



Submitted On: June 18, 2025



Modern Work
Data and Al
Digital & App Innovation
Infrastructure











Submitted to Charlotte County Purchasing Division

Submitted by





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1. Executive Summary Letter

June 11, 2025

RFP Title: Consultant to Redesign Intranet

Subject: Response to "Consultant to Redesign Intranet" RFP

AgreeYa Solutions, Inc. (herein referred to as "AgreeYa"), is pleased to submit this proposal to **Charlotte County** (here in referred as "County") for redesign of its employee intranet to create a more effective, user-friendly, and centralized digital workplace as detailed in the RFP and released question's response. We hereby **acknowledge the receipt of the addendum** Nos. – 253636 a, 253636b, 253636c, 253636d.

AgreeYa Understanding of the Scope

We understand County is embarking on a strategic project to redesign its **Connect@Work** employee intranet with the objective of developing a modern, centralized, and intuitive digital workplace. The goal is to create a responsive platform that acts as both a **communication hub and a service delivery portal**, supporting various working environments—on-site, remote, hybrid, and field-based.

Therefore, County is seeking a partner to conduct comprehensive **requirements gathering**, facilitate **employee and management focus groups**, and define the **initial design** of the platform. The focus will be on improving usability, mobile accessibility, content findability, and reducing administrative overhead ensuring the new intranet aligns with business needs and delivers measurable value to County employees.

AgreeYa Expertise and Capabilities in Similar Solutions

AgreeYa brings a **structured**, **agile**, **and experience-led approach** to successfully deliver intranet redesign initiatives for public sector clients. Our process is broken into three key phases:

- Discovery & Requirements Gathering: We conduct stakeholder workshops, employee focus groups, content audits, and persona development to deeply understand user needs and technical constraints.
- **Design & Planning**: We define the information architecture, develop wireframes, visual design concepts, and create a scalable content governance model.
- **Implementation Planning**: We provide a detailed implementation roadmap, change management strategy, and clear success metrics to guide adoption and measure outcomes.

Our expertise of UX/UI, design and prototype is reflected in our successful delivery of numerous SharePoint Redesign and transformation, Application Modernization, Website designing from intranet portals to enterprise systems.

Our experience includes successful completion of projects from Requirement Gathering, Assessment, Redesign, Implementation, Configuration, Migration and Providing Roadmap and Recommendation ranging from public sector customers to several districts, private, and non-profit organizations to Fortune 100 companies.

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AgreeYa brings extensive experience in UX/UI design, requirement gathering, and application modernization, demonstrated through successful engagements with clients such as the California State Agency, Town of Morrisville, Kent County, IndyGo, California Air Resources Board (CARB), Santa Clara County, Humboldt County, South Coast Air Quality Management District (SCAQMD), Evalueserve, Oklahoma City Fire Department (OKCFD and the RB_CARL App Modernization project.



125+

UX/UI Design **Implementations**



10+

UX/UI Accelerators



100+

Certified **Professionals**



Experience Design

We design experience for digital products with one goal "Design a valuable, memorable, seamless user experience for the user"



Experience Engineering

Our human-centered design approach lets us empathize with your customers, identify their pain points, and innovative solution that enhance their experience with the product



Emerging Experience

We create professional and aesthetic design for emerging experiences that will help to differentiate business solution from others and increase the target audience



Experience Research

We design rich visualization that simplifies complex data and get insightful visuals to the users. We help users understand the complex data without any ambiguity



Mobility **Experience**

We design a mix of mobility experience which is paramount at offering user satisfaction and business success. We keep abreast of best practice to understand user behaviors



Visualization **Experience**

we gather user Insights through our UX research methods to collect data such as user personality, motivation, requirements and problems to make the digital platform function efficiently

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Our work has spanned discovery workshops, focus groups, and user research to inform intuitive design strategies and platform-agnostic solutions. We have delivered information architecture documentation, wireframes, prototypes, UI specifications, and visual style guides, while optimizing navigation, usability, and responsiveness across devices.

From mobile apps and intranet portals to enterprise systems, our UX/UI teams have consistently enhanced user experiences, reduced friction, and developed detailed roadmaps and implementation recommendations that align with client goals. This breadth of experience highlights our ability to design engaging, efficient, and scalable digital experiences across public sector and enterprise environments.

Awards & Recognitions:

AgreeYa: A Microsoft-Certified Leader in Technology Excellence and Global Recognition:

 25 years of Microsoft experience with various Microsoft Partner certifications such as Microsoft Solution Partner, Cloud Partner, Azure Government Beta Partner, Co-Sell Ready Partner, Microsoft FastTrack Program Partner etc.



- Among the **top 1% of Microsoft partners** globally with exclusive credentials.
- Certified in AICPA SOC 2 (Type 2), SEI CMMI, and ISO 9001:2015.
- 4.4-star rating on Glassdoor reflects strong employee satisfaction.
- Awarded with Best Company to Work for, Best Place to Work with Customer service
- TITAN Awards





Our expertise in *SharePoint solutions* has been **recognized by Microsoft**, with our project for **Blue Diamond Growers** being highlighted on the <u>Microsoft Portal</u> for a "SharePoint Online Intranet Implementation and Migration".



AgreeYa has actively contributed to industry knowledge-sharing by presenting at MISAC and CCISDA conferences. Notably, we copresented at MISAC with the Oklahoma City Fire Department on optimizing emergency operations, and with the City of Fontana on "Transforming City Operations amidst Continued Disruption".





With the **Southern California Association of Governments**, we copresented at <u>CCISDA</u> on streamlining county workflows & data. Our experts, <u>Ankit Saxena</u> and <u>Parth Shah</u>, who led these sessions, will bring their expertise to the **County's** project if selected.



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Testimonials:



"We worked with AgreeYa to upgrade from SharePoint 2010 and implement OneDrive and Teams. The resources who worked on the project were knowledgeable and helped us with smooth migration and implementation. I highly recommend AgreeYa's service."



"The SharePoint implementation that AgreeYa has carried out have become mission-critical and is a vital component in our ability to achieve our business-efficiency and organization objectives. Thanks to the entire AgreeYa Team on making this happen."



"AgreeYa Team has really thought through our requirements and suggested a solution that looks like the best fit for our environment. They are doing excellent, and I wish good luck to the team."



AgreeYa transformed St. Louis County's intranet into a modern SharePoint Online solution, migrating 70 GB of content, implementing custom PowerApps, automating workflows, and integrating an intuitive chatbot to enhance collaboration and communication.

The county awarded us a perfect 5/5 rating across all key areas, highlighting our responsiveness, proactive problem-solving, and adherence to timelines. They expressed: "I greatly appreciate your staff's time. They provided solid insights, and remediation steps."

Additional Testimonials



Our firm has worked with AgreeYa for several years and we can always depend on AgreeYa for quality candidates to fill our positions.

Executive Director, Verizon Wireless



I want to thank AgreeYa for the effort you put in bringing the right team at the right time for our project. I'm impressed with your responsiveness, dedication and ability to always get results.

Chief of Research, Air Research Board, California



MyEncore Intranet portal is Live! Very well received by all employees. Thanks for all Your Efforts.

Manager IT, Encore Capital

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Key Strengths:

- 1. Experience: Over 25 years in business with a strong focus on Microsoft technologies.
- 2. <u>Technical Competence:</u> Expertise in SharePoint Online, Microsoft Teams, Azure Cloud Solutions, and AI technologies.
- 3. Proven Track Record: Successful delivery of similar projects for public sector clients.
- 4. <u>Comprehensive Services:</u> End-to-end solutions including design, development, integration, migration, training, and ongoing support.

