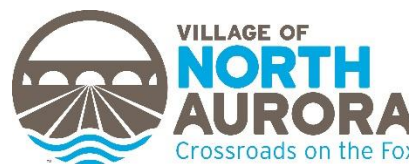


# Memorandum



**To:** Steve Bosco  
**From:** David Arndt, IT Manager  
**Date:** 8/10/2023  
**Re:** Document Management and SharePoint Implementation

---

In 2022 the Village started a three-phase project to modernize our office technology. The first phase implemented Office 365, the most current version of Microsoft Office. This project was completed in December 2022. Included with this version of Office was extensive cloud storage space and a front-end product named SharePoint. SharePoint is a robust document management system with searching and archiving and retention standards. The front facing portion of SharePoint is a friendly web-based intranet. Files can be organized by department or purpose. Staff can invite third party consultants, vendors, developers, even the public to share and review files. Security is very extensive and granular.

The second phase of the project is to move all our current digital documents from on-premise file servers to the cloud-based storage. All files will be ingested into a document management system (DMS) where they will be identified, rated, assigned ownership, security, and a review/expiration date. All files will be searchable by title and content when possible.

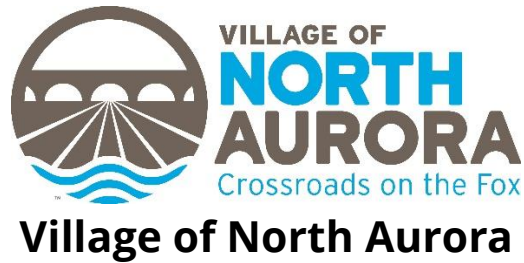
The final phase will be digitizing our physical paper files and building plans and moving them to our cloud based DMS.

As part of phase I, Village staff met with consultants to determine the best course of action to migrate away from on-site file servers and move to a dynamic cloud-based system. Office 365 was identified at this point to be the desired DMS. As part of the Office 365 licensing the Village receives terabytes of cloud storage, SharePoint, OneDrive, and Teams. SharePoint will be the DMS, OneDrive will become the individual employee's personal storage folder, Teams will become a project collaboration tool. Additionally, SharePoint integration is fully supported by our other enterprise level applications such as SpringBrook and CityView.

Using the recommendations from the consultants Village Staff budgeted \$60,000 for this phase of the project and released an RFP in July. Staff received 12 proposals. The

prices ranged from \$40,400 to \$1.27 million. Staff reviewed the proposals and selected the 4<sup>th</sup> lowest cost proposal submitted by Heartland Business System (HBS) out of Lisle, Illinois. The first three were incomplete or not as extensive as the selected proposal. Overall HBS has an excellent reputation within the Illinois municipal environment. Their references were very strong. HBS also showed extensive knowledge for this specific project regarding a municipal environment and specifically understanding CJIS requirements. HBS will provide an extensive review of our current file environment, review file structures, compatibility, internal links. Provide temporary servers to phase the migration to the cloud to ensure zero data loss and minimal downtime. HBS will create intranet sites for each Village department and division of the Police. They will also create an overall DMS to allow searching Village wide for files. We will also receive a public portal where citizens and staff can submit forms and have workflows to ensure proper resolution and transparency.

Village staff recommends selecting Hartland Business System's proposal in the amount of \$54,745.84 to implement a document management system, SharePoint intranet and migrate our current digital files.



## REQUEST FOR PROPOSAL

### SHAREPOINT IMPLEMENTATION SERVICES

Village of North Aurora

#### **Purpose of the RFP:**

The Village of North Aurora is requesting from qualified vendors to provide the implementation services of an enterprise intranet solution based on Microsoft SharePoint and OneDrive. This RFP is designed to solicit responses from vendors in order to assist the Village in delivering a SharePoint/OneDrive infrastructure, security, and assessment of current on-premise file structure and assistance with migration from a on-premise to cloud based file system. Additionally, the Village intends to utilize SharePoint as a Village wide document management system. Migration of all files from on-premise to SharePoint must be incorporated into the document management system.

#### **About the Village of North Aurora**

The Village was incorporated in 1905 and operates under a president-trustee form of government. The Village Board consists of a Village President and six Village Trustees who are elected at-large for overlapping terms of four years. Elections are staggered with three trustees elected every two years. The Village Clerk and Village President are elected every four years. Municipal elections occur in odd numbered years.

The Village of North Aurora has a current population of 18,261 as of 2020 and is located in the heart of Chicago's western suburbs in southeast Kane County. Only 40 minutes west of the City of Chicago, residents of North Aurora enjoy direct access to I-88, Route 31, Route 25, Route 56 (Butterfield Road), Randall Road, and Orchard Road. The proximity of these major suburban routes makes for easy traveling around town and into Chicago's metropolitan center. North Aurora is a family-friendly community that is located along the scenic Fox River which provides many recreational opportunities. The Village offers numerous opportunities for residential growth and economic development.

#### **Project Background**

The Village of North Aurora began utilizing Microsoft's cloud-based products in 2020 with the migration to a hosted Azure Exchange server. The next phase in this project was the implementation of Office 365, which was completed in January of 2023. The final phase is to migrate from an on-premise file server to Microsoft's SharePoint/OneDrive solution. The Village currently has (95) Exchange EO, (56) G3, and (25)G1 licensees.

#### **Description**

The Village of North Aurora currently has two physical file servers housing roughly 1.4 TB General Data and 600 GB of user data. The data is accessible via network shares and mapped drives. The current environment does not have many desired capabilities, including but not limited to document versioning, collaboration, search capabilities, workflow, and self-service, and does not provide a platform for creating individual sites or for sharing information between departments, other government agencies, external consultants, or with the public.

## DEFINITIONS

The words (A) "Village", (B) "Department", (C) "Contractor, Firm, Vendor ", (D) "DMS", or (E) CJIS "Criminal Justice Information Systems" as used in this RFP, shall be understood to refer respectively to (A) the Village of North Aurora, Illinois; (B) the several departments therein; (C) the person, firm or corporation with whom the contract is made by said Village or the agent or legal representative who may be appointed to represent such person, firm or corporation in the signing and performance of said contract, and (D) Document Management System.

## GOALS

The Village of North Aurora has identified the following goals:

- Create SharePoint sites for each Village department and divisions of the Police Department
- Central repository for document management system
  - Searchable by meta and/or content
- Establish processes for employees to add documents to the DMS
  - Directly created
  - Scanned from document scanners
  - Received from external sources
- Establish templates for new internal SharePoint and Team sites
- Create an internal help desk system
- Establish a system to create and manage forms for internal and external use
  - Dynamic workflows
  - Customizable
  - Searchable and archive ready PDF
- Create a portal for the public to submit forms and documents
- Review and establish default security settings
- Train IT staff

## RFP QUESTIONS AND PRE-BID MEETINGS

All questions concerning this solicitation must be submitted via email to the designated Village contact. The official responses to questions or requests for interpretation to this solicitation will be posted on the RFP section of the Village's website (<https://northaurora.org/government/rfp-rfq-bidding/>). The deadline for submission of questions or deviations shall be 4:30 PM (CST) on 06/16/2023. Any information resulting from questions that causes a material change in the solicitation will be posted on the RFP section of the Village's website as an addendum. Proposal close date is 2:00 PM (CST) on 06/23/2023. Late submissions will not be considered. The Village will not be responsible for late submissions of any kind.

