**State of West Virginia**
# Purchase Order

**Order Date:** 01-09-2025

CORRECT ORDER NUMBER MUST APPEAR ON ALL PACKAGES, INVOICES, AND SHIPPING PAPERS. QUESTIONS CONCERNING THIS ORDER SHOULD BE DIRECTED TO THE DEPARTMENT CONTACT.

| | |
|---|---|
| **Order Number:** | CPO 0705 0705 LOT2500000002 1 |
| **Document Name:** | Research & Advisory Subscription Service |
| **Document Description:** | Research & Advisory Subscription Service |
| **Procurement Type:** | Central Sole Source |
| **Buyer Name:** | Brandon L Barr |
| **Telephone:** | 304-558-2652 |
| **Email:** | brandon.l.barr@wv.gov |
| **Shipping Method:** | Best Way |
| **Free on Board:** | |

**Procurement Folder:** 1550853

**Reason for Modification:**
*AWARD FOR CSSD LOT25*02

**Effective Start Date:**

**Effective End Date:**

## VENDOR

**Vendor Customer Code:** VC0000073737
INFO TECH RESEARCH GROUP INC
3960 HOWARD HUGHES PKWY STE 500

LAS VEGAS      NV      89169
US

**Vendor Contact Phone:** (888) 670-8889   **Extension:**

**Discount Details:**

| | **Discount Allowed** | **Discount Percentage** | **Discount Days** |
|---|---|---|---|
| #1 | No | 0.0000 | 0 |
| #2 | Not Entered | | |
| #3 | Not Entered | | |
| #4 | Not Entered | | |

## DEPARTMENT CONTACT

| | |
|---|---|
| **Requestor Name:** | Thomas P Hymes |
| **Requestor Phone:** | 304-558-2350 |
| **Requestor Email:** | thymes@wvlottery.com |

# 2025
**FILE LOCATION** _____

## INVOICE TO

ACCOUNTS PAYABLE
LOTTERY

PO BOX 2067

CHARLESTON      WV 25327-2067

US

## SHIP TO

PURCHASING
LOTTERY

900 PENNSYLVANIA AVE

CHARLESTON      WV 25302

US

CR 1-13-25

| **Total Order Amount:** | $178,793.82 |
|---|---|

Purchasing Division's File Copy

**PURCHASING DIVISION AUTHORIZATION**
1/13/2025
DATE:
ELECTRONIC SIGNATURE ON FILE 1/13/2025

**ATTORNEY GENERAL APPROVAL AS TO FORM**
DATE:
ELECTRONIC SIGNATURE ON FILE
1/21/2025

**ENCUMBRANCE CERTIFICATION**
DATE: 3-7-25
ELECTRONIC SIGNATURE ON FILE

**Extended Description:**

The Vendor: INFO TECH RESEARCH GROUP INC agrees to enter into this contract to provide Research & Advisory Subscription Service to the WV Lottery per the vendor's Statement of Work dated 10/29/2024, terms and conditions, all incorporated herein by reference and made a part of hereof.

| Line | Commodity Code | Quantity | Unit | Unit Price | Total Price |
|------|----------------|----------|------|------------|-------------|
| 1 | 81112206 | 0.00000 | | 0.000000 | 59597.94 |
| **Service From** | **Service To** | **Manufacturer** | | **Model No** | |
| 2024-12-15 | 2025-12-14 | | | | |

**Commodity Line Description:** Dedicated Executive Counselor Software maintenance & support

**Extended Description:**
AS PER ATTACHED QUOTATION

Dedicated Executive Counselor, 1 Onsite/Virtual Counselor visit, Unlimited Price Benchmarking, IT Vendor Negotiation Assistance for 2 contracts

| Line | Commodity Code | Quantity | Unit | Unit Price | Total Price |
|------|----------------|----------|------|------------|-------------|
| 2 | 81112206 | 0.00000 | | 0.000000 | 59597.94 |
| **Service From** | **Service To** | **Manufacturer** | | **Model No** | |
| 2025-12-15 | 2026-12-14 | | | | |

**Commodity Line Description:** Dedicated Executive Counselor Software maintenance Year 2

**Extended Description:**
AS PER ATTACHED QUOTATION

Dedicated Executive Counselor, 1 Onsite/Virtual Counselor visit, Unlimited Price Benchmarking, IT Vendor Negotiation Assistance for 2 contracts

| Line | Commodity Code | Quantity | Unit | Unit Price | Total Price |
|------|----------------|----------|------|------------|-------------|
| 3 | 81112206 | 0.00000 | | 0.000000 | 59597.94 |
| **Service From** | **Service To** | **Manufacturer** | | **Model No** | |
| 2026-12-15 | 2027-12-14 | | | | |

