



JANUARY 12, 2022

# Make the mark.

BEAUFORT COUNTY SCHOOL DISTRICT  
Technology Assessment Services Proposal

# Table of contents

<b>Table of contents .....</b>	<b>1</b>
<b>Cover page and page two .....</b>	<b>2</b>
<b>Cover letter .....</b>	<b>5</b>
<b>Executive summary .....</b>	<b>7</b>
<i>Plante Moran in brief .....</i>	<i>8</i>
<i>Plante Moran background and experience.....</i>	<i>8</i>
<i>A trusted advisor .....</i>	<i>10</i>
<b>Offeror profile .....</b>	<b>11</b>
<b>Narrative on the approach to the scope of work .....</b>	<b>13</b>
<i>Information technology assessment.....</i>	<i>14</i>
<b>Certifications.....</b>	<b>23</b>
<b>References.....</b>	<b>25</b>
<i>References .....</i>	<i>26</i>
<i>Similar projects.....</i>	<i>27</i>
<b>Financial stability .....</b>	<b>29</b>
<i>Financial information .....</i>	<i>30</i>
<b>Appendix.....</b>	<b>31</b>
<i>Project team overview .....</i>	<i>32</i>
<i>Team resumes .....</i>	<i>33</i>
<i>Preliminary timeline.....</i>	<i>41</i>
<i>Bidding schedule/price business proposal.....</i>	<i>42</i>
<i>Attachments to solicitation .....</i>	<i>43</i>
<i>Proposed contract exceptions.....</i>	<i>44</i>

# Cover page and page two







# Beaufort County School District

Solicitation Number: 22-013  
 Date Printed: December 8, 2021  
 Date Issued: December 8, 2021  
 Procurement Officer: Kaylee Yinger, CPPB  
 Phone: 843-322-2349  
 Email: Kaylee.Yinger@beaufort.k12.sc.us

## Request for Proposals (RFP)

DESCRIPTION: **TECHNOLOGY ASSESSMENT SERVICES**  
 SUBMIT OFFER BY (Opening Date & Time): **January 12, 2022 by 4:00 PM EST**  
 QUESTIONS MUST BE RECEIVED BY: **January 5, 2022 by 5:00 PM EST**  
 NUMBER OF COPIES TO BE SUBMITTED: **Five (5) Original Signed Copies and One (1) Redacted Version on CD/USB**

Offers must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior.

SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES:

### MAILING ADDRESS:

Beaufort County School District  
 Procurement Office  
 P.O. Drawer 309  
 Beaufort, SC 29901-0309

### PHYSICAL ADDRESS:

Beaufort County School District  
 Procurement Office  
 2900 Mink Point Blvd  
 Beaufort, SC 29902

CONFERENCE TYPE:  
 DATE & TIME:

LOCATION:

### AWARDS & AMENDMENTS:


Award will be posted at the Physical Address stated above on or after January 12, 2022. The award, this solicitation, and any amendments will be posted at the following web address: <http://beaufortschools.net> must submit a signed copy of this form with Your Offer. By submitting a proposal or bid, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of ninety (90) calendar days after the Opening Date.

NAME OF OFFEROR: (Full legal name of business submitting the offer)

Plante & Moran PLLC

ENTITY TYPE:

Professional Limited Liability Company

  
 AUTHORIZED SIGNATURE (Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above)

Judy Wright

PRINTED NAME

Partner

TITLE

Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror above. An offer may be submitted by only one legal entity. The entity named as the Offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc.

**PAGE TWO**  
(Return Page Two with Your Offer)

<b>HOME OFFICE ADDRESS</b> (Address for Offeror's home office/ Principal place of business):  <p style="text-align: center;">Plante &amp; Moran, PLLC 3000 Town Center Southfield, MI 48075</p>	<b>NOTICE ADDRESS</b> (Address to which all procurement and contract related notices should be sent):  <p style="text-align: center;">Plante &amp; Moran, PLLC 3000 Town Center Southfield, MI 48075</p>
<b>PHONE NUMBER:</b>	
<b>EMAIL ADDRESS:</b>	

<b>PAYMENT ADDRESS</b> (Address to which payments will be sent):  <p style="text-align: center;">Plante &amp; Moran, PLLC 16060 Collections Center Drive Chicago, IL 60693</p> <p><input type="checkbox"/> Payment Address Same as Home Office Address  <input type="checkbox"/> Payment Address Same as Home Notice Address  (check one only)</p>	<b>ORDER ADDRESS</b> (Address to which all purchase orders will be sent):  <p style="text-align: center;">Plante &amp; Moran, PLLC Judy Wright 3000 Town Center Southfield, MI 48075</p> <p><input type="checkbox"/> Payment Address Same as Home Office Address  <input type="checkbox"/> Payment Address Same as Notice Address  (check one only)</p>
--	--

<b>ACKNOWLEDGEMENT OF AMENDMENTS:</b>	<u>Amendment Number</u> 1 2 3	<u>Amendment Issue Date</u> 12/16/21 01/05/22 01/06/22
Offeror acknowledges receipt of amendments by indicating amendment number and its date of issue.		