## PROJECT

### **Assess current environment**

- Review current on-premise file structures
- Review current on-premise file versions and extensions and identify possible conflicts and recommend resolution.
- Review current SharePoint and OneDrive licensing and determine if additional licensing or storage is required

### **Create Migration Plan**

- Work with Village Staff to create a migration plan
- Work with Village Staff to establish a timeline

### **Create initial SharePoint sites**

- Create default template for Village SharePoint and Teams Sites
- Establish Document Management system
- Create SharePoint sites for each Village Department and Police Division
- Create OneDrive for each Village Employee
- Create a public facing portal for document and form submittals

### **Migration**

- Migrate all identified department files to Document Management and SharePoint sites
- Migrate select users to OneDrive
- Train IT staff on how to migrate remaining user to OneDrive

### **Create processes**

- Create process to ingest digital files into Document Management System
  - Created by end users
  - Scanned documents
  - Documents received by external sources
  - Create process for identifying obsolete documents
- Create process to delete or archive user OneDrive
- Create process to delete or archive SharePoint and/or Team site
- Create process to create custom forms for internal or external use
  - Establish workflow logic
  - Forms will be saved as archivable and searchable pdf

### **Train IT Staff**

- SharePoint template creating and editing
- Migrating remaining users to OneDrive
- Using Document Management System

- Edit or update Document Management System backend

### **Notice to Proposers**

Failure to carefully read, understand and comply with all requirements in this RFP may cause the proposal to be considered nonresponsive, rejected by the Village, or legally obligate the proposer to more than it intended. Information obtained by the proposer from any officer, agent or employee of the Village shall not affect the risks or obligations assumed by the proposer or relieve the proposer from fulfilling any of the RFP conditions or any subsequent contract conditions. Attempts by or on behalf of a prospective or existing proposer to contact or to influence any member of the selection team, any member of the Board of Trustees, or any employee of the Village with regard to the acceptance of a proposal may lead to elimination of that proposer from further consideration. Only the format described in the RFP and the attachments included with this RFP will be accepted as compliant for the submitted proposal. Failure to completely fill out all required attachments may result in rejection of the proposals.

### **Conditions**

Implementation pricing must be submitted on a deliverable and “milestone” basis. Vendors are to provide all work effort and assumptions used to calculate the fixed fee for each deliverable and milestone. The scope of the project will be defined by the statement of work and detailed functional requirements included as Attachment 7 (Cost). All firms submitting proposals are encouraged to submit the most competitive proposal possible as the failure to do so may lead to elimination prior to software demonstrations.

All proposals and any subsequent clarification or response to the Village’s questions shall be valid for a minimum of 120 days.

### **Village of North Aurora Rights Reserved**

The VILLAGE reserves the right to select the proposal(s) which in its sole judgment best meets the needs of the VILLAGE. The lowest proposed cost will not be the sole criterion for recommending the contract award. The VILLAGE is not bound to accept the lowest priced proposal or any of the response proposals submitted.

The VILLAGE reserves the right to award multiple contracts from this RFP.

The VILLAGE reserves the right to reject any or all proposals if the proposal is nonresponsive, fails to include requested information required in this RFP, or if the proposal is incomplete, or otherwise does not comply with RFP requirements. VILLAGE also reserves the right to waive technicalities, irregularities and informalities when such waiver is determined by the VILLAGE to be in the VILLAGE’s best interest.

The VILLAGE may modify this RFP by issuance of one or more written addenda. Addenda will be posted here: <https://northaurora.org/government/rfp-rfq-bidding/>

The VILLAGE reserves the right to interview and meet with select proposers at any time to gather additional information. Furthermore, the VILLAGE reserves the right to remove or add functionality (i.e., modules, components, and/or services) until the final contract is executed.

This RFP does not commit the VILLAGE to award a contract. This RFP contains no contractual proposal of any kind, and any proposal submitted will be regarded as a proposal by the proposer and not as an acceptance by the proposer of any offer by the VILLAGE. No contractual relationship will exist except pursuant to a written contract document signed by the authorized official of the VILLAGE and by the successful proposer chosen by the VILLAGE. All proposals submitted in response to this RFP become the property of the VILLAGE and may constitute public records, and as such, may be subject to public review and disclosure at the determination of the VILLAGE.

The VILLAGE shall not be liable for any pre-contractual expenses incurred by prospective vendors, including but not limited to costs incurred in the preparation or submission of SharePoint Implementation Services proposals (see page 7 of 25, Village of North Aurora REQUEST FOR PROPOSAL). The VILLAGE shall be held harmless and free from any and all liability, claims, or expenses whatsoever incurred by, or on behalf of, any person or organization responding to this RFP.

The VILLAGE shall not be under any requirement to complete the evaluation for this RFP by any specific date and reserves the right to suspend or postpone the evaluation process should the need arise due to budget constraints, time constraints or other factors as directed by the VILLAGE.

The VILLAGE reserves the right to negotiate and award only a portion of the requirements; to negotiate and award separate or multiple contracts for the elements covered by this RFP in any combination it may deem appropriate, at its sole discretion to add new considerations, information or requirements at any stage of the procurement process, including during negotiations with proposers; and reject proposal of any proposer that has previously failed to perform properly or in a timely manner contracts of a similar nature, or of a proposer that, in the opinion of the VILLAGE, is not in a position or is not sufficiently qualified to perform the contract.

The VILLAGE reserves the right to modify any deadlines set forth in this RFP, and to cancel, revise, or reissue this RFP.

## **DETAILED SUBMITTAL REQUIREMENTS**

### **SCOPE OF SERVICES**

This section of the proposal should include a general discussion of the Proposer's overall understanding of the project and the scope of work proposed including the following:

Company Background

Three References for similar sized and scoped projects

Microsoft Certification(s)

### **CHANGE MANAGEMENT**

Any additional work identified during the project that is deemed necessary, but outside the original scope of work, must be recorded as a change order and approved by the Village Project Manager before work is started.

### **SUBCONTRACTING**

All proposed subcontracting must be detailed in the firm's proposal. No subcontracting will be allowed without the express written consent of the Village of North Aurora.

## **CONTENTS OF PROPSOAL**

Proposals must include, but need not be limited to, the content identified below and should be organized according to the following sections. All pages should be numbered. Marketing information will not be accepted in lieu of direct response to all requirements and questions.

