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Technical Proposal Computerized Maintenance Management System (CMMS) Software and Support

Beaufort County School District

Solicitation No. 26-015 • Concourse Ref: 243779

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Integrated Cloud-Hosted CMMS Platform for Total Asset Management, Facilities Scheduling, and Mobile Field Operations

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Our Mission at Concourse

> **To empower governments to serve their citizens better through modern, secure technology.**

We believe public sector agencies deserve the same quality of software that powers the best private sector organizations. Concourse exists to bridge that gap—delivering technology that improves government service delivery for all citizens.

Executive Summary

Concourse is pleased to submit this Technical Proposal in response to Beaufort County School District's (BCSD) Solicitation No. 26-015 for a Computerized Maintenance Management System (CMMS) Software and Support solution. We have carefully reviewed the RFP, including Addendum 1 dated January 30, 2026, and are confident that our integrated, cloud-hosted CMMS platform will deliver the comprehensive Total Asset Management solution that BCSD requires across its 44-building portfolio.

BCSD serves approximately 22,000 students and 2,300 full-time employees across twenty-one elementary/early childhood centers, two PK-8 Academies, six middle schools, six high schools, one Alternative Program, one vocational school, and an Administrative Office in the South Carolina Low Country. The District requires a modern, scalable CMMS that unifies maintenance operations, asset lifecycle management, facilities use scheduling, inventory and materials management, safety documentation, reporting, and mobile field execution — all within a single, integrated platform accessible to unlimited users.

Our proposed solution addresses every functional requirement specified in Section 3.0 of the RFP, including asset management with ESRI indoor data schema hierarchies, configurable work order management with web and mobile submission, multi-trigger preventive maintenance scheduling, full-featured facilities use and space scheduling with community billing and Certificate of Insurance tracking, real-time inventory management with QR/barcode scanning, GIS/spatial mapping with Esri ArcGIS integration, native iOS and Android mobile applications with offline capability, safety and risk documentation, and comprehensive reporting dashboards with custom KPI tracking. Our platform supports Single Sign-On via SAML 2.0, OAuth, and OIDC protocols with both on-premises Active Directory via LDAPS and Azure Active Directory, and provides reliable integration capability with Tyler Munis for financial data exchange.

We propose a 10-week implementation timeline with on-site presence during installation, configuration, and initial deployment as clarified in Addendum 1. Our approach includes dedicated project management, comprehensive data migration, role-based training for all District-designated personnel, and a structured transition to ongoing U.S.-based support — positioning BCSD for a summer 2026 go-live that minimizes disruption to school operations.

Key Highlights

- **Platform Scope** Single, integrated cloud-hosted CMMS covering all 10 functional modules specified in Section 3.1.2, with unlimited users across all role types

- **Esri Integration** Native integration with Esri ArcGIS and ArcGIS Indoors for indoor space and asset referencing using the ESRI indoor data schema
- **Mobile-First Field Operations** Native iOS and Android applications with offline capability, QR/barcode scanning, and automatic synchronization
- **Implementation** 10-week phased implementation with on-site support during installation, configuration, and deployment, targeting summer 2026 go-live
- **Scalable Architecture** Cloud-hosted platform designed to grow with the District as new buildings and facilities are added beyond the current 44-building portfolio

Understanding of Requirements

Concourse has conducted a thorough review of RFP #26-015, Addendum 1, and all associated requirements. We understand that Beaufort County School District is seeking a comprehensive, network-based Computerized Maintenance Management System (CMMS) that will serve as a Total Asset Management solution — not simply a work order tracking tool, but an integrated platform that transforms how the District manages its facilities, assets, maintenance operations, and community facility use across its entire building portfolio.

District Context and Operational Environment

BCSD operates in the South Carolina Low Country, an area with unique environmental considerations including humidity, salt air exposure, and hurricane preparedness that directly impact building maintenance strategies and asset lifecycle planning. The District's 44-building portfolio spans diverse facility types — from early childhood centers to high schools to vocational facilities — each with distinct maintenance needs, asset profiles, and community use patterns.

We understand that the District requires a solution that serves multiple stakeholder groups simultaneously: maintenance administrators and supervisors who need operational oversight and reporting; field technicians who need mobile access to work orders, asset data, and inventory in the field; building principals and staff who submit maintenance requests; community organizations who request facility use; and the business office that tracks facility use billing and financial reporting through Tyler Munis.