<b>MINORITY PARTICIPATION-</b> Are you a Minority Business Enterprise: Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, please include a copy of your certification.
--

# Cover letter



January 12, 2022

Ms. Kaylee Yinger, CPPB  
Procurement Officer  
Beaufort County School District  
2900 Mink Point Blvd  
Beaufort, South Carolina 29902

Dear Kaylee:

Our team at Plante Moran is excited about the prospect of acting in a trusted advisor role to provide technology assessment services to Beaufort County School District (BCSD or District). We understand the District is seeking the assistance of an experienced consultant to perform an independent assessment of the current technology environment and long-range strategic technology planning. Our firm offers the District the following benefits:

- **Significant experience:** We have conducted numerous assessments, planning, design, selection, and implementation projects for education and public sector clients spanning 30 years. Our firm has completed **hundreds of IT assessments** across a spectrum of clients and industries.
- **Unrivaled breadth and depth of expertise:** Our proposed team of experienced management consultants blends deep knowledge of educational technologies, education operations, infrastructure systems, and cybersecurity. Our approach is to leverage a **broad team** in which each member brings **specific, deep technical expertise** in their areas of responsibility.
- **Forward thinking:** Our team also keeps a constant eye towards the future. Given the times of rapid technological change that we live in, we have established a **Disruptive Technologies Resource Center** to expand expertise and provide thought leadership in areas such as cognitive technologies, blockchain, augmented and mixed reality, and the internet of things.
- **Commitment to K-12:** Our firm is **committed to the K-12 industry** having worked with more than 200 education clients. We understand K-12 operations and technology, resulting in practical, actionable recommendations.
- **Commitment to exceeding expectations:** We are committed to investing the time to **fully understand your needs, making those needs our top priority**, meeting your quality requirements, maintaining staff continuity, and being available when and where you need us.

Our proposal further describes our qualifications, proposed engagement team, and fee summary. We look forward to answering any questions you may have.

Sincerely,  
**PLANTE & MORAN, PLLC**

A handwritten signature in purple ink, appearing to read "Judy Wright".

Judy Wright, Partner



# Executive summary





## Plante Moran in brief

---

We are the 13th largest certified public accounting and management consulting firm in the nation. With **a history spanning nearly 100 years**, our firm provides clients with financial, human capital, operations improvement, strategic planning, technology selection and implementation, and family wealth management services.

### Fast facts



## Plante Moran background and experience

---

Plante Moran takes great pride in the quality of services it provides to its clients. We have a rigorous set of quality controls designed to provide assurance that professional standards are followed, and our clients receive a high-quality product. Plante Moran takes equal pride in our people and our professional work environment. Some of the facts about our firm that we are proud of include:

- Women comprise 27.9% of the partner group, which is the highest percentage of female equity partners among the nation's largest public accounting firms, according to CPA Personnel Report, a national public accounting trade publication.
- Our staff turnover rate is below 13%, which is significantly lower than that of other national public accounting firms.
- The firm has been named to Fortune magazine's "100 Best Companies to Work For" in America for the last 23 years.
- Plante Moran's management consulting group, consisting of more than 400 dedicated consultants, is a versatile, full-service consulting organization with a proven track record for providing quality professional services.

Our emphasis and commitment to management consulting has resulted in the extension of the consulting practice into all major aspects of government and education, addressing our clients' unique needs related to information technology, security, compliance, and policy.

## K-12 experience

Plante Moran is a proven leader, providing quality professional services to over 200 education clients. We take pride in our extensive experience with school districts which will enable us to assemble a team of professionals capable of providing the services specifically designed for you.

Our consulting staff maintains a **high level of understanding of, and sensitivity to, the key issues** that influence the operations within educational institutions. Key issues may include:

- Budget and financial challenges
- Increasing labor, service, and material costs while resources are fixed or declining
- Increased public awareness and scrutiny of the use of technology, including data security
- Increased reporting requirements
- Safety and security precautions for students and staff
- Increasing pressure to measure the benefits, as well as the costs, of technology and services
- The need for operational agility to maintain operations and instruction in a secure manner through the pandemic

The consulting staff at Plante Moran **remains abreast of these issues** through seminars, close contact with officials at the state levels, and, more importantly, through continuing education and consulting engagements. We warmly embrace the leadership role our educational clients have entrusted in us, and we always strive to exceed the expectations they have for us.

## A best-in-class reputation

60+	years serving schools
150+	professionals who specialize in the education industry
200+	K-12 school districts served
300+	million in technology expenditures for school districts

## Our clients

1,300	public sector clients
\$1M-\$1B	range of budgets for school clients we serve
\$9B	federal expenditures audited per year

## A trusted advisor

---

We have helped more than 250 organizations assess their IT environment, including assessing service providers and outsourcing agreements. Using our proven methodology, we gather and analyze feedback from key stakeholders and then study the organization's position relative to peer organizations and industry best practices. In doing so, we examine a broad scope of areas under the categories of IT organization (people), IT administration (process), and technology. Each client engagement is tailored to answer the questions each client has in order to improve their IT function. Frequent areas of focus include IT governance, use of vendors/third-party service providers, outsourcing, increasing demands on technology, IT support structure, and the robustness of the technical environment. **We have helped many clients increase the effectiveness and efficiency of the IT support function.** These assessments frequently provide the basis for either updating or creating a technology plan or initiating a selection process for new/replacement technology

Plante Moran's management consultants have made a significant commitment to assist K-12 and public sector clients in developing and implementing appropriate technology. We are among the few accounting and consulting firms that are **completely vendor-independent with respect to the offering of hardware or application software** for our governmental clients. This enables our consultants to select the most appropriate solution for our clients based on the client's current situation and future goals and objectives. The services we offer address virtually all aspects of information systems, including the following:

- Strategic information technology planning
- Information technology assessments
- IT infrastructure consulting
- System needs assessment (ERP, EAM, etc.)
- Project budgeting and return on investment (ROI) analysis
- Preparation of ERP system requirements
- Request for proposal development
- System selection assistance
- Contract review and negotiations
- Implementation advisory services
- Quality assurance
- Project management
- Systems control review
- Cybersecurity



# Offeror profile



### 1. Name of firm submitting proposal

[Plante & Moran, PLLC](#), is the name of the firm that will be submitting the proposal

### 2. Main office address, telephone number, fax number

Through our “one-firm” [firm philosophy](#), we are able to seamlessly serve clients with a depth of expertise from any combination of our 24 office locations. However, our primary business address is:

3000 Town Center  
Suite 100  
Southfield, MI 48075  
Phone: 248-352-2500  
Fax: 248-352-0018

### 3. Primary contact email address and website address



[Judy Wright](#)  
Engagement Partner  
248-223-3304  
[judy.wright@plantemoran.com](mailto:judy.wright@plantemoran.com)  
Website: [www.plantemoran.com](http://www.plantemoran.com)

### 4. If a corporation, when and where incorporated

Plante Moran is a privately held firm.

### 5. List any dba's

None noted.

### 6. Number of years in business

Founded in 1924, we are the [13th largest certified](#) public accounting and management consulting firm in the nation. With a history spanning nearly 100 years, our firm provides clients with financial, human capital, operations improvement, strategic planning, technology selection and implementation, and family wealth management services.

### 7. Total number of employees

Plante & Moran, PLLC, has [3,300+ staff](#)

### 8. State acceptance of Procurement Cards as required in Section 7.1.23.

Unfortunately, we do not accept procurement card payments at this time. We do accept domestic Wire / ACH for use by clients to remit payments.

# Narrative on the approach to the scope of work





1. Briefly state your firm's understanding of the work to be done and make positive commitment to perform the work.

## Information technology assessment

---

### Assessment overview

Plante Moran's assessment and strategic planning methodology has been time-tested and continuously refined on numerous client engagements during the past 30 years. Our comprehensive and objective approach to assessing a client's technology environment has proven to be valuable, enabling our clients to garner a holistic view of the maturity of the technology function, identify opportunities for improvement, and obtain practical recommendations to help them accomplish their goals.

Our experience has allowed us to understand the unique circumstances K-12 clients face when performing an assessment of the technology environment. These challenges are as much about people and processes as they are about the technologies themselves. K-12 organizations frequently face an environment where IT functions are distributed at various levels, often with staff having overlapping duties and unclear expectations on their roles and responsibilities. Furthermore, the level of autonomy residing with building administrators can complicate the technology operational support model and lead to divergent strategies between "central" and "local" IT functions. We recognize the value and importance of a robust technology organizational structure as a foundational element of the technology environment. Our approach works to balance budget, funding, staff recruitment, and retention; helping clients to determine the optimal staffing model for their unique circumstances and objectives.

As with any assessment, opportunities for improvement frequently result in and can span a broad spectrum of people, process, and technology. Organizational change management can be particularly challenging within a K-12 institution due to its effect on staff, teachers, administrators, stakeholders, and parents alike. Our approach works to balance change by providing pragmatic recommendations and implementation strategies that help districts mitigate the negative impacts of change while promoting a culture of collaboration and cooperation to empower users and improve the student learning experience.

As your trusted advisor, Plante Moran will help you navigate the assessment process and will deliver significant value and benefit to the District.

## Assessment scope

As noted previously, to achieve BCSD’s objectives, we believe a broad and comprehensive review the “people, process, and technology” areas and key topics is essential. The broader review allows us to gain a comprehensive view of the entire IT environment and identify gaps and associated recommendations that not only address the objectives identified but provide a model for long-term sustainability.

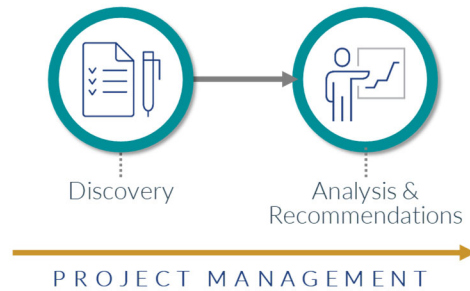
A sampling of the key areas and topics that will be addressed is provided below. Based on our understanding of the District’s needs articulated in the RFP, the **bolded** items will receive greater focus during the assessment.

People	<b>Human capital management</b>	<b>Strategic sourcing</b>	<b>Stakeholders</b>
	Organizational structure	External service providers	Stakeholder engagement
	Staffing levels	Procurement	User satisfaction
	Departmental competency	Vendor & contract management	
Process	<b>Strategy</b>	<b>Governance</b>	<b>Operations management</b>
	Project management	<b>Investment strategy</b>	Asset lifecycle management
	Organizational change management	Enterprise architecture	<b>Performance &amp; capacity management</b>
	<b>Organizational alignment</b>	Standards & policies	Configuration management
		Service level agreements	Change management
		Governance model	IT service management
		<b>Risk management</b>	<b>Automation &amp; orchestration</b>
		<b>Cybersecurity management</b>	
		Log collection & analysis	
		<b>Security architecture</b>	
Technology	<b>Infrastructure technology</b>	<b>End user enablement</b>	<b>Business intelligence &amp; data</b>
	<b>Data center</b>	Device portfolio	Data governance
	Cloud services	Mobility	Analysis & reporting tools
	<b>Network</b>	<b>Classroom technology</b>	
	<b>Servers &amp; virtualization</b>	<b>Collaboration &amp; presentation solutions</b>	
	Enterprise storage & backup	<b>Productivity solutions</b>	
	Telecommunications	<b>ERP &amp; SIS applications*</b>	
	<b>Video surveillance</b>		

*\* Please note that the review of these applications is not intended to be a comprehensive assessment of these systems, but rather a review to identify gaps or deficiencies in functional, technical and support needs along with the integration of these systems.*

## Methodology

In order to achieve the outlined objectives, we recommend a phased approach. Our overall approach encompasses the following major phases:



For the successful execution of this phased approach, project monitoring will be a work step running in parallel throughout the project. The purpose is to conduct activities that are relevant to managing all phases of the project and enhancing its success.