**Commodity Line Description:** Dedicated Executive Counselor Software maintenance Year 3

**Extended Description:**
AS PER ATTACHED QUOTATION

Dedicated Executive Counselor, 1 Onsite/Virtual Counselor visit, Unlimited Price Benchmarking, IT Vendor Negotiation Assistance for 2 contracts

# STATE OF WEST VIRGINIA
## ORDER OF PRECEDENT AND ADDITIONAL TERMS AGREEMENT

**THIS ORDER OF PRECEDENT AND ADDITIONAL TERMS AGREEMENT**, by and between

**Info-Tech Research Group Inc.**
("Vendor")

and **West Virgina Lottery** the ("State")

is intended to provide an order of priority for the various documents that comprise the contract resulting from the solicitation identified as

Research & Advisory Subscription Services (the "Contract") and to add certain required contract terms to the contract.

The Parties Agree as follows:

1. **Order of Precedence:** The Contract is comprised of the documents listed in this section. The terms and conditions contained in the various documents shall be interpreted according to the priority given to the Contract document in this section.

   **Contract Documents:**

   a. This Addendum - First in priority.
   b. Additional State Documents (if any) attached hereto as Exhibit A – Second Priority
   c. Vendor Quote, and Scope of Work (if any), attached hereto as Exhibit B – Third Priority
   d. Additional Vendor Documents Attached hereto as Exhibit C – Fourth Priority

2. **Additional Contract Terms.** The following additional terms are added to the Contract.

   a. **VOID CONTRACT CLAUSES** – This Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law.

   b. **LATE PAYMENT PENALTIES** – Any language in any document imposing any interest or charges due to late payment is deleted.

   c. **BACKGROUND CHECK:** In accordance with W. Va. Code § 15-2D-3, the State reserves the right to prohibit a service provider's employees from accessing sensitive or critical information or to be present at the Capitol complex based upon results addressed from a criminal background check. Service providers should contact the West Virginia Division of Protective

Services by phone at (304) 558-9911 for more information.

d. **ANTITRUST:** In submitting a bid to, signing a contract with, or accepting a Award Document from any agency of the State of West Virginia, the Vendor agrees to convey, sell, assign, or transfer to the State of West Virginia all rights,

title, and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the State of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to Vendor.

e. **PRIVACY, SECURITY, AND CONFIDENTIALITY:** The Vendor agrees that it will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the Agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the Agency's policies, procedures, and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, as they currently appear set forth in http://www.state.wv.us/admin/purchase/privacy/default.html

f. **ISRAEL BOYCOTT:** Vendor understands and agrees that pursuant to W. Va. Code § 5A-3-63, it is prohibited from engaging in a boycott of Israel during the term of this contract.
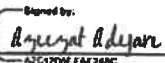
g. **NO DEBT CERTIFICATION:** In accordance with West Virginia Code §§ 5A-3-10a and 5-22-1(i), the State is prohibited from awarding a contract to any bidder that owes a debt to the State or a political subdivision of the State. By submitting a bid, or entering into a contract with the State. Vendor is affirming that (1) for construction contracts, the Vendor is not in default on any monetary obligation owed to the state or a political subdivision of the state, and (2) for all other contracts, neither the Vendor nor any related party owe a debt as defined above, and neither the Vendor nor any related party are in employer default as defined in the statute cited above unless the debt or employer default is permitted under the statute.

The Parties are signing this Agreement on the date stated below the signature.

VENDOR: Info-Tech Research Group Inc.   STATE AGENCY: West Virgina Lottery

Printed Name: _Azeezat Adejare_     Printed Name: _Crystal Crouch_

Signature: _Azeezat Adejare_       Signature: _Crystal Crouch_

Title: _Legal Counsel_          Title: _Budget & Acconting Manager_

Date: _08 November 2024_        Date: _12/19/24_

# West Virginia Lottery

Service Proposal

# INFO~TECH
## RESEARCH GROUP

Natasha Vanos
Associate Member Services Director
nvanos@infotech.com
1-888-670-8889 ext.3144
October 29, 2024

Hi Jonathan,

On behalf of our entire team at Info-Tech Research Group, I am pleased to present this proposal for IT Research and Advisory services to you and your IT department at West Virginia Lottery.

Info-Tech's IT Research and Advisory membership provides you with access to our powerful diagnostic tools and key research to help you systematically improve your IT department's performance.

To help you maximize the impact of your membership, we also provide an unmatched level of member service.