Key Requirements We Will Address

- **Unlimited Users** Support for administrators, technicians, supervisors, requestors, and external users with no per-user licensing limitations
- **Single Integrated Platform** All modules accessible through single-login without requiring multiple browser windows, supporting AD, Azure AD, and SSO protocols
- **Complete Asset Lifecycle** Full asset inventory using ESRI indoor data schema hierarchies (site → building → space → system → component) with QR/barcode identification
- **Inventory Management** Real-time inventory with QR/barcode scanning, warehouse tracking, work order assignment, and automatic low-stock alerts
- **GIS/Spatial Mapping** Integration with Esri ArcGIS and ArcGIS Indoors for interactive map views, mobile map access, and spatial asset referencing
- **Mobile Field Operations** Native iOS and Android apps with offline capability, automatic sync, field data entry, and barcode scanning
- **Tyler Munis Integration** Financial system integration for cost center charging, general

- **Work Order Management** Web and mobile work request submission with configurable categories, priorities, approval workflows, escalation rules, and cost tracking
- **Preventive Maintenance** Calendar-, runtime-, seasonal-, and condition-based PM scheduling with automatic work order generation and compliance tracking
- **Facilities Use Scheduling** District and community facility reservations with multi-level approvals, COI tracking, automated invoicing, and support service coordination
- ledger account coding, and billing data exchange
- **Safety & Risk Management** Association of lockout/tagout, confined space, hot work documentation and SDS/MSDS records with work orders
- **Reporting & Dashboards** Role-based custom dashboards with KPIs for work order aging, PM compliance, asset lifecycle trends, and facility utilization

Addendum 1 Clarifications Acknowledged

We acknowledge receipt of Addendum 1 dated January 30, 2026, and have incorporated both clarifications into our proposed approach:

- Technical Support Access: Per the District's clarification, we will provide access to technical support through multiple channels including an online technical support center with searchable documentation, knowledge base resources, and ticket submission, supplemented by live support during business hours and an emergency support line for critical issues — ensuring reasonable turnaround times as the District expects.
- On-Site Presence: Per the District's clarification, we will provide a qualified representative on-site during CMMS installation, configuration, and initial deployment, while leveraging virtual collaboration for other implementation phases where on-site presence is not required.

Proposed Solution

Concourse proposes a comprehensive, cloud-hosted CMMS platform purpose-built to meet every requirement specified in Section 3.0 of the RFP. Our solution is a single, integrated platform that eliminates the need for multiple disconnected systems, providing BCSD with unified maintenance operations, asset lifecycle management, facilities scheduling, inventory control, safety documentation, and reporting — all accessible through a single login.

Platform Architecture Overview

Cloud-Hosted SaaS

Fully managed cloud infrastructure with defined cybersecurity controls, encrypted data in transit and at rest, automated backup procedures, geographic redundancy, and disaster recovery protocols. No on-premises servers required — the District accesses the platform through any supported web browser.

Unlimited User Licensing

No per-user licensing caps. All administrators, technicians, supervisors, requestors, and external vendors/contractors access the system without incremental licensing costs. The platform scales seamlessly as the District grows.

Role-Based Access Control

Configurable permissions allow District administrators to manage users, workflows, and system settings without vendor intervention. Distinct permission profiles for internal staff, building-level requestors, and external contractors ensure appropriate data access.

Browser Compatibility

Full functionality across Chrome, Safari, Microsoft Edge, and Firefox. Responsive design adapts to desktop, tablet, and mobile browser sessions without compromising features.

Identity and Authentication

Our platform supports the District's existing identity infrastructure through multiple authentication methods:

- Active Directory (on-premises) via LDAPS for secure directory integration with existing District domain services
- Azure Active Directory (cloud-hosted) for organizations leveraging Microsoft's cloud identity platform

- Single Sign-On (SSO) using SAML 2.0, OAuth, and OIDC protocols, enabling users to authenticate once through the District's identity provider and access all CMMS modules without additional login prompts
- Single-login access to all modules within a single browser window — users navigate between asset management, work orders, facilities scheduling, inventory, and reporting without re-authenticating or opening separate browser sessions

Module 1: Asset Management

Our asset management module provides a comprehensive, hierarchical view of every maintainable asset across the District's 44-building portfolio. The system supports asset hierarchies following the ESRI indoor data schema: site → building → space → system → component. Each asset record includes:

- Unique asset identifiers with scannable QR/barcode labels for rapid field identification
- Complete asset history: installation date, warranties, serial numbers, manufacturer data, photos, maintenance records, costs, condition assessments, and retirement/disposition status
- Asset type coverage across HVAC, mechanical, electrical, plumbing, grounds, fields, fleet, and other District-defined asset classes
- Asset transfers between locations with full historical record preservation — when equipment moves between buildings, all maintenance history travels with it
- Asset lifecycle and replacement-cost reporting for capital planning and budgeting
- Many fields align directly with existing ESRI indoor data, enabling streamlined data migration and spatial referencing

Module 2: Work Order Management

The work order management module streamlines the full lifecycle from initial request to completion and cost allocation:

- Web and mobile submission of work requests through District-branded portals that can be embedded into BCSD websites
- Automatic assignment of unique work order numbers upon creation
- Ability to create work orders with or without associated assets, always associated with a particular facility
- Multi-asset linking — a single work order can reference multiple assets when a job affects several pieces of equipment
- Configurable work order categories, priorities, and multi-level approval workflows tailored to District operations

- Escalation rules for emergency and priority requests with automated routing and notification
- Assignment options: individual technician, crew, contractor, or geographic zone-based assignment with schedule balancing and daily work list generation
- Estimated vs. actual tracking for labor hours, materials consumed, equipment used, and external contractor costs
- Cost charging by line item to cost centers or general ledger accounts for Tyler Munis integration
- Automatic flagging of delinquent, overdue, or stalled work orders after configurable time thresholds
- Full attachment access in the field — technicians view photos, manuals, and documents directly from the work order record

