



NOVEMBER 11, 2021

Make the mark.

REGION 10 ESC

Technology Assessment and Planning Services
Proposal

November 11, 2021

Mr. Clint Pechecek
Purchasing Consultant
Region 10 ESC
400 E. Spring Valley Rd.
Richardson, TX 75081

Dear Mr. Pechecek:

Thank you for the opportunity to submit our proposal for Technology Assessment and Planning Services to Region 10 ESC (Region 10 ESC). We are excited to work with your constituents on IT assessment and planning initiatives. As one of the largest consulting and accounting firms nationally, we are well qualified and have extensive experience in helping public sector entities. Over 300 current public sector clients have established Plante Moran as a leader in this industry.

- **Our independence:** Plante Moran provides clients with advice and counsel based on proven technology management practices and solutions rather than vendor relationships. We do not sell ERP software, nor are we bound by any agreements to recommend certain products.
- **Our breadth:** Our team has a successful record of assisting education and governmental clients with technology assessments, planning, design, and selection of ERP software and instructional technology and IT infrastructure as well as cybersecurity and data analytics.
- **Proven project approach:** Our methodologies are supported by a robust and flexible set of tools and templates refined through experience with numerous public sector clients.
- **Professional involvement:** We employ active professionals who are members of national and local organizations dedicated to improving the operations of local and state government, K-12 and higher education clients.
- **Our responsiveness:** As a firm, we also value our relationship with our education and government clients and look forward to providing high quality services to the Region 10 ESC constituents.

I will be the point of contact and am authorized to make representations for our firm. We would welcome the opportunity to further discuss your needs. Please contact me at 248.223.3304 or judy.wright@plantemoran.com if you have any questions.

Sincerely,
PLANTE & MORAN, PLLC

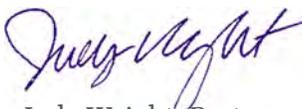

Judy Wright, Partner

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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 Region 10 ESC and its constituents

- **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 our clients.

If you have any questions, Engagement Partner Judy Wright is awaiting your call. **Region 10 ESC needs a trusted advisor — now more than ever — and we're ready to fulfill that role.**

Performance capability



Proposal form 2: Questionnaire

Company profile

1. What is your company’s official registered name?

Plante & Moran, PLLC

2. Provide a link to your company’s website.

www.plantemoran.com

3. What is/are your corporate office location(s)?

3000 Town Center, Suite 100, Southfield, MI 48075

4. Please provide a brief history of your company, including the year it was established.

Founded in 1924, Plante & Moran, PLLC (Plante Moran) is among the nation's largest management consulting and public accounting firms in the United States. Plante Moran operates as a partnership. Plante Moran's staff of over 3,300 persons is organized into four major service areas: Management Consulting, Accounting and Auditing, Tax Consulting, and Personal Financial Planning Services.

5. Who is your competition in the marketplace?

Various management consulting firms nation-wide.

6. What was your annual sales volume over last three (3) years?

P&M Holding Group, LLP Financial Information (in thousands)					
	Fiscal Year Ending 06/30/2020	Fiscal Year Ending 06/30/2019	Fiscal Year Ending 06/30/2018	Fiscal Year Ending 06/30/2017	Fiscal Year Ending 06/30/2016
Income Statement					
Net Revenue	724,257	658,017	516,231	477,152	448,423
Balance Sheet					
Current Assets	288,913	201,415	159,062	149,065	139,939
Total Assets	320,791	238,157	190,297	185,894	179,734
Current Liabilities	72,014	47,660	40,746	41,522	36,668
Total Liabilities	82,046	58,631	44,177	44,099	39,354
Partners Investment	238,745	179,526	146,120	141,795	140,380

P&M Holding Group, LLP is a privately owned company with excess of 300 partners. The Firm is well capitalized with the Partners' Investments of over \$200 million.

As a privately held accounting & consulting Firm, Plante & Moran is not required to have an independent audit of its financial statements, nor has an audit been performed. The summary above, however, reflects the strong financial condition of the Firm.

7. What are your overall public sector sales, excluding Federal Government, for last three (3) years?

New Revenue - Last 3 Fiscal Years (in thousands)			
	FY19	FY20	FY21
TOTAL	49,529	51,092	57,906

8. What is your strategy to increase market share in the public sector?

We don't just participate – we lead

We take our commitment to the public sector community seriously. We don't just belong to various organizations — we view it as our duty to be involved as an advocate for our clients, to gain information for our clients, and to help shape the practical application of various rules and regulations. We are actively involved in the following organizations:

- Texas Association of School Business Officials (TASBO)
- Government Finance Officers Association (GFOA)
- The Council of Great City Schools (CGCS)
- Texas Government Finance Officers Association (GFOAT)
- Texas Association of Government Information Technology Managers (TAGITM)
- Public Technology Institute (PTI)
- Project Management Institute (PMI)
- Association of School Business Officials International (ASBO)
- Numerous other state-level administrative and technical associations

9. What differentiates your company from competitors in the public sector?



“One-firm” firm philosophy

We are unique with our “one-firm” firm philosophy and structure. Based on this philosophy and structure, we are fundamentally built different from our competitors. There are no competing profit centers, so we are able to bring our full breadth of experts from across the firm to serve your specific needs.



Colleague partner approach

Not just one, but at least two partners will serve you. We call this our colleague partner system. This model provides our clients more diverse, expert, and well-rounded thinking to solve your increasingly difficult day-to-day challenges and most complex issues.



Deep industry expertise

You will experience extensive information technology audit and security consulting expertise from professionals who specialize in the financial services industry. Our professionals serve more than 200 public sector clients. Therefore, we’ll start your engagement with a thorough knowledge of the market’s trends, business issues, and best practices. From there, it’s a smooth and efficient path to your goals – complemented by relevant experience and insights we’re ready to share with you.



No surprises

The security of knowing there will be no unwanted surprises because of upfront planning, regular communications, and early identification of issues that will be resolved before project-end. Risks are dealt with prior to project-end to provide a smooth audit, exceed key service deadlines, and assure no surprises after the project-end.



Proactive communication

We are proactive in our communication with clients. We are interested in your activities, and we are dedicated to helping you succeed. We will be available to assist you throughout the year. Our approach emphasizes 24-hour turnaround on communications, and attendance at your meetings with the Audit Committee.



Commitment

We listen upfront to what you need and we deliver. On time and what you requested. We meet the promises we make. This is the number one thing that business executives tell us they want when we ask them what is important when hiring a professional service company, and we strive to meet their needs.

10. Diversity program - Do you currently have a diversity program or any diversity partners that you do business with?

Yes, please see the following page for our diversity program

a. If the answer is yes, do you plan to offer your program or partnership through Equalis Group?

No

Inclusion and diversity

At Plante Moran, the words “inclusion” and “diversity” aren’t just buzzwords; they’re principles to live and work by, and they’re mission critical. We know that increasing the number of diverse professionals at our firm translates to diversity in perspectives, and, as a result, more innovative solutions for our clients.

Our Inclusion and Diversity Council, founded in 2003, is focused on the recruitment, retention, development, and promotion of diverse staff, along with creating an equitable workplace environment that welcomes and celebrates differences. We’re committed to making meaningful progress and becoming a better representation of the clients and communities we serve.



Some of the ways we live by our commitment:

We facilitate **core inclusion and diversity training** to build cultural awareness and competency and establish belonging throughout the firm.

Our **Inclusion and Diversity Council** comprises our Women in Leadership (WIL) program, WorkFlex Committee, and Affinity Network.

Our **Women in Leadership (WIL) program** provides resources, skills training, and support to increase the pipeline of women to partnership and includes a mentoring program that pairs senior partners with emerging female leaders.

Our **WorkFlex Committee** is committed to providing initiatives to support PMers to successfully balance their professional and personal lives.

Our **Affinity Network** comprises staff resources groups (SRGs) that foster career development, retention, and networking among our diverse staff. We currently have the following SRGs:

African American SRG	Veterans SRG
PM Pride SRG	Remote SRG

Our **TRACK Internship Program** introduces multicultural college freshmen and sophomores to the public accounting profession through partner shadowing, mentoring, and client engagement.

Our **Inclusion and Diversity Fellowship** is a three-year commitment for staff to assist with the development and implementation of firmwide inclusion and diversity initiatives.

We actively engage with **professional and community organizations** that support diversity initiatives for recruiting and networking efforts. Organizations include:

- State CPA societies
- The National Association of Black Accountants (NABA)
- Grow Detroit's Young Talent
- Noble Network of Charter Schools Alumni externship program
- Exceptional Academy

11. Provide your safety record, safety rating, EMR and worker's compensation rate where available.

N/A

Pricing/products/services offered

12. Please include a narrative that clearly demonstrates experience and expertise in providing assessments, planning and implementation for each system and function listed in the RFP

Commitment to education and government

Plante Moran is a leader in providing services to public sector entities. We have provided IT assessments, technology design, cybersecurity, and ERP consulting services for educational clients for 30 years. We take pride in our reputation as a provider of quality professional services to over 150 education clients. Our extensive experience with education clients has enabled us to assemble a team of professionals capable of providing a broad array of services for education.

Our services address virtually all aspects of information systems including:



Technology/process assessment

- IT assessment
- Strategic planning
- ERP assessment and selection
- Business process evaluation & redesign
- Acquisition management
- Sourcing
- Cloud strategy



Infrastructure & design

- Network assessment
- Design & acquisition
- Implementation management
- Video surveillance/door access control
- Enterprise wired/wireless design & selection
- Independent verification & validation



Cybersecurity

- HIPAA/HITECH compliance
- Disaster planning
- SAS70/SSAE16/SOC assessment
- IT audit
- IT risk assessment
- PCI DSS assessment
- Network security assessment

TECHNOLOGY/PROCESS ASSESSMENT CONSULTING – IT ASSESSMENTS

We have assisted more than 200 organizations, including many education and governmental clients, assess their IT environment. Using our proven methodology, we solicit feedback from key stakeholders and assess the organization’s position relative to peer organizations and industry best practices. In doing so, we examine up to 84 different areas under the categories of people, process, and technology. Each engagement is tailored to answer the specific questions each client has in order to improve their IT function. Frequent areas of focus in the public sector include IT governance, allocation of resources, alignment of resources with district goals, use of vendors/third party service providers, increasing academic demands on technology (education), 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.

INFRASTRUCTURE & DESIGN CONSULTING

Plante Moran has a team of technology specialists that provide design, selection, and implementation services for virtually every technology solution used in education. Specific technologies include local and wide area networks, wireless solutions, servers and storage area networks, structured cabling, voice solutions, classroom collaboration tools, end user technologies, classroom presentation (sound and video), video production and distribution, video surveillance and door access control, mobile device management, and curriculum specific solutions. We refer to the design of any of these systems as Technology Design.

Our philosophy to technology design is simple: teaching and learning needs should drive technology. In today’s marketplace there are many exciting technology solutions available. However, an investment in technology which does not advance your learning objectives is not a sound investment. Instructional and student needs drive the curriculum, which in turn should identify the technical solutions that need to be assessed and implemented. While technology is rapidly changing, we see several trends occurring within education, all with the goal of increasing student achievement.

We are completely vendor independent. Our team of infrastructure specialists will work with the District to assess the current IT infrastructure environment, define requirements, and develop a conceptual design. We will then review the design with the District and once approved, develop detailed specifications including a Request for Proposal (RFP) document. This RFP will be issued to qualified vendors in accordance with the District's procurement policies. We will respond to vendor inquiries while the RFP is open, issuing bid addenda as needed. Once proposals are received, we will review and analyze proposals, issue clarifications to the vendors, and review with the District in order to identify a short list. Depending on the technology, we may conduct vendor interviews in conjunction with district IT staff. We will facilitate due diligence activities like reference checking or site visits. Once a solution has been identified, we will prepare a packet documenting the process and recommendation for Board action. We also provide contract negotiations assistance and implementation management services.

CYBERSECURITY CONSULTING

Cybersecurity is evolving with multiple attack vectors, making it difficult for organizations to manage the risks effectively. Organizations are also confused as to what standard or framework to use, i.e., NIST Cybersecurity, COSO/COBIT, CIS Critical Security Controls, ISO 270001, etc. Complicating matters further are the various security and privacy regulations.

We can help you by identifying and understanding threats to your data and system. Our cybersecurity team provides a variety of solutions to public sector clients. Below are the examples of cybersecurity services that we can assist you with the following:

- Network security and penetration assessments
- IT risk and internal control assessments
- Business process/application security and control reviews
- Security policy development, procedures and training
- Security compliance reviews such as PCI Data Security Standards, HIPAA, GLBA, and Red Flag
- Business continuity and disaster recovery planning

Cybersecurity assurance services

Our security team provides a variety of solutions to public sector clients including:

- IT risk and internal control assessment
- Baseline network security assessments (layered approach of internet, firewall, network, etc.)
- Business process/application security and control reviews
- Security planning including development of security strategies and plans, policies, procedures and training
- Adherence to compliance related issues such as PCI Data Security Standards, HIPAA, GLBA, and Red Flag
- Network security assessment and penetration studies
- Business continuity and disaster recovery planning

IT security and risk assessment services

Plante Moran has been providing IT audit and IT security consulting services to public sector clients for over 25 years. Our IT risk services take into account various industry accepted security frameworks to map out an approach for a comprehensive assessment of IT controls and processes. We leverage the National Institute of Standards and Technology (NIST) cybersecurity framework, Control Objectives for Information and Related Technology (COBIT), SANS CIS Security Controls, and International Organization for Standardization (ISO 27001 series) of cybersecurity control standards.