I welcome the opportunity to work with you and your IT executives at West Virginia Lottery. Should you have questions at any time, please contact me directly at your convenience.

Sincerely,


Natasha Vanos
Associate Member Services Director
nvanos@infotech.com
1-888-670-8889 ext.3144

Info-Tech Research Group

3960 Howard Hughes Parkway
Suite 500, Las Vegas, NV, USA
89169

infotech.com


Proposal prepared for:

Jonathan O'Quinn

West Virginia Lottery
900 Pennsylvania Ave, Charleston, West Virginia, United States 25302-3548

# SERVICE AGREEMENT WITH INFO-TECH RESEARCH GROUP

Service Start Date: December 15, 2024 || Contract Length: 3-year
Contact: Jonathan O'Quinn

## West Virginia Lottery

| Product | Bundle Options | Description | Quantity | Subtotal | Discount | Total |
|---|---|---|---|---|---|---|
| SE Core Membership | See below for your selected bundle products | | 1.00 | | | |
| | Team Membership | Access to core research content - project blueprints, Info-Tech Academy, online Leadership training, software selection content, tools and templates library | 1.00 | $4,243.16 | $792.62 | $3,450.54 |
| | Industry /SE | Deep Insights Tailored To Your Industry | 1.00 | $6,710.12 | $6,710.12 | $0.00 |
| | Executive Counselor Membership | Dedicated Executive Counselor, 2 Onsite/Virtual Counselor visits, Concierge Services, Industry Research, Unlimited Price Benchmarking, IT Vendor Negotiation Assistance for 3 contracts | 1.00 | $65,621.03 | $9,473.63 | $56,147.40 |
| | Online IT Spend & Staffing Benchmarking Membership | IT Spend & Staffing Benchmarking Membership (Online) | 1.00 | | | |
| | Industry /SE (Executive/ Technical Counselor Option) | Deep Insights Tailored To Your Industry | 1.00 | | | |

|  |  |
|---|---|
| **Total Discounts:** | $16,976.37 |
| **Total:** | $59,597.94 |

All items stated on this document are in USD and is subject to applicable taxes.

Federal Supply Service Authorized Federal Supply Schedule Price List (GSA) - GS-35F-298GA
Payment Terms: Prompt payment terms 0%, Net 30 days

Unless otherwise stated, consulting and workshop engagements do not include travel and expenses, which will be charged in addition to the fees listed. Workshops purchased as part of membership expire without refund or credit at the end of the membership period covered by the purchase. Workshops purchased outside membership expire without refund or credit 1-year after purchase. Please work with your member services representative to select and schedule workshops prior to expiration.

Subject to applicable taxes. If your company is tax exempt, please provide a valid tax exemption certificate with the signed proposal. This Service Agreement is subject to the terms of the Federal Supply Schedule for Info-Tech, available online, including s 552.238-114 (Use of Federal Supply Schedule Contracts by Non-Federal Entities) of the GS-35F-298GA Contract Clause

Unless agreed to in writing, any customer terms, including purchase order terms and conditions, are of no force or effect. By signing this Service Agreement, you agree to pay the fees set out herein annually for the term indicated.

This proposal has a definite expiry date of November 27, 2024.

**Please return this signed Service Agreement to Info-Tech by DocuSign, email nvanos@infotech.com or fax (1-519-432-2506). Please include PO if required. Thank you for your business!**

The signature below affirms your commitment to pay for the services ordered in accordance with the terms of this Service Agreement and the GSA Approved Terms of Use.

**If you are tax exempt, please provide tax exemption certificate.**

| Term Number | Invoice Date | Invoice Amount | Term Start Date | Term End Date | Notes |
|---|---|---|---|---|---|
| 1 | November 27, 2024 | $59,597.94 | December 15, 2024 | December 15, 2025 | Year 1: Total Contract Value = $76,574.31 (SE Core Membership + EC) - 13,172.25 (Core Membership Bundle Discount) - $3,804.11 (6% multi-year discount) = $59,597.94 Total to invoice |
| 2 | October 15, 2025 | $59,597.94 | December 15, 2025 | December 15, 2026 | Year 2: Total Contract Value = $76,574.31 (SE Core Membership + EC) - 13,172.25 (Core Membership Bundle Discount) - $3,804.11 (6% multi-year discount) = $59,597.94 Total to invoice |
| 3 | October 15, 2026 | $59,597.94 | December 15, 2026 | December 15, 2027 | Year 3: Total Contract Value = $76,574.31 (SE Core Membership + EC) - 13,172.25 (Core Membership Bundle Discount) - $3,804.11 (6% multi-year discount) = $59,597.94 Total to invoice |

