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Header 1

List View

- General Information**
- Contact
- Default Values
- Discount
- Document Information
- Clarification Request

Procurement Folder: 1228506	SO Doc Code: CRFQ
Procurement Type: Central Master Agreement	SO Dept: 0506
Vendor ID: VS0000042411 <input type="button" value="Upload"/>	SO Doc ID: MIS23000000003
Legal Name: Dominion Digital, Inc.	Published Date: 6/9/23
Alias/DBA: WayPath	Close Date: 6/29/23
Total Bid: \$214,500.00	Close Time: 13:30
Response Date: 06/29/2023 <input type="button" value="Calendar"/>	Status: Closed
Response Time: 12:13	Solicitation Description: CLOUD BASED STATEWIDE CASE MANAGEMENT SYSTEM
Responded By User ID: awenzel-waypath <input type="button" value="Upload"/>	Total of Header Attachments: 1
First Name: Anthony	Total of All Attachments: 1
Last Name: Wenzel	
Email: awenzel@waypathconsulting	
Phone: 8046480600	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	One Time Implementation	0.00000	EA	268000.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: Includes discovery, design, implementation, and launch of FCO case management system. 'Requested Quantity' shows 0.00, but this item is required.

Extended Description:
One Time Implementation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Initial Year Term	5.00000	YR	42900.000000	214500.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: Pricing based on \$40,000 for initial year, with 3.5% increase for each subsequent year.

Extended Description:
Initial Year Term

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
3	Year One Optional Renewal	0.00000	YR	47500.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments:

Extended Description:
Year One Optional Renewal

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
4	Year Two Optional Renewal	0.00000	YR	49200.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments:

Extended Description:
Year Two Optional Renewal

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
5	Year Three Optional Renewal	0.00000	YR	50900.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments:

Extended Description:

Year Three Optional Renewal

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
6	Additional user licenses	1.00000	EA	0.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: No additional WayPath costs for additional users, but will require additional Microsoft licenses (not included).

Extended Description:

Additional user licenses



State of West Virginia
Department of Health and Human Resources
Cloud-Based Statewide
Case Management System
Solicitation #CRFQ 0506 MIS2300000003

Proposal submitted by:



WAYPATH

WayPath

(Legal name: Dominion Digital Inc. dba WayPath)

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Contact:

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434-960-0658 (mobile)

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June 29, 2023

Crystal Husted
Department of Administration, Purchasing Division
2019 Washington Street East
Charleston, WV 25305-3970

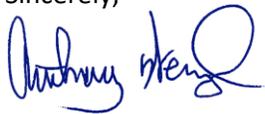
Dear Ms. Husted,

WayPath would like to thank the State of West Virginia for the opportunity to submit a response to the WVDHHR Cloud-Based Statewide Case Management System RFP. Attached please find a copy of our proposal and related forms and documents.

Communication regarding this proposal may be directed to me at the contact information below.

We look forward to the opportunity to work with you on this exciting initiative.

Sincerely,



Anthony Wenzel, Principal

WayPath

awenzel@waypathconsulting.com

434-960-0658 (mobile)

1.0 Executive Summary

WayPath will work closely with the West Virginia Department of Health and Human Resources (DHHR) office of the Foster Care Ombudsman (FCO) stakeholders to design and implement a cloud-based statewide case management system on the Microsoft Dynamics 365 platform, which is a platform already in use within DHHR. WayPath will collaborate with the FCO stakeholders to implement and deliver this solution to provide productive and intuitive experiences for FCO personnel.

WayPath has significant experience working with state government and private organizations to implement solutions based on the Microsoft Dynamics 365 platform. We work collaboratively with our clients, utilizing a formal and agile project management approach to ensure successful outcomes on our projects. Our approach includes engaging with agency stakeholders to ensure needs are fully understood, designing agency and constituent user interfaces for ease-of-use and efficiency, and architecting, developing, and testing the solutions to be reliable and easy to maintain.

WayPath has implemented Dynamics 365 solutions that are similar in size and complexity to the proposed FCO solution, including:

- **Virginia Department of Transportation (VDOT)** – Tort Claims System to manage statewide tort claims, including workflows spanning constituents and several departments, geospatial data, document management, incident resolution, notifications, and letter generation.
- **Virginia Department of Social Services (VDSS)** – Constituent management system to support engagement with VDSS service recipients, including a public-facing portal for SNAP benefits.
- **South Carolina Office of Regulatory Staff (ORS)** – Regulated Utility Management System to manage statewide regulated utility providers, including tracking accounts, incidents, fees and payments.
- **South Carolina Department of Alcohol and Other Drug Abuse Services (DAODAS)** – Grants Management System to administer grant funding and track expenditures across many counties and statewide local partnership organizations, including a public-facing portal to enable partnership organization authenticated users to submit grant performance updates.
- **North Carolina Department of Environmental Quality** – Data management platform for statewide environment asset tracking built on Dynamics 365.