With our experience in public sector projects and enterprise intranet redesigns, we are well-equipped to collaborate with your IT Business Analysts, department heads, and staff. We look forward to supporting this strategic transformation and helping redefine the **Connect@Work** experience.

Yours sincerely, Ajay Kaul Managing Partner

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2. Understanding of the Project Requirements

We understand that County seeks to redesign its Connect@Work intranet to serve as a modern, responsive digital workplace, one that functions both as a communications hub and as a centralized portal for employee services. The County's goals include enhanced usability, accessibility, and engagement across a diverse workforce that includes on-site, remote, hybrid, and field-based employees.

Based on the Scope of Services and Project Objectives outlined in the RFP, we recognize the following core requirements and have aligned our approach accordingly:

1. Stakeholder Engagement

- Facilitate inclusive, well-structured focus groups and interviews with County leadership, departmental staff, and front-line employees.
- Ensure proportional representation from various work settings—field, remote, hybrid, and on-premises, consistent with the County's organizational diversity.

2. Requirements Gathering

- Identify and document existing pain points and aspirational goals across all departments.
- Gather both functional and non-functional requirements, including usability, integration needs, scalability, and content governance.
- Conduct a comprehensive content audit of the existing intranet to evaluate relevance, accuracy, and redundancy.

3. Design and Planning

- Create detailed user personas and journey maps that reflect the needs and behaviors of key user groups.
- Develop an intuitive, scalable information architecture with clear navigation paths.
- Deliver wireframes and design mockups that are visually aligned with the County's brand and accessibility requirements.

4. Implementation Planning

- Recommend delivery models (internal, external, or hybrid) with pros and constailored to Charlotte County's IT capabilities and staffing.
- Develop a practical change management and communication strategy to drive user adoption.
- Define post-launch success metrics and KPIs aligned to engagement, usage, and service efficiency.

5. Compliance and Accessibility

- Ensure all design and technical recommendations meet ADA and WCAG 2.1 AA standards.
- Incorporate security, performance, and maintainability requirements as foundational elements of the future platform.

6. Expected Deliverables

- Comprehensive requirements documentation and user research findings.
- Scalable information architecture and branded visual design concepts.
- A detailed project roadmap, including implementation strategy and change management plan.

We are committed to delivering a user-centered, inclusive, and sustainable intranet solution that positions the County for future digital growth. Our proven methodology, extensive experience with government digital workplace projects, and cross-functional team of UX designers, technologists, and

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change specialists uniquely qualify us to guide Charlotte County through a successful redesign of its Connect@Work platform.

3. Relevant Experience and Qualifications

AgreeYa brings extensive experience in leading intranet redesign and employee portal strategy projects across the public sector, with a strong focus on stakeholder-driven discovery, user experience design and change readiness. Our clients include city and county governments, transportation authorities, and higher education institutions each with diverse workforces and complex governance models.

Our qualifications include:

- Human-Centered Design Expertise: We have successfully delivered projects involving persona
 development, journey mapping, information architecture, wireframing, and prototyping. Our UX
 teams specialize in designing intuitive, inclusive, and engaging digital experiences for
 government employees.
- Government Sector Experience: We have supported over 100 public sector organizations in planning and designing employee-facing solutions. Our experience includes navigating procurement, compliance, and accessibility requirements specific to government environments.
- Multimodal Stakeholder Engagement: Our teams are skilled at facilitating focus groups, workshops, and 1:1 interview across a variety of work settings—on-site, hybrid, remote, and field-based—ensuring all voices are represented in the final design strategy.
- Compliance and Accessibility: We have designed digital solutions that meet ADA and WCAG 2.1
 AA accessibility standards and adhere to strict data security and governance guidelines (HIPAA, GDPR, FedRAMP).
- Change Management and Adoption: Our approach includes tailored training, communication
 planning, and stakeholder onboarding to support high adoption and long-term success of
 intranet platforms—regardless of technology stack.

This project is not about technology deployment but about **getting the strategy right**—and that's where our experience stands out. Whether the County chooses to develop the redesigned intranet internally, externally, or via a hybrid model, AgreeYa's approach ensures that design, usability, compliance, and user needs remain at the center of the solution.

3.1 Relevant Experience Matrix

Below are just a few of the many projects that AgreeYa has executed on behalf of clients across various sectors in Mobile Apps and to Enterprise Systems to Intranet Portals (other than SharePoint).

These examples will provide a flavor of the unique experience we bring to the County which is now seeking the similar work.

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Selected Similar Project Summary							
Client Detail	Discovery/ User Research	Journey Mapping	Designing & Roadmap	Development	Testing	Support & Maintenance	Public Sector
Town of Morrisville							
Sacramento Municipal Utility District (SMUD)				Ø			
Rotary International							
College of Lake County							
City of Fontana							
Solano County							
CA Department of Public Health (CDPH)							
Genesee Community College							

Following is the matrix showcasing the **relevant experience in SharePoint Redesigning and modernizing Intranet.**

Clients	Discovery and Assessment	Intranet Modernization	Migration/Content and Document Management	Information Architecture and UX/UI	Governance, Training & Support	Public Agency
City of Vancouver						
Ohio Public Employees Retirement System (OPERS)	⊘	⊘	Ø			
Charleston County Parks & Recreation Commission (CCPRC)	>			S	>	\bigcirc

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Consultant to Redesign Intranet

RFP No.: 20250363



Clients	Discovery and Assessment	Intranet Modernization	Migration/Content and Document Management	Information Architecture and UX/UI	Governance, Training & Support	Public Agency
Central Ohio Transit Authority (COTA)						\bigcirc
San Diego Port District						
Electric Reliability Council of Texas (ERCOT)						
City of Fontana						
South Coast Air Quality Management District (SCAQMD)						
SAFE Credit Union						
City of Hanford						
SCAG						
California Department of Public Health (CDPH)						
Pacific Coast Companies, Inc. (PCCI)						
City of Loveland						
Blue Diamond Growers						
Kent County						
Region V BOCES						

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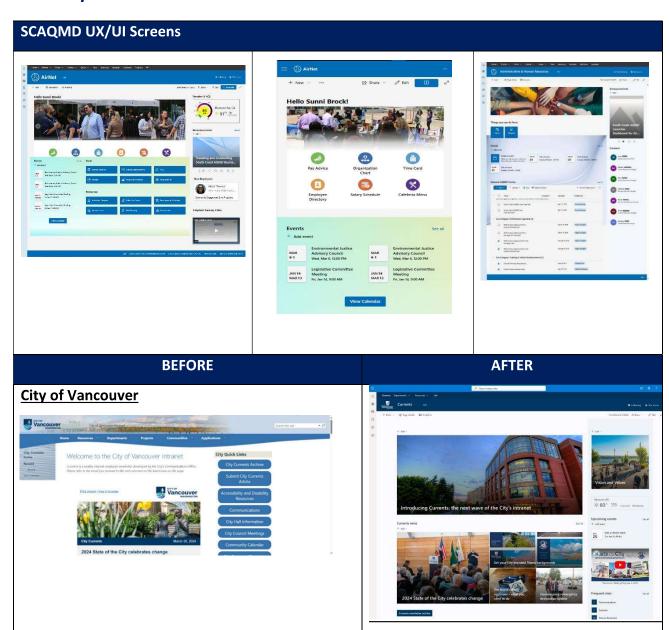
AgreeYa has extensive experience and has successfully completed numerous projects, following are few of the highlights of the relevant work done in past.