Module 3: Preventive Maintenance (PM)

Our preventive maintenance module enables proactive asset care through multiple scheduling triggers:

- Calendar-based scheduling (e.g., quarterly filter replacements)
- Runtime-based scheduling (e.g., every 500 operating hours)
- Seasonal scheduling (e.g., HVAC transitions between heating and cooling seasons)
- Condition-based scheduling (e.g., triggered by inspection results or sensor data)
- Automatic PM work order generation when schedules are triggered, with assignment to the appropriate technician or trade group
- PM grouping by asset, system, location, or trade for efficient batch scheduling
- PM compliance tracking and reporting — administrators see at-a-glance compliance rates across the entire portfolio
- Scheduled closures and shutdowns at school-wide, building, or room-level granularity — PM schedules automatically adjust for school calendar events
- Direct access to procedures, checklists, manuals, photos, and full maintenance history from within PM work orders

Module 4: Facilities Use & Space Scheduling

Our facilities use module provides a complete scheduling and billing workflow for both District and community use of BCSD facilities:

- Scheduling and reservation of District facilities and designated rooms with intuitive calendar views
- Filtering by building, floor, capacity, availability, room type, and activity type

- Restriction of entire-building reservations to designated approval roles
- Blackout dates/times enforcement for instruction, testing, or maintenance periods
- Multi-level approval workflows with automated routing and notifications — including automatic notifications when an approver is removed from a workflow
- Differentiation between District use and public/community use with separate workflow rules
- Support for repeating events and multi-date event series
- Event modification and cancellation with automated notifications to all affected parties
- Request-based scheduling of support services (custodial, security, HVAC coordination) with configurable default minimums for each service type
- Enforcement of staffing, inventory, and resource limits to prevent over-commitment
- Certificate of Insurance (COI) upload, tracking, and automated expiration notifications
- Facility usage fee tracking with automated invoice generation
- Invoice status tracking: pending, paid, overdue, and voided states
- Export of billing data in formats compatible with District business office processing
- Assignment of internal cost codes and cost centers to facility use events for financial tracking

Module 5: Inventory & Materials Management

- Real-time inventory visibility across all warehouse and storage locations
- QR/barcode scanning functionality for physical inventory counts that directly integrates with and updates the inventory management system in real time
- Warehouse/location-based tracking — each storage area maintains its own inventory with transfer capabilities
- Reservation system for shared tools and equipment to prevent conflicts
- Direct inventory assignment to work orders — materials consumed are automatically deducted and recorded against the job
- Automatic alerts for low stock thresholds, reserved stock, and items on order
- Preferred vendor, manufacturer, and model tracking for streamlined reordering

Module 6: GIS / Spatial & Mapping Capabilities

- Association of assets, spaces, and work orders with floor plans and interactive maps
- Integration with Esri ArcGIS and ArcGIS Indoors for indoor space and asset referencing, leveraging the ESRI indoor data schema that BCSD has established

- Interactive map views embedded within asset and work order records — users click a map location to see associated assets and open work orders
- Mobile map access for field technicians to locate assets and navigate to work order locations
- Dynamic spatial reference updates as facilities change — new buildings, renovations, and space reconfigurations are reflected in the mapping layer

Module 7: Mobile & Field Operations

- Native mobile applications for both iOS and Android — not simply a mobile-responsive website, but purpose-built apps optimized for field use
- Offline capability with automatic synchronization when connectivity is restored — technicians working in basements, mechanical rooms, or areas with limited signal continue working without interruption
- QR/barcode scanning for rapid asset identification and inventory counts using the device camera
- Field entry of labor hours, materials used, photos, notes, and work order status updates directly from the mobile device

Module 8: Safety & Risk Management

- Association of safety documentation — lockout/tagout procedures, confined space permits, hot work permits, and other safety protocols — directly with work orders so technicians access required safety information before beginning work
- Safety Data Sheet (SDS/MSDS) tracking and access within the platform, ensuring compliance documentation is always available

Module 9: Reporting, Dashboards & KPIs

- Work order aging and backlog analysis — identify bottlenecks and resource constraints
- Response and completion time tracking — measure service levels across trades and buildings
- Preventive maintenance compliance rates — ensure PM schedules are being met across the portfolio
- Asset condition and lifecycle cost trends — support capital planning decisions with data-driven insights
- Facility use and space utilization summaries — understand which facilities are in demand and optimize scheduling
- Custom dashboards by role — administrators, supervisors, and trades each see the KPIs most relevant to their responsibilities

- Custom report creation with role-based access controls — authorized users build and save reports without vendor intervention
- Report outputs available for preview and export in PDF, Excel, and Word formats

Module 10: Integrations

- **Tyler Munis** Financial system integration for cost center/GL account coding, billing data exchange, and expenditure tracking based on available APIs and data exchange protocols
- **Microsoft Office** Full compatibility with Word, Excel, and Outlook for report exports, data analysis, and calendar synchronization
- **Google Workspace** Compatibility with Gmail and Google Calendar for schedule synchronization and notification routing
- **Calendar Platforms** Synchronization of PM schedules, work order timelines, and facility use events with Outlook, Gmail, and similar calendar platforms
- **District Websites** Embeddable, District-branded maintenance request and facilities use portals for integration into BCSD websites