Name _____     Signature _____

Title _____          Date _____

# INFO~TECH
## RESEARCH GROUP

# SOLE SOURCE JUSTIFICATION - IT RESEARCH & ADVISORY SUBSCRIPTION SERVICES WEST VIRGINIA LOTTERY

Info-Tech Research Group Inc.
3960 Howard Hughes Parkway, Suite 500
Las Vegas, Nevada, United States
89169

Point of Contact: Andrew Daigle

E-Mail:    Adaigle@infotech.com

Phone: 1-888-670-8889 Ext. 2617

Jonathon O'Quinn

Director of IT
West Virginia Lottery
900 Pennsylvania Ave, Charleston,
WV 25302, United States

## Re: Information Technology Research & Advisory Subscription Services

Dear Jonathon,

Thank you for your time as we discuss Info-Tech Research Group as your organizations' IT Research & Advisory membership services provider.

The following is a sole source justification document to demonstrate Info-Tech Research Group's ("Info-Tech") exclusive capability to meet your IT department's goals and initiatives through the purchase of your membership to Info-Tech's reference materials for information technology including online research and remote advisory services.

Info-Tech is a sole source research provider for the scope of services and expected deliverables from this membership. No other vendor will be able to provide these services to the requirements expected from West Virginia Lottery.

Info-Tech will focus on providing best practice research to the Information Technology staff members at The West Virginia Lottery. The IT division will in turn be a driving force of business value to the organization. Our research and advisory services across Applications, CIO, Infrastructure & Operations, Security, Project & Portfolio Management, Data and Business Intelligence, Enterprise Architecture and Vendor Management silos will support a complex IT department responsible for a wide variety of tasks and services.

What sets Info-Tech apart from the other IT Research & Advisory service providers in the market is our practical and tactical approach to our membership and consulting services. We measure the true impact on our members by experiences delivered as opposed to pages read. Our service provides the tools and know-how to get your projects done but also provides on-going support to ensure sustained success and systematic process improvement.

Thank you for your time, once again as we discuss Info-Tech's IT Research & Advisory membership services.

Sincerely,

Andrew Daigle
Managing Commercial Director
Info-Tech Research Group, Inc.
Adaigle@infotech.com
1-888-670-8889 Ext. 2617

## EXCLUSIVE CAPABILITY FOR THE PROPOSED SCOPE OF WORK

Info-Tech is confident that we can deliver exceptional value to The West Virginia Lottery. This document will detail exactly how we deliver IT Research and Advisory Services with a specific focus on our experience with Mechanical engineering members. It is our goal to demonstrate how we are different to traditional IT research providers; ultimately, showcasing how we will deliver measurable value throughout the term of a membership.

Info-Tech uses a number of formats to effectively present our research including solution sets, project blueprints, tools, templates, analyst calls, webinars and workshops. Our focus is to help your

Sole Source Justification – IT Research & Advisory Subscription Services
West Virginia Lottery

organization navigate critical technology projects through a guided implementation. We move beyond reports with action-based research to drive sustainable IT improvement through innovative research.

Our competencies include:

- Providing analyst advisory services that include both written and verbal consultations
- Assisting with vendor and technology sourcing support and selection decisions
- Supporting critical IT projects and implementations throughout the year
- Providing IT governance and process support and improvement advice
- Assisting senior management with organizational planning and strategy
- Providing a self-serving 24 hour resource of written research
- Providing benchmarking reports that include business alignment assessments
- Building business cases for key IT investments made throughout the year

Info-Tech is a full-service professional IT Research, Advisory, and Professional Services firm, founded in 1997 with approximately 425 full-time employees. Our services include technology-based business research, industry-specific reporting, best practice methodologies, benchmarking, and market analysis research. Info-Tech offers a practical approach to complex IT and business issues. Our consultants, including veteran IT professionals and CIO's, work side-by-side with you and your team in a co-operative approach that delivers results and leaves you with the tools needed for continued success.

Info-Tech prides itself on, and utilizes, its independence, quality of thought, quantitative data, and experience, to form its opinions. Our independence is critical to our success in providing our clients with an informed and unbiased opinion, and as such, we have no direct or indirect affiliation with any hardware or software provider, and do not sell technology products.