Client	Work Performed
Vancouver WASHINGTON	City of Vancouver : Upgraded their SharePoint platform to SharePoint Online, enhancing communication and collaboration.
FONTANA CALIFORNIA	City of Fontana: Implemented Modern Intranet portal and Microsoft Teams, improving remote working productivity.
A COMP	SCQMD: AgreeYa redesigned the South Coast Air Quality Management District mobile application (iOS and Android) with a strong focus on user experience, accessibility, and visual design. The project included creating wireframes and UI prototypes to enhance complaint submission flows, integrating an interactive facilities map, and developing a customizable color scheme to support accessibility needs. Visual elements were refined to ensure clarity, responsiveness, and inclusivity across devices. The new interface allowed residents to easily file and track complaints, view data on air quality facilities, and access features in multiple languages, greatly improving user engagement and accessibility through modern design and thoughtful UX strategies.
College Lake County.	AgreeYa led the UX/UI redesign of the organization's intranet, focusing on personalization, usability, and improved employee engagement. Key features included a customizable 'My Systems' dashboard, drag-and-drop interface, personalized 'My Links', and 'News Digest' email notifications. The redesigned portal was developed to be fully responsive , support Single Sign-On (SSO), and enhance the overall user experience to boost collaboration and productivity across the organization.
OPERS .	AgreeYa supported Ohio Public Employees Retirement System (OPERS) , with a comprehensive content assessment across 65 site collections, enabling informed decisions for streamlining and modernizing their digital environment . This effort laid the groundwork for a future-ready UX redesign , as part of a broader SharePoint 2016 to Online migration strategy, complete with roadmap and recommendations.
PORT of SAN DIEGO	San Diego Unified Port District: Modernized their Employee Intranet, improving collaboration and operational efficiency.
IndyGo	Indianapolis Public Transportation Corporation (IndyGo): Modernized their SharePoint Online Intranet, improving collaboration and communication.

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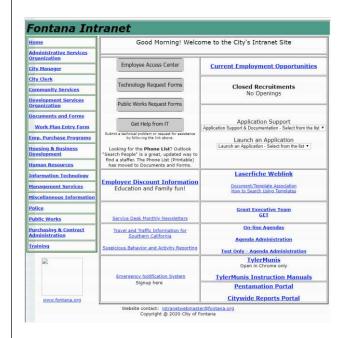
3.2 UI/UX Screens

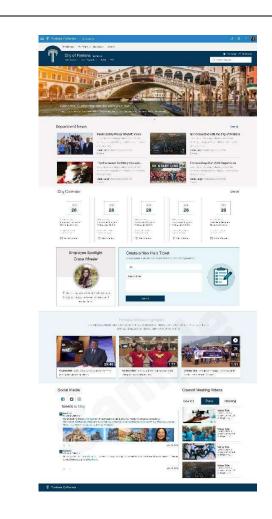


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City of Fontana





Solano County



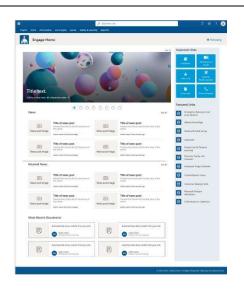


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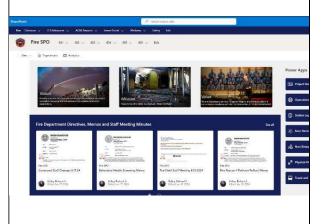




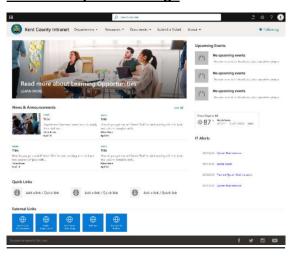


OKCFD

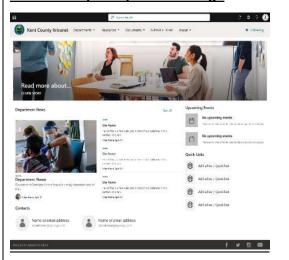




Kent County - Home Page



Kent County – Department Page



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3.3 References

Reference #1

Details	Proposer Response	
Client company name	City of Vancouver	
Contact name	Patrick Gilbride, CISSP IT Director	
Contact phone	Prefer email	
Contact email	Patrick.Gilbride@cityofvancouver.us	
Client Address	453 West 12th Avenue, Vancouver	
Description of work	AgreeYa successfully supported the City of Vancouver in modernizing their digital workplace by migrating their legacy SharePoint 2013 onpremises environment to SharePoint Online (SPO). This engagement involved discovery, design, redevelopment of InfoPath forms and Nintex workflows, content migration planning, intranet redesign, testing, deployment, and training — all aimed at optimizing	

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collaboration, enhancing data security, and leveraging cloud capabilities to reduce on-premises infrastructure.
Lessons learned at the City of Vancouver such as the importance of clearly establishing content ownership early, redesigning workflows during migration to drive efficiency, and involving business users early in design decisions to accelerate adoption will directly benefit County by ensuring a streamlined, user-focused, and low-risk migration. Please click here to view the complete case study.

Reference #2

Reterence #Z	
Details	Proposer Response
Client company name	Oklahoma City Fire Department
Contact name	Clint Regier, Information Technology
Contact phone	(405) 297-3311
Contact email	Clint.Regier@okc.gov
Client Address	820 NW 5th St, Oklahoma City, OK 73106, United States
Description of work	AgreeYa successfully supported the Oklahoma City Fire Department (OKCFD) in modernizing their digital workplace by designing and implementing a customized SharePoint Online (SPO) intranet solution. This engagement included discovery, assessment, close collaboration with IT departments, intranet design, development, deployment, recommendations for governance, and training focused on enhancing collaboration, improving communication, and reducing reliance on outdated on-premises systems.
	Lessons learned at OKCFD such as the value of tailoring intranet design to meet departmental needs, the importance of simplifying navigation to increase user satisfaction, and the benefits of early cross-departmental collaboration will help County ensure a highly adopted, intuitive, and efficient digital workplace experience. Please click here to view the complete case study.
MISAC (Municipal Information Systems Association of California)	We co-presented at MISAC with the Oklahoma City Fire Department on optimizing emergency operations.

Reference #3

Details	Proposer Response
Client company name	Kent County
Contact name	MaryBeth Van Till, IT Manager – OnBase/Business Analysis
Contact phone	616-632-6548 / 616-437-6806
Contact email	marybeth.vantill@kentcountymi.gov
Client Address	320 Ottawa Ave, Grand Rapids, MI 49503

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Description of work

AgreeYa led the UX/UI design of Kent County's new SharePoint Online intranet by conducting stakeholder workshops, developing wireframes and mock-ups, and creating visually consistent, responsive templates for home and department pages. Using a user-cantered design approach, we improved navigation, accessibility, and content layout, delivering a modern, intuitive intranet experience aligned with County branding.

Lessons learned: Early use of wireframes improved clarity and reduced rework. Iterative feedback ensured a user-friendly design, while standardized templates boosted adoption. Cross-team collaboration was key to aligning design goals with implementation feasibility.

Please click here to view the complete case study.

3.4 Case study

3.4.1 City of Vancouver



Client Name	City of Vancouver
Project Title	SharePoint Online Modernization Project / Intranet Upgrade and Redesign

Background:

The **City of Vancouver**, located in **Folsom**, serves a growing population that was approximately **189,700** in 2020 and is projected to surpass **200,000** within the next decade. As a dynamic and expanding community, the city recognized the need to upgrade its internal systems to continue delivering efficient services to its residents. A key priority was to modernize its existing **SharePoint 2013** On-Premises platform to foster improved **collaboration**, **knowledge sharing**, and **business application usage** across all departments.

Scope of Work / Requirement

The City identified several critical needs to transform its digital workplace environment:

• Upgrade the legacy SharePoint 2013 platform to SharePoint Online to leverage cloud capabilities.