### **SECTION 1 - EXECUTIVE SUMMARY AND INTRODUCTORY MATERIALS**

The introductory material should include a title page with the RFP name, name of the proposer, address, telephone number, the date, a Letter of Transmittal, and a Table of Contents. The executive summary should be limited to a brief narrative (less than 3 pages) summarizing the proposal.

### **SECTION 2 – TABLE OF CONTENTS**

### **SECTION 3 – STATE OF QUALIFICATIONS**

A statement of qualifications shall summarize key elements of the proposal and highlight your firm's qualifications as they relate to this project and these services requested. The statement of qualifications should demonstrate to the Village that your firm fully understands the scope of services, has industry knowledge, and possesses the qualifications to provide the services requested.

### **SECTION 4 – ORGANIZATIONAL INFORMATION**

Identify key personnel from your firm, including specific personnel that would be assigned to this project, if any. All prime contractor and subcontractor relationships and responsibilities must be detailed. Identify the Village's primary point(s) of contact for service requests if your firm is retained for this project. Identify how many potential different people will the Village have to contact for service.

### **SECTION 5 - VENDOR REQUIREMENTS/REFERENCES**

Responses will only be accepted from firms who are certified Microsoft Partners. Respondents shall have at least three (3) years' experience in SharePoint design and migration.

Provide at least three (3) references for which your firm has performed similar services. Provide a brief synopsis of the services performed and contact information. References shall include the name of the company, the name and contact info for company lead person and a brief description of the services rendered along with the date(s) of service.

All work performed remotely must be conducted by individuals physically located within the continental United States.

Individuals who will be accessing police data must pass a background check and complete CJIS Security Awareness training provided by the North Aurora Police department or possess valid CJIS Certification <https://www.fbi.gov/services/cjis>.

### **SECTION 6 – PROJECT APPROACH/METHODOLOGY**

What is your firm's process leading to service delivery? How much time does it take your firm to mobilize and deploy after a request is received? Provide a description of the equipment, software, and personnel your firm possesses that can adequately address this project.

### **SECTION 7 – COST OF PROPOSAL**



Provide a cost breakdown of the proposed solution (hardware, software, licensing, services, hosting, support, training, etc.), showing the cost for each part of the scope of work and any additional costs. This information shall be followed by narrative which shall describe and justify the proposed costs, and include an estimate of staff allocations, estimated hours, rates per assigned staff and an estimate of total billable hours. Also identify any assumptions you have built into your costs (e.g., Village performance of any work elements, availability, etc.). The cost proposal must provide a guarantee that no additional fees beyond those proposed will be charged to the Village of North Aurora without the Village's prior written consent. The Village cannot accept contract clauses that include payment terms within 30 days of the invoice issuance. The Village cannot accept contract clauses where the Village would be required to pay any late fees, interest charges or penalties.

## **SECTION 8 – ACKNOWLEDGEMENTS, ADDITIONS AND EXCEPTIONS**

- a) Acknowledge your ability to meet or not meet all the requirements as stated in the scope of work.
- b) Compile and include all other information you deem pertinent, but not specifically requested elsewhere (5 pages maximum).
- c) Indicate any exceptions to the terms and conditions of this request for proposal, or any qualifications/clarifications regarding the proposal response.

## **SECTION 9 – CERTIFICATE OF INSURANCE**

Proof of insurance is not required to be submitted with your proposal but will be required prior to the Village's award of the contract.

### **TIMELINE**

Event	Date
Release of RFP	06/02/2023
Deadline to submit inquiries	06/16/2023 @ 4:30 PM
Proposal due date	06/23/2023 @ 2:00 PM
Contract submission to Village Board for approval	TBD

### **PAYMENT AND DELIVERABLES**

The Village requires a payment schedule based on defined and measurable deliverables as outlined below. Under no circumstances will payments be made in advance of work performed.

Deliverable	Payments
Scope of Work and all Project Plans Delivered (Contract Execution).	20% of Total Cost
Hardware and Software Installation, System Configuration, Service and Data Migration, Operational Testing and Acceptance Testing Successfully Completed.	30% of Total Cost
100% of file server data and selected users have been migrated to new system and tested with 100% functionality.	30% of Total Cost

Reliable Performance for 45 Days after Complete Migration (Performance or availability of the solution must continue at the baseline established at conclusion of Acceptance Testing. No significant loss in performance, availability or reliability should occur).	20% of Total Cost
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No payment for extra services (items not included in the total cost) shall be made unless such services and their costs have been previously authorized in writing and approved by the Village.

## INSTRUCTIONS AND QUESTIONS

Village representative from whom the proposer will receive instructions:

David J. Arndt

Information Technology Manager

Administration Department

25 E. State Street

North Aurora, IL 60542

Email: [darndt@northaurora.org](mailto:darndt@northaurora.org)

Questions regarding this Request for Proposals should be directed only to the person designated above. All questions need to be submitted as described under RFP INSTRUCTIONS AND QUESTIONS

## SUBMISSIONS

Proposals may be emailed to David Arndt IT Manager at [darndt@northaurora.org](mailto:darndt@northaurora.org). The subject line of the email shall read "SharePoint Migration Document Management Proposal"

Or Sealed proposals can be dropped off or mailed\* to

"SharePoint	Migration	Document	Management	Proposal"
Attn:		David		Arndt
North	Aurora		Village	Hall
25	E.		State	Street
North Aurora, IL 60542.				

\*Proposals must be received prior to 2:00PM CST 06/09/2023.

## RFP AMENDMENTS

The Village reserves the right to change the RFP schedule or issue amendments to the RFP at any time. In the event the Village amends the RFP, the Village will extend the Proposal Due Date commensurately. The Village also reserves the right to cancel or reissue the RFP.

## WITHDRAWAL OF PROPOSAL

Firms may withdraw their proposals, without prejudice, prior to the date and time specified for proposal submission, by sending a written request or email to David Arndt, Information Technology Manager.

#### **RESERVATIONS**

The Village reserves the right to reject any or all proposals, to waive technicalities or formalities, and to accept any proposal deemed to be in the best interest of the Village. Where two or more firms are deemed equal, the Village reserves the right to make the award to one of the two firms.

#### **ERRORS AND OMISSIONS**

Proposer and/or the Contractor shall not be allowed to take advantage of any errors in or omissions from the Request for Proposals. Full instructions will be given if such error or omission is discovered and timely called to the attention of the Village.

#### **RFP NOT CONTRACTUAL**

Nothing contained in this Request for Proposals (RFP) shall create any contractual relationship between the proposer and the Village. The Village accepts no financial responsibility for costs incurred by any proposer regarding this RFP. Each proposal prepared in response to this RFP shall be done at the sole cost and expense of each proposing firm and with the express understanding that no claims against the Village for reimbursement will be accepted.

#### **TAXES**

The Village of North Aurora is a tax-exempt entity



**CONTRACT FOR: SHAREPOINT IMPLEMENTATION SERVICES**

**THIS AGREEMENT**, made and concluded this 21 day of September 2023, between the Village of North Aurora, an Illinois municipal corporation (hereinafter referred to as "Village") and Heartland Business System an Business (hereinafter referred to as "Contractor") for .