Those solutions are described in more detail in the customer references section of this proposal, and we encourage you to speak to the stakeholders in those organizations for their experience in working with WayPath.

Numerous other state government agencies have selected WayPath as their Dynamics 365 CRM vendor partner of choice, based on their high level of satisfaction with our approach, our services, and the quality of our solutions. We look forward to the opportunity to engage with FCO to create a successful case management system.

2.0 Proposed Solution Overview

We propose to implement the new FCO Case Management System in collaboration with FCO on the Microsoft Dynamics 365 cloud platform. This system will include case management, contact management, configurable workflows, automated notifications, document management, templated document generation, data import/export, and data visualization via reports and dashboards with Power BI.

WayPath will provide documentation, knowledge transfer, and training to FCO for the solution that is developed.

The following sections describe additional details of the proposed solution.

2.1 User Interface, Access, and Administration

The solution will leverage the Dynamics 365 platform capabilities to provide user management and access control via security roles. Dynamics 365 Security Roles will be created for the various types of users that will access the system. Administrative users will have the ability to manage users and their security roles, as well as manage the various lists of data in the system. In addition, the Dynamics 365 data import/export capabilities can be used to update these lists.

The Dynamics 365 user interface is designed to be compatible with most modern browsers, including desktop, tablet and mobile phone browsers. Any customizations and configurations will be implemented using Microsoft Power Apps user interface best practices to ensure browser compatibility and allow for platform upgrades.

Microsoft is committed to making technology and data accessible for all customers, and considers U.S. Section 508 in the development of products and services. Conformance reports for all Microsoft products and services, including Dynamics 365, are available at the following link:
<https://docs.microsoft.com/en-us/compliance/regulatory/offering-Section-508-VPATS>

Dynamics 365 includes a highly flexible and configurable set of capabilities for automatically processing data to validate the data or perform additional actions/events. Submitted data will be automatically processed using the required business logic, such as updating calculated fields, performing additional calculations, or initiating a workflow (aka Power Automate Flow) – these workflows can include complex business logic and can trigger actions such as updating other data in the system or sending notifications.

Dynamics 365 applications support the creation of a custom navigation structure. Our approach to designing Dynamics 365 solutions is to design and implement the navigation to best support the user needs to efficiently get their work done. In addition, Dynamics 365 Views and Forms can be customized for different user groups, as needed to best support the needs of specific users. WayPath will configure the Dynamics fields and forms based on the correct data types and field lengths to ensure truncation of data does not occur either in the storage or display of data. Navigation and menus in the solution will be based on specific user security roles, and will be designed to provide an intuitive user experience.

2.2 Technical Requirements

The data/entity structure will be designed based on analysis of existing data from the current systems in conjunction with analysis of entity relationships and enhanced functionality requested. The Dynamics entities/tables and relationships will align to Dynamics 365 best practices.

Case Management

Dynamics 365 case management is the core record that tracks individual customer service issues across channels and agents over time. Dynamics 365 Customer Service provides enhanced case configuration and improved case analytics for supervisors.

A case typically represents an incident that's reported by a customer and requires a resolution. Cases are designed to track the process from the initial intake of an incident, through the remediation process, to the final resolution. Dynamics 365 Customer Service has several components that work together to provide an end-to-end case management solution, including:

- **Cases:** A case represents a single incident of service. In other words, it represents anything, in the context of a customer interaction, that requires some type of resolution or answer. Multiple cases can be associated with a single customer at any time.
- **Activities:** An activity typically represents an interaction with a customer, like a phone call. Multiple activities can be associated with a single case.
- **Entitlements:** Entitlements specify the amount of support services that a customer is entitled to. Think of them as support contracts.
- **Knowledge articles:** The knowledge base is a repository of informational articles that help customer service representatives resolve cases.
- **Queues:** A queue is a place to organize and store activities and cases that are waiting to be processed.
- **Record creation and update rules:** Record creation and update rules can be applied to different activity types to automatically create Dynamics 365 records.
- **Routing rules:** Routing rules are applied to cases to automatically route them to a specific queue or user.
- **Business process flows:** A business process flow represents a guided process that has different stages and steps that are used to resolve a specific item, like a case.

WayPath will configure the Dynamics 365 case management capabilities to align to FCO unique business needs.

Document Management

Dynamics 365 enables attaching documents to various records in the system, including contacts, accounts, cases, etc. These documents can be in nearly any file format, including Microsoft Office (Word, Excel, etc.), OpenDocument, RTF, PDF, image, audio, video, etc. Alternatively, Dynamics 365 can

be configured to store documents in SharePoint Online, which provides greater document management capabilities. In addition, records can be configured to include links to documents stored in external systems, such as Google Docs.