Although there are several security frameworks in the industry, we leverage and utilize the NIST cybersecurity framework for a number of our education and government clients. A key reason is the ability to easily compare an organization's current cybersecurity activities with those outlined in the Framework Core. The results of the assessment can be easily leveraged to identify and determine the risk strategies (i.e., the acceptance, avoidance, transfer, or mitigation of risk) to strengthen existing IT controls and security processes and practices.

13. Describe your assessment process, and how your company determines and presents next steps for a client.

Overview of our proposed methodology

We've refined and strengthened our assessment and strategic planning methodology during our numerous client engagements over the past 30 years. Our methodology incorporates best practices from ITIL, COBIT, TOGAF, and other frameworks to deliver technical, schedule, and cost advantages, in alignment with our clients' business objectives. We're also continually updating our approach based on our new client projects and industry involvement.

To achieve client's objectives, a broad and comprehensive review of the IT environment from the standpoint of **people**, **process**, and **technology** is essential:

People.

Organization of the technology support function, including governance, organization structure, user satisfaction, staff development, etc.

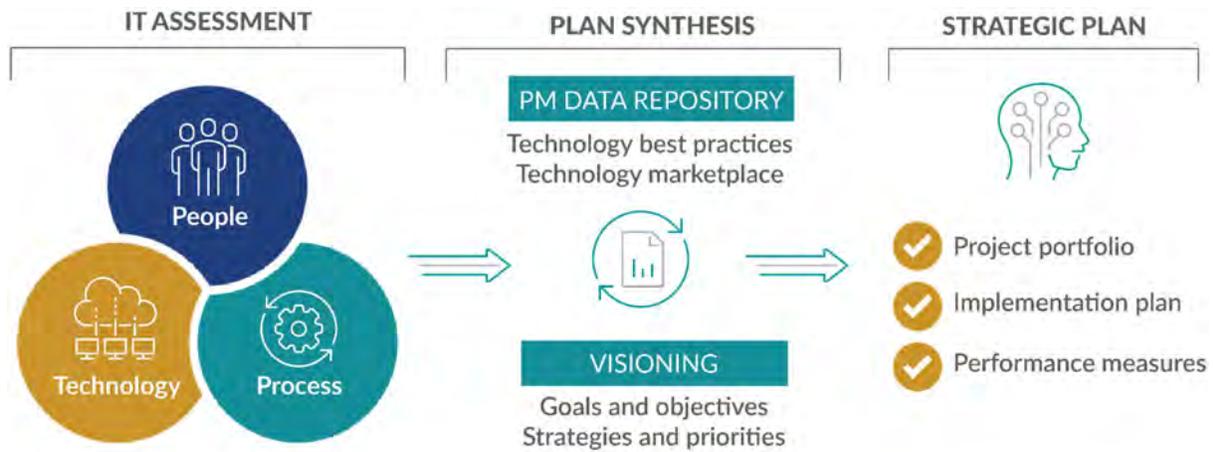
Process.

Administration of technology, including policies and procedures, technology standards, service delivery, help desk administration, network management, software deployment, etc.

Technology.

Technologies and systems used to accomplish current objectives.

As shown below, the IT strategic plan is informed by the results of the IT assessment, as it relates to the organizational execution capabilities, current plans and initiatives, and overall performance and stakeholder satisfaction. Visioning sessions will identify goals, strategies, and priorities, which will be synthesized into an IT strategic plan that will guide the organization's investments, decisions, and activities. The IT strategic plan will include a prioritized list of key initiatives to drive transformation and/or growth, as well as an actionable roadmap of projects.



Cybersecurity elements

Our assessments incorporate elements of cybersecurity to identify any additional protections and controls necessary to mitigate security risks and threats. Based on our understanding of your needs, there will be an emphasis on cybersecurity throughout the assessment. However, the cybersecurity review included in our proposal does not replace the need for comprehensive and periodic network vulnerability assessment and penetration testing.

Assessment scope

Our IT assessment methodology is designed to provide a broad and comprehensive view of your IT environment. This enables us to identify gaps and develop recommendations that not only address identified objectives, but also provide a model for long-term sustainability. The results of the IT assessment will inform the IT strategic plan. Below is a sampling of the key areas and topics that can be addressed:

PEOPLE	Human capital management <ul style="list-style-type: none"> Organizational structure Staffing levels Departmental skillset Competency development Succession planning 	Strategic sourcing <ul style="list-style-type: none"> External service providers Procurement Vendor and contract management 	Stakeholders <ul style="list-style-type: none"> Stakeholders' engagement Expectation management Business relationship management Customer satisfaction
PROCESS	Strategy <ul style="list-style-type: none"> IT mission, vision, and values Business context Business alignment Innovation Project portfolio management <ul style="list-style-type: none"> Portfolio management Project management Organizational change management 	Governance <ul style="list-style-type: none"> Investment strategy Enterprise architecture Standards and policies Service level agreements Governance model Risk management <ul style="list-style-type: none"> Cybersecurity management Log collection and analysis Security architecture Information protection Disaster recovery and business continuity plans Regulatory and compliance obligations 	Operations management <ul style="list-style-type: none"> Asset lifecycle management Performance and capacity management Configuration management Change management IT service management Knowledge management Software development lifecycle
TECHNOLOGY	Infrastructure technology <ul style="list-style-type: none"> Data center Cloud services Structured cabling Network Servers and virtualization Enterprise storage and backup Telecommunications Specialized systems 	Workforce enablement <ul style="list-style-type: none"> Device portfolio Mobility Remote access Collaboration and presentation solutions Productivity solutions Line-of-business applications* 	Business intelligence and data <ul style="list-style-type: none"> Data governance Integrations Analysis and reporting tools

* 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 technical and support needs of these systems.

Project workplan: Typical approach

This section outline our typical workplan which can be modified to address specific needs of the client. Our project will be divided into three major phases, with project monitoring throughout.



PHASE 1: DISCOVERY

Objective: Review client’s current IT organization, technology environment, products, services, staffing, processes, systems, etc. identified in our statement of understanding.

Deliverables: Initial themes, preliminary findings and gaps, areas for improvement.



PHASE 2: ANALYSIS AND RECOMMENDATIONS

Objective: Perform a deeper analysis of the information gathered during Phase 1. The findings and prioritized recommendations will be assembled into a report that will be reviewed with client’s project team.

Deliverables: IT assessment report and presentation to leadership.



PHASE 3: STRATEGIC PLAN DEVELOPMENT

Objective: Using findings from Phases 1 and 2, develop IT strategic plan to connect the current state to the envisioned future state, and present and discuss the plan with client leadership and key stakeholders.

Deliverables: Actionable IT strategic plan and roadmap to guide client’s investments, decisions, and activities.



THROUGHOUT THE PROJECT: ONGOING PROJECT MANAGEMENT AND MONITORING

From initiation to completion, our team will manage this project including:

- Project initiation activities, including a meeting with the client to introduce the project team and confirm project objectives, scope, deliverables, and timetables.
- Development of a project organizational structure and detailed project plans.
- Use of data collaboration tools.
- Project status meetings (no more than once weekly).

Activities by phase



PHASE 1: DISCOVERY

1. Collect and review documentation

Prior to our kick-off meeting (step 2 below), we will provide the client with an information request list. We will review existing documentation to gain a comprehensive understanding of client's current technology environment. We anticipate requesting documents in the following categories.

- IT organization and staffing
- Plans and budgets
- Network and telecom
- Server and storage environment
- End-user environment
- Applications
- Policies and procedures
- Cybersecurity
- External support

Please note that we do **not** expect the client 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.

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), if necessary. The tools will enable us to collect information in an efficient and consistent manner, to quickly compare the availability and use of technologies across the organization.

2. Conduct project kick-off meeting

During this meeting, we will confirm the objectives, timing, and scope of the project, as well as the anticipated level of involvement from the client's staff. We will discuss with you which team members should attend this session.

3. Conduct end-user technology satisfaction survey

To assess the use of technologies and their functions, we will develop and administer an online end-user survey. We will gather meaningful opinions, comments, and feedback regarding the deployment, use, and effectiveness of technologies across the organization, as well as the support function. Ideally, the survey would be administered to all stakeholders.

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

4. Administer IT staff time/effort allocation survey

To support the client's objective of assessing the technology department's current staffing approach and its ability to meet current and future expectations for technology, we recommend the use of an online survey to aggregate information regarding roles and responsibilities, job requirements, available tools and resources, organization and report structure, and work volumes.

This is a staff self-administered survey and, ideally, we would like this survey to be completed by all IT staff prior to our meetings with IT staff to prompt and focus discussion. The time/effort allocation surveys will be analyzed for the IT organization overall, not at the individual level. For accuracy, it is crucial to have this survey completed for or by all members of the IT department.

5. Administer IT department skills survey (optional)

To support the client's objective of assessing the IT department's alignment to the organizational technical support needs, we recommend the use of an online survey to gather information on the various skills of the technology department staff, their level of expertise for a skill, certifications, and professional development needs. This process will assist us in understanding the roles and responsibilities of the various technology department staff members, and to develop a model to collectively identify the areas of IT where additional future IT skills would be beneficial. The skill surveys will be analyzed for the collective/aggregate talent of the IT organization, not at the individual level.

This is a staff self-administered survey and, ideally, we would like this survey to be completed prior to our meetings with IT staff to prompt and focus discussion with your technology department staff.

6. Conduct leadership and stakeholder interviews

We will meet with key stakeholder groups to understand the IT vision and expectations of IT and its technologies in support of that vision. The focus of these interviews is to identify the effectiveness of current IT operations, the ability to service and support current and future technical needs, and the overall use of technology at the organization. Interview topics will likely include:

- The strengths and opportunities for improvement of key enterprise systems and other IT systems as applicable
- Utilization of existing technologies
- IT service delivery
- Major IT initiatives, project prioritization, and governance
- Justification, approval process, and funding for IT
- Current and anticipated information and technology needs over the next five years

We find that conducting these meetings without technology representatives present allows us to receive more candid feedback. The number of days of interviews will vary by client; we will work with the client's project team to schedule the interviews at a time that is mutually convenient.

7. Meet with IT staff

We will meet with individuals representing each area of IT. While we anticipate that many of the meetings will be group interviews, we will also meet separately with key IT personnel where necessary. For any IT staff we do not meet with individually, we will gather their input using the survey tools mentioned in our previous work steps. The topics of discussion will vary by group, with some overlap, but will likely include:

- Organization structure, communication/working relationship
- IT roles, responsibilities, and resources/tools
- Key technology functions, systems/applications usage and challenges
- Alignment of IT initiatives with the department and client's strategic plans
- Current and anticipated skills and professional development/training needs
- Current and anticipated IT needs over the next three to five years
- Policies and procedures related to administration and management of IT systems

These meetings will complement and further clarify the information gathered using the survey instruments described above.

The number of days of interviews will vary by client; we will work with your project team to schedule the interviews at a time that is mutually convenient. Please note that these interviews can be conducted either concurrently or separate from the stakeholder interviews. Note: We will discuss with the client as to whether interviews will be conducted face to face or using collaboration tools.

8. Assess technical environment

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

We will document our findings from this phase, which will serve to inform the subsequent phase described below. Depending on the client needs, an initial themes worksheet may be prepared by Plante Moran, identifying the main findings and gaps, as well as survey results, and presented to client's project team for discussion.



PHASE 2: ANALYSIS AND RECOMMENDATIONS

1. Perform industry standard comparison

We will incorporate a review of the IT operations, resources, and technologies of the client 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. Conduct in-depth analysis

We will further review and analyze the information gathered during the discovery phase (Phase 1, described above). At a minimum, the following information (data and observations) will be analyzed:

- Documentation provided by the client
- On-site meetings and interviews with leadership, stakeholders, and IT staff
- Survey results (end-user technology satisfaction, time/effort allocation, and department skills)
- Technologies in use, including systems architecture and methods for delivery of services
- Comparison to industry standards and best practices
- Alignment of IT department goals with the overall organizational strategy

3. Develop IT assessment report

Based on our findings, we will develop an IT assessment report that identifies areas of improvement for client's IT environment. The report will contain recommendations aligned with industry standards and best practices for each of the topical areas identified in the assessment overview section.

We anticipate the report will consist of the following sections, keeping in context the size and the nature of the organization:

- **Observations:** The current state, challenges, and gaps for the areas assessed. Includes detailed descriptions and maturity ratings by topical area within the areas of people, process, and technology.
- **Recommendations:** The prioritized opportunities for improvement and potential projects to be considered in the future state.

4. Prepare final assessment deliverables

We will review the preliminary assessment with the project steering committee to validate and agree upon key recommendations. Following approval of the preliminary assessment, we will move to assessment finalization and strategic planning activities.



PHASE 3: STRATEGIC PLAN DEVELOPMENT

1. Conduct visioning workshop

The overall goal for implementing technology is not for the technology itself, but rather to enhance existing business processes performed by IT and provide support for processes that are performed across the organization. As such, the goal in developing an IT strategic plan is to provide a coordinated, planned approach towards the deployment of technology with the intention of supporting the goals of the organization and improving the effectiveness of business processes. We will conduct a half-day workshop with the key organizational leaders to facilitate the development of:

- Technology vision and mission
- Technology goals and strategies
- Technology principles

Our discussions will consider:

- IT alignment with organizational goals and current business environment
- Alignment with industry standards for IT operations
- Expected technology needs
- Emerging technologies and trends
- Productivity enhancement through technology
- Opportunities to achieve cost savings
- Projects and requirements, including resource capacity, data governance, security, etc.
- Funding requirements
- Risks and mitigation strategies
- Metrics for evaluation

Also during this workshop, we will work closely with organizational leaders to develop project criteria to objectively evaluate and prioritize technology projects. It is expected that these prioritization criteria will clearly reflect the linkage between the organization's goals and objectives and IT initiatives. We also consider the urgency (e.g., requirement to reduce the current risk of an aging technology) and impact of the projects.