**WHEREAS**, the Village advertised for proposals for SHAREPOINT IMPLEMENTATION services (hereinafter "(Services)") and provided proposal specifications for such services, a copy of which is attached hereto and incorporated herein by reference as Exhibit "A" ("Proposal Specifications"); and

**WHEREAS**, Contractor submitted a proposal for the Services in the amount of Fifty-four thousand seven hundred forty-five dollars and eighty-four cents. (\$54,745.84) Dollars in response to the request for proposals advertised by the Village, a copy of which proposal is attached hereto and incorporated herein by reference as Exhibit "B" (the "Proposal"); and

**WHEREAS**, the Contractor's proposal was determined to be the lowest responsible proposal and was accepted by the Village Board of Trustees at the regularly scheduled meeting on <date>.

**NOW THEREFORE**, in consideration of Fifty-four thousand seven hundred forty-five dollars and eighty-four cents (\$54,745.84) Dollars to be paid by the Village



to the Contractor as follows \_\_\_\_\_, the parties hereto agree  
and covenant as follows:

1. The Village and the Contractor agree the Proposal Specifications attached hereto and incorporated herein are essential documents to this Contract and are made a part thereof.

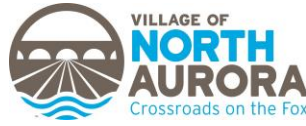
2. The Contractor shall fulfill all the Services in keeping with the Proposal Specifications and the Proposal and shall furnish all labor and equipment necessary to perform the Services in a professional and workman like manner.

3. The Contractor shall be solely responsible for its own employees, subcontractors and agents and for the performance of the Services and shall indemnify and hold the Village harmless from and against any claims or causes of action asserted by its employees, subcontractors and agents or claims, causes of action, liabilities or damages resulting or related to the performance of the Services.

4. If there is any conflict between the Proposal Specifications and the Proposal, the Proposal Specifications shall control.

5. If not previously provided, the Contractor shall supply a Certificate or other proof of Insurance in acceptable form to the Village as a condition to the Village's obligations under this Contract in compliance with the Proposal Specifications.

6. If required pursuant to Village ordinance or the Proposal Specifications, the Contractor shall supply a payment and performance bond and surety in form acceptable to the Village before performing the Services.



7. The Contractor acknowledges and agrees that, if the Illinois Prevailing Wage Act applies, the Contractor shall be responsible for such compliance and shall hold the Village and indemnify the Village from and against and claims or liabilities arising from a failure to comply.

8. Either party may terminate this Agreement upon thirty (30) days written notice by registered mail, or by personal delivery of notice, to the other party.

9. This instrument contains the entire agreement between the parties, and those statements, promises, or inducements made by either party or agent of either party that are not contained in this written agreement shall not be valid or binding.

10. In any claims for breach of this contract, the prevailing party shall be entitled to recovery all of its reasonable costs, including reasonable attorney fees.

11. Any litigation brought in regard to this Contract shall be brought in the Sixteenth Judicial Circuit, Kane County, Illinois.

12. This Agreement shall not be altered or modified in any way except in writing and signed by both parties.

[signatures to follow]

**IN WITNESS WHEREOF**, the said parties have executed these presents on the date above mentioned.

**Village of North Aurora**

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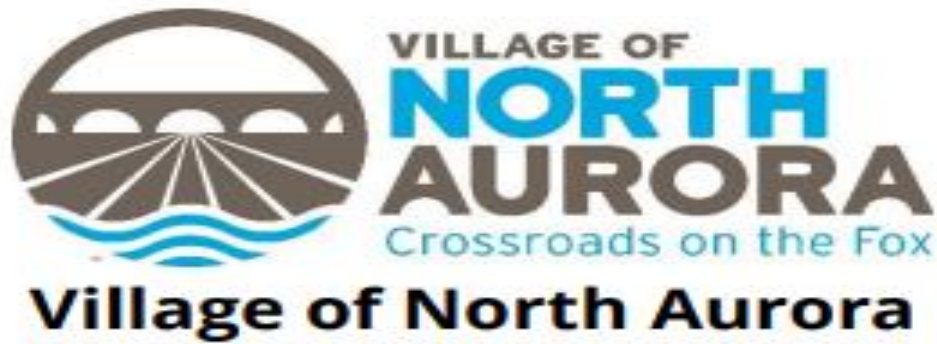


By: Mark Gaffino, Village President

**[Contractor]**

---

By: [Name, Office]



AND



**REQUEST FOR PROPOSAL**  
**SHAREPOINT IMPLEMENTATION SERVICES**

Date: June 23<sup>rd</sup> 2023





June 23<sup>rd</sup>, 2023

Mr. David J. Arndt  
Information Technology Manager  
Village of North Aurora - Administration Department  
25 E. State Street North Aurora, IL 60542  
Email: [darndt@northaurora.org](mailto:darndt@northaurora.org)

Dear Mr. Arndt,

Heartland Business Systems appreciate this opportunity to respond to the Village of North Aurora SharePoint Implementation Services. We understand your desire to partner with a leading manufacturer of enterprise systems and a trusted expert with a successful track record supporting business like yours. We also understand your requirement of working with a partner experienced and credentialed with-in the Microsoft Solutions Space.

Heartland has enjoyed significant growth over the last 25 years with \$200 million dollars in annual sales and over 150 certified engineers, project managers, and solutions architects employed. It is one of the largest technology resellers and service providers in the Midwest, with over 2000 clients. It is Heartland's commitment to its company mission, "to implement hardware, software technologies and solution services that will improve the profitability of every customer we serve", that is the cornerstone to its success. Exceptional customer satisfaction ratings are coveted by Heartland's team.

We are excited by the prospect of earning your business and truly thank you for your consideration of our proposal.

Respectfully,

Mike Carroll  
Sr. Solutions Consultant  
Heartland Business Systems  
Phone: 608.444.7994  
[mcarroll@hbs.net](mailto:mcarroll@hbs.net)



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## State of Qualifications

Heartland Business Systems values the invitation to respond to Village of North Aurora Request for Proposal. Heartland Business Systems is part of the Heartland Technology Group Family of Services. We've been in business for 30 years, with our headquarters in Wisconsin. Today, we have grown to 10 regional offices across the Midwest, with an extensive focus on public sector / government work. One of our main differentiators is providing more local IT engineering resources than our competitors in Illinois. We are also proud of the additional "HBS Business Productivity Team" differentiators outlined below, after the References Section.

### HBS Key Differentiators

HBS, a **Microsoft Gold Partner** offers expertise across the Microsoft Modern Work platform, namely Exchange, M365 Security, SharePoint, Microsoft Teams, OneDrive for Business, Groups, and Planner. Additionally, we can consult on your development needs, workflow automation business objectives, and advise on your long-term roadmap. From assessments to migrations to new adoptions, the HBS team has seen, implemented, and supported it all! We pride ourselves on drinking our own champagne, so your struggles were probably our struggles in the past. We've been there, done that, or helped a client work their way out of it. Our team brings a meticulous attention to detail, great project planning, creativity, expertise, and a healthy dose of fun to each customer engagement. Not only do we want to partner with you to deliver a successful project; we want to build a lasting, meaningful relationship that brings a smile to our customer's faces.