Our proprietary and proven assessment methodology uses a quantifiable scale to measure the overall maturity and performance of the IT environment. These ratings are founded on best practices, comparable clients, and our expertise as your trusted advisor. Our approach includes providing the District with a scorecard indicating the current and recommended maturity, along with a trending rating for each of the key assessment areas. Supplementing the maturity scorecard are key performance indicators (KPI) that measure the delivery, agility, and results of the IT function.

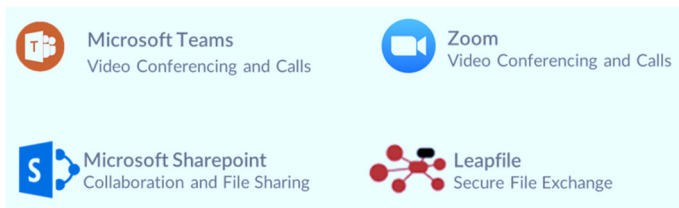
The major activities (Worksteps) to be performed for each phase are detailed below. We intend to blend on-site and remote project activities using collaboration and video conferencing technologies to facilitate remote meetings with the BCSD's staff.

## Ongoing project management/monitoring

The purpose of this work step is to conduct activities that are relevant to managing the project and enhancing its success for BCSD.

Project initiation activities will be conducted to introduce the project team, confirm objectives, project scope, deliverables, and timetables. The project objectives will be accomplished through the development of a project organizational structure, detailed project plans, and regularly scheduled progress meetings.

The project initiation activity will occur during a project initiation meeting with BCSD's project team. We anticipate that this project initiation meeting can be conducted over an audio/video conference call and with use of data collaboration tools. Key engagement management technologies are shown below:



Project status meetings will be conducted remotely and occur no more than twice per month with the BCSD's project manager.



## Phase 1: Discovery

Measurable objectives	Understanding of BCSD's technology environment, identifying strengths, possible gaps, and opportunities for improvement
Deliverables	Initial themes: Preliminary findings, gaps, and strengths

Phase objective: The purpose of this set of activities is to review BCSD's current systems, processes, and organizational structure in order to gain an understanding of the current technology environment, services delivered, and staffing. The purpose of the discovery phase is to collect information that will form the basis for the assessment deliverables.

### 1. Conduct project kick-off meeting

We intend to conduct an on-site project kick-off meeting that will confirm the objectives, timing, scope, anticipated BCSD staff involvement, and other items relevant to the project. We will discuss with BCSD who should attend this session. We assume that the project kickoff and stakeholder interviews will occur on the same visit.

### 2. Collect and review documentation

Prior to our kick-off meeting, an information request list will be provided to BCSD. Plante Moran will review existing documentation to gain a comprehensive understanding of BCSD's current technology environment. Documents to be reviewed are anticipated to include the following:

- **Technology services department organization and staffing:** Organization chart with staffing levels, responsibilities and job descriptions, service portfolio, use of external service providers, etc.
- **Management:** Detailed budget, expenditures (planned vs. actual), technology plan, project portfolio/backlog, planned projects, results for previous user satisfaction surveys.
- **Network and telecom:** WAN and LAN diagrams, internet connectivity, network management tools, security management tools, telecommunication systems.
- **Server and storage environment:** Equipment and operating systems inventory, virtualization technologies, system management tools.
- **Data center and cloud:** Data center facility information (e.g., power, cooling, etc.), floor plans, rack elevation, facility photographs, cloud services inventory, cloud connectivity.
- **End user environment:** Equipment and operating systems inventory, help desk tools and reports, virus and patch management tools, services level agreements.
- **Instructional and classroom technologies/classroom and multimedia technologies:** Inventory of audio, video, multimedia and online teaching/learning technologies.
- **Applications:** List of applications (on premise and cloud) used by the District, users of the applications.
- **Policies and procedures:** Listing of available policies and procedures such as disaster recovery plan, acceptable use policy, systems refresh plan, change management, etc.

- **Cybersecurity:** Cybersecurity and data privacy policies, systems, controls, compliance requirements, results from recent vulnerability assessments.
- **External support:** Detail of services from service providers and managed service providers, including standard contract clauses.
- **Video surveillance:** Details regarding existing and planned systems including as-built diagrams.

Please note that we do **NOT** expect BCSD to create any documentation that does not already exist. For any of the areas where documentation does not exist, the pertinent information will be obtained during the interview process.

As a part of the information collection process, if deemed appropriate, we will distribute technical survey tools to gather information on current technologies in use (network, servers, storage, backup, disaster recovery, end user computing environment, applications). The tools will enable us to collect information in an efficient and consistent manner, to quickly compare and contrast the availability and use of technologies across the District. We would like to obtain this information prior to our interviews to prompt and focus the discussion with session participants.