2. Define technology projects

Based on the vision session and recommendations developed in the work step above, we will identify discrete technology projects that should be undertaken by client, which may include the following:

- Existing business application projects, enhancements, upgrades, or replacements
- New business solutions
- Business intelligence deployment
- Technology infrastructure
- IT staffing and governance
- IT administration and policies and procedures
- IT security

We will design these projects to enhance the synergy within and between business units and other entities.

3. Compare projects against prioritization criteria and develop plans

Based on the defined prioritization criteria and the projects identified in the previous work step, we will work with the client's project steering team to classify each project as a high, medium, or low priority. We will develop a preliminary implementation plan with budgetary estimates and timelines for each project, which we will then review and finalize with the project steering team.

4. Define performance metrics (optional)

We will review any existing metrics and key performance indicators to understand what the client is currently measuring, then make recommendations for key metrics that will allow them to better monitor organizational progress, make future decisions, and improve results.

Our approach to IT metrics is to identify the target audiences and calibrate metrics with the organizational goals, objectives, and strategic plan. We typically define IT metrics in four categories: health, delivery, outcome, and agility. Each category produces a unique metric that serves to provide a comprehensive view of the technology department. This information is essential for informed IT decision-making and future development of IT strategies.

5. Develop and present the IT strategic plan

We will develop a draft IT strategic plan that will provide a roadmap for addressing client's most critical technology needs over the next three years. We anticipate the plan will include the following:

- Executive summary
- Summary of planning methodology and approach
- IT vision, mission, and goals
- Specific IT strategies, aligned with client's business needs and goals
- Implementation projects, prioritized by the identified client goals and objectives

We will review the draft strategic plan document with client’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 and finalize the strategic plan.

6. Finalize and present IT strategic plan

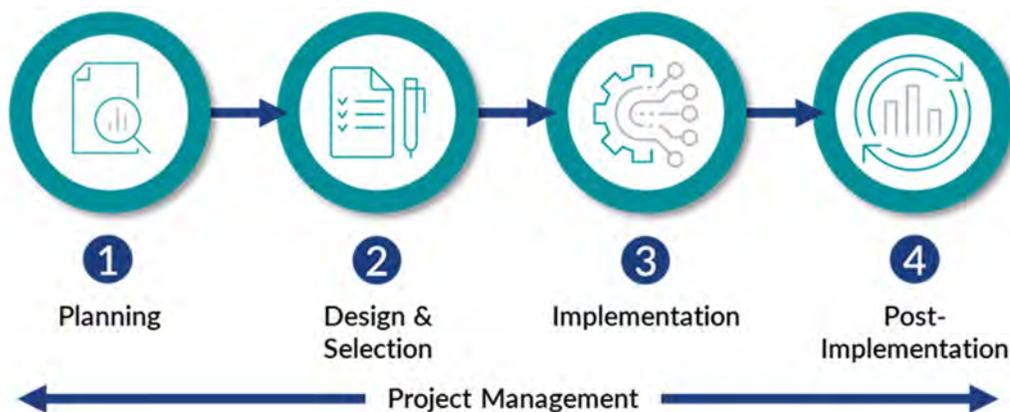
We will present the final IT strategic plan and associated recommendations to an audience of client’s choosing, typically the project steering committee, executive management, and/or key stakeholders.

14. Describe any services your company provides involving implementation of any plans that come out of the assessment your company provides, including assistance with procurement, training, installation, etc.

We frequently assist clients with the implementation of recommendations or the plans resulting from the IT assessment and planning process. Services range from project management of the overall plan to technology design services which includes assistance with the design, procurement, and implementation of specific solutions. While Plante Moran does not resell hardware or software within the public sector (except for certain business analytics tools), we do assist with requirements definition, design, and selection processes. Our specific process may vary based on the type of services being performed. Below is a description of our technology design process for K-12, which addresses most IT infrastructure and hardware solutions.

Technology design

Our standard approach, which can be modified to meet the client’s unique needs, consists of an upfront planning phase, followed by detailed design and selection, implementation management, and post-construction reviews repeated for each technology.



Plante Moran has a team of educational technology specialists that provide design, selection, and implementation services for virtually every technology solution used in education facilities. Many of our activities and efforts in this practice area are devoted to helping clients provide both classroom and collaborative technology to students, while at the same time identify and realize improvement opportunities by creating stable, robust, and secure network environments. The solutions have successfully integrated curriculum needs with technology and digital content to facilitate the digital learning experience and contribute to student achievement. Specific services (collectively referred to as technology design services) provided by our consultants are designed to develop these opportunities, including:

- Classroom technology planning and design
- Strategic security planning
- Strategic communications planning
- Wireless planning and assessment
- Enterprise-wide network design and deployment
- Development of bid specifications through complete needs analysis
- Solution and proposal evaluation
- Contract assistance
- Implementation management, acceptance testing, and multi-vendor coordination and troubleshooting

A high-level description of the phases is as follows:

1. Planning services

If not already completed through a strategic planning process, we will work with the client to develop a detailed plan including a budget, outlining technology projects by building. This budget is called a program of service. We will also define a project schedule, coordinated with construction, if appropriate. A key element of the planning will include a bid-pack schedule, defining the procurement strategy, combination of technologies and associated timing. Lastly, we will work with the client to develop a communications plan for socializing the plans and timing with stakeholders.

2. Detailed design and selection

Using the Program of Service as the guiding document, for each of the projects identified we will conduct building walkthroughs, lead requirements definition discussions, develop schematics, and, finally, develop detailed design documents. This information will be used to create detailed specifications and RFP documents to be released to the vendor community. As appropriate, we will lead or participate in pre-bid meetings for potential vendors, responding to vendor inquiries. Once proposals are received, we will review from technical, compliance with RFP requirements, and cost perspectives. We will facilitate due diligence and work with the client to identify the recommended solution.

3. Implementation management

For each technology solution with the scope, we will provide project management, problem resolution, risk management, and acceptance testing (punch lists). We will conduct regular status meetings, conduct site visits where appropriate, and work with the vendors and client to resolve issues and manage the overall timeline. We will act as an independent third party to provide quality assurance throughout the project.

4. Post implementation services

Typically, as a part of the project requirements, to address the client's need to provide operational support for an implemented system, we require that the vendors include the client's technical personnel during the system design and implementation process. This process allows the client to be involved early on in the implementation process. Based on the complexity of the system being implemented, we may also mandate that an on-site and customized system administration training be included.

15. Were all products/lines/services and pricing being made available under this contract provided in the attachment B and/or Appendix B, pricing sections?

Yes. A note about pricing; we are offering consulting services rather than specific products. We do not publish a rate card. We have proposed a blended hourly rate for each of the services which can be applied to any of our consultants, regardless of title/position.

16. Does the respondent agree to offer all future product introductions at prices that are proportionate to contract pricing offered herein?

Yes.

17. Does pricing submitted include the required administrative fee?

Yes, assuming that the administrative fee is 4% or less.

18. Define your invoicing process and standard terms of payment

We typically invoice monthly for fees incurred in the prior month. Our primary cost is salaries that are paid currently. Accordingly, our invoices will be rendered periodically and are due when received. In the event an invoice is not paid timely, a late charge in the amount of 1.25% per month will be added, beginning 30 days after the date of the invoice.

PERFORMANCE CAPABILITIES

19. States being offered - Respondent must indicate any and all states where products and services are being offered.

Our firm is offering services to the District of Columbia and all states except for New Jersey; we cannot comply with the requirements noted in Proposal Form 19. We are not offering the services outlined in this proposal to U.S. Territories and Outlying Areas at this time.

20. List the number and location of offices, or service centers for all states being proposed in solicitation.

MICHIGAN

Ann Arbor
Auburn Hills
Detroit
East Lansing
Grand Rapids
Flint
Kalamazoo
Macomb
Southfield
Traverse City

ILLINOIS

Chicago
Schaumburg

OHIO

Cincinnati
Cleveland
Columbus
Toledo

COLORADO

Boulder
Denver Downtown
Denver Tech Center
Fort Collins

21. Distribution Channel: Which best describes your company's position in the distribution channel:

- Manufacturer direct
- Authorized distributor
- Value-added reseller
- Certified education/government reseller
- Manufacturer marketing through reseller
- Other

22. Provide relevant information regarding your client engagement process, including the ability for purchasing group members to verify they are receiving contract pricing.

We expect that we will have scoping discussions with a given purchasing group member to determine the requirements for the IT assessment and strategic planning process. We will then document that understanding in an engagement letter and, using the hourly rates noted in our pricing form submitted through this proposal process, provide a fixed fee price.

23. Outline the methods of payments you will accept and include the overall process for agencies to make payments.

Remittance information:

Check:

Plante & Moran, PLLC
16060 Collections Center Drive
Chicago, IL 60693

Bank
Routing/ABA#
Bank Address

Account Number
Account Name

Wire Transfer:

Bank of America
026009593
100 West 33rd Street
New York, NY 10001
9890996003
Plante & Moran, PLLC

ACH:

Bank of America
071000039
1401 Elm Street 2nd Floor
Dallas, TX 75202
9890996003
Plante & Moran, PLLC

24. Please describe your company's ability to quantify the successful implementation of an IT plan based on your company's assessment process.

Successful implementation begins with planning. Starting with a defined program of service, we work with our clients to establish a technology budget to serve as starting point to compare budget versus actual expenditures including budget, total committed, anticipated expenses, and variance to track project costs.

Based on the established budgets and working collaboratively with the client, we will develop RFPs with specifications that are designed to fit within the established budget. Part of this process includes conducting detailed design meetings to ensure the design is clear and no unknown issues arise. If adjustments to the budget are required either due to availability of new technologies or unpredicted market conditions, we bring those to the attention of the client along with our opinion for course of action.

For each individual technology project, we work with the vendor to confirm timeline expectations, change order process, and any potential risks to the timeline and/or budget. We hold weekly status meetings with vendors and client staff during implementation, to make sure the contractor is on schedule and that minimal unforeseen issues arise.

Throughout the project, we conduct frequent site visits to review progress, as well as quality and accuracy of implementation. During the walkthroughs, we note contractor progress and identify any potential concerns. We communicate this immediately back to the vendor so that any issues may be addressed immediately and do not become a larger issue, managing their resolution, and keeping the client apprised of the status of issues throughout the process.

We are constantly looking for ways to decrease project costs while delivering the appropriate functionality. Our experience has taught us that competitive bidding, detailed bid specifications, and good project management allow us to provide practical solutions within established budgets.

25. Describe your company's affiliation and familiarity with different IT brands and products, and whether your company specializes in a certain set of IT products and services.

In both the education and municipal government sectors we are completely vendor independent, allowing our consultants to assist clients in selecting the most appropriate solution based solely on the client's current situation and future goals and objectives. We work with all IT brands and products, specializing in the items listed below.

Specific areas of focus include:

- Collaboration technologies
- Classroom technologies
- Audio/video technologies
- Structured cabling
- Server/storage
- Virtualization technologies
- Telephony/unified communications
- Cybersecurity solutions
- Video surveillance (physical security)
- Door access control
- Network infrastructure (WAN/LAN/WLAN)
- Data center design
- Cloud computing
- Strategic sourcing

Ongoing research in trends and emerging technologies such as:

- Immersive learning
- Mobility & collaboration tools
- Intent-based networking
- Wireless technologies
- IoT/beacons
- Cloud governance
- Smart campuses
- High availability/high performance computing

26. Describe your company's Customer Service Department (hours of operation, how you resolve issues, number of service centers, etc.).

N/A

27. Describe any training or other support resources you provide to support end users in better understanding how to utilize the products and services you recommend.

N/A

28. Outline any implementation or other resources you provide in helping to configure your solutions, whether during the initial startup, or ongoing as part of follow up support.

N/A

29. Describe the capacity of your company to report monthly sales through this agreement to Equalis Group.

We can provide reports as required.

30. Describe the capacity of your company to provide management reports, i.e. consolidated billing by location, time and attendance reports, etc. for each eligible agency.

We can provide reports as required.

Proposal form 3: Diversity vendor certification participation

PROPOSAL FORM 3: DIVERSITY VENDOR CERTIFICATION PARTICIPATION

Diversity Vendor Certification Participation - It is the policy of some Members participating in Equalis Group to involve minority and women business enterprises (M/WBE), small and/or disadvantaged business enterprises, disable veterans business enterprises, historically utilized businesses (HUB) and other diversity recognized businesses in the purchase of goods and services. Respondents shall indicate below whether or not they hold certification in any of the classified areas and include proof of such certification with their response.