## Organizational Information

Heartland has enjoyed significant growth over the last 25 years and currently employs over 500 employees across Illinois, Wisconsin, Iowa, Nebraska, Michigan, and Minnesota. It is Heartland's commitment to its company mission, "to implement hardware and software technologies that will improve the profitability of every customer we serve", that is the cornerstone to its success.

### HEARTLAND BUSINESS SYSTEM OVERVIEW

From the very beginning, the mission of Heartland Business Systems has been to implement microcomputer hardware and software technologies that will improve the profitability of the business customer we serve. Technology is the key to success for every business. You need instant access to information to make the very best business decisions. At Heartland Business Systems, our capabilities and expertise make us uniquely qualified to put you in touch with the very latest in technology. It takes experience to design the right program to meet your needs – not just for today, but for the future. It takes leadership to put that plan in place. At Heartland Business Systems, we pledge to provide you with unsurpassed customer service to help increase your productivity, efficiency, and profitability.

### INDUSTRY ACCOMPLISHMENTS INCLUDE:

- Certified Microsoft Gold Partner
- Cisco Central Partner of the Year
- Excellence in HP Customer Satisfaction Award
- HP Gold Partner
- Cisco "Customer Satisfaction" Award – 26 consecutive quarters
- Inc. HirePower #1 in Wisconsin - #9 in the US for Business Products and Services
- HBS Recognized for Most Strategic Partner in Cisco Enterprise & Cloud 2019
- Cisco Gold Partner in All Regions HBS Supports
- 25+ years of sustained growth
- CRN VAR 500 Solution Provider



## Management

### Project Management

Due to the number of projects within this overall digital transformation, HBS will provide a senior project lead to act as the Project Manager to manage plans, timelines, and budget for all efforts provided by HBS. This single point of contact will have expertise and experience across the multiple featured solutions and will understand how to manage all team members involved to keep budget spend under control and ensure the overall program plan remains focused and effective. As part of project management, regular status reporting will be provided, including a summary of progress on deliverable completion versus spending for each deliverable will be provided for approval.

## Project Team

### HBS Team Member Contacts

Mike Carroll (Account Management Executive), Kelly Grosskreutz (Business Productivity Practice & Project Manager), Cindy Lucas (Sr Productivity Analyst), Jodie Strutz (Modern Workplace Analyst) and Travis Nabbefeld (Microsoft Development Engineer) are the key HBS Team members responsible for the content of this RFP response.



## Kelly Grosskreutz

### Core Skills

Business Analysis	SharePoint Online
Project Management	Microsoft Teams
Organizational Change Mgmt & Communications	IT Governance

### Professional Experience

- SharePoint implementation experience across a global organization; fluent in collaborating across time zones, regions, and cultures
- Facilitate SharePoint Deployment Planning architecture design sessions to map out O365 adoption, including Groups, Teams, and OneDrive for Business.
- Project Manager for multiple CRM on prem to cloud data migrations; leading business process transformations fueled by CRM





## Cindy Lucas

### Core Skills

Document Management	InfoPath
Records Retention	SharePoint Training
SharePoint Online & On-prem	Business Process Management
OneDrive for Business	

### Professional Experience

- Migrating SharePoint 2010 sites to SharePoint Online
- Streamlining and automating simple to complex business workflows
- Working with Office 365 including Microsoft Teams and expanding into CRM and Dynamics 365



## Jodie Strutz

### Core Skills

Business Process Consulting	OneDrive for Business
SharePoint On Prem & Online	Document Management
Microsoft Teams	

### Professional Experience

- Application support: SharePoint 2007, 2010 and SPO; D365 and Citrix at Global Personal Care Company
- Lead OneDrive for Business rollout at Fortune 500 Company
- O365 implementations, including discovery, planning, training and migrations.
- Numerous Microsoft Teams Rapid Implementations during the rush to enable remote work in Spring 2020





## Travis Nabbefeld

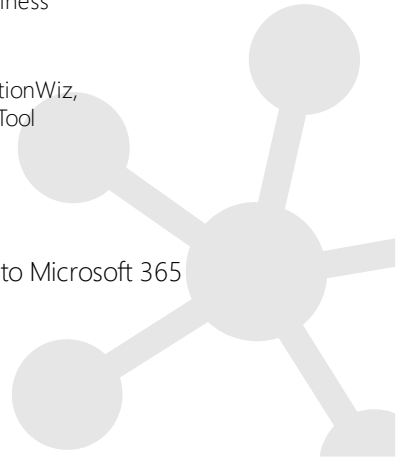
### Core Skills

On-Premises to Microsoft  
365 Migrations  
Tenant to Tenant Migrations  
Power Apps  
Power Automate

SharePoint Online  
OneDrive for Business  
Microsoft Teams  
ShareGate, MigrationWiz,  
Quest Migration Tool

### Professional Experience

- Building custom apps and solutions utilizing Power Apps and Power Automate
- Migrating SharePoint On -Premises, File Share, Google Workspace, and Dropbox to Microsoft 365
- Performing Tenant to Tenant Microsoft 365 migrations





## IL Municipality References

Microsoft Exchange/AD & 365 Migration		SharePoint Migration	
Company Name	City of Wood Dale	Company Name	Palatine Park District
Contact	Nick Kace	Contact	Dan Mangum
Title	Director of IT	Title	Director of IT
Email	nkace@wooddale.com	Email	dmangum@palatineparks.org
Company Name	Village of Bolingbrook	Company Name	Village of Plainfield
Contact	James Farrell	Contact	James Kastrantas
Title	Director of IT	Title	IT Operations Manager
Email	jfarrell@bolingbrook.com	Email	jkastrantas@goplainfield.com
Company Name	Village of Plainfield	Company Name	Forest Preserve of Will County
Contact	James Kastrantas	Contact	Denise Steffen
Title	IT Operations Manager	Title	Director of IT
Email	jkastrantas@goplainfield.com	Email	dsteffen@fpdwc.org
Company Name	Village of Tinley Park	Company Name	Village of Tinley Park
Contact	Anthony Ardolino	Contact	Anthony Ardolino
Title	Director of IT	Title	Director of IT
Email	aardolino@tinleypark.org	Email	aardolino@tinleypark.org





# Statement of Work

PROJECT APPROACH/METHODOLOGY

**Village of North Aurora**

**M365 COLLABORATION  
MODERNIZATION  
PROGRAM**

June 21<sup>st</sup>, 2023

## HBS Contact Information:

**Mike Carroll**

Heartland Business Systems  
5400 Patton Drive  
Lisle, IL 60532  
Phone: (608) 444-7994  
[mcarroll@hbs.net](mailto:mcarroll@hbs.net)

**Kelly Grosskreutz**

Heartland Business Systems  
1700 Stephen Street  
Little Chute, WI 54140  
Phone: (920) 687-4658  
[kgrosskreutz@hbs.net](mailto:kgrosskreutz@hbs.net)



## Project Overview

This Statement of Work (“SOW”) reflects the services and material to be provided by Heartland Business Systems, LLC, hereinafter referred to as “HBS” for Village of North Aurora, hereinafter referred to as “Customer”.