### 3. Conduct end-user technology satisfaction survey

---

To assess the utilization of technology and their functions, we will develop and administer an online end-user survey. We will gather meaningful opinions, comments, and feedback regarding the deployment, utilization, and effectiveness of technologies across the organization. Ideally, the survey would be administered to all stakeholders; survey topics will include:

- Direction and leadership, strategic plan, vision
- Service and support
- Communication
- Technology
- Training
- Use of instructional and classroom technologies
- Integration of curriculum and technology

The survey questionnaire(s) will be reviewed with BCSD's project team, refined as necessary, and prepared for distribution to teachers and staff. When possible, we prefer to obtain preliminary results prior to our onsite interviews as information from the survey allows us to prompt and focus discussions with interview participants.

An analysis of the information would be provided to BCSD in an anonymous summarized format and incorporated into the assessment report. From the survey results, we would identify gaps between current levels of service and desired (expected) levels of service, as well as gaps where current technology is not meeting the needs of the District. Having conducted similar surveys with other K-12 clients will allow us to perform a comparative analysis to determine specific areas of strength and opportunities for improvement.

## 4. Conduct leadership and stakeholder interviews

---

We will meet on site with key stakeholder groups to understand the IT vision and expectations of the technology services department and its technologies in support of that vision. We find that conducting these meetings without technology representatives present allows us to receive more candid feedback. The focus of these interviews is to identify the effectiveness of current technology services department operations, the ability to service and support current and future technical needs, and the overall use of technology at the District. Interview topics will likely include:

- Perceptions regarding technology services and educational technology department opportunities
- Project prioritization and governance
- Aligning technology initiatives with the District's mission and vision
- Key technology functions, applications usage, and challenges
- Current and anticipated technology and support needs over the next five years

Based on our understanding of the District's organizational structure, we anticipate meeting with representative leadership staff from the following District departments and functions:

- Administrative offices (five to seven representative groups)
- Building administration (two to three representative groups)
- Teachers (three representative groups)
- Building level support staff
- Superintendent's cabinet
- Focus groups for ERP and SIS applications (two ERP meetings & one SIS meeting)

Additionally, based on the District's stated needs in the RFP and subsequent addenda, we intend to conduct focus group meetings with students at the middle and high school levels. We envision two remote one-hour meetings with six to eight representative student participants to solicit feedback on the District's technology. Should the District prefer an alternative approach, we are happy to discuss and amend our proposal accordingly.

We anticipate conducting the stakeholder meetings over a single visit at a centralized location within the District. We anticipate conducting 20–24 hours of interviews and will work with BCSD's project team to schedule the interviews at a time that is mutually convenient. Note: We can conduct some of these meetings remotely if this works better from a scheduling perspective.

## 5. Meet with technology support staff

---

We will meet with individuals representing each area of information technology. While we anticipate that many of the meetings will be group interviews, we will also meet separately with key technology service department personnel where necessary. Additionally, we will also meet with a representative group of staff from the educational technology team. For any technology services department staff that we do not meet individually with, we will gather their input using the survey tools mentioned in our previous work steps. The topics of discussions will vary by group, with some overlap, but will likely include:

- Organization structure, communication/working relationship

- Technology services department roles, responsibilities, and resources/tools
- Key technology functions, systems/applications usage, and challenges
- Alignment of technology services department initiatives with the strategic plans in place
- Current and anticipated skills and professional development/training needs
- Current and anticipated information and technology needs over the next three to five years
- Policies and procedures related to administration and management of technology systems

As part of this workstep, we will also review the areas identified in the assessment overview section. We anticipate conducting 10-12 hours of interviews and will work with BCSD's project team to schedule the interviews at a time that is mutually convenient. We anticipate that these will be a mix of remote and on-site meetings.

## 6. Assess technical environment

---

We will conduct a review of the existing technical environment at the District, focusing on the areas identified in the assessment overview section. We will meet with representative members of BCSD's technology services department staff who are responsible for administering and managing information technology systems and services.

The purpose of these meetings will be to review the operational, administrative, and technical aspects of the information technology systems and services provided by the information systems department. Key considerations of the technical assessment activity are:

- Review of technology asset inventory and related warranty/maintenance agreements
- Evaluation of operational state, security, condition, and usable lifespan of technology components
- Assessment of system architectures, redundancy, interoperability, and standardization
- Review of optimal system feature and functionality usage
- Assessment of technology administration, support, and maintenance strategy

Components of the technical environment will be assessed as part of this interview process and a review of existing documentation. For areas where documentation may be lacking, we can gather the critical information by using our technical survey instruments.

Furthermore, we will conduct up to six onsite classroom visits (two representative of each level; elementary, middle, and high school) to evaluate the technologies deployed, as well as survey the District's administrative office and two additional school buildings to determine the adequacy of existing video surveillance system not scheduled for 2019 bond referendum upgrades.

Where feasible, we will conduct these meetings simultaneously with the meetings with the technology support staff meetings detailed in the previous workstep.

*The findings from this phase will be documented and will serve to inform the subsequent phases. An initial themes worksheet will be prepared by Plante Moran, identifying the main findings and gaps, as well as survey results, and presented to BCSD's project team for discussion.*



## Phase 2: Analysis and assessment report delivery

Measurable objectives	Presentation of the technology assessment results to BCSD's project team and leadership
Deliverables	Technology assessment report, including: prioritized project recommendations and an executive summary presentation

**Phase objective:** The purpose of this phase is to perform a detailed analysis of the information collected during the discovery phase and develop the technology assessment report. The activities included in the phase are detailed below.