Dynamics 365 will natively index and enable searching of document content for documents attached to records, including documents of type Microsoft Office and PDF.

Dynamics 365 includes the ability to generate correspondence by merging data with document templates, which can be created either in Microsoft Word or HTML. This automation can be created using Power Automate to run an automated process using a selected set of records, and then automatically attach generated documents to records and/or send those documents via email.

Data Migration

Our client projects of migrating applications to Dynamics 365 typically include data migration of data from the legacy system to the new system. Our process for performing the data migration includes the following:

- Ensure that the new system requirements and design include the necessary fields to hold the needed information from the legacy system, and ensuring the data type, business rules and formatting will support all of the scenarios represented in the legacy data. In other words, reference the data schema of the legacy system in defining the requirements for the new system.
- Develop and test the data migration scripts, so that they can be run repeatedly and consistently, and can be used to verify and validate the data migration. The data migration scripts are considered a component of the solution, which includes requirements and acceptance criteria that are used to validate the data migration results, and which might include requirements for handling specific scenarios such as merging duplicate records.
- Typically, the data migration script development occurs in the later stages of the project, such that they are fully developed and tested in advance of conducting the final data migration.
- Depending on the volume of data to be migrated, the final data migration may be conducted in two stages, with “older” non-changing data being migrated early, followed by a final data migration of “newer” data occurring right before system cutover.

Data migration is typically conducted utilizing tools designed for this purpose. For Dynamics 365 data migration, we often recommend the KingswaySoft “SSIS Integration Toolkit for Microsoft Dynamics 365”, which is described in more detail at <https://www.kingswaysoft.com/products/ssis-integration-toolkit-for-microsoft-dynamics-365>. We have found this tool provides the greatest functionality and flexibility for performing data migration from external systems into Dynamics 365.

Security

The proposed solution is hosted in the Microsoft Azure / Dynamics 365 cloud environment, which is fully SOC 2 compliant. Audit reports and certifications related to the Microsoft Azure platform are available at <https://servicetrust.microsoft.com/>. The Microsoft Azure Government cloud has a FedRAMP certification rating of High. The Microsoft GovCloud environment, managed by WVOT, provides data storage and systems at facilities located within the continental United States.

The proposed solution will run on the Microsoft 365 GovCloud infrastructure, managed by WVOT. Therefore, the operation of the system is not dependent on any disaster situation with regard to WayPath facilities. As described in prior sections, the Microsoft 365 GovCloud infrastructure provides significant disaster recovery measures, upon which numerous state (and federal) government agency critical systems are dependent.

Dynamics 365 uses encryption technology to protect customer data in Dynamics 365 while at rest and while it is in transit between user devices and Microsoft datacenters. Connections established between customers and Microsoft datacenters are encrypted, and all public endpoints are secured using industry-standard TLS. TLS effectively establishes a security-enhanced browser-to-server connection to help ensure data confidentiality and integrity between desktops and datacenters. By default, Microsoft stores and manages the database encryption keys for your instances of Dynamics 365. More information about data encryption in Dynamics 365, including managing encryption keys, can be found in this article: <https://docs.microsoft.com/en-us/microsoft-365/compliance/office-365-encryption-in-microsoft-dynamics-365>

Dynamics 365, along with the entire Microsoft 365 ecosystem, provides strong audit tracking capabilities, including change tracking for all data changes, as well as audit logging of all security-related events (logins, etc.)

API Integration

WayPath has experience integrating Dynamics 365 with many other enterprise systems, using one of several methods for integration, including using Power Automate, developing Dynamics 365 plug-ins to integrate with custom RESTful API's, automating FTP handling of data files, implementing customized integration workflows, etc. For this project, WayPath will work with FCO stakeholders to determine the best integration methods to use, then map the data elements and implement the integrations as required.

Dynamics 365 provides advanced data import/export capabilities, including .csv files, which can be utilized to enable data to be shared amongst systems used in conjunction with system data processing. WayPath has implemented many external data integrations with Dynamics, and will explore with FCO how to best utilize these capabilities to reduce redundant data entry and/or increase reporting capabilities.

Failover and Disaster Recovery

The solution will provide for failover and disaster recovery through a combination of a) Microsoft FedRAMP hosting facilities, b) source code and configuration management via deployment scripts, and c) regular data backups. Such an approach does remain dependent on the availability of the Microsoft Dynamics 365 / Power Apps platform.

2.3 User Roles and Permissions

Dynamics 365 includes native user management with security roles to enable the appropriate access control. Users of the system can include agency employees and employees of other organizations.

As described earlier, the entity/table structure will be designed to meet the required functionality, and the system will provide add / update / delete functionality to those entities/tables for users based on their security role. The Dynamics 365 security role capability allows for fine-grained control of add / update / delete access for each entity/table.

As described in the RFP, the user roles and permissions will be setup as required for FCO Staff to ensure each user has the right level of access permissions to perform their tasks.