Village of North Aurora has contacted Heartland Business Systems, LLC (HBS) to assist in the migration of existing content within their File Share servers to OneDrive and SharePoint Online and implementing a basic SharePoint intranet.

The objectives of the project are:

- Migrate Police Department content to Office 365
- Implement Basic Village Intranet to Office 365
- Migrate all home drives to OneDrive
- Implement a solution for FOIA and Community Sign Request Form Creation

## Project Scope

HBS will provide the following services and material, herein referred to as “Scope”:

This project is expected to take 16 weeks to complete from the project kick-off. In the event that an extension to the project timeline is required, the parties shall utilize the Change Order process.

### [In Scope](#)

The effort defined in this proposal will initially deliver the following:

#### **Phase I: OneDrive user content migration (3 servers to be available for migration efforts)**

- Configure migration scripts for up to 3 servers
- Configure SQL database for managing migrations
- Conduct complete file scan of existing personal drives (2 locations identified to scan)
- Review findings of scans with client
- Make decisions about what content will move
- Discuss high-level communication plan
- Setup batch migration configuration templates/scripts
- Migrate personal drives (~82 users, ~167,000 files) to OneDrive (including conversion of old file types) in 2 waves

#### **Phase II: Basic Village Intranet**

- Up to four (4) planning and review meetings throughout the project to identify the content to be included and review work completed
- Set up of the SharePoint Online with the main features listed in the ‘Project Overview’ and the content identified in meetings for the following areas:
  - Main Communication Hub site
  - Up to 2 additional sites

Note: A site is defined as single site, including a landing page, up to 5 supporting pages and up to two additional lists or libraries.

- Create high level security strategy and work with you to apply security to the above sites
- Create a theme and a logo to the site based on standard organizational colors



- Site Owner training/hands on working session covering
  - Document management
  - High level page editing
  - Security
- 8 hours of Intranet Quick Start solution support to work with you as you start to populate document libraries, calendars, and page content.

#### **Phase III: Migrate file shares (2 servers) to SharePoint Online (~661,000 files)**

- Conduct complete file scan of existing department drives (2 locations identified to scan)
- Review findings of scans with client
- Design what the SharePoint Online site structure will look like
- Make decisions about what content will move
- Discuss high level migration communication plan outline
- Setup batch migration configuration templates/scripts for SharePoint emails
- Create destination SharePoint site/library and set basic permissions (up to 17 sites)
- Migrate department drives to SharePoint (including conversion of old file types) in 8 waves

#### **Phase IV: FOIA and Community Sign Request Form Creation**

- Hold discovery sessions to gather requirements
- Build Community Sign Form in MS Forms with simple formatting
- Build FOIA Form in MS Forms with simple formatting

#### **Out of Scope**

Any work or material not specifically identified in this document is not included in this Agreement, including but not limited to:

- End user training materials
- Delivery of end user training
- Communication email templates
- Custom branding
- Workflows for FOIA and Community Sign Request Forms
- Migration of current FOIA and Community Sign completed forms into SharePoint

#### **Additional Requirements and Conditions**

- Discovery meeting findings may produce recommendations that warrant additional scope. In the event this is discovered, a change of scope will be presented to the customer for approval.
- HBS and Customer will both ensure that adequate resources, for which each respective party is responsible, are available when needed throughout the duration of this engagement. The timely completion of this engagement will depend on the availability of the necessary Customer personnel.
- The timely completion of this engagement will also depend on the availability and delivery of the product(s) associated with this SOW from other vendors.



- Any potential dependencies discovered prior to or during implementation will be communicated to Customer and HBS to determine impact to the timing, scope and pricing for the project, and the parties shall utilize the Change Order process as necessary.
- File migration estimates are calculated with the following assumptions in mind. If any of these assumptions is altered during the project, a change request may be required to account for the additional hours needed.
  - One batch consists of 30,000 files or less.
  - The migration-time-period will be at least an unbroken 12-hour span.
  - One wave consists of running one batch on each of the available migration servers during the migration-time-period.
  - The number of migration servers specified in this document must all remain available through the duration of the project.
  - Waves will be run at full capacity during the designated migration-time-periods.
- All meetings will be held remotely.

## **Customer Responsibilities**

### *Site and System(s) Readiness*

The items listed below shall be the responsibility of the customer:

- Customer will provide 3 servers that will be used for migration and meet these guidelines:
  - Should not be hosting any critical business processes.
  - Should be able to be restarted frequently without causing service outages.
  - Network bandwidth will sustain max throughput for migrations.
- Customer will provide the following access to allow for scanning and migration:
  - User account(s) with SharePoint Online Admin permissions to SharePoint online Tenant
    - One account will be needed *per migration server* – totaling 3 accounts
  - Local administrator and remote access to the migration server(s)
    - Only one local administrator account is needed
- Number of sites to be created and users to migrate have been estimated based on the information FPDWC has given HBS.
- Migration file error resolution is expected to be handled by the content owners. Assistance from HBS in resolving migration file errors will be counted toward support hours.
- Email templates should be provided to HBS in their final format.

### *Working Conditions and Access*

The items listed below shall apply to the extent applicable:

- Customer will provide a Single Point of Contact with decision making ability to interface with HBS. This person is responsible for signing off on Scope of Work and Change Order documents throughout the project.
- Customer will provide Subject Matter Experts (SMEs) when required by project personnel and/or project activities. If delays in the project timeline are a result of delayed access to SME personnel or any other Customer delays, Customer may be subject to additional charges.



- Customer will provide HBS with access, including all password and logins, to required existing network or system assets listed in the scope.
- Customer will provide HBS with proper access and workspace areas at Customer locations that includes internet, physical and remote access to in scope infrastructure or systems.
- Customer will allow the HBS engineer to connect their computer to Customer network in order to perform their duties. HBS will allow Customer to examine said notebook for current anti-virus software, if needed.
- Customer will allow HBS unescorted access to computer rooms, equipment closets and the general facility. If unescorted access is not available, Customer shall assign access levels appropriately and coordinate escorts.
- Customer will provide adequate access and credentials required for the assessment of all components or systems listed in the scope.
- Customer will provide remote access prior to, and throughout, the project if required.
- Customer will have working Internet access available where the work will be performed.
- Customer is responsible for resolving problems outside the SOW that are beyond the control of HBS. These shall include but not be limited to software/firmware bugs, vendor engineering support cases, hardware failures, telecommunication circuits, server issues, desktop issues, the acts or omissions of any third party, or any other occurrence not caused by HBS. HBS can assist with these out-of-scope issues through the Change Order process or on a time and materials basis.

