



Technology Assessment and Planning Proposal Prepared for

Dodge County
June 8, 2021

Agenda Item # 20
Date 7/28/21

CoreTech has developed this proposal after conversations with representatives from Dodge County and a review by our solution design team.

Introduction

Dodge County does not currently have a centralized IT strategy, plan, or set of standards. Each county department handles their IT systems, support, and budget independently. This situation has led to concerns about risk, efficiency, and overall cost.

Project Objectives

Dodge County is seeking a technology partner to execute a technology assessment and planning project for the county with the following objectives.

1. Evaluate current technology systems and platforms.
2. Identify areas where the county has risk.
3. Assess opportunities for consolidation, deployment of standards, and optimization of IT systems.
4. Deliver a high-level technology roadmap to implement the changes identified above and construct a scalable, reliable technology platform.
5. Develop a support structure for the county's IT systems.

IT Goals

The overall goals of this effort as expressed by the Dodge County technology committee are as follows.

1. Manage and minimize risk.
2. Optimize IT spend throughout the county.
3. Improve communications within and between departments.
4. Maximize IT system stability and reliability through appropriate redundancies.

Project Deliverables

Based on the information provided regarding the organization's needs and concerns, we are recommending the following technology support services.

- **Assessment Reports** – The assessment reports contain the detailed information gathered through the assessment and planning process including details about the existing technology systems and survey data.
- **Technology Plan** – The technology plan (1) itemizes key areas of risk, (2) provides detailed explanations of the recommended IT systems, structure, and standards and (3) identifies benefits in terms of reduced risk, improved productivity and efficiency, and cost savings.
- **IT Roadmap** – The IT roadmap is a 1 to 3 year plan outlining the primary long-term technology initiatives and detailing the steps to be taken within the next 12 months.
- **Recommended IT Support Structure** – CoreTech will provide a recommendation for the ongoing support of the Dodge County IT systems including internal staffing and/or outsourcing based on the information gathered from this effort.

Project Team

CoreTech's project team will consist of the following individuals.

- Chris Vilim – President
- Bill Weber – IT Manager / Project Manager
- Joel Havenridge – IT Operations Team Lead
- Project engineers – multiple IT and UC systems administrators and/or engineers as required

Technology Systems and Platforms

The assessment and planning effort will target the main technology systems and platforms listed below:

- Computers
- Servers
- Network wiring
- Network switches, routers, and firewalls
- WiFi systems
- ISP connectivity
- IT security
- Data backup and business continuity
- Applications
- Cloud services
- Email, communications, and collaboration platforms
- Phone systems and carrier services (optional)

Methodology

CoreTech's project team will follow the general outline below for execution of the assessment and planning project.

1. **Departmental questionnaire** – a questionnaire will be distributed to each department to gather the initial round of information about the existing IT systems, and current IT management.
2. **On-site network scans** – CoreTech's team will be on-site to run scans of each department's network to collect more detailed information about the computers and network systems.
3. **Site survey** – A site survey will be conducted to gather information about the physical networks.
4. **Stakeholder interviews** – CoreTech will conduct interviews with each department head to clarify any questions generated from the prior data collection steps.
5. **Data analysis** – CoreTech's project team will compile and analyze the various data points collected throughout the process to determine the primary facets of the technology plan.
6. **Deliverables development** – the project deliverables will be created as per the descriptions above.
7. **Communications** – a combination of email, phone, and video communications will be used throughout the project to provide updates to the stakeholders.
8. **Present Deliverables** – the project deliverables will be presented to the technology committee for their consideration.



Investment

CoreTech is proposing this effort as a "not-to-exceed" engagement based on the scope of work described in this document.

| Description | Fees (Excluding taxes) |
|--|---------------------------|
| Professional Services – Assessment and Planning | |
| - Execution of items outlined in this document | Not to exceed |
| - Estimated total hours = 90-120 hours | \$15,000 |
| - Hourly rate = \$150/hour | |

Service Credit

If Dodge County contracts with CoreTech for IT management services (full management or co-management) within 90 days of completion of this project, a credit of 50% of the total project fee will be issued.

Engagement and Terms

When a decision has been made to move forward with the proposed engagement, CoreTech will create and provide a Master Services Agreement

Payment Terms:

- 50% of the total investment is due upon acceptance of this proposal as a down payment. The down payment will be applied to project invoices in chronological order.
- Professional services will be invoiced as work is performed with NET30 terms
- Any invoice that is not paid-in-full within the above terms will be assessed finance charges at a rate equal to 1.5% of the overdue balance per month.

Client Acceptance:

By signing below you accept this document as a purchase order to CoreTech for the items and services detailed in the prior pages and confirm that you have the authority to make such a purchase. Further, your signature acknowledges this document as a Statement of Work and you understand that it is bound by the terms and conditions set forth in the Master Services Agreement.

Signature

Date

Printed Name and Title

Purchase Order Number