### 1. Perform industry standard and best practice comparison

We will incorporate a review of the technology services operations, resources, and technologies of BCSD against comparable organizations, industry standards, and best practices. For this purpose, we will use a variety of sources, including our own research and knowledge from similar work with other clients. We will focus on identifying specific areas of strength and opportunities for enhancement. The information obtained from this work step will be used to contrast and compare the effectiveness of the existing technology systems with current industry standards or other emerging technologies.

### 2. Perform comparative research

We will utilize comparative research with other entities similar to BCSD using a variety of sources, Plante Moran currently possesses a rich amount of information. We will take the results from our best practices research and conduct applicable comparisons with BCSD to include the following areas:

- Departmental structure and staffing patterns (including outsourcing)
- Information technology funding levels and the allocation of those funds
- Alternate service delivery options that are being used
- Technology maturity in the use of various technologies
- Cost of services and funding
- Other areas deemed necessary

### 3. Conduct in-depth analysis

The information gathered during the discovery phase will be further reviewed and analyzed. At a minimum, the following information (data and observations) will be analyzed:

- Provided documentation
- Meetings and interviews with leadership, stakeholders, and technology services department staff
- Survey results: End-user technology satisfaction
- Technologies in use, including systems architecture and methods for delivery of services
- Comparison to industry standards and best practices
- Alignment with of technology goals with the overall organizational strategy

## 4. Develop technology assessment report

---

Based on the findings outlined in the previous phase, we will develop an information technology assessment report that clearly identifies areas of improvement for the technology environment at BCSD. The report will contain recommendations aligned with industry standards and best practices for each of the topical areas identified in the assessment scope section.

This draft will be provided to the BCSD project team, who will distribute it for review and comments prior to finalizing the report. We anticipate the report to consist of the following sections, keeping in context the size and the nature of the District:

- **Executive summary:** This section will include a project overview and a succinct narrative on the current state of the technology services department environment (maturity), gaps identified, and a prioritized list of critical needs along with estimated budgets and timeline for addressing the gaps.
- **Detailed assessment:** This section will provide details on the current state of information technology at BCSD, including:
  - ♦ Maturity assessment of the technology environment, including people, process, and technology including key KPI's.
  - ♦ Current state assessment and gap analysis to identify areas for improvement by topical area within the areas of people, process, and technology.
  - ♦ A prioritized listing of the technology services department most critical needs with descriptions.
  - ♦ Preliminary project prioritization recommendations for the implementation of strategic and tactical projects identified in the critical needs/future state section. Where applicable we will review the current portfolio of projects to identify potential synergies and dependencies, and prioritize the plan based on the needs of the District.
- **Appendices:** Key performance indicators, end-user technology satisfaction survey results, technology department time/effort allocation survey results, technology department skills survey results, and other supporting information as applicable.

## 5. Prepare final assessment deliverables

---

We will review the draft technology assessment report with BCSD's project team and make any modifications necessary as a result of this meeting. Once feedback is received from the project team, we will incorporate any changes to this report and finalize the report.

If requested, we will develop an executive presentation of the technology assessment report, and plan to be remotely to deliver the final report and the presentation that summarizes the results of this assessment to BCSD's Board of Education.

# Certifications



---

There are no required certifications to complete the proposed scope of work. However, Plante Moran's information technology and cybersecurity consultants possess many professional certifications and accreditations. Additionally, all our staff are required to complete 40 hours annually of continuing professional educations (CPE). Many of our staff are active in various industry associations, participate in industry conferences and publish thought leadership. Relevant staff certifications include: CCNA, CIA, CISA, CISSP, CompTIA, ITIL MCTA, MCSE, MCP, and PMP.



# References



# References

---

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

## Similar projects

---

In addition to the above references, Plante Moran has assisted many public sector clients across the nation with their information technology and planning needs. A sampling of recent similar projects is listed below:

- I [REDACTED]
- I [REDACTED]
- I [REDACTED]
- I [REDACTED]
- I [REDACTED]

- I [REDACTED]
- I [REDACTED]
- I [REDACTED]
- I [REDACTED]
- I [REDACTED]
- I [REDACTED]
- I [REDACTED]



# Financial stability



# Financial information

---

[REDACTED]

[REDACTED]

# Appendix



# Project team overview

Primary team members	Roles and responsibilities
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
Additional team members	Roles and responsibilities
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]



# Team resumes

<div>[REDACTED]</div>	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
<div>[REDACTED]</div>	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
	[REDACTED]	
<div>[REDACTED]</div>	[REDACTED]	[REDACTED]
		[REDACTED]
		[REDACTED]
		[REDACTED]
		[REDACTED]
		[REDACTED]
		[REDACTED]
		[REDACTED]
		[REDACTED]
		[REDACTED]
		[REDACTED]
		[REDACTED]
		[REDACTED]
		[REDACTED]
		[REDACTED]
		[REDACTED]



\_\_\_\_\_

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]



[Redacted text block]

[Redacted text block]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]



[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]



[Redacted text block]

[Redacted text block]



[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

## Preliminary timeline

The proposed preliminary project schedule below supports the detailed workplan provided above. We are prepared to start the project within two to three weeks of a negotiated contract. We anticipate that this work will take an estimated **20 weeks** to complete, predicated upon the availability and responsiveness of BCSD's staff for surveys and interviews, and the timely provisioning of requested information. During the project initiation step, we will meet with your project team to validate our information gathering approach and to confirm a schedule that best meets your needs, resources, and accounts for the District's calendar.