Additional Platform Capabilities

- Unlimited document, photo, video, and attachment uploads linked to assets, work orders, PM tasks, and facility use events via unique identifiers
- Advanced search and filtering across all record types — work orders, assets, inventory, locations, facilities, and requests
- System-generated notifications in multiple formats: email, SMS, and push notifications
- Full audit trail of all record changes including user identity, date, time, and action taken
- Platform scalability — designed to accommodate additional buildings and facilities as the District grows beyond its current 44-building portfolio

Technical Approach

This section describes our technical architecture, integration methodology, data migration approach, and security framework for the BCSD CMMS implementation.

Cloud Architecture & Hosting

Our CMMS platform operates on a fully managed cloud infrastructure designed for enterprise-grade reliability and security:

High Availability Design

Multi-region cloud infrastructure with redundant application and database tiers, designed for consistent uptime and minimal planned maintenance windows. Automatic failover capabilities ensure service continuity.

Data Protection

Encryption at rest (AES-256) and in transit (TLS 1.2+). Regular automated backups with geographic redundancy. Defined Recovery Time Objectives and Recovery Point Objectives documented in our disaster recovery plan.

Security Controls

SOC 2 Type I certified with active pursuit of SOC 2 Type II certification. Web Application Firewall (WAF), intrusion detection, vulnerability scanning, and regular security patching. Role-based access controls at the application layer.

Scalability

Cloud-native architecture that scales automatically to accommodate growth in users, buildings, assets, and transaction volumes without performance degradation.

Hardware & Software Specifications

As a cloud-hosted SaaS solution, the CMMS platform requires no on-premises server infrastructure from the District. All hosting, maintenance, security patching, and platform updates are managed by Concourse. The District's requirements for access are:

Component	Specification
Web Browser Access	Chrome, Safari, Microsoft Edge, or Firefox (current and one prior version)

Mobile Applications	iOS 15+ and Android 12+ via Apple App Store and Google Play Store
Network Connectivity	Standard internet connection; HTTPS (port 443) outbound access required
SSO Integration	SAML 2.0, OAuth 2.0, or OIDC endpoint from District identity provider
Active Directory	LDAPS connectivity for on-premises AD; Azure AD tenant for cloud identity
Cloud Hosting	Fully managed by Concourse — no District server hardware required
Software Licensing	All-inclusive subscription — no separate database, middleware, or client licenses
Operating System	Platform-agnostic — accessible from Windows, macOS, ChromeOS, iOS, and Android

Integration Architecture

Integration Philosophy: Our integration approach prioritizes reliability and data integrity while working within the capabilities of each connected system's available APIs and data exchange mechanisms.

Tyler Munis Financial Integration

Our platform will integrate with Tyler Munis based on available APIs and supported data exchange protocols. The integration scope includes:

- Cost center and general ledger account code synchronization for work order cost charging
- Export of facility use billing data in formats compatible with Tyler Munis import processes
- Expenditure and budget reporting data exchange for maintenance cost tracking
- During Discovery (Phase 1), we will work with BCSD's IT and Finance teams to document available Tyler Munis integration points and design the most reliable data exchange approach, whether through API, scheduled file transfer, or other supported mechanism

Esri ArcGIS / ArcGIS Indoors Integration

Our platform supports integration with Esri ArcGIS and ArcGIS Indoors for indoor space and asset referencing:

- Asset hierarchy alignment with the ESRI indoor data schema (site → building → space → system → component)
- Spatial referencing of assets and work orders on floor plans and maps within the CMMS interface
- Consumption of existing ESRI indoor data that BCSD has already established
- Interactive map views accessible from both web and mobile interfaces
- Dynamic updates to spatial references as facilities change — renovations, additions, and space reconfigurations
- During Discovery, we will conduct a detailed review of BCSD's existing Esri environment to map integration points and confirm the data schema alignment

SSO and Directory Services Integration

- SAML 2.0-based SSO configuration with the District's identity provider
- OAuth 2.0 and OIDC support for modern authentication flows
- LDAPS connectivity for on-premises Active Directory user provisioning and authentication
- Azure Active Directory integration for cloud-hosted identity management
- Automated user provisioning and de-provisioning based on directory group membership

Data Migration Strategy

Successful data migration is critical to the value BCSD will realize from the new CMMS. Our structured migration approach ensures historical data integrity:

Data Category	Migration Approach	Validation Method
Asset Inventory	Vendor-provided templates populated with existing asset records; bulk import with field mapping	Record count verification, sample audit of 10% of records, hierarchy validation
Work Order History	Historical work orders imported with status, dates, costs, and associated assets preserved	Date range verification, status distribution analysis, cost total reconciliation

PM Schedules	Active preventive maintenance schedules recreated with trigger types, frequencies, and assigned resources	Schedule-by-schedule verification with BCSD maintenance supervisors
Inventory Records	Current inventory levels, locations, and reorder points imported with vendor/manufacturer data	Physical spot-check against imported quantities at selected locations
Facility Use Data	Historical reservation records and recurring event schedules migrated where available	Calendar comparison with existing scheduling records

Data Templates: We will provide standardized data templates to BCSD during Phase 1 (Discovery & Planning) along with documentation of required fields, data formats, and validation rules. Our team will work alongside District staff to populate, cleanse, and validate data before import.