2.4 Desired Features and Functions

Data Structures and Relationships

Dynamics 365 includes a native yet highly configurable table/entity structure for common customer engagement and support management, which can be configured with the unique data elements, views, forms, and workflows required. In addition, Dynamics 365 enables the creation of custom tables/entities for managing business-specific data, such as cases, contacts, activities, documents, correspondence, progress metrics, and other data needed for the functionality of the system – these custom entities can also have unique data elements, views, forms, and workflows.

Data Visualization – Reporting and Dashboards

Dynamics 365 provides a robust reporting and dashboard capability, which can be used to create Reports, Views, Charts, and Dashboards. In addition, for more advanced reporting needs, Microsoft Power BI natively connects with Dynamics 365 to provide additional advanced reporting and dashboard capabilities. While no coding is required for users to create reports, the creation of reports does require an understanding of the Dynamics 365 data structure and relationships.

Any number of standard and ad hoc/custom reports can be created in Dynamics 365. These reports can be customized and restricted to specific user roles. Reports can be created and maintained by individual users, and then made available to a specified set of users. Reports can be created to show aggregated, deidentified data. Reports can be exported to various formats, including Excel, CSV and PDF.

WayPath will implement reports and queries as required by users for this system. In addition, users and administrators will have the ability to create additional reports, as needed.

2.5 Training and Documentation

WayPath will collaborate with FCO to determine training and documentation needs, and provide a training plan. Documentation may include User Guides and Online Help as needed. WayPath will provide training and knowledge sharing for FCO business and technical personnel, including training materials as needed. Our focus on designing highly intuitive and easy-to-use solutions often minimizes the need for significant training for end users.

2.6 Data Management Framework

Access Control

The system will utilize the standard Dynamics 365 user authentication mechanism, which utilizes the existing WVOT-managed Azure Active Directory.

Metadata Management

WayPath has implemented Dynamics 365 systems that allow organization to classify certain types of sensitive data to enable different access permissions, which then leverages the Dynamics 365 fine-grained permissions model. This system will enable FCO to designate certain data elements as sensitive, specifically PII data, which will then enable access control and filtering to protect that data as needed.

Data Provisioning

As described earlier in this proposal, the Dynamics 365 platform includes extensive capabilities for data import/export and data sharing with other users and platforms. In addition, the tight integration with Power BI and Excel provides additional capabilities for data sharing and analysis. We will work with FCO stakeholders to understand specific requirements and enable efficient and effective methods for providing those capabilities.

Cloud Compatibility

WayPath will design and implement the system using Microsoft Dynamics 365 best practices to ensure compatibility with the Microsoft Azure cloud platform and the M365 product suite.

Policy Enforcement and Auditing

Dynamics 365 enables business rules for enforcing data validation, including linking with other data in the system. For example, this can include rules to ensure data meets a specified format or to “cascade” data changes to child data records.

The Dynamics 365 platform has a robust audit history capability that logs all changes (add/update/delete) of data in the system, including the date and time of the change, the user that made the change, and the old and new values of that data. This capability will be configured in the platform to track all data changes by users.

Masking and Anonymization

The system will be designed to provide masking for PII data, such as SSNs, addresses, and names, for certain user roles. Other user roles, specifically LP users, will receive a popup alert message about PII data masking, with the option to bypass the masking to view and edit that PII information.

2.7 Privacy and Security

WayPath has implemented a robust Information Security Program, which is led by a member of the senior leadership team with support from an external Chief Information Security Officer (CISO). This program includes elements associated with topics including data classification, access control, and acceptable use. This program includes education that spans end users, system administrator, and software/technology developers.

All WayPath personnel are subject to employment agreements which require confidentiality and compliance with all laws in our industry. In addition, WayPath provides regular training on subjects such as information security and software development best practices. Many of our clients require our compliance with strict security and data privacy requirements, and we have successfully implemented solutions that are compliant with HIPAA and PCI.

Our consulting project teams are trained on best practices for design and implementation of secure systems. We have experience designing and implementing highly secure systems that meet standards such as HIPAA and PCI.

3.0 Staff Capabilities

3.1 Overview

The WayPath team has the following capabilities:

- Solutions
 - Customer Relationship Management (CRM) – implementation of CRM solutions based on the Microsoft Dynamics 365 / Power Apps platform
 - Web Content Management (WCMS) – implementation of web content management solutions based on the Sitecore, Adobe, Contentstack, Brightspot, and other platforms
 - Customer Communication Management (CCM) – implementation of solutions for high-volume customer statement and letter generation based on the OpenText Exstream platform
- Team Roles:
 - Dynamics 365 CRM Architect & Developer
 - System / Software Architect
 - Solution / Software Developer
 - User Experience (UX) Design
 - Project & Program Manager
 - Business Analyst / Business Systems Analyst
 - Quality Assurance (QA) Analyst
 - Cloud / DevOps Architect & Engineer

Our cross-functional teams enable us to design and implement solutions that delight end-users, including both agency users and constituent users.