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- **Design and develop** a new **modern Intranet** site to enhance internal communication and usability.
- Redevelop existing InfoPath forms and Nintex workflows onto a more sustainable platform manageable by end users and City IT staff.
- Establish a robust content migration process to ensure seamless and secure transition of critical data.
- Define and implement best practices for Intranet navigation and content management.
- **Build an information architecture** and a **governance framework** to maintain system integrity and manage growth.
- Provide training and support services post-implementation to drive user adoption and platform selfsufficiency.

Proposed Solution:

AgreeYa proposed a comprehensive modernization plan that addressed all aspects of the City's requirements:

- Content Migration: Transitioned all data, libraries, and lists from SharePoint 2013 to the SharePoint Online environment while maintaining data integrity.
- Workflow and Form Redevelopment: Redesigned existing InfoPath forms and Nintex workflows
 utilizing modern tools such as Power Apps and Power Automate, creating scalable and easily
 maintainable solutions.
- **New Intranet Development**: Designed and developed a **modern Intranet** with a **responsive** and **personalized user experience**, enhancing communication across departments.
- Governance and Best Practices: Established a comprehensive information architecture and governance framework, ensuring structured content management and streamlined user navigation.
- **Training and Support**: Delivered **training sessions** and provided **ongoing support** to empower City employees to manage and optimize their new environment independently.

Benefits Realized:

The implementation of AgreeYa's solution delivered multiple strategic benefits to the City of Vancouver:

- Improved collaboration and communication across city departments.
- **Streamlined business processes** through reimagined workflows.
- Enhanced information accessibility and searchability.
- Increased productivity by simplifying content management and daily operations.
- Scalability and flexibility to support ongoing city expansion and evolving technology needs.

Conclusion:

Through the modernization of the City's digital workplace, AgreeYa demonstrated its expertise in SharePoint migration, governance establishment, workflow redesign, and user training—all critical to County's requirements. Our approach enabled a secure, cloud-based collaboration platform while reducing reliance on legacy infrastructure, optimizing data security, collaboration, and modern cloud adoption.

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3.4.2 Oklahoma City Fire Department



Background:

The **Oklahoma City Fire Department (OKCFD)** is one of the largest and busiest fire departments in the **United States**, serving a large metropolitan area. The department operates multiple fire stations, ensuring rapid response to emergencies, medical incidents, and fires. However, the department faced significant challenges with its outdated **Microsoft FrontPage-based intranet** that hindered collaboration and timely response during emergencies.

Scope of Work / Requirement

The existing intranet, built over a decade ago using Microsoft FrontPage, posed several challenges:

- Outdated Interface: The interface was hard to navigate, complicating information access.
- Inefficient Collaboration: Slow and ineffective collaboration affected response times.
- Complex User Interface: Employees struggled to quickly retrieve critical data.

The project aimed to:

- Design and implement a modern intranet solution.
- **Enable seamless communication**, policy dissemination, and collaboration.
- Provide recommendations for optimizing SPO practices to meet OKCFD's needs.

Proposed Solution:

AgreeYa took a comprehensive approach:

- **Assessment and Roadmap**: Evaluated OKCFD's current SPO environment and identified areas for improvement.
- **UI/UX Design**: Crafted intuitive layouts and user journeys to enhance user experience.
- **Custom SPO Intranet**: Designed and implemented a tailored **SharePoint Online** solution for improved collaboration.

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• **Collaboration with IT**: Worked closely with OKCFD and IT departments to align the solution with departmental goals.

Benefits Realized:

- Increased Collaboration: Improved communication and information sharing.
- Reduced Emergency Response Time: Real-time data access enabled quicker decision-making.
- **Higher User Satisfaction**: Intuitive UI/UX design led to positive feedback.
- Faster Document Retrieval: Leveraged SharePoint Online's advanced search capabilities.
- IT Cost Reduction: Reduced maintenance and streamlined processes.
- Increased Intranet Adoption: Modern design and usability resulted in higher user adoption rates.

Conclusion:

The collaboration between OKCFD and AgreeYa resulted in the successful delivery of a modern SharePoint Online intranet, which addressed key challenges such as improving communication, enhancing collaboration, and optimizing workflows. This solution aligns with the County's RFP scope, offering a modern, scalable, and efficient platform that meets the department's business needs. It also highlights AgreeYa's ability to deliver impactful, tailored solutions in the public sector to improve operational efficiency and user satisfaction.

3.4.3 Kent County



Client Name	Kent County
Project Title	Enterprise Intranet Solution

Background:

Kent County sought to modernize its intranet to create a more intuitive and engaging digital workplace for its employees. The existing platform was difficult to update, lacked design consistency, and did not effectively reflect the County's brand or facilitate cross-departmental collaboration. The County engaged AgreeYa to design and implement a responsive, user-friendly intranet on SharePoint Online that would improve internal communication, access to key resources, and foster organizational alignment with its mission, vision, and values.

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Scope of Work / Requirement

- Assess the current state of the County's SharePoint, OneDrive, Teams, and PowerApps environments
- Conduct stakeholder interviews and requirement gathering workshops
- Deliver "Art of the Possible" sessions to explore intranet capabilities
- Define and document the intranet's business and functional requirements
- Create wireframes, mockups, and UI specifications for home and department site templates
- Provide governance, information architecture, and navigation best practices recommendations
- Deliver training and documentation to enable the County's IT team to manage content independently

Proposed Solution:

AgreeYa followed a user-centered, agile approach, initiating with stakeholder engagement and collaborative discovery sessions. We created interactive UI specs during the planning phase to validate requirements in real time and ensure alignment with user expectations. Based on finalized mockups, we designed custom intranet site templates, developed governance and IA recommendations (Hub-Team-Communication flat architecture), and documented best practices for SharePoint navigation, security, and roles. We also provided a comprehensive implementation roadmap and trained the County's team to confidently manage the intranet moving forward.

Benefits Realized:

- Replaced a legacy intranet with a modern, responsive platform accessible across devices
- Enabled the County's IT department to create and manage department/resource sites using predefined templates
- Empowered non-technical staff to update and maintain content independently
- Improved intranet usability, access to resources, and visibility of updated content
- Reinforced branding and consistency across departments while enhancing internal communication

Conclusion:

AgreeYa successfully designed and delivered a scalable, visually engaging, and easy-to-maintain intranet for Kent County using SharePoint Online. The solution met the County's goals of creating a unified communication hub, streamlining content management, and driving user adoption—all while aligning with best practices in UX/UI design, governance, and Microsoft 365 optimization.

3.5 Proposed Project Team

AgreeYa is fully prepared and well-positioned to successfully execute this engagement within the proposed timeframe. A dedicated team of seasoned professionals, each with extensive expertise in SharePoint assessment, migrations, governance implementation, user adoption strategies, and organizational change management, will lead the project. Resource availability has been carefully coordinated with the project phases to ensure continuity, efficiency, and seamless delivery.

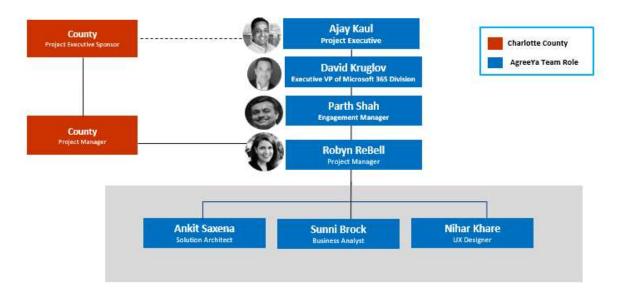
Key areas of focus include:

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- Best Practices: Leveraging industry standards and proven methodologies for SharePoint Online migration and governance.
- **User Adoption and Change Management:** Implementing structured adoption strategies to drive user engagement and minimize disruption.
- **Relationship Building:** Establishing strong, collaborative partnerships with client stakeholders to ensure alignment and project success.
- **Business Solutions Delivery:** Designing and delivering solutions that create tangible, positive business impact.