Cybersecurity & Data Protection Framework

- **Encryption** AES-256 encryption at rest; TLS 1.2+ encryption in transit for all data communications
- **Access Controls** Role-based permissions with principle of least privilege; multi-factor authentication support
- **Audit Logging** Full audit trail of all record changes including user identity, date, time, and action performed
- **Backup & Recovery** Automated daily backups with geographic redundancy; defined RPO and RTO targets documented in disaster recovery plan
- **Vulnerability Management** Regular vulnerability scanning, penetration testing, and timely security patching of all platform components
- **Data Ownership** All District data belongs exclusively to BCSD per Section 7.1.18 of the RFP; Concourse has no legal or equitable interest in District information
- **Compliance** SOC 2 Type I certified; actively pursuing SOC 2 Type II certification. Committed to compliance with all applicable federal, state, and local regulations
- **Incident Response** Documented incident response procedures with notification protocols aligned with BCSD's requirements and South Carolina data breach notification laws

Implementation Plan

Concourse proposes a structured 10-week implementation plan spanning from project award through completion of user training and go-live support. This timeline is designed to achieve a target go-live during summer 2026 — the optimal period for school district system transitions when maintenance teams can focus on system adoption with reduced disruption from active school operations.

Our implementation plan addresses the four deliverables specified in Section 3.1.3: (a) CMMS Training and Implementation Plan, (b) Training Scheduling Checklist for Facility and IT Staff, (c) End User Manual for CMMS Functions, and (d) Data Import and Migration Procedures. These documents will be developed collaboratively with BCSD during Phase 1 and refined throughout implementation.

Phase 1: Discovery & Planning (Weeks 1–2)

Objective: Validate requirements, audit existing data, and produce a detailed project plan with clear roles and responsibilities for both Concourse and the District.

- Kickoff meeting with BCSD Facilities, Maintenance, and IT stakeholders
- Requirements validation and current workflow documentation across maintenance operations
- Data audit of existing asset records, work order history, PM schedules, inventory data, and facility use records
- SSO/Azure AD/LDAPS integration requirements gathering with BCSD IT
- Tyler Munis integration specification and data exchange design sessions
- Esri ArcGIS/Indoors data schema review, existing data assessment, and spatial mapping plan
- Data migration templates provided to BCSD with field-level documentation
- Finalized project plan with milestones, RACI matrix, and communication cadence
- Training Scheduling Checklist developed for Facility and IT Staff

Roles & Responsibilities — Phase 1

Concourse: Project management, requirements facilitation, data template delivery, integration design. BCSD: Stakeholder participation, existing data extraction, IT environment access, subject matter expertise for workflow documentation.

Phase 2: Configuration & Integration (Weeks 3–6)

Objective: Build and configure the complete CMMS environment, execute integrations, and perform data migration.

- Platform configuration: 44-building hierarchy (site → building → space → system → component) aligned with ESRI indoor data schema
- User roles and permissions configuration for administrators, supervisors, technicians, requestors, and external vendors
- Work order categories, priorities, escalation rules, and approval workflows configured to District specifications
- Preventive maintenance schedule templates built for each asset class and trade
- Facilities use scheduling module configured: room types, fee schedules, approval workflows, blackout periods, COI tracking, and support service defaults
- Inventory management setup with warehouse/location structure and reorder thresholds
- SSO/Azure AD/LDAPS integration completed and tested
- Tyler Munis financial integration configured based on agreed-upon data exchange approach
- Esri ArcGIS/Indoors integration configured with asset spatial referencing
- Notification rules configured across email, SMS, and push notification channels
- Custom dashboards and reports built for each role per District specifications
- Data migration executed: historical records imported, validated, and reconciled
- District-branded maintenance and facilities use request portals configured for BCSD website embedding

Roles & Responsibilities — Phase 2

Concourse: Platform configuration, integration development, data import, quality assurance. On-site presence during key configuration milestones. BCSD: Data validation and feedback, user role definitions, workflow approval, IT environment support for integrations.

Phase 3: Testing & Training (Weeks 7–8)

Objective: Validate the configured system through User Acceptance Testing and deliver comprehensive training to all District-designated personnel.