- a. Minority Women Business Enterprise
Respondent certifies that this firm is an MWBE Yes No
List certifying agency: _____
- b. Small Business Enterprise (SBE) or Disadvantaged Business Enterprise (DBE)
Respondent certifies that this firm is a SBE or DBE Yes No
List certifying agency: _____
- c. Disabled Veterans Business Enterprise (DVBE)
Respondent certifies that this firm is an DVBE Yes No
List certifying agency: _____
- d. Historically Underutilized Businesses (HUB)
Respondent certifies that this firm is an HUB Yes No
List certifying agency: _____
- e. Historically Underutilized Business Zone Enterprise (HUBZone)
Respondent certifies that this firm is an HUBZone Yes No
List certifying agency: _____
- f. Other
Respondent certifies that this firm is a recognized diversity certificate holder Yes No
List certifying agency: _____

Qualification and experience



Proposal form 4: Management personnel

PROPOSAL FORM 4: MANAGEMENT PERSONNEL

Please provide contact information and resumes for the person(s) who will be responsible for the following areas.

Executive Contact Judy Wright
Contact Person: _____
Title: _____ Partner _____
Company: _____ Plante & Moran, PLLC _____
Address: _____ 3000 Town Center, Ste 100 _____
City: _____ Southfield _____ State: _____ MI _____ Zip: _____ 48075 _____
Phone: _____ 248-223-3304 _____ Fax: _____ 248-603-5953 _____
Email: _____

Account Manager / Sales Lead Melissa Miller
Contact Person: _____
Title: _____ Sr. Manager _____
Company: _____ Same as above _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____
Email: _____

Contract Management (if different than the Sales Lead)
Contact Person: _____ Same as executive contact _____

Billing & Reporting/Accounts Payable
Contact Person: _____ Same as executive contact _____

Marketing
Contact Person: _____ N/A _____

Resumes



Judy Wright

Partner
Management Consulting

Summary of experience

Judy has over 25 years of experience in the education industry, she leads the education consulting practice for Plante Moran and works with organizations to better leverage technology and improve operations. Her experience includes project management, strategic initiatives including IT assessments and project facilitation, process improvement, technology planning, ERP assessment and selection, and enterprise network design. She has managed in excess of \$120 million of enterprise-wide technology, in close coordination with the client, architects, and construction managers. Prior to joining Plante Moran, Judy was the Director of Computing Services at Wayne State University School of Business Administration and adjunct faculty in the Management Information Systems program. She holds a Bachelor of Arts degree in Computer Science from Wayne State University and a Master's in Business Administration from The University of Michigan.

Education

Master of Business Administration
University of Michigan

Bachelor of Arts, Computer Science,
Wayne State University

Selected presentations

Procurement Best Practices: IASBO

What K-12 Business Officials Need to
Know about Cybersecurity: IASBO

What K-12 Business Officials Need to
Know about Cybersecurity: TASBO

Cloud Computing for Schools: MSBO

Security Trends in K-12: PM Webinar

High performing IT organizations:
TASBO

Selected key clients

- Richardson Independent School District, TX
- Community Unit School District 300, IL
- Fort Worth Independent School District, TX
- Garland Independent School District, TX
- Cherry Creek School District, CO
- Baltimore City Public Schools, MD
- San Jose Evergreen Community College District, CA
- Cerritos College, CA
- Milwaukee Public Schools, WI
- Richland County School District One, SC
- Oakland Schools. MI
- Forest Hills Public Schools, MI
- Toledo Public Schools, OH
- County of Lee, FL
- County of Oakland, MI
- Oakland Community College, MI
- Auburn University, AL
- Detroit Public Schools Community District, MI



Mike Riffel, MPA, CGCIO

Partner
Management Consulting

Summary of experience

Mike has over 17 years of experience in assisting the public sector through the information technology assessment, selection, and implementation process. Mike has facilitated the RFP development, proposal analysis, and system selection process for dozens of public sector organizations throughout the United States, and has extensive knowledge of the functionality provided by public sector focused enterprise solutions. Mike is well versed in conducting information technology assessments as well as working in technology implementation advisory roles, reviewing integrator deliverables, assisting in the design of a post implementation support structure, and implementing change management techniques to ensure user acceptance of new business processes and/or technology.

Education

Master of Public Policy Analysis and Administration (MPA)

Michigan State University

Bachelor of Science in International Relations

Michigan State University

Certified Government Chief Information Officer (CGCIO)

Rutgers University – Public Technology Institute

Selected publications

Riffel, Mike; Bailey, Mike.

“Understanding and Mitigating IT Project Risks.” Government Finance Review; June 2010.

Riffel, Mike. “Chapter 4 - Overview of the Current ERP Marketplace.” The ERP Book: Financial Management Technology from A to Z. Chicago, GFOA, 2010.

Riffel, Mike; Kavanagh, Shayne and Melbye, David. “Mission Critical: Evaluating and Funding Business Application Projects.” IT Budgeting and Decision Making; Maximizing Your Governments Technology Investment. Edited by Shayne Kavanagh. Chicago: GFOA, 2009.

Professional training and affiliations

- Government Finance Officers Association (GFOA)
- Illinois Government Finance Officers Association (IGFOA)
- New York Government Finance Officers Association (NYSGFOA)
- Public Technology Institute (PTI)
- Pi Alpha Alpha – National Honor Society in Public Administration

Selected key clients

- City of Chandler, AZ
- City of Baton Rouge, LA
- City of Palo Alto, CA
- Sumner County, TN
- City of Bend, OR
- County of Marin, CA
- City of Fayetteville, AR
- City of North Miami Beach, FL
- City of Alexandria, VA
- Town of Nantucket, MA
- Hampton Roads Transit, VA
- Milwaukee Sanitation District, WI
- Gwinnett County, GA
- City of Georgetown, TX
- Town of Watertown, MA
- Town of Little Elm, TX
- City of Waco, TX
- Cook County Public Guardian, IL
- Village of Elk Grove, IL
- Montgomery County, TX
- Village of Woodridge, IL
- Village of Park Forest, IL
- Suffolk County Water Authority, NY
- City of Corpus Christi, TX
- Town of Hempstead, NY
- Milwaukee County, WI
- Village of Arlington Heights, IL
- Hampton Roads San. District, VA
- Town of Hilton Head Island, SC
- Health Research, Inc., NY
- Spotsylvania County, VA
- City of Philadelphia, PA
- County of Anoka, MN
- City of Pflugerville, TX



Marvin Sauer

Principal
Management Consulting

Summary of experience

Marvin has worked with a wide variety of clients for over 25 years taking them from initial strategic planning through the successful implementation of a variety of proven and leading-edge technologies. He is a talented facilitator of small to large groups working with personnel ranging from end users to executive management. Marv has given presentations at local and national educational conferences on topics such as “Building the Network of Tomorrow, Today” and “With Strategic Planning First, Successful Implementation Follows.”

Education

Master of Business Administration in
Finance

University of Michigan

Bachelor of Science in Math/Computer
Science

University of California, Los Angeles

Selected presentations

IT/Cybersecurity Assessment: Council
of Great City Schools

High performing IT organizations:
TASBO

IT Strategic Sourcing: MSBO

Technology in Administration: MSBO

AASPA Social media, the good, the bad,
and the issues

IASBO Optimizing IT support

OACUBO Balancing quality service with
operational efficiency

Technology Trends at MC Meeting

Plante Moran webinars

Data Security

Enterprise Mobility Management

Cloud Computing

Integrating technology into your
district

K12 Technology to enhance learning

Higher Education data security

Is your building and network secure?

Dealing with mobile devices in the
classroom

Cyber Security

Selected key clients

- CUSD #300, IL
- Detroit Public Schools, MI
- Boulder Valley School District, TX
- Fort Worth Independent School District, TX
- Richardson Independent School District, TX
- Farmington Public Schools, MI
- Richland County School District One, TX
- Ann Arbor Public Schools, MI
- Southfield Public Schools, MI
- Bloomfield Hills Public Schools, MI
- Rochester Community Schools, MI
- Rockford Public Schools, IL
- Toledo Public Schools, OH
- Huron School District, MI
- Trenton Public Schools, MI
- Ottawa ISD, MI
- Ingham ISD, MI
- Springfield Public Schools, IL



Melissa Miller, PMP

Senior Manager
Management Consulting

Summary of experience

Melissa has over 25 years of experience working with education and manufacturing clients in the area of operations, process, and technology. She is an experienced project manager with specific expertise in the areas of ERP implementation, strategy, organizational and operational analysis, and performance improvement solutions. Melissa works with education clients nationwide on a variety of IT consulting projects. Prior to joining Plante Moran, Melissa was Vice President of Manufacturing Solutions for a management consulting firm leading the human performance and organizational effectiveness practice. She has worked with large organizations, leading strategy development, operational effectiveness efforts, managing large scale project implementations, and performance improvement initiatives. Melissa previously served as a local school board member and was an active member of the Michigan Association of School Boards and Oakland County School Boards Association.

Education

Human Resource Development,
Oakland University

Selected presentations

Technology Trends: MASB
Tips for ERP System Selection and
Implementation: TASBO
Technology Primer for Board
Members: MASB
Project Management Essentials:
Plante Moran

Professional training and affiliations

Certified, Project Management
Professional (PMP), Project
Management Institute
Member, Project Management
Institute (PMI)
Michigan Association of School
Boards; Certified Board Member
(2013)

Selected key clients

- Garland Independent School District, TX
- Milwaukee Public Schools, WI
- Berkley County School District, SC
- Richland County School District One, SC
- Kettering City Schools, OH
- Forest Hills Public Schools, MI
- St. Johns Public Schools, MI
- Delta College, MI
- Oakland Community College, MI
- Youngstown City Schools, OH
- Lenawee Intermediate School District, MI
- Ingham Intermediate School District, MI
- Health Research Institute



Kyle Macyda

Senior Manager
Management Consulting

Summary of experience

Kyle has over 20 years of experience in designing, implementing, and managing IT infrastructure solutions across a wide range of industries including education (K-12 and higher education), city and county government, non-profit, healthcare, manufacturing and distribution, retail and financial services, and private equity. His hands-on, technical experience includes various aspects of business continuity, disaster recovery, server-based computing, cloud computing, enterprise storage solutions, backup and recovery methodologies, and data center technologies. He has expertise in system deployment, systems management, and workload migrations. He has extensive knowledge of complex virtualized environments that include a mixture of on premise, private cloud, and public cloud solutions for both server and endpoint virtualization. In addition to his technical capabilities, Kyle also advises clients on matters related to IT service delivery, outsourcing, governance, strategy, staffing, support, and operations. His projects have required understanding clients' business needs and technology requirements, developing technology approaches, designing solutions, and providing hands-on assistance to ensure the successful implementation. Prior to joining Plante Moran, Kyle was a senior-level system engineer at one of the nation's top healthcare organizations, and in other roles elsewhere, has provided IT integration services to a variety of clients and industries.

Education

Bachelor of Science in Computer Engineering
University of Michigan - Dearborn

Selected presentations

Cybersecurity in K12: PM Webinar

Professional training and affiliations

Microsoft Certified Systems Engineer
Microsoft Certified Professional

Selected key clients

- Broward County, FL
- Miami-Dade County, FL
- Hamilton County, OH
- Kent County, MI
- Lee County, FL
- Milwaukee County, WI
- Monterey County, CA
- Oakland County, MI
- Pierce County, WA
- City of Detroit, MI
- City of Livonia, MI
- City of Monroe, MI
- City of St. Louis, MO



Jacinto Cordero

Senior Manager
Management Consulting

Summary of experience

Jacinto has over 20 years of experience in information and communication technologies. His areas of expertise include IT assessment and strategic planning, voice, data, video, and wireless/mobile network design and optimization, managed network services, network security, cybersecurity policies and controls, physical security (including video surveillance, access control, public addressing and radio communications), high-availability compute/storage, disaster recovery/business continuity, data lifecycle management, data center design, cloud migration, Internet of Things (IoT), ERP readiness, and digital transformation for private and public organizations in multiple industries, as well as for service providers. Prior to joining Plante Moran, Jacinto worked in consultancy, solutions and business development roles at Huawei Technologies, China Telecom, and Telmex/Claro/América Móvil.

Education

Master of Business Administration
Texas A&M University

Bachelor of Science, Electronics
Engineering, ESPOL

Professional training and affiliations

Cisco CCNA Routing & Switching
CompTIA Security+
ITIL 4 Foundation

Selected articles

Five key things to know about 5G
Remote work done right
Demystifying SD-WAN

Selected presentations

Migrating to a remote workforce
webinar
General Speaker at Barcelona MWC
for Emerging Technologies,
including 5G, IoT, big data, cloud
How to Deploy
Connected/Autonomous Vehicle
Applications in China

Additional languages

Spanish (fluent)
French (intermediate)

Selected key clients*

- Town of Hilton Head Island, SC
- Gwinnett County, GA
- Department of Natural Resources (DNR), WA
- City of Oregon, OR
- Panama City Beach, FL
- City of San Mateo, CA
- City of Farmington Hills, MI
- Cerritos Community College, CA
- Schoolcraft Community College, MI
- Grosse Pointe Public Schools System, MI
- Lake Orion Community Schools, MI
- Forest Hills Public Schools, MI
- Detroit Public Schools Community District, MI
- Nationwide mid-size insurance company
- Mid-western senior living company



F. Alex Brown, CPA, CHP, CISSP

Principal
Management Consulting, Cybersecurity Practice

Summary of experience

Alex has over 18 years of information technology audit, technology regulatory control compliance, and system integration project experience. Alex has extensive experience in the assessment of technology risk and evaluation of IT controls in support of IT security regulatory compliance engagements (e.g. HIPAA/HITECH and Sarbanes-Oxley). In addition, Alex has extensive experience in working with various IT security control frameworks (e.g. NIST 800, ISO 27001/27002, COBIT, HIPAA, FERPA). Alex has extensive industry experience including healthcare, government, higher education, and manufacturing. Alex's experience includes planning and performing engagements to evaluate and assess IT risk, evaluate the effectiveness of control measures implemented, identify IT control deficiencies, and develop remediation recommendations.

