

Exhibit B: Page 1

Data Classification and Collaboration Implementation Vendor Scorecard

Scope Summary		Points	CDW	PRESIDIO	KOPIUSTECH	GO-PLANET
Project Launch	Establishes the foundation for the engagement through project kickoff, governance, stakeholder alignment, and environmental readiness assessments. Confirms project objectives, communication and escalation paths, M365 licensing and security posture, Entra ID and backup readiness, and ensuring secure administrative access is available.	5	5	5	5	5
Data Classification Dictionary	This phase implements a Microsoft 365 data classification and protection framework, using sensitivity labels, automated classification, encryption controls, and reporting dashboards to secure sensitive organizational data.	15	10	14	15	11
Purview: Compliance	This phase delivers regulatory compliance and legal readiness across Microsoft 365 by implementing data protection, retention, monitoring, auditing, eDiscovery, and insider risk management capabilities.	15	11	14	13	12
SharePoint Online	This phase designs and deploys SBCERA's SharePoint Online collaboration and document management framework, including site architecture, document libraries, metadata, permissions, governance, and enterprise search.	10	7	9	8	8
Teams	This phase extends the existing Microsoft Teams implementation into Microsoft Purview, enabling centralized compliance, governance, data protection, retention, and eDiscovery capabilities across Teams content and communications.	10	8	7	7	9
CoPilot	This phase extends the existing Microsoft Copilot implementation into Microsoft Purview, enabling governance, data protection, compliance, retention, and auditing controls to support secure and responsible use of Copilot across SBCERA.	10	7	9	8	8
OneDrive for Business	This phase enables enterprise cloud-based personal storage and synchronization for all users. OneDrive policies, desktop folder redirection, endpoint synchronization, storage quotas, and security protections are configured organization-wide.	10	7	8	7	7
Share Drive Migration	This phase executes the migration of on-premises file shares into SharePoint Online. Activities include discovery and inventory analysis, remediation of migration blockers, migration planning, phased execution, validation testing, and user acceptance testing.	10	9	10	9	8
Training & Adoption	This phase supports organizational adoption through role-based training, user enablement resources, and post-go-live engagement activities. Training sessions, quick reference guides, self-service support resources, and adoption surveys are delivered.	5	4	4	4	3
Documentation	This phase delivers the operational and governance documentation required for long-term support and sustainability. Deliverables include architecture documentation, governance playbooks, operational runbooks, migration procedures, and updated incident response guidance.	5	3	4	4	4
Knowledge Transfer & Close	This final phase transitions ownership of the environment to SBCERA's internal teams. Knowledge transfer workshops, operational handoff sessions, documentation reviews, and formal project closeout activities are completed.	5	3	5	5	3
Total Points		100	74	89	85	78