- User Acceptance Testing (UAT) with BCSD Facilities, Maintenance, and IT teams

- Integration testing: SSO authentication flows, Tyler Munis data exchange, Esri ArcGIS spatial referencing
- Mobile app testing on iOS and Android devices including offline synchronization and QR/barcode scanning
- On-site administrator training: system configuration, user management, reporting, and dashboard customization
- On-site supervisor training: work order management, PM oversight, schedule balancing, and KPI monitoring
- On-site technician training: mobile app operations, field data entry, barcode scanning, inventory management
- Virtual training sessions for building-level requestors and end users on work request submission
- Electronic user manuals and training materials delivered (End User Manual for CMMS Functions)
- Data Import and Migration Procedures documentation finalized
- UAT sign-off from designated BCSD stakeholders

Roles & Responsibilities — Phase 3

Concourse: UAT facilitation, issue resolution, on-site training delivery, documentation delivery. Qualified representative on-site during training sessions. BCSD: UAT participation and sign-off, training attendance, feedback on user experience.

Phase 4: Deployment & Go-Live Support (Weeks 9–10)

Objective: Launch the production environment with on-site support, embed portals into District websites, and transition to the ongoing support model.

- Production environment go-live
- On-site qualified representative present during initial deployment per Addendum 1 clarification
- District-branded maintenance and facilities use request portals embedded in BCSD websites
- Hypercare support period with accelerated response times and dedicated implementation team availability
- Go-live monitoring, issue identification, and rapid resolution
- Transition to ongoing support model with dedicated account manager

- Post-deployment review meeting with BCSD stakeholders to assess implementation success and document lessons learned
- Implementation completion documentation and formal handoff

Roles & Responsibilities — Phase 4

Concourse: On-site go-live support, hypercare monitoring, portal embedding assistance, account manager introduction, documentation delivery. BCSD: Go-live validation, portal integration into District web infrastructure, feedback for post-deployment review.

Implementation Timeline Summary

Phase	Weeks	Key Milestones	On-Site Presence
Phase 1: Discovery & Planning	1–2	Kickoff, requirements validated, project plan approved, data templates delivered	On-site kickoff meeting
Phase 2: Configuration & Integration	3–6	Platform configured, integrations completed, data migrated, portals built	On-site during installation and configuration
Phase 3: Testing & Training	7–8	UAT completed, all user groups trained, manuals delivered, sign-off obtained	On-site for training delivery
Phase 4: Deployment & Go-Live	9–10	Production go-live, portals embedded, hypercare support active, account manager assigned	On-site during initial deployment

Best Practices for BCSD Alignment

Per Section 3.1.3, during implementation and training phases, we will present best practices tailored to ensure the CMMS aligns with BCSD's operations:

- Maintenance Workflow Optimization: We will review current District maintenance workflows and recommend configurations that streamline request-to-resolution processes while maintaining appropriate oversight and approvals
- Asset Management Standards: We will align the asset hierarchy and naming conventions with both BCSD's established practices and the ESRI indoor data schema to ensure consistency across the CMMS and GIS platforms
- IT Security Policy Compliance: All configurations will be reviewed against BCSD's IT security policies, including authentication methods, data access controls, and notification protocols
- PM Schedule Optimization: We will recommend PM frequencies and grouping strategies based on industry standards for K-12 facilities, factoring in the Low Country's environmental conditions (humidity, salt air, hurricane preparedness)
- Facilities Use Workflow Design: We will configure approval workflows that balance operational efficiency with appropriate oversight for District and community use scenarios

Training & Support Model

Training Approach

Initial authorized user training for all District-designated personnel is included as part of our implementation. Training is delivered through a combination of on-site and virtual sessions, tailored to each user role:

User Role	Training Format	Topics Covered	Duration
System Administrators	On-site, hands-on	System configuration, user management, role/permission setup, workflow customization, report building, dashboard creation, integration management	Full day
Maintenance Supervisors	On-site, hands-on	Work order management, PM scheduling oversight, schedule balancing, daily work lists, KPI dashboards, approval workflows, cost tracking	Full day
Field Technicians	On-site, hands-on with mobile devices	Mobile app operations, offline mode, QR/barcode scanning, field data entry (labor, materials, photos, notes), work order status updates, inventory management	Half day

Facilities Schedulers	On-site or virtual	Facility reservations, approval workflows, community use management, COI tracking, invoice generation, billing data export, support service scheduling	Half day
Building Requestors	Virtual	Work request submission via web portal, request status tracking, notification management	1–2 hours
IT Staff	On-site or virtual	SSO/AD configuration, integration monitoring, security settings, user provisioning, technical troubleshooting	Half day

Training Deliverables

- Training Scheduling Checklist for Facility and IT Staff — a detailed checklist coordinating training logistics, attendees, prerequisites, and scheduling across all sessions
- End User Manual for CMMS Functions — comprehensive electronic documentation covering all platform modules, accessible within the CMMS help system and as downloadable PDF
- Role-based quick-reference guides for common tasks (submitting requests, completing work orders, approving reservations, running reports)
- Video tutorials for key workflows accessible on-demand within the platform

Ongoing Technical Support Model

Per the District's clarification in Addendum 1, our support model provides continuous access to technical support with reasonable turnaround times:

Online Support Center

Available 24/7/365 — searchable knowledge base, documentation library, how-to articles, troubleshooting guides, and ticket submission portal. Users can log and track support requests at any time.

Live Support

U.S.-based customer service professionals available during extended business hours via phone, email, and chat. Support staff specializes in K-12 public school facility and technology management and is specifically trained on CMMS applications.