Education

Bachelor of Science
Accounting
North Carolina A&T State University

Selected presentations

IT Security Trends
IT Governance and Security Trends
2014 Annual GFOA (Government
Finance Officers Association)
Conference
IT Security in Healthcare
2014 Plante Moran Healthcare
Symposium
Technology Governance
Ohio Society of CPAs Healthcare
Conference

Professional training and affiliations

Certified Public Accountant (CPA)
Member of the American Institute of
Certified Public Accountants (AICPA)
Certified HIPAA Security Professional
(CHP)

Selected key clients

- North Carolina A&T State University, NC
- Michigan Technology University, MI
- Hampton Roads Transit Authority, VA
- Orange County, CA
- New York State Teachers Retirement System, NY
- Savannah State University, GA
- McLaren Health Incorporated, MI
- Volkswagen of North America, CO
- California Earthquake Authority, CA
- Chart Industries, OH
- Marathon Oil Petroleum, OH
- Hi-lex Controls, MI
- Musashi Automotive Parts – North America, MI
- Wayne County, MI
- OhioHealth Incorporated, OH



Natalie Schwarz, PMP

Senior Manager
Management Consulting

Summary of experience

Natalie is a certified Project Management Professional with over 10 years of professional service experience consulting and implementing systems for a wide range of clients and industries. Natalie is a Chicago native and has been working in the Plante Moran downtown Chicago office for over four years in the information technology management consulting government group. She specializes in assisting public sector entities assess, plan for, select, and implement enabling technologies within the public sector. Her areas of expertise include business process optimization specifically within financial process areas, large-scale project management, and software needs assessments, selections, and implementations. She has experience in developing enterprise software needs assessments, identifying current state gaps and best-fit solutions, software requirements, and business process reviews; she has successfully guided dozens of clients through development of software request for proposals, solution selection, vendor contract negotiations, and implementations initiatives.

Prior to Plante Moran, Natalie worked for a big four accounting firm focusing on practice and process development as well as large-scale project management for software implementations. Since coming to Plante Moran, Natalie has focused on servicing governmental clients only and is a member of the national and local Government Finance Officers Association (GFOA). Natalie's clients have included a wide range of local municipalities, counties, and special authorities.

Education

Bachelor of Finance & Accountancy,
Illinois State University

Professional certifications & affiliations

Certified Project Management
Professional (PMP)

Member of Project Management
Institute (PMI)

Member of Illinois Government
Finance Officers Association (IGFOA)

Member of Government Finance
Officers Association (GFOA)

Certified, Thomson Reuters Indirect
Tax OneSource

Certified, Vertex O Series

Certified, Oracle R12 E-Business Tax

Selected key clients

- Village of Glencoe, IL
- City of St. Charles, IL
- City of Lake Forest, IL
- City of Peoria, IL
- Milwaukee County, WI
- Milwaukee County Zoo, WI
- Milwaukee County Parks, WI
- City of Wauwatosa, WI
- St. Louis County, MO
- Boone County, MO
- City of O'Fallon, MO
- City of Kirkwood, MO
- Ramsey County, MN
- Three Rivers Parks, MN
- Horry County, SC
- City of Georgetown, TX
- Montgomery County, TX
- Jefferson County, CO
- Town of Cary Parks, NC
- Town of Natick, MA
- City of Santa Monica, CA
- Spotsylvania County, VA
- Regional Transportation Authority (RTA)
- Solid Waste Authority of Central Ohio (SWACO)
- Baton Rouge Parks Commission (BREC)
- Menorah Park



Andrea Selke, CISSP, CEH, Security+

Senior Manager
Cybersecurity Consulting

Summary of experience

Andrea has over 10 years of experience as an information security professional and is versed in ethical hacking and penetration testing, IT audit, forensic technology, and internal controls over information systems. Her experiences in industry include public sector and government, financial institutions (banks and credit unions), services, nonprofit, health care, education, and manufacturing. Within Plante Moran's Cybersecurity practice, Andrea specializes in attack and penetration, vulnerability assessments, social engineering, wireless security, IT security audits, seven-point assessment, and other technical security assessments. Andrea holds a master's degree in information assurance from Eastern Michigan University and a B.A. in psychology from the University of Michigan.

Andrea is a board member (former President and Membership Chair) of the International Information Systems Security Certification Consortium (ISC)² Greater Detroit Chapter, and a member of the Information Systems Security Association (ISSA) and Women Security Alliance (WomSA) Detroit Chapters. She has presented on several security related topics for conferences.

Education

Bachelor of Arts
Psychology
University of Michigan

Master of Science
Information Assurance
Eastern Michigan University

Selected presentations

"The Truth about Penetration Testing", 2019 DCON Cybersecurity Conference

"Cybersecurity Trends", 2019 IASA Spring Conference

"Cybersecurity Trends – 2019 & Beyond", 2019 SCG Equity Leadership Summit

"Cybersecurity: Many Paths for Success in the Digital Age", EMU 2019 Digital Divas

"Cybersecurity Trends", 2018 Michigan American Council of Engineering Companies (ACEC)

Professional training and affiliations

Certified Information Systems Security Professional (CISSP)

Certified Ethical Hacker (CEH)
Security+ (CompTIA)

(ISC)² Detroit Chapter Board member

ISSA Motor City Chapter member

Women Security Alliance (WomSA) Chapter member

Selected key clients

- Ohio Deferred Compensation Program
- RGIS
- Ohio Public Employees Retirement (OPERS)
- RouteOne
- City of Tacoma, WA
- Huron Capital Partners
- City of Sunnyvale, CA
- The William Davidson Foundation
- Live Oak Bank
- Soil and Materials Engineering Inc.
- Detroit Public Community School District, MI
- Isabella Bank
- Birmingham Public Schools, MI

Proposal form 5: References and experience questionnaire*

Provide a minimum of five customer references for product and/or services of similar scope dating within the past three years. Please try to provide references for K-12, Higher Education, City/County and State entities. Provide the following information for each reference:

*Plante Moran considers the annual volume confidential information and therefore does not provide the annual volume of our projects.

Reference 1

Entity name	Fort Worth ISD, TX
Contact name and title	Michael Ball, Chief Financial Officer
City and state	Fort Worth, Texas
Phone number	817.814.2100
Years serviced	April 2017 to August 2017
Description of services	Performed a comprehensive assessment of instructional and administrative technology from multiple perspectives including the people, processes, and the technology itself. Our review included six focus areas: education technology, student information system, network infrastructure, hardware systems, application development, and customer service. Developed recommendations for improvement including restructuring, processes and procedures and technology infrastructure. Project also included comparative research to determine key technology performance metrics and staffing levels at peer districts

Reference 2

Entity name	Cerritos College
Contact name and title	Felipe Lopez, Vice President of Business
City and state	Norwalk, Calif.
Phone number	562.860.2451 Ext: 2242
Years serviced	November 2019 to April 2020
Description of services	<p>Cerritos College engaged Plante Moran to develop an IT Master Plan that described the future vision for technology within the College, in alignment with its recently completed Facilities Master Plan and (earlier completed) Education Master Plan. The IT Master Plan is intended to provide a clear and compelling set of activities to be undertaken by the College that integrates institution-wide technology initiatives and priorities and supports the Cerritos Mission, Vision, and Values.</p> <p>The Plante Moran team reviewed and assessed current education technology, demographic, and California higher education trends; completed a comprehensive stakeholder survey of students, faculty, staff, and administration; and assessed the current IT capabilities as foundation elements of the IT Master Plan. The team defined mission, vision, strategic priorities, and specific IT initiatives that aligned with the EMP and FMP goals and objectives. The team developed a five-year plan with specific IT initiatives, with a focused Year 1 Plan (roadmap) for execution.</p>

Reference 3

Entity name	Kalamazoo Public Schools
Contact name and title	Caycee Sledge, Executive Director of Instructional and Informational Technology
City and state	Kalamazoo, Mich.
Phone number	269.337.0576
Years serviced	2021
Description of services	Reviewed instructional and administrative technology from multiple perspectives including people, process, and technology. Developed recommendations for improvement including restructuring, processes and procedures, and technology infrastructure.

Reference 4

Entity name	City of Panama City Beach, FL
Contact name and title	Mr. Jason Pickle, IT Manager
City and state	Panama City Beach, Fla.
Phone number	850.233.5100 Ext 2324
Years serviced	Nov 2020 to April 2021
Description of services	Conducted assessment of the City's information technology staffing, processes, and infrastructure. Interviewed both IT staff and department heads, and created an online end-user survey to gather current state information. After completing the assessment, Plante Moran facilitated an IT visioning session to define the future direction of technology at the City. Plante Moran then created an IT strategic plan for the City to follow, including recommended projects to complete in each year of the plan.

Reference 5

Entity name	State of Washington, Department of Natural Resources
Contact name and title	Brule Burkhart, Deputy Supervisor for Administration
City and state	Olympia, Wash.
Phone number	360-902-1251
Years serviced	January 2020 to June 2020
Description of services	<p>Plante Moran conducted a comprehensive information technology assessment for the State of Washington Department of Natural Resources (LSO) that included a review of all aspects of the organization, administration, and use of technology within the agency. The engagement combined documentation review, surveys, and feedback acquired through interviews with IT staff and agency stakeholders, and a benchmarking survey of peer organizations.</p> <p>The IT assessment evaluated how effectively agency-wide IT is organized to deliver services, assessed overall capacity for IT organizational and system changes, and prioritized initiatives and addressed findings based on level of effort and business value. The assessment also addressed improvements to governance, GIS, and data management.</p> <p>We worked with LSO to develop a five-year IT strategic plan and implementation schedule, including a framework for annual monitoring and refresh.</p>

QUESTIONS:

- 1. Identify any contracts with other cooperative or government group purchasing organizations of which your company is currently a part of:**

TIPS; EPIC 6; FCCC CollegeBuys; CMAS; SLP for State of CA; SHI Cloud Contract; Omnia Partners; SHARE; State of Michigan DTMB

- 2. Provide a copy of all current licenses, registrations and certifications issued by federal, state and local agencies, and any other licenses, registrations or certifications from any other governmental entity with jurisdiction, allowing Respondent to perform the covered services including, but not limited to licenses, registrations or certifications. M/WBE, HUB, DVBE, small and disadvantaged business certifications and other diverse business certifications, as well as manufacturer certifications for sales and service must be included if applicable.**

None.

- 3. Provide information regarding whether your firm, either presently or in the past, has been involved in any litigation, bankruptcy, or reorganization.**

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. Nevertheless, claims are filed from time to time. We believe the number of claims filed against Plante & Moran is well below industry averages for a firm of our size. Moreover, we take great pride in the fact that the firm has never, in its history, been adjudicated as negligent in a matter involving accounting, audit, or consulting services. Plante & Moran has not at any time been the subject of any action by a regulatory agency. There are no claims currently pending of any kind that could have material impact on the firm.

- 4. Felony Conviction Notice – Please check applicable box:**

A publicly held corporation; therefore, this reporting requirement is not applicable

Is not owned or operated by anyone who has been convicted of a felony.

Is owned or operated by the following individual(s) who has/have been convicted of a felony.

***If the 3rd box is checked a detailed explanation of the names and convictions must be attached.**

N/A

Value add



Proposal form 6: Value add questionnaire

Proposer must agree to work in cooperation with Region 10 ESC and the Equalis Group to develop a marketing strategy and provide avenues to equally market and drive sales through the Contract and program to all current and potential Members.

1. Detail how your organization plans to market and promote this contract upon award.

Our public sector team will highlight our cooperative activities with Region 10 ESC and the Equalis Group.

2. Provide the number of sales representatives which will work on this contract and where the sales representatives are located.

Our consulting team sells our services to clients, we do not have a formal sales team within our management consulting team.

3. Acknowledge that your organization agrees to provide its company logo(s) to Region 10 ESC and Equalis Group and agrees to provide permission for reproduction of such logo in marketing communications and promotions.

Yes.

4. Provide a copy of all current licenses, registrations and certifications issued by federal, state and local agencies, and any other licenses, registrations or certifications from any other governmental entity with jurisdiction, allowing Respondent to perform the covered services including, but not limited to licenses, registrations or certifications. M/WBE, HUB, DVBE, small and disadvantaged business certifications and other diverse business certifications, as well as manufacturer certifications for sales and service must be included if applicable

None.

Please also list and include copies of any certificates you hold that would show value for your response not already included above.

N/A

5. Please include any additional products and/or services not included in the scope of the solicitation that you think will enhance and/or add value to this contract participating agencies.

Other related services are included in our response to the Education Software and Related Products and Services RFP response.

Other required proposal forms



Proposal form 7: Clean air and water act

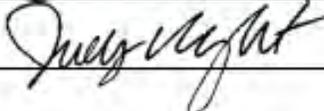
PROPOSAL FORM 7: CLEAN AIR WATER ACT

I, the Vendor, am in compliance with all applicable standards, orders or regulations issued pursuant to the Clean Air Act of 1970, as Amended (42 U.S. C. 1857 (h), Section 508 of the Clean Water Act, as amended (33 U.S.C. 1368), Executive Order 117389 and Environmental Protection Agency Regulation, 40 CFR Part 15 as required under OMB Circular A-102, Attachment O, Paragraph 14 (1) regarding reporting violations to the grantor agency and to the United States Environment Protection Agency Assistant Administrator for the Enforcement.