3.2 Project Team Members

We propose a full-lifecycle project team that includes a Project Manager, Business Analyst, and Technical Resources, including Architect, Designers, Developers and Testers. This team will be responsible for the full project from kickoff through production launch and O&M support thereafter. The following sections list representative bios of the key people who will be assigned to this project team.

Dynamics 365 Architect

A seasoned developer with over 15 years of specialized experience in Dynamics CRM. Experience with multiple programming languages, integrated development environments, and implementation methodologies.

- Supported an organization leading in cancer research in Alexandria Virginia. Streamlined their eCommerce and online fundraising month end reconciliation processes from a week each month to minutes. Implemented a nightly automatic reconciliation against

the payments gateway, leading to every transaction being validated between their payments gateway and Dynamics CRM system each day.

- Wrote the financial aspects from payment processor integration through the posting of general ledger distributions, for a product with more than 40 installs, cumulatively processing almost \$100 million in sales annually.
- Managed a development calendar for a team of seven while simultaneously serving an operations team of thirteen members and supporting over 10 active projects.

Dynamics 365 Business Analyst

Hands-on and enthusiastic Business Analyst with over ten years of experience and demonstrated success of managing multiple client projects simultaneously, including several Dynamics 365 projects with state agencies. Solid history of leveraging project management tools to balance team performance, customer service targets, and business objectives. Dedicated to working closely with team members and clients to maximize productivity and optimize procedures. Has worked with multiple Fortune 100, 200, and 500 companies.

- Extensive work for a state government agency Dynamics 365 project; conducted requirements sessions and current state analysis for project user stories, wrote and executed user acceptance test cases while providing additional testing support through life of the project, and facilitated sprint planning and demo sessions and produced user documentation.
- Created and maintained relational databases while governing data quality. Designed and developed custom SSRS, Power BI, and other cloud-based reports to ensure company's federal compliance was met. Mitigated risks by ensuring internal and partner security policies were up to date and substantiated customer compliance through third party audits (OSHA, HIPPA, CMS).
- Hosted software product implementation training to global participants via web conference.

Project Manager

A results-driven leader with 10 years of experience developing high-performing teams, ensuring customer success, developing key business partnerships and leading B2B and B2C products, programs, and projects in the technology, resource staffing and government sectors.

This person has been the project manager on many large, state government Dynamics 365 implementation projects.

4.0 Service Capabilities

4.1 Company Overview

WayPath is a US-based company with headquarters in Richmond, Virginia. Founded in 1997 as Dominion Digital with a primary focus on providing positive human experiences for our employees, that foundational commitment naturally expanded to include our communities, our clients, and their customers. These commitments, combined with a pursuit of excellence and a hunger for learning, have earned us consistently high marks and recognition from those we serve for over 20 years.

Technology is changing the world at a more rapid pace than ever. We believe that in order for businesses to survive, they must stay at the cutting edge of technology. Since the firm's founding over 20 years ago, we have been creating technology, and new ways of working, that improves the lives of the people our technology touches. This is true for our clients, for their customers, and for our team. We believe a single interaction, with our technology or our consultants, can start a wave of positive impact.

In 2014, Dominion Digital changed its market-facing name and began doing business as SingleStone. In 2019, in order to more clearly define and differentiate our services, we separated into a new division that is doing business as WayPath. WayPath is focused on improving digital engagement through strategy and implementation of enterprise customer experience platforms, including Microsoft Dynamics 365.

Organization

Dominion Digital Inc. is currently “doing business as” (dba) the following two closely related divisions:

- **WayPath** – improve digital engagement through strategy and implementation of enterprise customer experience platforms.
- **SingleStone** – empower businesses to think and work like a modern tech company, with expertise in software, cloud & DevOps, and data & advanced analytics.

Capabilities

WayPath has the following capabilities:

- Solutions
 - Customer Relationship Management (CRM) – implementation of CRM solutions based on the Microsoft Dynamics 365 / Power Apps platform
 - Web Content Management (WCMS) – implementation of web content management solutions based on the Sitecore and Adobe platforms
 - Customer Communication Management (CCM) – implementation of solutions for high-volume customer statement and letter generation based on the OpenText Exstream platform

- Team Roles:
 - Dynamics 365 CRM Architect & Developer
 - System / Software Architect
 - Solution / Software Developer
 - User Experience (UX) Design
 - Project & Program Manager
 - Business Analyst / Business Systems Analyst
 - Quality Assurance (QA) Analyst
 - Cloud / DevOps Architect & Engineer

Our cross-functional teams enable us to design and implement solutions that delight end-users, including both agency users and constituent users.