Phase/activity	Duration	Estimated timing									
		Month 1		Month 2		Month 3		Month 4		Month 5	
Project management	<i>Ongoing</i>										
<b>Phase 1: Discovery</b>											
1. Conduct project initiation & kick-off	1 week										
2. Collect and review documentation	2 weeks										
3. Conduct end-user satisfaction survey	2 weeks										
4. Conduct leadership/stakeholder interviews	4 weeks										
5. Meet with technology support staff	4 weeks										
6. Review & assess technical environment	1 week										
<b>Phase 2: Analysis &amp; recommendations</b>											
1. Perform industry standard comparison	1 week										
2. Perform comparative research	2 weeks										
3. Conduct in-depth analysis	4 weeks										
4. Develop IT assessment report	4 weeks										
5. Prepare final assessment deliverables	1 week										

## Bidding schedule/price business proposal

---

Proposed costs for overall cost for the project until completion based on the scope of work listed in section 3.0.

\$\_\_\_\_\_ \$71,000

Additional value-added services.

\$\_\_\_\_\_ N/A

These fees are based on a mixture of on-site and remote services as noted for each of the project activities and are inclusive of all travel expenses. Should the district prefer to transition all activities to fully remote, we are happy to discuss those needs and revise our proposal accordingly.

We have estimated the effort based on our understanding of the requirements and scope of the project, but we are open to make any adjustments deemed necessary by the district.

Notes:

- It is our practice to bill monthly for fees incurred in the prior month.
- If any issues arise during the course of the project that will impact the timing or the budget, we will discuss the issue with BCSD prior to proceeding.

### Project assumptions

Our proposal and associated fees are based upon the assumptions listed below. Should these assumptions change, we would adjust our professional fees accordingly, in consultation with BCSD.

- Our findings and observations are derived from the documents reviewed, site visits, and interviews conducted. Our reporting is solely based on the information obtained through this process and will not be validated by other means.
- BCSD will appoint an internal project lead who will be the main point of contact between BCSD and Plante Moran and will assist with logistics and coordination of activities.
- There will be a single draft-to-final process for each deliverable (assumed to be 10 working days).



## Attachments to solicitation

---

### **MINORITY AND WOMAN BUSINESS ENTERPRISE POLICY AND REQUIREMENTS**

This is not applicable. Plante Moran will not use any W/MBE certified contractors for providing the proposed services to BCSD.

We have proposed the use of a subcontracted resource to assist in the technology assessment activities serving as an expert in the areas of instructional technology and curriculum integration.

## Proposed contract exceptions

Page Number	Section / Reference	Proposed Exception	Rationale
31	7.1.2 Changes a) Contract Modification	<b><i>Please Modify as Follows:</i></b> By a written order, at any time, <del>and without notice to any surety,</del> the Procurement Officer and Contractor may mutually agree, subject to all appropriate adjustments, to make changes within the general scope of this Contract in any one or more of the following:	Plante Moran would like to clarify that the contract may only be amended by mutual agreement and approval of the School District and Plante Moran.
35	7.1.8 Default a) 1)	<b><i>Please Modify as Follows:</i></b> The District may, subject to paragraphs (c) and (d) of this clause, by written notice of default to the contractor, terminate this contract in whole or in part if the contractor fails to – i) Deliver the supplies or to perform the services within the time specified in this contract or any extension, <b>provided the District provides the necessary information in a timely manner necessary for the performance of the contract;</b> ii) Make progress, so as to endanger performance of this contract (but see paragraph (a)(2) of this clause; or iii) Perform any of the other material provisions of this contract (but see paragraph (a)(2) of this clause).	Plante Moran will strive to meet all project deadlines; however, the ability to adhere to a schedule also requires cooperation from the District staff in terms of providing timely information and disclosing all relevant facts.
35	7.1.8 Default b)	<b><i>Please Modify as Follows:</i></b> If the District terminates this contract in whole or in part, it may acquire, under the terms and in the manner the Procurement Officer considers appropriate, supplies or services similar to those terminated, and the contractor will be liable to the District for any excess costs <b>incurred</b> for those supplies or services <b>that exceed the unpaid balance of the contract.</b> However, the contractor shall <b>continue the work not terminated.</b>	Plante Moran shall be responsible for the cost of cover in the unlikely event of Plante Moran failing to fulfill its contractual obligations; however, Plante Moran shall be provided an opportunity to reasonably correct any default, and Plante Moran shall only be responsible for reasonable costs required for the District to complete the work that exceed the expense amounts of this contract
35	7.1.8 Default e)	<b><i>Please Modify as Follows:</i></b> e) If this contract is terminated for default, <b>upon full payment for the Contractor's services and work,</b> the District may require the contractor to transfer title and deliver to the District, as directed by the Procurement Officer, any 1) completed supplies, and Technology Assessment Services RFP #22-013 36 2) partially completed supplies and materials, parts, tools, dies, jigs, fixtures, plans, drawings, information, and contract rights (collectively referred to as "manufacturing materials" in this clause) that the contractor has specifically produced or acquired for the terminated portion of this contract. Upon direction of the Procurement Officer, the contractor shall also protect and preserve property in its possession in which the District has an interest.	Payments for Plante Moran's services shall be made in full prior to delivery.
37	7.1.11 Indemnification – Third Party Claims – General	<b><i>Please Modify as Follows:</i></b> Notwithstanding any limitation in this agreement, and to the fullest extent permitted by law, Contractor shall defend and hold harmless Indemnitees for and against any and all suits or claims of any character (and all related damages, settlement payments, <b>reasonable</b> attorneys' fees, costs, expenses, losses or liabilities) by a third party which are attributable to bodily injury, sickness, disease or death, or to injury to or destruction of tangible property,	Plante Moran is willing to indemnify its clients for its negligence and willful misconduct but requests that the obligation be proportional to its fault, if any.