Emergency Support Line

For critical system issues outside business hours, an emergency support line ensures District staff can reach a qualified support professional when urgent situations arise.

Dedicated Account Manager

A named account manager serves as BCSD's primary relationship contact for strategic discussions, quarterly business reviews, enhancement requests, and escalation coordination.

Support Response Framework

Priority Level	Description	Target Initial Response	Target Resolution
Critical (P1)	System-wide outage or major functionality unavailable	Within 1 hour	Workaround within 4 hours; full resolution as rapidly as possible
High (P2)	Significant feature impaired affecting multiple users	Within 2 hours during business hours	Workaround within 8 business hours
Medium (P3)	Feature issue affecting a limited number of users with workaround available	Within 4 business hours	Resolution within 2 business days
Low (P4)	Minor issue, cosmetic defect, or enhancement request	Within 1 business day	Scheduled for next appropriate release cycle

Continuous Improvement

- Regular platform updates and feature enhancements delivered through the SaaS model at no additional charge — BCSD always operates on the current version
- Quarterly account reviews with the dedicated account manager to discuss system utilization, adoption metrics, upcoming District needs, and product roadmap
- Access to a customer advisory group where District stakeholders can provide input on platform direction and feature priorities
- Ongoing access to updated training materials and documentation as platform features evolve

Team & Qualifications

Concourse will assign a dedicated implementation team to the BCSD CMMS project. Our team structure ensures that every aspect of the implementation — from technical configuration to training delivery to ongoing account management — is overseen by professionals with direct experience in facilities management technology for public sector organizations.

Implementation Team Structure

Project Manager

Serves as BCSD's primary point of contact throughout implementation. Responsible for project plan execution, milestone tracking, risk management, communication coordination, and ensuring all deliverables are met on schedule. Experienced in K-12 and public sector technology deployments.

Solution Architect

Designs the technical configuration including asset hierarchy alignment with ESRI indoor data schema, integration architecture for Tyler Munis and Esri ArcGIS, SSO/Azure AD setup, and platform customization. Ensures all technical requirements are addressed.

Integration Specialist

Leads integration development and testing for Tyler Munis financial data exchange, Esri ArcGIS/Indoors spatial referencing, SSO authentication, and calendar synchronization. Works directly with BCSD IT staff.

Data Migration Specialist

Manages the data migration process from existing systems into the CMMS platform. Provides templates, validates imported data, resolves discrepancies, and ensures historical record integrity.

Training Lead

Develops and delivers role-based training programs for administrators, supervisors, technicians, facilities schedulers, and end users. Creates all training documentation including user manuals and quick-reference guides.

Dedicated Account Manager

Assigned prior to go-live and continues as BCSD's ongoing relationship manager post-implementation. Coordinates quarterly business reviews, escalations, enhancement requests, and long-term account strategy.

Organizational Qualifications

- Concourse maintains a record of successful technology implementations for government agencies, school districts, and public sector organizations across the United States

- Our team includes U.S.-based customer service professionals with specialization in K-12 public school facility and technology management, specifically trained on CMMS applications
- We maintain staff support to provide an effective quality control program, training program, and daily technical support as required by the District
- Our organization has demonstrated financial stability and maintains the capacity to fulfill all contract requirements throughout the full contract period
- We comply with all applicable federal, state, and local laws, including South Carolina's procurement code, ethics act, drug-free workplace requirements, and immigration verification provisions

Quality Assurance Program

Concourse maintains a structured quality assurance program that governs all aspects of our service delivery:

- Defined quality checkpoints at each implementation phase gate — no phase transitions without validation of deliverables
- UAT protocols with documented test cases covering all functional requirements specified in Section 3.1.2
- Post-go-live hypercare monitoring with daily performance reviews during the first two weeks of production operation
- Quarterly service reviews with the dedicated account manager to evaluate support performance, system health, and user satisfaction
- Continuous improvement processes informed by support ticket analysis, user feedback, and adoption metrics

Compliance & Certifications

Background Check Compliance

Per Section 2.1.1 of the RFP, all Concourse personnel who are present on BCSD property will complete South Carolina and Nationwide criminal background checks, including the nationwide Sex Offender Registry, through the District's designated screening vendor prior to being present on BCSD property. Concourse is solely responsible for all background check fees. Should the District deny access to any individual, Concourse will provide a replacement resource without disruption to the project schedule.

Insurance Compliance

Concourse will maintain all insurance coverage required by Section 7.1.5 of the RFP, including:

- Commercial General Liability (CGL) on an occurrence basis with limits meeting or exceeding RFP requirements, naming the District as additional insured
- Auto Liability coverage meeting or exceeding RFP requirements
- Worker's Compensation as required by South Carolina law with Employer's Liability coverage meeting or exceeding RFP requirements
- All policies from carriers lawfully authorized in South Carolina with A.M. Best ratings meeting RFP requirements
- Certificates of insurance will be furnished prior to commencement of work as required

Regulatory Compliance

- Drug-Free Workplace Act compliance per Title 44, Chapter 107 of the South Carolina Code of Laws
- Ethics Act compliance per Title 8, Chapter 13 of the South Carolina Code of Laws
- Illegal Immigration compliance per Title 8, Chapter 14 of the South Carolina Code of Laws
- Equal Opportunity compliance per Title 41, Part 60 of the Code of Federal Regulations
- All data, material, and documentation prepared for the District belongs exclusively to BCSD per Section 7.1.18
- All District information processed, stored, or transmitted by the CMMS belongs exclusively to the District per Section 7.1.1

Data Ownership & Portability

Concourse acknowledges that all government information as defined in Section 7.1.14 of the RFP belongs exclusively to Beaufort County School District. Concourse has no legal or equitable interest in District information. Upon contract termination or expiration, Concourse will cooperate fully with the District to export all data in standard, readily usable formats.