4.2 References

WayPath has deep experience with implementing Dynamics 365 solutions, with a focus on creating intuitive user experiences that promote user adoption. Our experience spans the range of services requested in this RFP, including Dynamics 365 solution development, data migration, system integration, security, code management and deployment process. Our full-lifecycle project approach includes requirements management, stakeholder engagement, and regular and transparent project status reporting to ensure a successful outcome and a positive client experience.

Experience with State Government Agencies

WayPath (and formerly under our SingleStone name) has a very strong track record with the state government agencies that we serve. Below we have described several example projects with state government agencies that have been recently successfully completed. Our experience has included work with state government agencies including:

- Virginia Department of Social Services
- Virginia Department of Transportation
- Virginia Department of Corrections
- Virginia Division of Legislative Automation Systems
- Virginia Department of General Services
- Virginia Department of Elections
- Virginia Department of Environmental Quality
- Virginia Department of Agriculture and Consumer Affairs
- South Carolina Office of Regulatory Staff
- South Carolina Department of Alcohol and Other Drug Abuse Services

To help ensure success of our engagements with state government agencies, we employ the Agile Scrum method of delivery augmented with industry project management best practices to ensure the overall timely execution and quality delivery of the developed solution. This approach has allowed us to successfully complete fixed-price / fixed-scope engagements with our state government clients, while still providing for agile flexibility in meeting and exceeding agency stakeholder needs.

Reference #1

Regulated Utility Management System

WayPath designed and implemented a solution for managing regulated utility providers in Dynamics 365. This solution has been designed to provide intuitive and productive experiences, and includes workflow and automation features to reduce or eliminate repetitive tasks, freeing users up to achieve greater capacity and productivity. The solution includes integrations with several backend systems to enable financial records tracking.

Reference #2

Statewide Tort Claims Management System

WayPath implemented this Tort Claims Management system on Dynamics 365, which replaced a statewide manual and paper-based process with an automated online workflow solution. This solution enables claims workers in offices around the state to collaborate and handle tort claims, including claims document management and workflows. The agency was able to leverage the investment in the Dynamics CRM platform to implement this application efficiently. This Tort Claims system was awarded the Governor's Technology Award for IT Efficiency.

WayPath has continued to be engaged by the agency since 2017 to provide ongoing operations and maintenance support for the solution.

Reference #3

Correspondence Tracking System

WayPath implemented a Dept of Corrections Correspondence Tracking System that is used to track all correspondence between the general public and offenders. A prior implementation of the system was in Dynamics CRM 2013, which was migrated to Dynamics 365 in the government cloud. As part of this migration, the solution was redesigned to better meet the needs of the business and to work better with the new technology. This solution includes a complex data security / privacy model, which was successfully implemented utilizing the Dynamics 365 flexible security capabilities. In addition, all data from the existing system was migrated to the new platform. Following the successful migration to Dynamics 365 and enhancements of the system, we have continued to be engaged to provide ongoing operations and maintenance support for the solution.

Reference #4

Statewide Grants Management System

WayPath was selected via an RFP process to implement this statewide Grants Management System on Dynamics 365 and GrantVantage, a leading grants management system built on Dynamics 365. In addition to implementing and configuring the GrantVantage product, WayPath will extend the capabilities of the solution to leverage Power Apps Portals to allow county and local partnership organizations to submit data to report progress on grant goals and objectives.

5.0 Project Management Plan

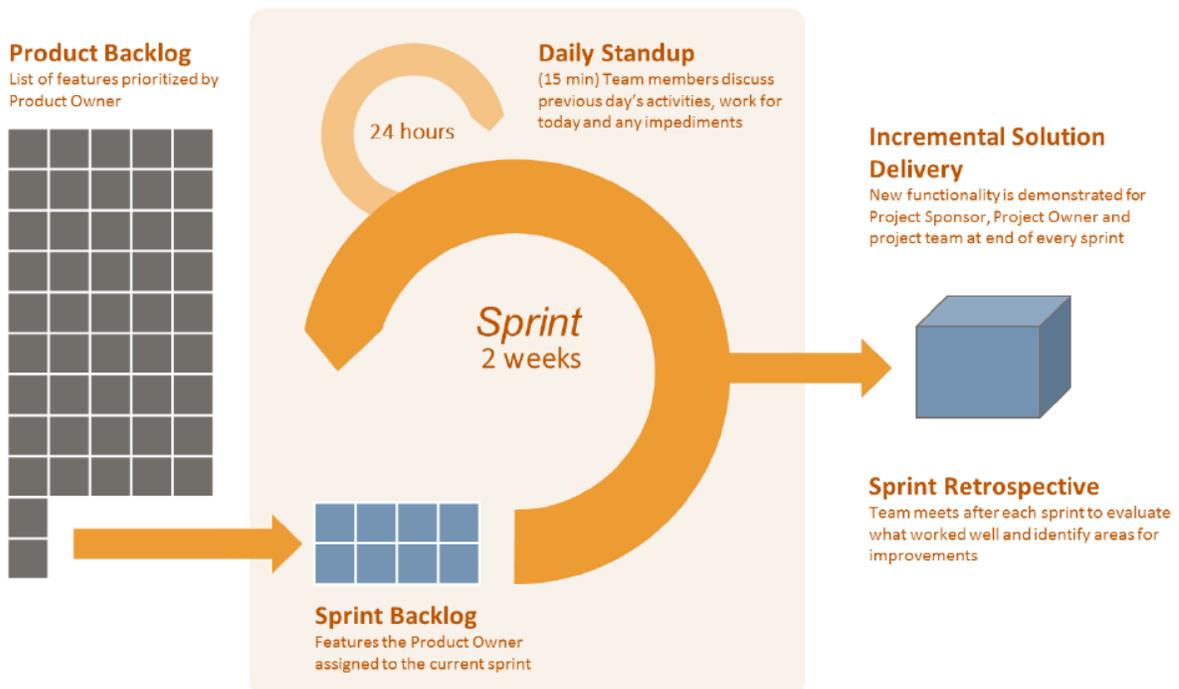
5.1 Software Development Lifecycle (SDLC)