Page Number	Section / Reference	Proposed Exception	Rationale
		<p><del>arising out of or in connection with the goods or services acquired hereunder or to the extent caused by in whole or in part by any act or omission</del> negligence or willful misconduct of contractor, its subcontractors, their employees, workmen, servants, agents, or anyone directly or indirectly employed by them or anyone for whose acts any of them may be liable, <del>regardless of whether or not caused in part by an Indemnatee, and whether or not such claims are made by a third party of an Indemnatee; however, if to the extent</del> an Indemnatee's negligent act or omission is <del>subsequently</del> determined to be the <del>sole proximate</del> cause of a suit or claim, the Indemnatee shall not be entitled to indemnification hereunder. Contractor shall be given timely written notice of any suit or claim. Contractor's obligations hereunder are in no way limited by any protection afforded under workers' compensation acts, disability benefits acts, or other employee benefit acts. This clause shall not negate, abridge, or reduce any other rights or obligations of indemnity which would otherwise exist. The obligations of this paragraph shall survive termination, cancelation, or expiration of the parties' agreement. This provision shall be construed fairly and reasonably, neither strongly for nor against either party, and without regard to any clause regarding insurance. As used in this clause, "Indemnitees" means the BCSD, its instrumentalities, agencies, departments, boards, political subdivisions and all their respective officers, agents and employees.</p>	<p>Additionally, Plante Moran cannot be responsible for the District's own negligence.</p>
41	7.1.16 Material and Workmanship	<p><b><i>Please Modify as Follows:</i></b> Unless otherwise specifically provided in this contract, all equipment, material, and articles incorporated in the work covered by this Contract <del>are to be new and of the most suitable grade for the purpose intended shall be in accordance with the terms and conditions of the Contract.</del></p>	<p>Plante Moran is a service provider and not a supplier of goods. Plante Moran cannot provide a warranty for new or merchantable goods, and as such it would be preferred to make the clarifying edits.</p>
41	7.1.18 Ownership or Data & Materials	<p><b><i>Please Modify as Follows:</i></b> All data, material and documentation prepared <del>and intended for delivery to</del> the District pursuant to this contract shall belong exclusively to the District.</p>	<p>Plante Moran would like to clarify that the District is entitled to ownership of all documents and deliverables intended for delivery to the District but not necessarily internal workpapers of Plante Moran.</p>
43	7.1.25 Restrictions on Presenting Terms or Use or Offering Additional Services	<p><b><i>Please Modify as Follows:</i></b> Any violation of this clause is a material breach of contract. The parties acknowledge the difficulties inherent in determining the damage from any breach of these restrictions. <del>Contractor shall pay the District liquidated damages of \$1,000 for each contact with a citizen or end user that violates this restriction.</del></p>	<p>Plante Moran cannot agree to consequential or liquidated damages unless it is proven Plante Moran's negligence has caused monetary harm.</p>

# COVID-19 protocols

We're committed to maintaining the highest possible level of client service while protecting our clients, staff, families, and communities. Throughout the COVID-19 pandemic, our dedicated task force of leaders across the firm have monitored, addressed, and mitigated risks presented by the virus, and we've strictly adhered to all guidance presented by the Centers for Disease Control and Prevention (CDC), the Occupational Safety and Health Administration (OSHA), the World Health Organization (WHO), and other trusted public health officials.

Each of our staff has made this pledge: "I commit to embody the firm's 'We Care' philosophy by following all safety protocols as established by the firm to promote a safe work environment for my fellow PMers and clients."

Our updated COVID-19 policies include the following protocols, which will continue to be updated as often as necessary:

- **Return-to-office program:** We have reopened our offices to 50% capacity and are following local and OSHA guidance regarding social distancing, distance between workspaces, cleanliness, mask wearing, etc. Staff who can effectively work remotely are able to continue doing so.
- **Vaccination policy:** We have implemented a voluntary vaccination tracking policy and protocols surrounding vaccination status. In accordance with OSHA guidelines, staff who are not fully vaccinated must adhere to social distancing and masking requirements when interacting with others.
- **Daily health checks:** Our internal health check form asks all staff to confirm daily whether they're working from home or from a Plante Moran office, client site, or other work location. Staff must certify they are free from symptoms of COVID-19 and any known exposure prior to work at any environment outside their homes.

## What this means for Beaufort County School District

- **The right technology in place to perform our work remotely:** We'll exercise flexibility in planning an engagement approach that works for your team, striking the right balance between virtual and in-person work.
- **Communication that fits your needs:** We'll coordinate video or conference calls — and in-person meetings as requested — with your team at a frequency that meets the needs of your engagement and your preferences.
- **Regular updates on the ongoing business impacts of COVID-19:** Our [COVID-19 Resource Center](#) will continue to keep you updated with relevant economic analysis, crisis management guidelines, notices of changing regulations, and more to support Beaufort County School District.

If you have any questions, Engagement Partner Judy Wright is awaiting your call. **Beaufort County School District needs a trusted advisor — now more than ever — and we're ready to fulfill that role.**



**We look forward to working with you.  
Please contact us with any questions.**



**Judy Wright**  
Engagement Partner  
248-223-3304  
[judy.wright@plantemoran.com](mailto:judy.wright@plantemoran.com)

According to our recent  
client satisfaction survey,

**97%**

of clients say they  
**would recommend  
Plante Moran.**