Below is our organizational chart for the project which illustrates our cohesive team structure, designed to facilitate seamless collaboration with County's stakeholders to ensure the project's success.



How We Ensure On-Time Project Completion:

- Structured Project Management: We follow PMBOK-aligned methodologies and Agile frameworks to ensure efficient planning, execution, and risk mitigation.
- Proactive Issue Resolution: Our teams use Azure DevOps, Jira, and Microsoft Project for real-time tracking, early risk identification, and course correction.
- **Transparent Communication & Progress Monitoring:** Weekly status reports, sprint retrospectives, and dedicated project dashboards keep stakeholders informed at every stage.
- ❖ Stringent QA & Risk Management: Each project phase undergoes rigorous testing, ensuring that quality is maintained without last-minute delays.

Sr. No.	Roles	Responsibilities
1.	Project Manager –	 Lead project initiation and kickoff
	Responsible for overall	 Develop and maintain project plan
	coordination, planning,	 Manage timelines, risks, and communication
	tracking, and client	 Oversee task execution and reporting
	engagement.	 Lead status calls, issue resolution, and signoffs

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Consultant to Redesign Intranet

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		Organize final review and project closure activities
2.	Business Analyst – Leads requirement gathering, documentation, and process mapping.	 Facilitate departmental interviews Provide Document BRD, Communication Plan, Test Plan Walkthrough documents and coordinate signoff Coordinate validation feedback and signoff Collect stakeholder feedback and lessons learned
3.	Change Management Lead – Supports communication, planning.	Draft Communication PlanProvide change Management Plan
4.	UX Designer - Conducts user research and defines the structure and flow of user experiences across platforms.	 Conduct user interviews, focus groups, and usability testing to gather insights Translate research findings into user personas, journey maps, and empathy maps Collaborate with UI developers to ensure user flows are intuitive and accessible Create wireframes and interactive prototypes based on user needs Validate design concepts through iterative testing and feedback loops Support requirement gathering sessions and ensure alignment with user experience goals

We offer a wide range of skills that we can combine to create the correct fit for the project. Together with our technology and proficiency of our skilled team, we help shape the project from inception to delivery through the following -



Experience Design

- Design System
- Visual Interface Design
- Interaction Design
- · Rapid Concept Prototyping
- · Illustration / Doodling



Experience Innovation

- · Design Thinking Workshop
- · Co-creation Workshop
- Service Blueprints



Experience Research

- · User Research & Analysis
- Journey Mapping User Testing
- UX Audit



Visualization Experience

- · Dashboard Visualization
- Reports and Presentations
- Infographics



Mobility Experience

- Native Application Design
 Mobile First Responsive Design
- · Wearable Experience



Emerging Experience

- IOT Experience
- Con.Al Experience
- AR & VR Experience

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3.6 Resumes

3.6.1 Robyn ReBell - Project Manager

Education	Deshalow of Auto Communications Instructional Design	
Education	Bachelor of Arts – Communications, Instructional Design	
Summary of Experience	Robyn is a highly experienced Project Manager with over 25 years of success leading large-scale SharePoint Intranet deployments , Office 365 migrations , and collaboration platform modernizations . Her ability to bridge business and technical needs ensures projects are delivered on time, within scope, and aligned with strategic goals. Robyn specializes in user-centered design , governance planning , workflow automation , and change management , and has led transformation initiatives for cities, counties, and public agencies—making her an ideal fit to manage Microsoft 365 environment and platform transformation.	
Certifications	PMP Certified	
Technical Skills SharePoint Online, O365, jQuery, CSS, HTML, Java Script, Python, Patterns, JSP, JSON, Web Services, XML, XSLT, XPATH, Gulp, REST,		
Select Professional E	perience	
AgreeYa Solutions Inc. Nov 2020 – Present		
Others Relevant projects	 Taborda Solutions Coldwell Solar California Earthquake Authority Autodesk, Restoration Hardware The Gap, Inc May 2019 - Nov 2020 Feb 2018 - Nov 2018 May 2016 - Dec 2017 - 	

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3.6.2 Ankit Saxena – Solution Architect

Education	Bachelor's degree in Computer Applications
Summary of Experience	Ankit is an accomplished Microsoft SharePoint Architect/SME with over 16 years of expertise delivering enterprise SharePoint solutions, including migrations, governance, architecture design, and end-user training. He brings a deep understanding of transitioning complex SharePoint environments to modern SharePoint Online (SPO) solutions while enhancing security, collaboration, and information architecture. His career spans several high-impact public sector and government projects, making him ideally suited to modernize and migrate from SharePoint 2019 Premises to SharePoint Online.
Certifications	Microsoft Certified Professional Associate – SharePoint Server Core Solutions, Microsoft Certified Technology Specialist – SharePoint App Development, Microsoft Certified Technology Specialist – SharePoint Core Solutions, Microsoft Certified Technology Specialist – SharePoint Configuration
Technical Skills	 Microsoft Technology Stack: Microsoft 365 (Teams, OneDrive, Planner, Hybrid Search, Yammer, etc.), SharePoint 2019/2016 (Online & On-Premises), SharePoint 2013/2010, MOSS 2007, SharePoint Designer, Dynamics CRM, SSRS, SSIS Databases: MS SQL Server, Azure Synapse/Azure SQL Data Warehouse, Azure Data Factory, Azure SQL Database, MS Access App Development Tools: MS Visual Studio, Azure DevOps, Azure Developer Tools (Visual Studio, Power Flow, Power Apps) Languages: C, C++, C#, ASP.NET, HTML5, AJAX, CSS3, jQuery, JavaScript, VB.NET, AngularJS, Python, Web APIs Server: MS Exchange 2016/2019, MS Access, IIS Other Tools: Microsoft Azure (Power BI, Databricks, Stream Analytics, Data Lake Storage, Analysis Services), ShareGate, Metalogix, Nintex, InfoPath, Design Patterns
Select Professional	Experience
AgreeYa Solutions Dec 2018 – Present	 Ohio Public Employees Retirement System: Served as the SharePoint Architect for OPERS' migration project, conducting a detailed assessment of the existing SharePoint 2016 environment and designing the roadmap for transition to SharePoint Online. St. Louis County – Migrated legacy intranet to SharePoint Online; led complete UI/UX redesign with ADA-compliant templates and modern search. City of Vancouver – SharePoint 2013 to Online migration; delivered site architecture, custom department templates, and Teams integration. Oklahoma City Fire Department – Digitized legacy paper processes using Power Apps; automated field inspections and reporting in SharePoint Online.

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- City of Fontana Executed full redesign and migration from SharePoint 2013 to SharePoint Online (SPO); configured document libraries and permission-based navigation.
- College of Lake County Modernized legacy collaboration platform to SharePoint Online (SPO) with student/staff portals, dashboards, and Power Automate workflows.
- San Diego Unified Port District Developed accessible SharePoint
 Online (SPO) templates; converted manual forms into digital Power
 Apps.
- **Blue Diamond Growers** Delivered intranet modernization and SharePoint Online (SPO) migration; built HR and procurement workflows with Power Platform.
- He also worked for Pierce Transit and Bureau Veritas, where he built the SharePoint Online (SPO) knowledge centre, migrated file shares, and updated process documentation to SharePoint Online, and implemented workflows.