WayPath employs the Agile Scrum method of delivery augmented with industry project management best practices to ensure the overall timely execution and quality delivery of the developed solution. For a more detailed explanation of Scrum, please visit: <https://www.scrumalliance.org/why-scrum>.

WayPath utilizes the following project governance activities to ensure alignment through the project duration:

1. Drafting and distributing weekly and monthly dashboards keeping stakeholders abreast of accomplishments, upcoming activities milestones, as well as risks and issues.
2. Facilitating weekly status reviews with designated project team members.
3. Identifying emergent risks and issues.
4. As issues arise, striving to resolve them within the core team. Risks and issues requiring escalation will begin with the relevant members of the Project Leadership Team.
5. Escalating unresolved issues to the Executive Steering Committee in a timely manner while providing the appropriate level of information needed to make an informed decision.

WayPath uses cross-functional teams for optimal results on iterative delivery projects. Employing this team dynamic produces a greater number of perspectives, increasing creativity through interaction and enable rapid decision making and deployment of functionality.



5.2 Project Management Plan

Project Management

As described in the previous section, WayPath employs the Agile Scrum method of delivery augmented with industry project management best practices. This blend of managing a fixed-price, fixed-scope project, while utilizing Agile practices for week-to-week implementation activities has been highly successful on many other state agency projects.

We create the deliverables that are required by our clients, and our typical engagement includes the same deliverables as listed in the RFP, including:

- Project Management
 - Kick-Off Meeting
 - Project Schedule / Roadmap
 - Project Communication Plan and Communications Matrix
 - Project Risk and Issues Tracking (as part of regular status reports)
 - Solution and Sprint Backlogs
 - Project Status Meetings
 - Regular Status Reports (for Project and O&M)
 - Transition Plan
- Solution Requirements and Design
 - Technical Architecture and System Design Document/Architecture Diagrams
 - Solution Requirements, in the form of User Stories
 - Data Model / Data Dictionary
 - General Backup and Recovery Plan
 - Disaster Recovery Plan
- Testing
 - Testing Plan
 - Test Cases/Scripts
 - Unit Test Results
 - Technical Test Results Reports (System, Integration, Regression, Security, Accessibility, Performance)
 - Demonstration of Tested System
 - UAT Test Cases and Test Scripts
 - UAT Training, with materials as needed
 - UAT Results Report
- Data Migration and Deployment
 - Data Conversion and Migration Plan
 - Automated Data Conversion and Migration Software/Scripts
 - Data Conversion Test Cases/Scripts
 - Data Conversion and Migration Test Results Report

- Deployment Plan, including Readiness Checklist
- Validation Test Results Report
- Deployment UAT Results Report
- Training
 - Training Plan
 - User Guides, Quick Reference Guides, and Online Help Documentation
 - Training Delivery, including Training Materials as needed

5.3 Project Schedule

We propose a high-level project schedule as shown below, which includes a Discovery period followed by eleven (11) 2-week Design/Build/Release sprints followed by UAT, Training and Launch, all with a total duration of 30 weeks (~7 months).

Focus Area	Duration (weeks)
Project Kickoff, Planning & High-Level Solution Design	4
Implementation Sprints (11 X 2 weeks), to include: <ul style="list-style-type: none"> ● Solution Development & Testing ● Data Conversion & Migration 	22
Pre-Launch Activities <ul style="list-style-type: none"> ● User Acceptance Testing & Remediation ● Training & Documentation 	3
Launch & Transition	1
Total Duration (weeks)	30

This project plan and schedule is based on the following assumptions:

- All security requirements must fit within the Dynamics 365 and Azure platform capabilities.
- Historical data / versioning of data will be handled via the Dynamics 365 audit history platform capability.