Potential Vendor: Plante & Moran, PLLC

Title of Authorized Representative: Judy Wright

Mailing Address: 3000 Town Center, Ste 100 Southfield MI 48075

Signature: 

Proposal form 8: Debarment notice

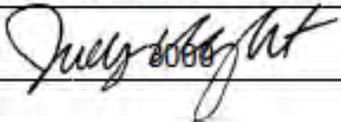
PROPOSAL FORM 8: DEBARMENT NOTICE

I, the Vendor, certify that my company has not been debarred, suspended or otherwise ineligible for participation in Federal Assistance programs under Executive Order 12549, "Debarment and Suspension", as described in the Federal Register and Rules and Regulations.

Potential Vendor: Plante & Moran, PLLC

Title of Authorized Representative: Partner

Mailing Address: 3000 Town Center, Ste 100 Southfield MI 48075

Signature: 

Proposal form 9: Lobbying certification

PROPOSAL FORM 9: LOBBYING CERTIFICATION

Submission of this certification is a prerequisite for making or entering into this transaction and is imposed by Section 1352, Title 31, U.S. Code. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Any person who fails to file the required certification shall be subject to civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The undersigned certifies, to the best of his/her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract or cooperative agreement, the undersigned shall complete and submit Standard Form LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all covered sub-awards exceeding \$100,000 in Federal funds at all appropriate tiers and that all sub-recipients shall certify and disclose accordingly.



Signature of Respondent

11/4/21

Date

Proposal form 10: Contractor certification requirements

PROPOSAL FORM 10: CONTRACTOR CERTIFICATION REQUIREMENTS

Contractor's Employment Eligibility

By entering the contract, Contractor warrants compliance with the Federal Immigration and Nationality Act (FINA), and all other federal and state immigration laws and regulations. The Contractor further warrants that it is in compliance with the various state statutes of the states it will operate this contract in.

Participating Government Entities including School Districts may request verification of compliance from any Contractor or subcontractor performing work under this Contract. These Entities reserve the right to confirm compliance in accordance with applicable laws.

Should the Participating Entities suspect or find that the Contractor or any of its subcontractors are not in compliance, they may pursue any and all remedies allowed by law, including, but not limited to: suspension of work, termination of the Contract for default, and suspension and/or debarment of the Contractor. All costs necessary to verify compliance are the responsibility of the Contractor.

The Respondent complies and maintains compliance with the appropriate statutes which requires compliance with federal immigration laws by State employers, State contractors and State subcontractors in accordance with the E-Verify Employee Eligibility Verification Program.

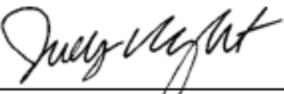
Contractor shall comply with governing board policy of the Region 10 ESC Participating entities in which work is being performed.

Fingerprint & Criminal Background Checks

If required to provide services on school district property at least five (5) times during a month, contractor shall submit a full set of fingerprints to the school district if requested of each person or employee who may provide such service. Alternately, the school district may fingerprint those persons or employees. An exception to this requirement may be made as authorized in Governing Board policy. The district shall conduct a fingerprint check in accordance with the appropriate state and federal laws of all contractors, subcontractors or vendors and their employees for which fingerprints are submitted to the district. Contractor, subcontractors, vendors and their employees shall not provide services on school district properties until authorized by the District.

The Respondent shall comply with fingerprinting requirements in accordance with appropriate statutes in the state in which the work is being performed unless otherwise exempted.

Contractor shall comply with governing board policy in the school district or Participating Entity in which work is being performed.



Signature of Respondent

11/4/21

Date

Proposal form 11: Antitrust certification statements

PROPOSAL FORM 11: ANTITRUST CERTIFICATION STATEMENTS
(Tex. Government Code § 2155.005)

I affirm under penalty of perjury of the laws of the State of Texas that:

- (1) I am duly authorized to execute this contract on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Company) listed below;
- (2) In connection with this proposal, neither I nor any representative of the Company has violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus. & Comm. Code Chapter 15;
- (3) In connection with this proposal, neither I nor any representative of the Company has violated any federal antitrust law; and
- (4) Neither I nor any representative of the Company has directly or indirectly communicated any of the contents of this proposal to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.

VENDOR Plante & Moran, PLLC

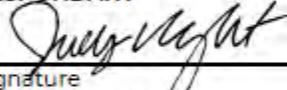
ADDRESS 3000 Town Center, Ste 100

Southfield, MI 48075

PHONE 248-223-3304

FAX 248-603-5953

RESPONDANT

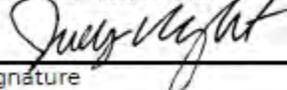

Signature
Judy Wright

Printed Name

Partner

Position with Company

AUTHORIZING OFFICIAL


Signature

Judy Wright
Printed Name

Partner

Position with Company

Proposal form 13: Boycott

PROPOSAL FORM 13: BOYCOTT CERTIFICATION, TERRORIST STATE CERTIFICATION, AND NONDISCRIMINATION AGAINST FIREARM INDUSTRY CERTIFICATION

BOYCOTT CERTIFICATION

Respondent certifies that during the term of any Agreement, it does not boycott Israel and will not boycott Israel. "Boycott" means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations specifically with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory, but does not include an action made for ordinary business purposes.

Respondent certifies that respondent does not boycott energy companies, and it will not boycott energy companies during the term of any subsequent contract. Pursuant to Texas Government Code Chapter 2274, as enacted in Senate Bill 19 of the 87th Texas Legislature, if respondent is a for-profit organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or limited liability company, including a wholly owned subsidiary, majority-owned subsidiary, parent company, or affiliate of those entities or business associations (specifically excluding sole proprietorships) that exists to make a profit which has ten (10) or more full-time employees and the value of the contract with the ESC is \$100,000 or more, the respondent must represent and warrant to the ESC that the respondent does not boycott energy companies and will not boycott energy companies during the term of any subsequent contract.

Does vendor agree? JA
(Initials of Authorized Representative)

TERRORIST STATE CERTIFICATION

In accordance with Texas Government Code, Chapter 2252, Subchapter F, REGION 10 ESC is prohibited from entering into a contract with a company that is identified on a list prepared and maintained by the Texas Comptroller or the State Pension Review Board under Texas Government Code Sections 806.051, 807.051, or 2252.153. By execution of any agreement, the respondent certifies to REGION 10 ESC that it is not a listed company under any of those Texas Government Code provisions. Responders must voluntarily and knowingly acknowledge and agree that any agreement shall be null and void should facts arise leading the REGION 10 ESC to believe that the respondent was a listed company at the time of this procurement.

Does vendor agree? JW
(Initials of Authorized Representative)

NONDISCRIMINATION AGAINST FIREARM INDUSTRY CERTIFICATION

Respondent certifies that respondent does not discriminate against firearm entities or firearm trade associations, and it will not discriminate against firearm entities or firearm trade associations during the term any subsequent contract. Pursuant to Texas Government Code Chapter 2274, as enacted in Senate Bill 19 of the 87th Texas Legislature, if respondent is a for-profit organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or limited liability company, including a wholly owned subsidiary, majority-owned subsidiary, parent company, or affiliate of those entities or business associations (specifically excluding sole proprietorships) that exists to make a profit which has ten (10) or more full-time employees and the value of the contract with the ESC is \$100,000 or more, the respondent must represent and warrant to the ESC that the vendor does not have a practice, policy, guidance or directive that discriminates against a firearm entity or firearm trade association and will not discriminate against a firearm entity or firearm trade association during the term of any subsequent contract.

Does vendor agree? JW
(Initials of Authorized Representative)

Proposal form 14: Resident certification

PROPOSAL FORM 14: RESIDENT CERTIFICATION

This Certification Section must be completed and submitted before a proposal can be awarded to your company. This information may be placed in an envelope labeled "Proprietary" and is not subject to public view. In order for a proposal to be considered, the following information must be provided. Failure to complete may result in rejection of the proposal:

As defined by Texas House Bill 602, a "nonresident Bidder" means a Bidder whose principal place of business is not in Texas, but excludes a contractor whose ultimate parent company or majority owner has its principal place of business in Texas.

Texas or Non-Texas Resident

- I certify that my company is a "resident Bidder"
 I certify that my company qualifies as a "nonresident Bidder"

If you qualify as a "nonresident Bidder," you must furnish the following information:

What is your resident state? (The state your principal place of business is located.)

Plante & Moran, PLLC 3000 Town Center, Ste 100

Company Name	Address	
Southfield	MICHIGAN	48075
City	State	Zip

Proposal form 15: Federal funds certification form

PROPOSAL FORM 15: FEDERAL FUNDS CERIFICATION FORM

When a participating agency seeks to procure goods and services using funds under a federal grant or contract, specific federal laws, regulations, and requirements may apply in addition to those under state law. This includes, but is not limited to, the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 CFR 200 (sometimes referred to as the "Uniform Guidance" or "EDGAR" requirements). All Vendors submitting proposals must complete this Federal Funds Certification Form regarding Vendor's willingness and ability to comply with certain requirements which may be applicable to specific participating agency purchases using federal grant funds. This completed form will be made available to participating agencies for their use while considering their purchasing options when using federal grant funds. Participating agencies may also require Vendors to enter into ancillary agreements, in addition to the contract's general terms and conditions, to address the member's specific contractual needs, including contract requirements for a procurement using federal grants or contracts.

For each of the items below, Vendor should certify Vendor's agreement and ability to comply, where applicable, by having Vendor's authorized representative complete and initial the applicable lines after each section and sign the acknowledgment at the end of this form. If a vendor fails to complete any item in this form, Region 10 ESC will consider the Vendor's response to be that they are unable or unwilling to comply. A negative response to any of the items may, if applicable, impact the ability of a participating agency to purchase from the Vendor using federal funds.

1. Vendor Violation or Breach of Contract Terms:

Contracts for more than the simplified acquisition threshold currently set at \$150,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 USC 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

Any Contract award will be subject to Region 10 ESC General Terms and Conditions, as well as any additional terms and conditions in any Purchase Order, participating agency ancillary contract, or Member Construction Contract agreed upon by Vendor and the participating agency which must be consistent with and protect the participating agency at least to the same extent as the Region 10 ESC Terms and Conditions.

The remedies under the Contract are in addition to any other remedies that may be available under law or in equity. By submitting a Proposal, you agree to these Vendor violation and breach of contract terms.

Does vendor agree? _____

(Initials of Authorized Representative)

2. Termination for Cause or Convenience:

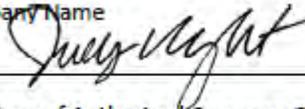
When a participating agency expends federal funds, the participating agency reserves the right to immediately terminate any agreement in excess of \$10,000 resulting from this procurement process in the event of a breach or default of the agreement by Offeror in the event Offeror fails to: (1) meet schedules, deadlines, and/or delivery dates within the time specified in the procurement solicitation, contract, and/or a purchase order; (2) make any payments owed; or (3) otherwise perform in accordance with the contract and/or the procurement solicitation. participating agency also reserves the right to terminate the contract immediately, with written notice to offeror, for convenience, if participating agency believes, in its sole discretion that it is in the best

(Initials of Authorized Representative)

By signature below, I certify that the information in this form is true, complete, and accurate and that I am authorized by my company to make this certification and all consents and agreements contained herein.

Plante & Moran, PLLC

Company Name



Signature of Authorized Company Official

Judy Wright

Printed Name

Partner

Title

11/4/21

Date

Proposal form 16: Additional Arizona contractor requirements

PROPOSAL FORM 16: ADDITIONAL ARIZONA CONTRACTOR REQUIREMENTS

AZ Compliance with Federal and state requirements: Contractor agrees when working on any federally assisted projects with more than \$2,000.00 in labor costs, to comply with all federal and state requirements, as well as Equal Opportunity Employment requirements and all other federal and state laws, statutes, etc. Contractor agrees to post wage rates at the work site and submit a copy of their payroll to the member for their files. Contractor must retain records for three years to allow the federal grantor agency access to these records, upon demand. Contractor also agrees to comply with the Arizona Executive Order 75-5, as amended by Executive Order 99-4.

When working on contracts funded with Federal Grant monies, contractor additionally agrees to comply with the administrative requirements for grants, and cooperative agreements to state, local and federally recognized Indian Tribal Governments.

AZ Compliance with workforce requirements: Pursuant to ARS 41-4401, Contractor and subcontractor(s) warrant their compliance with all federal and state immigration laws and regulations that relate to their employees, and compliance with ARS 23-214 subsection A, which states, "...every employer, after hiring an employee, shall verify the employment eligibility of the employee through the E-Verify program"

Region 10 ESC reserves the right to cancel or suspend the use of any contract for violations of immigration laws and regulations. Region 10 ESC and its members reserve the right to inspect the papers of any contractor or subcontract employee who works under this contract to ensure compliance with the warranty above.

AZ Contractor Employee Work Eligibility: By entering into this contract, contractor agrees and warrants compliance with A.R.S. 41-4401, A.R.S. 23-214, the Federal Immigration and Nationality Act (FINA), and all other Federal immigration laws and regulations. Region 10 ESC and/or Region 10 ESC members may request verification of compliance from any contractor or sub contractor performing work under this contract. Region 10 ESC and Region 10 ESC members reserve the right to confirm compliance. In the event that Region 10 ESC or Region 10 ESC members suspect or find that any contractor or subcontractor is not in compliance, Region 10 ESC may pursue any and all remedies allowed by law, including but not limited to suspension of work, termination of contract, suspension and/or debarment of the contractor. All cost associated with any legal action will be the responsibility of the contractor.