3.6.3 Sunni Brock – Business Analyst

Education	Bachelor's degree in Computer Science	
Summary of Experience	Sunni Brock is a senior Business Analyst and Trainer with over 28 years of experience in leading business process assessments, stakeholder collaboration, driving technology adoption, system migration, and process optimization. She specializes in SharePoint Online, Office 365, and Microsoft Teams solutions. Sunni has led enterprise-wide digital transformation efforts, including intranet redesigns, legacy system migrations to SharePoint Online, and the implementation of Power Platform solutions. Known for her ability to translate business needs into technical solutions, Sunni supports stakeholder engagement, training development, and documentation—critical to increasing user adoption and operational efficiency.	
Certifications	Microsoft Viva Employee ExperienceMicrosoft Certified Scrum Master and Scrum Product Owner	
Technical Skills	 HTML/XML/CMS/.NET/C#/C++/VB/Java/Web Services Printer/mark-up languages (PCL, PS, RTF, etc.) SharePoint Online, O365, Design Patterns, visual Studio Team Foundation SQL, PowerPivot/PowerBI, OLAP, SSRS, SSAS, Excel All Microsoft Applications (Office, Server, Windows) 	
Select Professional Experience		
AgreeYa Solutions May 2022 - Present	 Santa Clara County: Sunni recently led business requirements gathering, stakeholder collaboration, and user adoption planning for the CIP Portal migration from SharePoint 2013 to SharePoint Online. BOCES 5: Sunni spearheaded requirements gathering, process analysis, and stakeholder workshops to define the migration strategy from legacy file shares to Microsoft 365. She created comprehensive documentation, 	

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	 City of Vancouver: Sunni led bu workshops, and requirements g SharePoint 2013 to SharePoint 0 user training programs, governa guidelines to promote adoption tools. Safe Credit Union: Sunni facilita captured requirements for intra optimization, and supported the Platform solutions. She also devidocumentation. Sunni has also provided busines the South Coast Air Quality Mais Santa Clara University (SCU), Ci 	the efforts, and developed user training harePoint Online, OneDrive, and Teams. siness process analysis, stakeholder athering for the migration from Online. She also developed and delivered ance documentation, and best practice of the new intranet and collaboration at the dusiness process evaluations, and modernization and workflow transition from Nintex to Power reloped end-user training programs and as analysis expertise to clients including magement District, St. Louis County, ty of Loveland, Amador County, ERCOT, and Governments (SCAG), and City of
Others Relevant projects	AccentureAvanadeTecologyMicrosoftUTS Group	Mar 2021 – April 2022 Jun 2019- Feb 2021 Nov 2018 - May 2019 Jul 2015 – Feb 2017 Mar 2017 - Nov 2017

3.6.4 Nihar Khare – UI Designer

Education	Bachelor's degree in computer science	
Summary of Experience	Nihar is an experienced UX Designer with over 5 years of experience in designing and developing user-centered interfaces for SharePoint, web, and mobile platforms. He is an expert in creating intuitive, responsive, and visually appealing SharePoint sites, leveraging strong HTML5, CSS3, JavaScript, and SharePoint Framework (SPFx) knowledge.	
Technical Skills	 UX/UI Design: Wireframing, Prototyping, User Research, Personas, Usability Testing Web Technologies: HTML5, CSS3, JavaScript, jQuery, Bootstrap, React, Angular SharePoint Expertise: SharePoint Online, SharePoint 2013/2016/2019, SharePoint Designer, Power Automate, Power Apps Front-End Development: Responsive Design, Cross-Browser Compatibility, Mobile-First Development Tools: Figma, Adobe XD, InVision, Sketch, Visual Studio, Git Collaboration: Agile Methodology, JIRA, Confluence, Scrum 	
Select Professional Experience		

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AgreeYa Solutions May 2021 - Present	 Worked on over 40+ projects while in AgreeYa, and created wireframes, mockups, and prototypes using Figma and Adobe XD, ensuring all designs were user centered. Conducted stakeholder & user interviews for the UX design of SharePoint intranet for up to 5000+ employees Responsible for implementing any ADA-compliant requirements in design Led the design and front-end development of multiple SharePoint Online sites for public sector and enterprise clients, enhancing the user interface to improve site usability and engagement. Developed custom SPFx web parts using React and TypeScript to provide clients with tailor-made SharePoint solutions. Developed and maintained site navigation, customized master pages page layouts, content types, and custom forms to enhance functionality and user experience. Collaborated closely with project managers and business analysts to gather requirements and deliver designs that meet business objectives. Implemented branding guidelines and custom CSS for modern SharePoint sites, ensuring consistency with the organization's visual identity
GYM SOURCE May 2020 – Jul 2020	 Designed and implemented user-friendly interfaces for SharePoint applications, ensuring a seamless and intuitive user experience that aligns with client branding and accessibility standards. Conducted user research and usability testing to gather feedback, iterating on design prototypes to enhance functionality and engagement within the SharePoint environment. Collaborated with cross-functional teams, including developers and stakeholders, to create responsive layouts and interactive elements that optimize performance across various devices and browsers. Developed style guides and design systems for SharePoint projects, ensuring consistency in visual elements and usability across all site pages and components. Developed HTML templates for customer-facing "Proof of Delivery" webpage and integration with delivery tracking third party application Optimized overall search visibility of 400+ Gym Source Blog articles by editing meta descriptions and titles through HubSpot Took part in conducting the surveys, focus groups, user interviews, and workshops Worked on wireframes and design creations Developed product strategy by conducting market research and identifying user pain point
Others Relevant projects	• fabfitfun Jun 2019 – Sept 2019

4. Methodology and Approach

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4.1 Project Methodology

At the core of our methodology is a **user-centered UX/UI design approach**, which emphasizes early engagement, visual thinking, and collaborative requirement gathering. Our process is structured into well-defined phases that align with the County's goals, support iterative validation, and lead to actionable implementation roadmaps.

Our approach to redesigning Charlotte County's **Connect@Work** intranet is rooted in collaboration, user-centered design, and practical execution.

Phase 1: Project Kickoff and Requirement Planning

We begin with a project kick-off to align stakeholders, access the environment, and conduct surveys to identify communication, collaboration, and usability challenges. Simultaneously, we analyze the existing UX and develop a Project Plan outlining tasks, timelines, and responsibilities. This phase sets expectations and ensures that discovery and design efforts are grounded in practical constraints and goals.



Phase 2: Discovery and Requirements Gathering

This phase is centered on user research and stakeholder interviews (timeboxed to 20 hours), persona creation, and competitive analysis. We conduct up to 20 hours of structured stakeholder meetings to capture pain points, expectations, and workflows. Techniques like competitive analysis, persona creation, user journey mapping, and content audits are used to generate a Business Requirements Document (BRD) and define information architecture (IA). The finalized BRD forms the foundation for all design and implementation activities.



Phase 3: Design and Prototyping

In the design and prototyping phase, we begin by sharing up to **four (4) wireframes and UI sketches** to gather initial feedback and direction. Upon approval, we proceed to **develop visual designs** for the **homepage and department pages**, carefully aligning them with the City's branding and accessibility guidelines. To ensure usability across devices, we create a **responsive mobile version alongside**. Using tools like Figma, we develop prototypes that simulate navigation and user flows, enabling stakeholders to interact with and validate the designs before final adjustments. Each feedback round is integrated to

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enhance the information architecture, navigation structure, and UI elements, ensuring a refined and user-centric outcome.