#### *Testing, Notification and Change Control*

- Customer will provide advanced notification of any network outages or changes during the implementation period.
- Customer will assist with the creation of and perform user acceptance testing and post-migration end-point validations.
- HBS and Customer will provide 48-hour notification of any schedule changes.
- Customer will assist with the design, testing and validation of the project Deliverables.
- Customer and HBS agree that work shall progress when Customer staff is not available to participate.



## Deliverables

The following are the deliverables HBS will provide to Customer (herein referred to as “Deliverables”) for this Project:

Any change to the Deliverables listed below will require a Change Order.

#	Deliverable
1	<b>Phase I: OneDrive user content migration (3 servers to be available for migration efforts)</b>
2	Configured 3 servers for migration
3	Configured SQL database for managing migrations
4	Personal files scan report
5	High level communication plan outline
6	<b>Phase II: Basic Village Intranet</b>
7	Up to 4 Planning and Review meetings
8	Up to 3 SharePoint sites
9	1 half day Training event for site owners
10	Up to 8 hours of support
11	<b>Phase III: Migrate file shares (2 servers) to SharePoint Online (~661,000 files)</b>
12	Scan report
13	High level communication plan outline
14	SharePoint Site Map – First Draft
15	<b>Phase IV: FOIA and Community Sign Request Form Creation</b>
16	Community Sign Form in MS Forms
17	FOIA Form in MS Forms

## Estimated Hours

This is an estimate of hours and, by its nature, is a “best guess,” based on industry standards and best practices, HBS’ experience, and Customer’s needs as communicated thus far. HBS used input from its most experienced team members to generate this estimate. The pricing is set forth on the attached Quote.

#	Task	Est Effort (hrs)
	<b>Phase I: OneDrive user content migration (3 servers to be available for migration efforts)</b>	<b>76</b>
1	Configure migration scripts for up to 3 servers	20
2	Configure SQL database for managing migrations	10
3	Conduct complete file scan of existing personal drives (2 locations identified to scan)	14
4	Review findings of scans with client	2



5	Discuss high level migration communication plan	4
6	Migrate personal drives to OneDrive (including conversion of old file types) in 2 waves	13
7	Project Management	13
	<b>Phase II: Basic Village Intranet</b>	<b>40</b>
8	Intranet Quick Start solution implementation / configuration	24
9	Site owner training / hands on working sessions	4
10	Intranet Quick Start solution support	8
11	Project Management	4
	<b>Phase III: Migrate file shares (2 servers) to SharePoint Online (~661,000 files)</b>	<b>130</b>
12	Conduct complete file scan of existing personal drives (2 locations identified to scan)	14
13	Review findings of scans with client	2
14	Design what the SharePoint Online site structure will look like	24
15	Make decisions about what content will move	6
16	Discuss high level migration communication plan	10
17	Setup batch migration configuration templates/scripts	5
18	Create destination SharePoint site/library and set basic permissions (up to 17 sites)	2
19	Migrate department drives to SharePoint (including conversion of old file types) in 8 waves	45
20	Project Management	22
	<b>Phase IV: FOIA and Community Sign Request Form Creation</b>	<b>26</b>
20	Discovery sessions	14
21	Build Community Sign Form in MS Forms	4
22	Build FOIA Form in MS Forms	4
23	Project Management	4
	Total	272



## **Post Support and Training**

HBS believes that training is just one component of a successful implementation. We encourage clients to take a holistic view at technology adoption that addresses creating end user awareness/excitement for the upcoming change, then investing in training and education for end users (tailored to what topics will be most beneficial to each user in her/his specific role), and finally encouraging clients to think about ways to reinforce change behaviors after the technology has launched. [Appendix A – Sample Organization Change Management Plan](#)

### **Training Delivery**

Training for Team Owners is a staple of any HBS-implemented Office 365 project. Team Owners are the individuals who will be identified as the key individuals to assign access to new members (and remove access from others as roles/positions change). HBS can also provide non-power-user training to all end users – an example of a typical Teams 101 training session can be found on YouTube at this link: [HBS-recorded Teams 101 Training](#)

HBS is well-versed in conducting training to a remote audience. For groups of 10 or less, a single HBS teammate is assigned to deliver training. However, when audience size grows past 10 users, we may assign a second teammate to assist with any troubleshooting during the session to allow the key training to continue without distraction to the overall group.

Training agendas are customized to each client; however, sessions are typically timed to fit between 45 minutes – 120 minutes, depending on the audience. Shorter sessions are ideal for the general user audience, longer sessions are more appropriate for power users/Team Owner training sessions.

## **Project Completion**

Project will be complete when all Deliverables have been provided to Customer.

Customer will have seven (7) business days to review the Deliverables for the project. If HBS does not receive a written notice of rejection describing the basis for rejection within this period, the Deliverables will be considered accepted.

After the completion of the project, support may be obtained by contacting the HBS Account Manager. Support will be billed at an agreed upon rate for services rendered.

## **Change Management**

Additional products and services beyond the In-Scope deliverables listed above are considered out of scope and require a Change Order executed by the parties before any such work can be performed. Any additions, deletions, or modifications to the Agreement, regardless of change to project value, require a Change Order.

### **Terms**

Binding Agreement. This SOW describes the professional services and/or products, and results to be provided by HBS. Upon execution, this SOW shall be contractually binding on the parties. The HBS Standard Terms and Conditions are also made part of this Agreement.





Order of Precedence. Any ambiguity or inconsistency between or among the statements of this SOW and the Standard Terms and Conditions shall be resolved by giving priority and precedence in the following order:

- Statement of Work
- Standard Terms and Conditions

Work Hours. All professional services work will be completed during the normal business hours of 8:00 am – 5:00 pm Monday - Friday Central Time. Any work occurring after 5:00 pm or before 8:00 am or on weekends is subject to a bill rate of 1.5 times the normal rate, unless the parties agree otherwise in writing.

General. No other promises have been made related to this SOW except for those stated in this SOW. This SOW supersedes all other agreements or promises related to this project and SOW. HBS shall not be responsible for any delay caused by the Customer or its vendors or contractors, equipment or shipping delays, or any other occurrence not caused by HBS.

Confidentiality. Each party may have access to confidential information concerning the methodologies, pricing, and business practices of the other. Neither party shall make any use of such information of the other party except in connection with the exercise of its rights and responsibilities under this SOW.