AZ Non-Compliance: All federally assisted contracts to members that exceed \$10,000.00 may be terminated by the federal grantee for noncompliance by contractor. In projects that are not federally funded, Respondent must agree to meet any federal, state or local requirements as necessary. In addition, if compliance with the federal regulations increases the contract costs beyond the agreed on costs in this solicitation, the additional costs may only apply to the portion of the work paid by the federal grantee.

Registered Sex Offender Restrictions (Arizona): For work to be performed at an Arizona school, contractor agrees that no employee or employee of a subcontractor who has been adjudicated to be a registered sex offender will perform work at any time when students are present, or reasonably expected to be present. Contractor agrees that a violation of this condition shall be considered a material breach and may result in the cancellation of the purchase order at the Region 10 ESC member's discretion. Contractor must identify any additional costs associated with compliance to this term. If no costs are specified, compliance with this term will be provided at no additional charge.

Offshore Performance of Work Prohibited: Due to security and identity protection concerns, direct services under this contract shall be performed within the borders of the United States.

Terrorism Country Divestments: In accordance with A.R.S. 35-392, Region 10 ESC and Region 10 ESC members are prohibited from purchasing from a company that is in violation of the Export Administration Act. By entering into the contract, contractor warrants compliance with the Export Administration Act.

The undersigned hereby accepts and agrees to comply with all statutory compliance and notice requirements listed in this document.



Signature of Respondent

November 4, 2021

Date

Proposal form 17: Ownership disclosure form (N.J.S. 52:25-24.2)

PROPOSAL FORM 17: OWNERSHIP DISCLOSURE FORM (N.J.S. 52:25-24.2)

Pursuant to the requirements of P.L. 1999, Chapter 440 effective April 17, 2000 (Local Public Contracts Law), the Respondent shall complete the form attached to these specifications listing the persons owning 10 percent (10%) or more of the firm presenting the proposal.

Company Name: Plante & Moran PLLC, Southfield, MI

Street: 3000 Town Center, Ste 100

City, State, Zip Code: Southfield, MI 48075

Complete as appropriate:

I _____, certify that I am the sole owner of _____, that there are no partners and the business is not incorporated, and the provisions of N.J.S. 52:25-24.2 do not apply.

OR:

I _____, a partner in _____, do hereby certify that the following is a list of all individual partners who own a 10% or greater interest therein. I further certify that if one (1) or more of the partners is itself a corporation or partnership, there is also set forth the names and addresses of the stockholders holding 10% or more of that corporation's stock or the individual partners owning 10% or greater interest in that partnership.

OR:

I _____, an authorized representative of _____, a corporation, do hereby certify that the following is a list of the names and addresses of all stockholders in the corporation who own 10% or more of its stock of any class. I further certify that if one (1) or more of such stockholders is itself a corporation or partnership, that there is also set forth the names and addresses of the stockholders holding 10% or more of the corporation's stock or the individual partners owning a 10% or greater interest in that partnership.

(Note: If there are no partners or stockholders owning 10% or more interest, indicate none.)

Name	Address	Interest
<small>Plante Moran is owned and operated by its 300+ partners. If selected for this engagement, we can provide a full list of our partners upon request. All partners are authorized to commit the firm to binding contracts. Judy Wright is the partner managing this engagement. No individual person or entity owns a 10% or greater interest.</small>		

I further certify that the statements and information contained herein, are complete and correct to the best of my knowledge and belief.

Authorized Signature and Title

11/4/21
Date

Proposal form 18: Non-collusion affidavit

PROPOSAL FORM 18: NON-COLLUSION AFFIDAVIT

Company Name: Plante & Moran, PLLC
Street: 3000 Town Center, Ste 100
City, State, Zip Code: Southfield, MI 48075

State of New Jersey

County of _____

I, _____ of the _____
Name City

in the County of _____, State of _____ of full
age, being duly sworn according to law on my oath depose and say that:

I am the _____ of the firm of _____
Title Company Name

the Respondent making the Proposal for the goods, services or public work specified under the Harrison Township Board of Education attached proposal, and that I executed the said proposal with full authority to do so; that said Respondent has not directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free, competitive bidding in connection with the above proposal, and that all statements contained in said bid proposal and in this affidavit are true and correct, and made with full knowledge that the Harrison Township Board of Education relies upon the truth of the statements contained in said bid proposal and in the statements contained in this affidavit in awarding the contract for the said goods, services or public work.

I further warrant that no person or selling agency has been employed or retained to solicit or secure such contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, except bona fide employees or bona fide established commercial or selling agencies maintained by

Plante & Moran, PLLC

Company Name

Authorized Signature & Title

Subscribed and sworn before me

this _____ day of _____, 20____

Notary Public of New Jersey
My commission expires

SEAL

This appears to reference a specific project with Harrison Township Board of Education and therefore, we have not executed. We would be happy to execute a non-collusion affidavit for Region 10 or any client that wishes to purchase our services through Region 10.

Proposal form 19: Affirmative action affidavit

PROPOSAL FORM 19: AFFIRMATIVE ACTION AFFIDAVIT (P.L. 1975, C.127)

Company Name: Plante & Moran PLLC

Street: 3000 Town Center, Ste 100

City, State, Zip Code: Southfield, MI 48075

Bid Proposal Certification:

Indicate below your compliance with New Jersey Affirmative Action regulations. Your proposal will be accepted even if you are not in compliance at this time. No contract and/or purchase order may be issued, however, until all Affirmative Action requirements are met.

Required Affirmative Action Evidence:

Procurement, Professional & Service Contracts (Exhibit A)

Vendors must submit with proposal:

1. A photo copy of their Federal Letter of Affirmative Action Plan Approval _____
OR
2. A photo copy of their Certificate of Employee Information Report _____
OR
3. A complete Affirmative Action Employee Information Report (AA302) _____

Public Work – Over \$50,000 Total Project Cost:

A. No approved Federal or New Jersey Affirmative Action Plan. We will complete Report Form AA201-A upon receipt from the Harrison Township Board of Education _____

B. Approved Federal or New Jersey Plan – certificate enclosed _____

I further certify that the statements and information contained herein, are complete and correct to the best of my knowledge and belief.

We cannot comply with NJ Affirmative Action regulations at this time

Authorized Signature and Title

Date

P.L. 1995, c. 127 (N.J.A.C. 17:27)

MANDATORY AFFIRMATIVE ACTION LANGUAGE

PROCUREMENT, PROFESSIONAL AND SERVICE CONTRACTS

During the performance of this contract, the contractor agrees as follows:

The contractor or subcontractor, where applicable, will not discriminate against any employee or applicant for employment because of age, race, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation. The contractor will take affirmative action to ensure that such applicants are recruited and employed, and that employees are treated during employment, without regard to their age, race, creed, color,

national origin, ancestry, marital status, sex, affectional or sexual orientation. Such action shall include, but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the Public Agency Compliance Officer setting forth provisions of this non-discrimination clause.

The contractor or subcontractor, where applicable will, in all solicitations or advertisement for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to age, race, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation.

The contractor or subcontractor, where applicable, will send to each labor union or representative of workers with which it has a collective bargaining agreement or other contract or understanding, a notice, to be provided by the agency contracting officer advising the labor union or workers' representative of the contractor's commitments under this act and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

The contractor or subcontractor, where applicable, agrees to comply with any regulations promulgated by the Treasurer pursuant to P.L. 1975, c. 127, as amended and supplemented from time to time and the Americans with Disabilities Act.

The contractor or subcontractor agrees to attempt in good faith to employ minority and female workers trade consistent with the applicable county employment goal prescribed by N.J.A.C. 17:27-5.2 promulgated by the Treasurer pursuant to P.L. 1975, C.127, as amended and supplemented from time to time or in accordance with a binding determination of the applicable county employment goals determined by the Affirmative Action Office pursuant to N.J.A.C. 17:27-5.2 promulgated by the Treasurer pursuant to P.L. 1975, C.127, as amended and supplemented from time to time.

The contractor or subcontractor agrees to inform in writing appropriate recruitment agencies in the area, including employment agencies, placement bureaus, colleges, universities, labor unions, that it does not discriminate on the basis of age, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation, and that it will discontinue the use of any recruitment agency which engages in direct or indirect discriminatory practices.

The contractor or subcontractor agrees to revise any of its testing procedures, if necessary, to assure that all personnel testing conforms with the principles of job-related testing, as established by the statutes and court decisions of the state of New Jersey and as established by applicable Federal law and applicable Federal court decisions.

The contractor or subcontractor agrees to review all procedures relating to transfer, upgrading, downgrading and lay-off to ensure that all such actions are taken without regard to age, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation, and conform with the applicable employment goals, consistent with the statutes and court decisions of the State of New Jersey, and applicable Federal law and applicable Federal court decisions.

Proposal form 20: C. 271 Political contribution disclosure

We will be happy to complete in the event that we work with a client in NJ through this contract

PROPOSAL FORM 20: C. 271 POLITICAL CONTRIBUTION DISCLOSURE FORM

Public Agency Instructions

This page provides guidance to public agencies entering into contracts with business entities that are required to file Political Contribution Disclosure forms with the agency. It is not intended to be provided to contractors.

What follows are instructions on the use of form local units can provide to contractors that are required to disclose political contributions pursuant to N.J.S.A. 19:44A-20.26 (P.L. 2005, c. 271, s.2). Additional information is available in Local Finance Notice 2006-1 (https://www.nj.gov/dca/divisions/dlgs/resources/lfns_2006.html).

1. The disclosure is required for all contracts in excess of \$17,500 that are not awarded pursuant to a "fair and open" process (N.J.S.A. 19:44A-20.7).
2. Due to the potential length of some contractor submissions, the public agency should consider allowing data to be submitted in electronic form (i.e., spreadsheet, pdf file, etc.). Submissions must be kept with the contract documents or in an appropriate computer file and be available for public access. The form is worded to accept this alternate submission. The text should be amended if electronic submission will not be allowed.
3. The submission must be received from the contractor and on file at least 10 days prior to award of the contract. Resolutions of award should reflect that the disclosure has been received and is on file.
4. The contractor must disclose contributions made to candidate and party committees covering a wide range of public agencies, including all public agencies that have elected officials in the county of the public agency, state legislative positions, and various state entities. The Division of Local Government Services recommends that contractors be provided a list of the affected agencies. This will assist contractors in determining the campaign and political committees of the officials and candidates affected by the disclosure.
 - a) The Division has prepared model disclosure forms for each county. They can be downloaded from the "County PCD Forms" link on the Pay-to-Play web site at https://www.state.nj.us/dca/divisions/dlgs/programs/pay_2_play.html They will be updated from time-to-time as necessary.
 - b) A public agency using these forms should edit them to properly reflect the correct legislative district(s). As the forms are county-based, they list all legislative districts in each county. Districts that do not represent the public agency should be removed from the lists.
 - c) Some contractors may find it easier to provide a single list that covers all contributions, regardless of the county. These submissions are appropriate and should be accepted.
 - d) The form may be used "as-is", subject to edits as described herein.
 - e) The "Contractor Instructions" sheet is intended to be provided with the form. It is recommended that the Instructions and the form be printed on the same piece of paper. The form notes that the Instructions are printed on the back of the form; where that is not the case, the text should be edited accordingly.
 - f) The form is a Word document and can be edited to meet local needs, and posted for download on web sites, used as an e-mail attachment, or provided as a printed document.
5. It is recommended that the contractor also complete a "Stockholder Disclosure Certification." This will assist the local unit in its obligation to ensure that contractor did not make any prohibited contributions to the committees listed on the Business Entity Disclosure Certification in the 12 months prior to the contract. (See Local Finance Notice 2006-7 for additional information on this obligation) A sample Certification form is part of this package and the instruction to complete it is included in the Contractor Instructions. **NOTE: This section is not applicable to Boards of Education.**

C. 271 POLITICAL CONTRIBUTION DISCLOSURE FORM
Contractor Instructions

Business entities (contractors) receiving contracts from a public agency that are NOT awarded pursuant to a "fair and open" process (defined at N.J.S.A. 19:44A-20.7) are subject to the provisions of P.L. 2005, c. 271, s.2 (N.J.S.A. 19:44A-20.26). This law provides that 10 days prior to the award of such a contract, the contractor shall disclose contributions to:

1. any State, county, or municipal committee of a political party
2. any legislative leadership committee*
3. any continuing political committee (a.k.a., political action committee)
4. any candidate committee of a candidate for, or holder of, an elective office:
 1. of the public entity awarding the contract
 2. of that county in which that public entity is located
 3. of another public entity within that county
 4. or of a legislative district in which that public entity is located or, when the public entity is a county, of any legislative district which includes all or part of the county. The disclosure must list reportable contributions to any of the committees that exceed \$300 per election cycle that were made during the 12 months prior to award of the contract. See N.J.S.A. 19:44A-8 and 19:44A-16 for more details on reportable contributions.