5.4 Agency Resources

As described in this proposal, we utilize a collaborative approach to working with our clients to ensure a successful outcome. This typically requires the following resources from our client:

- Project Manager to serve as WayPath's primary point of contact to help coordinate meetings and resource access, typically allocated 60-100% to the project.
- Product Owner with decision making authority who will serve as the single point of contact for deliverable acceptance.
- Subject Matter Experts to provide information and documentation on current processes and systems, typically allocated as needed to support the project team.

6.0 Pricing & Assumptions

We propose a fixed-price for the full implementation of this solution.

Item	Fees
One-time implementation	\$268,000
Initial Support Year 1	\$40,000
Initial Support Year 2	\$41,400
Initial Support Year 3	\$42,849
Initial Support Year 4	\$44,349
Initial Support Year 5	\$45,901
Optional Support Year 1	\$47,507
Optional Support Year 2	\$49,170
Optional Support Year 3	\$50,891
TOTAL	\$630,067

Assumptions

Our pricing is based on the assumptions listed below. If any of these assumptions are incorrect, we would be glad to discuss with FCO how best to revise our proposal to accommodate.

1. Pricing does not include any required Microsoft or other product licenses, including Microsoft Dynamics, Power Automate, or Power BI, which will be procured by WV DHHR via existing state contract.
2. Assume that desktop OS will convert user speech to text that can be entered into text fields.
3. Assume no more than 5 total reports.
4. Assume Google Docs integration is limited to ability to store links to Google documents within the system (generation or editing of documents will occur outside of the system.) Assume the "thumbnail/first page preview" is limited to the thumbnail image provided by the Microsoft or Google API.
5. Assume that "maps" refer to stored images or links to mapping tools. System will not have internal mapping capability. Address verification will require a separate subscription to an address verification service. Assume that verification service chosen includes an out of the box connector to Microsoft Dynamics.
6. Google Docs that need to be searchable will be converted to MS Office format and uploaded into the system. Google Docs linked in the system will not be searchable.
7. Assume less than 20 unique templates for workflow automation document generation.
8. Templates will be recreated in Google Docs. Fill-in forms letters will receive variable data directly from system.
9. Assume web-portal is a single page with a single case entry form.
10. Assume Outlook is the email platform for sending and receiving emails by the system.

7.0 Required Forms

7.1 Certification and Signature

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

(Printed Name and Title) Anthony Wenzel, Principal

(Address) 2000 W Marshall St Fl 2, Richmond, VA 23220

(Phone Number) / (Fax Number) 804-648-0600

(Email address) awenzel@waypathconsulting.com

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that: I have reviewed this Solicitation/Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; that I am authorized by the Vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on Vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

WayPath (legal name Dominion Digital, Inc. dba WayPath)

(Company) _____

(Signature of Authorized Representative) _____

Anthony Wenzel, Principal 6/29/2023

(Printed Name and Title of Authorized Representative) (Date)

804-648-0600

(Phone Number) (Fax Number)

awenzel@waypathconsulting.com

(Email Address) _____

7.2 Addendum Acknowledgement Form

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: MIS2300000003

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

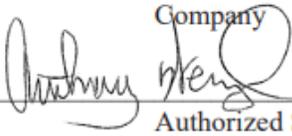
Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor’s representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

WayPath


 Company
 Authorized Signature

June 29, 2023
 Date

7.3 Virginia Small Business Certification

Company legal name: **Dominion Digital, Inc.**

Doing business as (dba):

- **SingleStone**
- **WayPath**

Certified as a Small Business under the Small, Women-owned, and Minority-owned Business (SWaM) certification program by the Virginia Department of Small Business and Supplier Diversity (SBSD).

SWaM Certification shown below, valid thru 4/18/2027, available online at <https://directory.sbsd.virginia.gov/>

<p>DOMINION DIGITAL INC</p> <p>DBA: SingleStone Anthony Wenzel 2000 W Marshall St Richmond, VA 23220 Phone: (804) 648-0600 bizoffice@DOMINIONDIGITAL.COM www.singlestoneconsulting.com</p>	<p>Certification Number: 6712</p> <p>SWaM Certification Type: Small Start Date: 04-18-2022 SWaM Expiration Date: 04-18-2027</p> <p>NIGP Code and Description:</p> <table><tr><td>91800</td><td>CONSULTING SERVICES</td></tr><tr><td>91829</td><td>Computer Software Consulting</td></tr><tr><td>91875</td><td>Management Consulting</td></tr></table> <p>Pcard: N Business Category: Consulting Services</p>	91800	CONSULTING SERVICES	91829	Computer Software Consulting	91875	Management Consulting
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91875	Management Consulting						