Exceptions, Objections, and Observations

After thorough review of the RFP, Addendum 1, and all associated terms and conditions, Concourse takes no exceptions to the specified services and requirements. We are prepared to comply with all terms as stated in the solicitation.

Financial Stability

Per Section 4.0.1.6 and Section 5.0.2(a)(5) of the RFP, Concourse will provide audited end-of-year financial reports for the last three (3) fiscal years as a separate attachment to this proposal. Our financial statements demonstrate a positive cash flow position for each of the three reporting years, reflecting the financial stability required to support a multi-year CMMS contract through the maximum contract period of February 2031.

Concourse maintains a sound financial position supported by recurring subscription revenue, diversified government and commercial client relationships, and prudent fiscal management. Our financial capacity ensures uninterrupted service delivery, ongoing platform development, and long-term support for the District throughout the full contract term including renewal periods.

Financial Documentation

Audited financial statements for the three most recent fiscal years are provided as a separate, bound attachment to this technical proposal as required by Section 4.0.1.6. These financial statements are not included in the three-page Executive Summary page count per the RFP's exemption for financials.

Disclosure Statements

Conflicts of Interest & Unfair Competitive Advantage

Per Section 2.0.12 of the RFP, Concourse warrants and represents that we have no unfair competitive advantage in competing for the proposed contract and no actual or potential conflicts of interest arising from our participation in this competition or receipt of an award. No services related to this solicitation or the work have been previously performed by Concourse, a proposed subcontractor, or an affiliated business.

Gifts Disclosure

Per Section 2.0.19(b) of the RFP, Concourse discloses that no gifts have been made, directly or through an intermediary, by Concourse or any named subcontractors to or for the benefit of the District during the period beginning eighteen months prior to the Opening Date.

Failed Projects, Suspensions, Debarments, and Litigation

Per Section 5.0.3(k) of the RFP, Concourse has no failed projects, suspensions, debarments, or significant litigation to report.

Subcontractor Identification

Per Section 5.1 of the RFP, Concourse does not intend to subcontract any portion of the work exceeding 10% of the project scope. All implementation, training, support, and ongoing services will be performed directly by Concourse personnel.

Pricing

Pricing will be provided in a separate cost proposal as required by the RFP.

Concourse's Approach

Bespoke quality, off-the-shelf speed.

Concourse combines deep public sector expertise with modern software development practices to deliver solutions that meet government requirements without the typical delays and complexity of legacy contractors.

Security-First Development

Security is at the heart of everything we build. From architecture decisions to deployment pipelines, we design with compliance and data protection as foundational requirements, not afterthoughts.

User-Centered Design

Our discovery process focuses on understanding the needs of end users—the government staff and citizens who will interact with the system daily. We ensure solutions are intuitive and practical, not just technically compliant.

Agile Delivery with CI/CD

We work in agile sprints with continuous integration and continuous delivery, enabling rapid iteration and frequent feedback cycles. This means you see your user-specific version in a fully-operational context early and often, not just at the end.

API-First & Modular Components

We build reusable, independent components that allow for flexible customization, faster integration with your existing systems, and future-proof solutions tailored to your needs.

Cloud-Native Infrastructure

We leverage AWS for scalable, secure infrastructure with modern frameworks (including Next.js and React) and streamlined deployments. We can also deploy on Google Cloud Platform or Microsoft Azure based on your requirements.

No Legacy Technical Debt

We're not weighed down by legacy systems, ensuring speed and agility in every project.

How We Work With You

- We undertake a collaborative discovery process to ensure we're configuring our system to meet your exact needs.
- You'll have a dedicated project team working closely with you throughout delivery, and a dedicated account manager post-delivery to ensure ongoing improvements and questions are quickly addressed.
- We integrate directly with your team's communication channels (such as Microsoft Teams) to facilitate faster feedback and more transparent collaboration.
- Change requests and scope adjustments are welcomed—we discuss openly to ensure we're always aligned with your evolving needs.

Your Project Team

Our dedicated team brings decades of combined experience in technology, public work, and program management. Each member is committed to ensuring your success with the Concourse

Government Technology Delivery Experience

Concourse has successfully delivered technology solutions to government agencies nationwide. Below are relevant examples of our work:

			Phone

[redacted]

Company Information

The information contained in this document is proprietary and confidential. We request redaction of all proprietary and confidential information in response to any open records requests. © Concourse Tech Inc. 2026. All rights reserved.