N.J.S.A. 19:44A-20.26 itemizes the parties from whom contributions must be disclosed when a business entity is not a natural person. This includes the following:

5. individuals with an "interest" ownership or control of more than 10% of the profits or assets of a business entity or 10% of the stock in the case of a business entity that is a corporation for profit
6. all principals, partners, officers, or directors of the business entity or their spouses
7. any subsidiaries directly or indirectly controlled by the business entity
8. IRS Code Section 527 New Jersey based organizations, directly or indirectly controlled by the business entity and filing as continuing political committees, (PACs). When the business entity is a natural person, "a contribution by that person's spouse or child, residing therewith, shall be deemed to be a contribution by the business entity." [N.J.S.A. 19:44A-20.26(b)] The contributor must be listed on the disclosure. Any business entity that fails to comply with the disclosure provisions shall be subject to a fine imposed by ELEC in an amount to be determined by the Commission which may be based upon the amount that the business entity failed to report. The enclosed list of agencies is provided to assist the contractor in identifying those public agencies whose elected official and/or candidate campaign committees are affected by the disclosure requirement. It is the contractor's responsibility to identify the specific committees to which contributions may have been made and need to be disclosed. The disclosed information may exceed the minimum requirement. The enclosed form, a content-consistent facsimile, or an electronic data file containing the required details (along with a signed cover sheet) may be used as the contractor's submission and is disclosable to the public under the Open Public Records Act. The contractor must also complete the attached Stockholder Disclosure Certification. This will assist the agency in meeting its obligations under the law.

NOTE: This section does not apply to Board of Education contracts.

* N.J.S.A. 19:44A-3(s): "The term "legislative leadership committee" means a committee established, authorized to be established, or designated by the President of the Senate, the Minority Leader of the Senate, the Speaker

List of Agencies with Elected Officials Required for Political Contribution Disclosure

N.J.S.A. 19:44A-20.26

County Name:

State: Governor, and Legislative Leadership Committees

Legislative District #s:

State Senator and two members of the General Assembly per district.

County:

Freeholders

County Clerk

Sheriff

{County Executive}

Surrogate

Municipalities (Mayor and members of governing body, regardless of title):

USERS SHOULD CREATE THEIR OWN FORM, OR DOWNLOAD FROM WWW.NJ.GOV/DCA/LGS/P2P A COUNTY-BASED, CUSTOMIZABLE FORM.

Proposal form 21: Stockholder disclosure certification

Plante Moran is owned and operated by its 300+ partners. If selected for this engagement, we can provide a full list of our Partners upon request. All Partners are authorized to commit the firm to binding contracts. Judy Wright is the partner managing this engagement. No individual person or entity owns a 10% or greater interest in PM.

PROPOSAL FORM 21: STOCKHOLDER DISCLOSURE CERTIFICATION

Name of Business:

I certify that the list below contains the names and home addresses of all stockholders holding 10% or more of the issued and outstanding stock of the undersigned.

OR

I certify that no one stockholder owns 10% or more of the issued and outstanding stock of the undersigned.

Check the box that represents the type of business organization:

Partnership

Sole Proprietorship

Limited Liability

Limited Partnership

Partnership

Corporation

Limited Liability

Subchapter S

Corporation

Corporation

Sign and notarize the form below, and, if necessary, complete the stockholder list below.

Stockholders:

Name:	Name:
Home Address:	Home Address:
Name:	Name:
Home Address:	Home Address:
Name:	Name:
Home Address:	Home Address:
Subscribed and sworn before me this ____ day of _____, 2__.	_____ (Affiant)
(Notary Public)	_____ (Print name & title of affiant)
My Commission expires:	_____ (Corporate Seal)

Proposal form 22: General terms and conditions acceptance

PROPOSAL FORM 22: GENERAL TERMS AND CONDITIONS ACCEPTANCE FORM

Signature on the Vendor Contract Signature form certifies complete acceptance of the General Terms and Conditions in this solicitation, except as noted below (additional pages may be attached, if necessary).

Check one of the following responses to the General Terms and Conditions:

We take no exceptions/deviations to the general terms and conditions

(Note: If none are listed below, it is understood that no exceptions/deviations are taken.)

We take the following exceptions/deviations to the general terms and conditions. All exceptions/deviations must be clearly explained. Reference the corresponding general terms and conditions that you are taking exceptions/deviations to. Clearly state if you are adding additions terms and conditions to the general terms and conditions. Provide details on your exceptions/deviations below:

(Note: Unacceptable exceptions shall remove your proposal from consideration for award. Region 10 ESC shall be the sole judge on the acceptance of exceptions/deviations and the decision shall be final.)

Proposed Contract Exceptions

Page Number	Section/ Reference	Proposed Exception	Rationale
SECTION TWO			
36 - 38	Proposal Form 19: Affirmative Action Affidavit (P.L. 1975, C.127)	<i>Please delete the entire document “Proposal Form 19: Affirmative Action Affidavit (P.L. 1975, C.127)”</i>	<p>Plante Moran has an equal opportunity program that documents its policies against discrimination and its affirmative action efforts. However, Plante Moran is not a federal contractor and does not provide services that are otherwise necessary for the performance of a federal contract or that are part of a federal contract.</p> <p>The Affirmative Action Affidavit is not applicable to the services proposed to be provided, and Plante Moran would like to request its removal for clarification.</p>
SECTION THREE			
4	1.4 Customer Support	<p><i>Please Modify as Follows:</i></p> <p>The vendor shall provide timely and accurate technical advice and sales support to Region 10 ESC staff, Equalis Group staff and participating agencies. The vendor shall promptly respond to such requests within one (1) working day after receipt of the request.</p>	Plante Moran agrees to respond promptly, but may not always be able to respond within 1 day.
6	5.3 Delivery/Service failures	<p><i>Please Modify as Follows:</i></p> <p>Failure to deliver goods or services within the time specified or within a reasonable time period as interpreted by the purchasing agent (provided Region 10 ESC provides the necessary information in a timely manner necessary for the performance of the Contract), or failure to make replacements or corrections of rejected articles/services when so requested shall constitute grounds for the contract to be terminated. In the event that the participating agency or entity must purchase in an open market, contractor agrees to reimburse the participating agency or entity, within a reasonable time period, for all reasonable expenses incurred in excess of the unpaid balance of the Contract.</p>	<p>Plante Moran will strive to meet all project deadlines; however, the ability to adhere to a schedule also requires cooperation from Region 10 ESC staff in terms of providing timely information and disclosing all relevant facts.</p> <p>Plante Moran shall be responsible for the cost of cover in the unlikely event of Plante Moran failing to fulfill its contractual obligations; however,</p>

Page Number	Section/ Reference	Proposed Exception	Rationale
			Plante Moran shall be provided an opportunity to reasonably correct any default, and Plante Moran shall only be responsible for reasonable costs required for Region 10 ESC to complete the work that exceed the expense amounts of this contract.
9	11.6 Warranty conditions	<p><i>Please Modify as Follows:</i> All supplies, equipment and services shall include manufacturer's minimum standard warranty and one (1) year labor warranty unless otherwise agreed to in writing.</p>	Plante Moran's proposed services are limited to providing assessments, consulting & planning services, and are focused on a point in time rather than prospective in nature and Plante Moran cannot assume responsibility for occurrences after completion of the proposed services.
11	13.3 Indemnity	<p><i>Please Modify as Follows:</i> Vendor shall protect, indemnify, and hold harmless both Region 10 ESC and Equalis Group and its Members, administrators, employees and agents against all claims, damages, losses and expenses arising out of or resulting from to the extent caused by the actions negligence or willful misconduct of Vendor, Vendor employees or Vendor subcontractors in the preparation of the solicitation and the later execution of the contract, including any supplemental agreements with Members...</p>	Plante Moran can agree to indemnify its clients but requests that the obligation be proportional to its fault, if any.

Proposal form 23: Equalis group administration agreement

PROPOSAL FORM 23: EQUALIS GROUP ADMINISTRATION AGREEMENT

Requirements for Master Agreement To be administered by Equalis Group

Attachment A, Equalis Group Administrative Agreement is used in administering Master Agreements with Region 10 and is preferred by Equalis Group. Redlined copies of this agreement should not be submitted with the response. Should a respondent be recommended for award, this agreement will be negotiated and executed between Equalis Group and the respondent. Respondents must select one of the following options for submitting their response.

- Respondent agrees to all terms and conditions outlined in each of the Administration Agreement.
- Respondent wishes to negotiate directly with Equalis Group on terms and conditions outlined in the Administration Agreement. Negotiations will commence after sealed Proposals are opened and Region 10 has determined the respondent met all requirements in their response and may be eligible for award.

Please refer to contract exceptions in our proposal

Proposal form 24: Open records policy acknowledgement and acceptance

PROPOSAL FORM 24: OPEN RECORDS POLICY ACKNOWLEDGEMENT AND ACCEPTANCE OPEN RECORDS POLICY ACKNOWLEDGMENT AND ACCEPTANCE

Be advised that all information and documents submitted will be subject to the Public Information Act requirements governed by Chapter 552 of the Texas Government Code.

Because contracts are awarded by a Texas governmental entity, all responses submitted are subject to release as public information after contracts are executed. If a Respondent believes that its response, or parts of its response, may be exempted from disclosure to the public, the Respondent must specify page-by-page and line-by-line the parts of the response, which it believes, are exempted from disclosure. In addition, the Respondent must specify which exception(s) are applicable and provide detailed reasons to substantiate the exception(s). Respondent must provide this information on the "Acknowledgement and Acceptance to Region 10 ESC's Public Information Act Policy" form found on the next page of this solicitation. Any information that is unmarked will be considered public information and released, if requested under the Public Information Act.

The determination of whether information is confidential and not subject to disclosure is the duty of the Office of Attorney General (OAG). Region 10 ESC must provide the OAG with the information requested in order for the OAG to render an opinion. In such circumstances, Respondent will be notified in writing that the material has been requested and delivered to the OAG. Respondent will have an opportunity to make arguments to the OAG in writing regarding the exception(s) to the TPIA that permit the information to be withheld from public disclosure. Respondents are advised that such arguments to the OAG must be specific and well-reasoned--vague and general claims to confidentiality by the Respondent are generally not acceptable to the OAG. Once the OAG opinion is received by Region 10 ESC, Region 10 ESC must comply with the opinions of the OAG. Region 10 ESC assumes no responsibility for asserting legal arguments on behalf of any Respondent. Respondents are advised to consult with their legal counsel concerning disclosure issues resulting from this procurement process and to take precautions to safeguard trade secrets and other proprietary information.

After completion of award, these documents will be available for public inspection.

Signature below certifies complete acceptance of Region 10 ESC's Open Records Policy, except as noted below (additional pages may be attached, if necessary). Check one of the following responses to the Acknowledgment and Acceptance of Region 10 ESC's Open Records Policy below:

We acknowledge Region 10 ESC's Public Information Act policy and declare that no information submitted with this proposal, or any part of our proposal, is exempt from disclosure under the Public Information Act. *(Note: All information believed to be a trade secret or proprietary must be listed below. It is further understood that failure to identify such information, in strict accordance with the instructions below, will result in that information being considered public information and released, if requested under the Public Information Act.)*

We declare the following information to be a trade secret or proprietary and exempt from disclosure under the Public Information Act. *(Note: Respondent must specify page-by-page and line-by-line the parts of the response, which it believes, are exempt. In addition, Respondent must specify which exception(s) are applicable and provide detailed reasons to substantiate the exception(s).)*

Date 

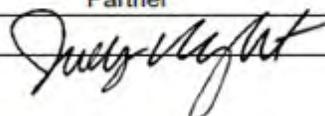
November 4, 2021
Authorized Signature & Title

Proposal form 25: Vendor contract and signature form

PROPOSAL FORM 25: VENDOR CONTRACT AND SIGNATURE FORM

The undersigned hereby proposes and agrees to furnish goods and/or services in strict compliance with the terms, specifications and conditions at the prices proposed within response unless noted in writing. The undersigned further certifies that he/she is an officer of the company and has authority to negotiate and bind the company named below and has not prepared this proposal in collusion with any other Respondent and that the contents of this proposal as to prices, terms or conditions of said proposal have not been communicated by the undersigned nor by any employee or agent to any person engaged in this type of business prior to the official opening of this proposal.

VENDORS MUST SUBMIT THIS FORM COMPLETED AND SIGNED WITH THEIR RESPONSE TO BE CONSIDERED

Company name Plante & Moran, PLLC
Address 3000 Town Center, Ste 100
City/State/Zip Southfield, MI
Telephone No. 248-223-3304
Fax No. 248-603-5953
Email address judy.wright@plantemoran.com
Printed name Judy Wright
Position with company Partner
Authorized signature 

Term of contract January 1, 2022 to December 31, 2024

Unless otherwise stated, all contracts are for a period of three (3) years with an option to renew annually for an additional two (2) years if agreed to by Region 10 ESC. Vendor shall honor all administrative fees for any sales made based on the contract whether renewed or not.

Dr. Jana Burns 12/17/21
Region 10 ESC Authorized Agent Date

Dr. Jana Burns
Print Name

Equalis Group Contract Number R10-1126A

Appendix



Firm profile

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



1924

Year founded



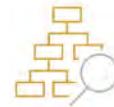
3,300+

Staff



24

Offices worldwide



25+

Industries served



50

States with clients



100+

Countries with clients



45+

Services available



30

Languages spoken firmwide

Plante Moran's history and culture, in under five minutes.

Our firm's founders had a vision: **"to create a people firm disguised as an accounting firm."** In other words, our professional expertise is just one part of who we are. Our character is what sets us apart and allows us to build meaningful relationships with our clients and colleagues.

As we move into the future — and continue to use artificial intelligence, data analytics, and other technologies to empower our client service model in new ways — we'll hold steadfast to that philosophy.



We invite you to watch our short film at plantemoran.com/get-to-know, which captures our history, goals, and impact.



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



Judy Wright
Engagement Partner
248-223-3304
judy.wright@plantemoran.com

According to our recent client satisfaction survey,

97%

of clients say they

**would recommend
Plante Moran.**