River Forest
Glenview SD 34	West Aurora SD 129	Village of Arlington Heights	Village of Riverside
Harlem SD 122	Winfield SD 34		City of Mount Airy
Hononegah Community HSD 207	Colton Joint USD	Village of Bloomingdale	City of Salisbury
	Lake Elsinore USD		County of Davie
	Romoland SD	Village of Cary	

Craig Williams, RCDD, NTS

Director, Infrastructure Consulting Services

Craig Williams has 25 years of experience in the IT profession, focused primarily on providing visionary consulting and support for public-sector organizations. 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, leveraging his extensive master planning, infrastructure design, and project management experience to provide clients with effective, lasting results in utilizing technology to fulfill their mission of service to their constituents.

Highlights

- Interim Director of IT, City of West Des Moines, Iowa
- Complete cabling replacement for California city
- Fiber Feasibility Study for City of Joliet, Illinois
- 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, including application support, network engineering, building tech support and Help Desk services
- 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

> **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*

Specialty Areas

- Infrastructure
- Data Center/Networking
- Wireless
- Project Management
- Business and Human Resources Systems
- Data Analytics
- Public-Facing Web Technology
- Staff Support/Customer Service

> **At a time when we needed assistance badly, you and your team have stepped up to the plate and done very well by us.**
>
> —Deputy City Manager
> *IA Municipality*

Education, Credentials, and Affiliations

- BICSI Registered Communication Distribution Designer (RCDD)
- BICSI Network Technology Systems (NTS) Designer
- MBA, North Central College (concentration in Management Information Systems)
- BS in Architecture, University of Illinois

Agency Experience

Geneva Public Schools	Mt. Prospect School District	Village of Lincolnwood	City of West Covina
Northbrook Public Library	Naperville School District 203	Village of Wheeling	City of West Des Moines
Rockford Public Library	Salt Creek School District 48	City of Glendora	Tuolumne County
J. Sterling Morton HSD 201	City of Joliet	City of Pacific Grove	Town of Groton
		City of Piedmont	City of Riviera Beach
		City of Rancho Mirage	County of Davie

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 may vary. This proposal will be invoiced for time and materials up to the project total.

Phase 1 – RFP Development

Structured Cabling System for Wireless Request for Proposals Development	Total Hours	Tom J.	Craig W.	Doc Team
Hours	31	1	28	2
Rates		$195	$185	$50
Fees	$5,475			
Local Travel Expenses (Mileage)	$50			
Total Fees and Expenses - Phase 1	**$5,525**			

Additional Expenses

Expenses are expected to be primarily for miscellaneous, small, IT-related items and mileage for travel to on-site meetings. These expenses are billed at cost. Any extraordinary expenses, such as airplane flights or hotels, are submitted for approval in advance.

Project Start

We can begin the initial activities related to this project, such as project coordination and scheduling, immediately upon finalizing an agreement 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 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 "piggy-back" under the same terms and conditions of a resulting similar services contract and/or purchases being offered in this contract. *CLIENTFIRST* has the option to agree or disagree to allow contract piggy-backs on a case-by-case basis. Before a seeking public agency can piggy-back any contract, the seeking agency must first obtain *CLIENTFIRST*'s written approval.

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 electronically.

If you have any questions, feel free to contact Craig Williams at 630.656.7366 or via email at cwilliams@clientfirstcg.com for additional information. We appreciate the continued opportunity of serving Harvey School District 152.

Sincerely,

Tom Jakobsen
Senior Partner
IT Infrastructure and Operations Practice Leader

Craig Williams, RCDD, NTS
Director
Infrastructure Consulting Services

Accepted by

Harvey SD 152, IL

_____

Signature   *Date*

_____

Name and Title (print)