Phase 4: Implementation Planning and Roadmap

Once the design and BRD are finalized, we translate them into a practical **implementation plan and roadmap**. This includes detailed scope, timeline, resource estimates, and a change management and training plan. The roadmap ensures that the visual and functional expectations captured during design are executed consistently during implementation.

Change Management Strategy

As part of the implementation roadmap, we will deliver a tailored Change Management Strategy that Charlotte County can use to support user adoption of the redesigned intranet.

The strategy will include:

- Communication planning for different user groups (remote, field, hybrid)
- Stakeholder engagement models to build buy-in
- End-user training recommendations by role
- A reinforcement and feedback plan post-implementation

This strategic plan will be grounded in industry frameworks (e.g., ADKAR) and designed to be executed by either internal teams or external implementers. It ensures that change readiness, adoption, and long-term success are supported beyond the design phase.

Phase 5: Final Deliverables and Project Closure

The engagement concludes with a **project closure report** and final presentation. This includes a summary of deliverables, design outcomes, and roadmap recommendations, ensuring a smooth handoff to the implementation team and full alignment with client goals.

4.2 Project Approach

Our phase-wise approach clearly defines responsibilities between AgreeYa and County to ensure a collaborative, transparent, and structured delivery process. Each phase concludes with concrete deliverables to support decision-making and align with the County's long-term intranet goals.

PHASE 1 – PROJECT KICK OFF AND REQUIREMENT

Project Kickoff and Requirement Planning		
AgreeYa's Responsibilities	County's Responsibilities	
Project Initiation and Project Kickoff meeting.	Take part in initiating the projectAttend the Kick-off meeting	
 Request access to Environment, share all pre-requisites. 	Review the Pre-Requisites & Provide all necessary access	

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Identify project plan activities, dependencies, and timeline	Designate core team members and executive stakeholders	
Share survey tools to assess current collaboration and communication gaps	Provide access to systems and documentation as needed	
Analyse existing design and UX issues	Share existing pain points, priorities, and known user challenges	
Provide project management (throughout the project duration).	Attend weekly project meetings	
Project Plan Creation.	Review the Project Plan and provide signoff	
DELIVERABLES:		

Project Plan

PHASE 2 – DISCOVERY & REQUIREMENTS GATHERING

Discovery & Requirement Gathering		
AgreeYa's Responsibilities	County's Responsibilities	
 Conduct Requirement Gathering & Stakeholder Sessions (*timeboxed* to 20 hours) Create and analyse surveys Review communication/collaboration challenges Identify business needs, functional & technical requirements Conduct Persona Creation & User Journey Mapping Facilitate discovery sessions using early UI sketches and design mock-ups 	 Actively participate in all requirement sessions Share relevant inputs and validate requirements 	
 Perform Competitive Analysis Brainstorming & Conceptualization Develop Front Landing Page & Division Layouts Define Information Architecture (Navigation) Identify Governance Requirements Perform Content Audit and Analysis 	 Provide feedback during discussions Share access to current site structure and content as needed 	
Create Business Requirements Document (BRD) and walk through for review and signoff.	Review BRD and provide timely feedback and signoff	
 DELIVERABLES: Assessment Report Business Requirements Document (BRD) 		

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PHASE 3 – DESIGN AND PROTOTYPING

Design and Prototyping		
AgreeYa's Responsibilities	County's Responsibilities	
 Develop up to 4 wireframes and present for feedback Create homepage and department page visual designs (2 concepts) Build responsive designs for mobile optimization Develop design prototype in Figma for navigation and flow testing 1 design Iteration based on input, finalize UI and navigation structure 	 Review and provide feedback on wireframes Validate design alignment with branding and expectations Provide accessibility and mobile behaviour preferences Test design prototype and share feedback Participate in design review sessions 	
DELIVERABLES:		
Wireframes (Home & Department Pages)		
Visual Design Concepts and Style Guide		

PHASE-4 IMPLEMENTATION, RECOMMENDATION & ROADMAP

AgreeYa's Responsibilities	County's Responsibilities	
 Implementation Plan and Roadmap Create Plan and Roadmap for Implementation as per the Requirements. OCM and Training Plan Review Plan and Roadmap, signoff SOW with cost and timeline for actual Implementation as per approved Roadmap 	Review and provide signoff.	
DELIVERABLES:		
Roadmap		
OCM Plan		

PHASE 5 – FINAL DELEVERABLES AND PRESENTATION

SOW with Cost and High-Level Timeline

Final Deliverables and Presentation	
AgreeYa's Responsibilities	County's Responsibilities
Closure	Attend project closeout meeting
Closure	Provide final feedback and confirm acceptance

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•	Submit Project Closure Report ensuring all artifacts are provided to the County.	•	Review and provide final signoff
	•		
•	Present final design, roadmap, and outcomes to stakeholders		
•	Conduct knowledge transfer and handoff		
	to County team		

DELIVERABLES:

- Project Closure Report
- Final Presentation and Knowledge Transfer

Time-boxed: A convention for estimating a task based on prior experience in the absence of detailed requirements or analysis. If an item is time-boxed, that means that we will make a best effort to complete the task as outlined within the given estimate however, we cannot guarantee completion of the task (i.e. additional time may be required to complete the task). An updated estimate for time-boxed tasks will be provided upon request after comprehensive requirements development and analysis are complete.

4.3 Risk and Mitigation Plan

Vendors should outline potential project risks and provide mitigation strategies.

A critical factor in project success is the proactive identification and mitigation of risks. AgreeYa uses a proven five-step risk management process (SUMMIT™): Identify, Analyze & Prioritize, Plan & Schedule, Track & Report, and Control. This framework is applied throughout the project lifecycle and reviewed weekly to ensure risks are surfaced and addressed early.

We will define a joint escalation path during project initiation to manage issues promptly and transparently.

Sample Project Risks and Mitigation Strategies:

Risk	Potential Impact	Mitigation Strategy
Limited stakeholder availability	Delayed discovery or unclear requirements	Plan sessions in advance, use async input (surveys), and secure executive sponsorship early
Unclear or evolving requirements	Scope creep or rework	Use timeboxed sessions, create a detailed BRD, and get formal signoff at each phase
Low user adoption post- launch	Project doesn't meet goals	Provide a detailed change management strategy and early user engagement via personas, journey maps, and prototype feedback
Inconsistent content or structure in current intranet	Inaccurate IA or excessive redesign effort	Conduct a content audit and prioritize re-use and cleanup recommendations

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Accessibility compliance	Legal risk or usability	Design to meet WCAG 2.1 AA from day one;
gaps	issues	validate designs against County accessibility
		requirements

4.4 Change Order Management

2. Establish a process for managing changes to requirements after finalization.

AgreeYa uses a structured Change Control process to manage any revisions to finalized requirements. This ensures that scope, timeline, and quality are preserved while maintaining transparency with all stakeholders.

If changes are requested after requirements are signed off, we follow these steps:

- 1. The Project Manager logs the change request and evaluates whether it falls within the agreed scope.
- 2. The request is reviewed by a joint change authority (e.g., project steering committee) for approval.
- 3. Upon approval, the change is incorporated into the plan, re-estimated if needed, and scheduled accordingly.
- 4. All changes are tracked through a formal log, and a post-implementation review is conducted if the change is significant.

This process will be defined and agreed upon during the project kickoff to ensure County stakeholders have clear visibility into how scope and requirement changes are managed throughout the project.

5. Project Timeline and Work Plan

5.1 Proposed Project Timeline

The total estimated timeline for the proposed services outlined in our proposal response is **Ten (10)** weeks. This plan aligns with our proposed project plan to successfully complete all project deliverables within the defined schedule.