## Cost of Proposal



### M365 COLLABORATION MODERNIZATION PROGRAM

Prepared For:  
**Village of North Aurora**  
David Arndt  
25 East State Street  
North Aurora, IL 60542

P: 630-897-8228 X267  
E: darndt@northaurora.org

Prepared By:  
**Chicago Illinois Office**  
Mike Carroll  
5400 Patton Drive Suite 4B  
Lisle, IL 60532

P: 608-444-7994  
E: mcarroll@hbs.net

### Quote #277318 v3

Date Issued:  
**06.23.2023**  
Expires:  
**07.28.2023**

Services		Price	Qty	Ext. Price
HBS-TM-LABOR	HBS Actual Hourly Labor Rate - See Attached SoW	\$195.00	272	\$53,040.00
		Subtotal		\$53,040.00

Azure CSP(Recurring)		Price	Qty	Ext. Price
<i>The Microsoft Azure monthly costs in this quote are based on estimated consumption and Microsoft pricing to date (subject to change). Final costs will be invoiced monthly by HBS based on your actual consumption.</i>				
CSP-DIRECT-AZURE-PLAN	<b>Microsoft Azure Direct CSP</b> Microsoft Azure Direct CSP  For the following: <ul style="list-style-type: none"><li>• 3 Virtual machines for migration purposes</li><li>• 1 database for processing migrations</li><li>• Disk Space</li><li>• VPN Gateway</li><li>• Anticipated Traffic</li></ul>	\$1,705.84	1	\$1,705.84
Upon signing this quote, you are allowing HBS to assign admin permissions to the appropriate resource(s) in order to support and manage your Azure subscription. This can be changed at any time. HBS has identified the following resource(s) be added to the subscription: <ul style="list-style-type: none"><li>• HBS Contact(s): Kelly Grosskreutz, Ben Stickney, Cindy Lucas</li><li>• Customer Contact(s): David Arndt</li></ul>				
		Subtotal		<b>\$1,705.84</b>

Quote Summary	Amount
Services	\$53,040.00
Azure CSP(Recurring)	\$1,705.84
Total:	\$54,745.84

This quote may not include applicable sales tax, shipping, handling and/or delivery charges. Final applicable sales tax, shipping, handling and/or delivery charges are calculated and applied at invoice. The above prices are for hardware/software only, and do not include delivery, setup or installation by Heartland ("HBS") unless otherwise noted. Installation by HBS is available at our regular hourly rates, or pursuant to a prepaid HBS/ITX Agreement. This configuration is presented for convenience only. HBS is not responsible for typographical or other errors/omissions regarding prices or other information. Prices and configurations are subject to change without notice. HBS may modify or cancel this quote if the pricing is impacted by a tariff. A 15% restocking fee will be charged on any returned part. Customer is responsible for all costs associated with return of product and a \$25.00 processing fee. No returns are accepted by HBS without prior written approval. This quote expressly limits acceptance to the terms of this quote, and HBS disclaims any additional terms. By providing your "E-Signature," you acknowledge that your electronic signature is the legal equivalent of your manual signature, and you warrant that you have express authority to execute this agreement and legally bind your organization to this proposal and all attached documents. Any purchase that the customer makes from HBS is governed by HBS' Standard Terms and Conditions ("ST&Cs") located at <http://www.hbs.net/standard-terms-and-conditions>, which are incorporated herein by reference. The ST&Cs are subject to change. When a new order is placed, the ST&Cs on the above-stated website at that time shall apply. If customer has signed HBS' ST&Cs version 2018.v2.0 or later, or the parties have executed a current master services agreement, the signed agreement shall supersede the version on the website. Any order(s) that exceeds the credit limit assigned by HBS shall require upfront payment from customer in an amount determined by HBS. HBS shall make this determination at the time of the order, unless customer has previously submitted the required onboarding paperwork. In such event, HBS shall make this determination at the time of quoting. QT.2021.v1.0



## Appendix A: Organizational Change Management Plan

Intranet Rollout Organizational Change Mgmt Plan					
Awareness   Desire	Audience	Sent From	Type	Timing	Notes
Request to Participate in Intranet Focus Group	Focus Group	Project Sponsor	Email + Meeting Notice	6 weeks prior to go-live	Special invitation to provide feedback on Intranet before it goes live!
Coming Soon   Get Ready	All Employees	Project Sponsor	Email	4 weeks prior to go-live	Craft message to target key engagement feedback, if applicable Launch naming contest for the new site!
Intranet coming soon!	All Employees	Project Sponsor	PPT on monitors in hallways, breakrooms, etc	1 week prior to go-live	Include screenshots of new site
Lunch & Learn Sessions	All Employees	Project Sponsor	Live Session	Week before and week of go-live	Lunch provided; VC for remote sites
Naming Contest	All Employees	Project Sponsor	Email + SharePoint	1 week prior to go-live	Winner revealed during launch / Lunch & Learn
Knowledge   Ability					
Site Launch Communication	All Employees	CEO or Senior ELT member	Email	Go-Live!	Include URL, note about becoming new home page and project team recognition
Site Tips & Tricks	All Employees	Intranet Owner	Email + SharePoint News	1 week post go-live and beyond	Include tips on how to do a People Search, where to find key links, how to stay up to date on news, etc
Reinforcement					
Feedback Request	All Employees	Intranet Owner	Email, SharePoint News > Link to Survey	1 week post go-live	Link to Feedback survey; keep the message short and sweet!
Success Story Sharing	All Employees	Post as News Article	SharePoint News	1 week post go-live and beyond	Compiled from feedback gathered in survey; anecdotal feedback from hallway conversations
Department Roadshow: Collect Organizational Feedback	All Departments	Intranet Owner	Video Meeting	1 week post go-live and beyond	Show check and adjust opportunities based on feedback



## **HEARTLAND BUSINESS SYSTEMS, LLC LIST OF EXCEPTIONS**

Heartland Business Systems, LLC's Standard Terms and Conditions ("Standard Terms and Conditions") are incorporated herein by reference and made a part of any agreement between the parties. In the event of any direct conflict between the Standard Terms and Conditions and any other provision, the Standard Terms and Conditions shall control. Unless the parties mutually agree otherwise in a Statement of Work, except as stated in the following sentence, Buyer shall be deemed to have irrevocably accepted the products and services sold hereunder if Buyer has not given to Seller a written notice of rejection and any other necessary documentation in order to establish that the product or service is defective, within ten business days after delivery. Product returns, cancellations and order changes are only allowed pursuant to the manufacturer's policies. Under Payment and Deliverables, the reliable performance period shall also be changed to ten business days. Buyer agrees and acknowledges that in order to provide a high level of service, Seller may store Buyer's information in the public, private or hybrid cloud (collectively the "Cloud"). This information may include but is not limited to drawings, pictures, equipment layouts, passwords, backups, or configuration files. Buyer agrees and acknowledges that the Cloud is a separate and independent network, which is not controlled by Seller, and that Seller shall have no liability whatsoever, under any circumstances, for any damages arising out of or relating to the use of the Cloud, including but not limited to the loss of any information. In addition, Seller shall have no liability for the accuracy of any data uploaded by Buyer or any other users. If Buyer is dissatisfied with any Cloud services, Buyer's sole and exclusive remedy is to discontinue use of such services.