Project Phases	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10
Project Kickoff and Requirement										
Discovery and Requirements Gathering							62	67	- 22	
Design and Prototyping										
Recommendation and Roadmap	Ü	8	8	8				24	8	30
Final Deliverables and Presentation		Î		Î	Î	Î		n		

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5.2 Project Assumptions

The following assumptions have been made in developing this proposal:

- This engagement includes only strategy, discovery, UX/UI design, and implementation planning —
 no development, migration, or backend configuration activities are in scope.
- The County will assign a **Single Point of Contact (SPOC)** to coordinate project communications, consolidate feedback, and sign off on deliverables in a timely manner.
- Stakeholder availability and timely participation will be coordinated by the County to avoid delays.
- All **reviews and approvals** (e.g., BRD, IA, design mockups) will be provided within **2–3 business days** unless otherwise discussed.
- **UX/UI scope includes wireframes, user flows, and high-fidelity mockups**; it does not include HTML, CSS, or frontend development.
- **Persona creation** will be based on stakeholder interviews and County-provided data; no independent user surveys or ethnographic studies will be conducted.
- Information Architecture will go through one round of review and approval.
- Each UI screen will include up to **one design iteration**, unless otherwise agreed.
- Visual designs will align with **existing County branding**; any new branding effort is out of scope unless explicitly requested.
- All visual design and UI assets will be delivered using Figma, unless an alternative tool is mutually agreed upon.
- Client-provided content (e.g., logos, icons, text) is considered final unless feedback is shared during the design phase.
- A style guide will be delivered in PDF or Figma format, covering typography, color palette, icons, components, and spacing—not a coded design system.
- One homepage and one department template will be designed in high fidelity, with up to **two** rounds of feedback each.

6. Cost Proposal

The total project cost of **\$45,350.00** (Dollars Forty-Five Thousand Three Fifty Only) reflects a carefully considered and well-structured pricing model aligned with the scope and complexity of work outlined in the RFP.

Note: Travel expenses, if required and pre-approved, will be reimbursed at actual cost in accordance with County policy.

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PART IV - SUBMITTAL FORMS PROPOSAL SUBMITTAL SIGNATURE FORM

1.	Project Team Name and T	itle	Yea experi		City of individua work out this proje	l will of for	City individual's office is normally located	City of individual's residence	
R	obyn ReBell, Project Ma	nager	25 Y	'ears	Folsom	l	Folsom	Loudon, TN	
Aı	nkit Saxena, Solution Arc	hitect	17 Y	ears	Folsom)	Folsom	Eldorado Hills, CA	
S	unni Brock, Business An	alyst	28 Y	'ears	Folsom		Folsom	Vancouver, WA	
Sı	rujan Chandra, Engineer		10 Y	10 Years Folsom			Folsom	Folsom, CA	
N	lihar Khare		5 ye	ars	Folsom		Folsom	Los Angeles, CA	
2.	Magnitude of Company O	perations					not publicly disclos	organization, AgreeYa does se its financial records. ard of the project,we are	
	A) Total professional service	es fees recei	ved within last 2	4 month	ns:		happy to share the	e relevant financial details esignated contact via email.	
	B) Number of similar project	s started wit	hin last 24 montl	ns:					
	C) Largest single project to			\$6 Million					
3.	Magnitude of Charlotte Co	unty Projec	cts						
	A) Number of current or sch	nty Projects		None					
	B) Payments received from executed contracts with the		over the past 24	months	(based upo	on	\$		
4.	Sub-Consultant(s) (if applicable)	Lo	ocation		% of Work to be Provided Services to be			Provided	
	NA		NA				NA		
5.	Disclosure of interest or i contract and who have an i held by your firm, or officers	nterest withi	n the areas affeo	ted by	this project	. Also,			
	Firm		Address						
	Phone #	None	Contact Name						
		Start Date Ending Date							
	Start Date Project Name/Description		Ending Date						

NAME OF FIRM AgreeYa Solutions, Inc.

(This form must be completed and returned)

12

6. Minority Business:			Yes	
The County will consider the firm's status a consultants proposed to be utilized by the fi			so the status of any su	ub-contractors or sub-
Comments or Additional Information:				
AgreeYa is certit	fied MBE by WRMSDO	;		
The undersigned attests to his/her authority to f the firm is awarded the Contract by the CProposal, Terms and Conditions, Insurance proposal is submitted with full knowledge and	County. The undersigned Requirements and any	d further ce other doc	ertifies that he/she had umentation relating to	s read the Request for this request and this
By signing this form, the proposer hereby desubmitting a proposal pursuant to this RFP.	clares that this proposal	is made wit	hout collusion with an	y other person or entity
In accordance with section 287.135, Florida Companies with Activities in Sudan List, the and does not have business operations in Cor is not participating in a boycott of Israel.	Scrutinized Companies	with Activit	ies in the Iran Petrole	um Energy Sector List,
As Addenda are considered binding as if con receipt of same. The submittal may be consi				
Addendum No2 <u>53636a</u> Dated May 21, 2025 Add	endum No. ^{253636b} Dated	May 22, 2025	Addendum No. 253636	^c Dated May 28, 2025
Addendum No. <u>253636d</u> Dated Jun 10, 2025 Add	endum No. ^{2453636e} Dated_	jun 10,2025	Addendum No. 253636	f_ Dated_ Jun 12, 2025
Type of Organization (please check one):	INDIVIDUAL CORPORATION	$\langle \! \! \! \! \! \rangle$	PARTNERSHIP JOINT VENTURE	(_) (_)
AgreeYa Solutions, Inc.		+1 (91	6) 294-9900	
Firm Name		Teleph	one	
Not Applicable		2029	65578	
Fictitious or d/b/a Name		Federa	l Employer Identification	on Number (FEIN)
605 Coolidge Drive, Suite #200,				
Home Office Address				_
Folsom, CA 95630		26 Ye	ars	
City, State, Zip	-	Numbe	er of Years in Business	3
Address: Office Servicing Charlotte County,	other than above			_
Sandeep Sharma		92533	07134	
Name/Title of your Charlotte County Rep.		Teleph	one	
Ajay Kaul, Managing Partner				
Name/Title of Individual Binding Firm (Please	e Print)			
sof fort		luna	12 2025	

(This form must be completed & returned)

Signature of Individual Binding Firm

ajay.kaul@agreeya.com Email Address Date

DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that AgreeYa Solutions, Inc. does:

- 1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
- 2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
- 3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
- 4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
- 5. Impose a sanction on or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
- 6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

Proposer's Signature

June 12, 2025

Date

(This form must be completed and returned)

HUMAN TRAFFICKING AFFIDAVIT for Nongovernmental Entities Pursuant To FS. §787.06

Charlotte County Contract #20250363

The undersigned on behalf of the entity listed below, (the "Nongovernmental Entity"), hereby attests under penalty of perjury as follows:

- 1. I am over the age of 18 and I have personal knowledge of the matters set forth except as otherwise set forth herein.
- 2. I am an officer or representative of the Nongovernmental Entity and authorized to provide this affidavit on the Company's behalf.
- 3. Nongovernmental Entity does not use coercion for labor or services as defined in Section 787.06, Florida Statutes.
- 4. This declaration is made pursuant to Section 92.525, Florida Statutes. I understand that making a false statement in this declaration may subject me to criminal penalties.

Under penalties of perjury, I declare that I have read the foregoing Human Trafficking Affidavit and that the facts stated in it are true.

Further Affiant sayeth naught.

sof but
Signature
Ajay Kaul
Printed Name
Managing Partner
Title
AgreeYa Solutions, Inc.
Nongovernmental Entity
June 12, 2025
Date

END OF PART IV

NAME OF FIRM AgreeYa Solutions, Inc.