Info-Tech helps you improve or manage thousands of technical processes and projects. For example:

a. Protect Yourself Against the WannaCry Ransomware Attack
b. Demystify Oracle Licensing and Optimize Spend
c. Integrate Threat Intelligence Into Your Security Operations
d. Conquer Data Quality & Security Challenges
e. Secure Critical Systems and Intellectual Property Against Advanced Persistent Threats
f. Structure Your DevOps Adoption Using a Metrics-Driven Approach

We do lots of 'what' and 'why' research, but the bulk of our product focuses on 'how'. We have thousands of blueprints that you and your team use to actually improve a process or deliver on a project.. Info-Tech will build out the project road map for you, the communications tools, planning documents, templates, etc. that you need to actually do the project. All of Info-Tech's research is based on a COBIT 5, CMMI, TOGAF, ITIL, and DAMA DMBOK2 Data Management framework.

## INNOVATIVE APPROACH TO RESEARCH

Our Data-Driven Insight Program enables IT organizations to objectively measure their performance, develop key initiative plans with role-based roadmaps, access our innovative research and industry experts, and systematically improve performance year-over-year.

INFO~TECH
RESEARCH GROUP

We move beyond reports, providing in-person experiences and expertise that drive sustainable IT improvement. As the fastest growing and one of the top 5 largest IT research and advisory companies in the world, Info-Tech is well positioned to address your key IT strategic initiatives and provide state-of-the-art technical analysis on a variety of IT subjects. Our step-by-step program enables our members to on average see a 20% improvement in IT performance ratings year-over-year.

A STEP BY STEP
## PROGRAM TO SYSTEMATICALLY
IMPROVE IT PERFOMANCE

Objectively measure IT performance using our Data Driven Insight Program.

**Step 1**
**Establish IT Performance Measurement**

**Step 2**
**Build a Data-Driven Strategy**

**Step 3**
**Manage Core IT Processes**

**Step 4**
**Create Roadmaps For Key IT Executives**

**Step 5**
**Utilize Tools and Best Practices for Key Products**

**Step 6**
**Leverage Executive Coaching Through the Year**

**Step 7**
**Measure Year-Over-Year Improvement**

We offer more than 450 do-it-yourself project and process Blueprints, developed by our industry experts to help our members save time and money when it comes to tackling their most important IT initiatives.

Included in these Blueprints are over 12,000 supporting storyboards, trend reports, tools, and templates that give our members the edge they need to complete their IT projects successfully.

We spend millions of dollars annually developing consulting-quality tools and templates for every project so that you can get to action as quickly as possible.

## ON-LINE RESEARCH ACCESS

The Blueprints published on Info-Tech's website are chosen based on market direction, client demand, and IT trends. We offer thousands of do-it-yourself project and process Blueprints, developed by our

Sole Source Justification – IT Research & Advisory Subscription Services
West Virginia Lottery

industry experts to help our members save time and money when it comes to tackling their most important IT initiatives.

All topics covered in these Blueprints are organized under four research silos (Applications, Infrastructure, Strategy & Leadership, and Talent & Leadership) and then are categorized based on further clarified sub sections. All written materials are also easily found via the search bar function based on extensive metadata and key words specific to topic, author, or title. Research is available in an unlimited fashion to all users through the 24/7 web-portal – www.infotech.com.

## IT VENDOR & COST COMPARISONS

Info-Tech has a wide variety of customizable Vendor Landscape's™ currently available on our website to select the right solution provider for your needs by providing a holistic view of the top vendors and products in the market space. The vast majority of our Vendor Landscape™ toolkits are refreshed during our research cycle every 12 months or earlier depending on the technology. There are over 100 Vendor Landscape's™ that West Virginia Lottery can access with the subscription.

The particular IT topics for the Vendor Landscapes™ are chosen and written based on market as well as client demand and Info-Tech briefs with the individual vendors themselves to gain an in-depth knowledge of that particular solution. Info-Tech is a firm believer in providing unbiased research; therefore, all Vendor Landscapes™ are written from a staunch perspective of objectivity.

## SOFTWARE REVIEWS

Info-Tech also has an unmatched **Software Review** business. We collect and analyze the most detailed reviews on enterprise software.

The software experience is shaped by both the software and the relationship with the vendor. By comparing vendors across both we provide a comprehensive understanding of the product and help identify vendors that can deliver. Before you break the bank, see what real users think about the value the software brings to their business. We can also show you customer retention of your peers. The software marketplace is massive with endless alternatives. By monitoring the user flow between competitors we can show you who is staying, leaving, where they're going, and even how they feel about their new software.

## INTERNAL SHARING RIGHTS

The West Virginia Lottery can forward reports to other individuals within the organization (members or non-members) for the purpose of facilitating executive decision-making. This will enable the internal exchange of information about best practices or areas of expertise.

## BENCHMARKING DATA COVERAGE (KEY IT METRICS)

Info-Tech's mission is to help clients tackle their key IT issues by enabling data-driven decision making with our consulting quality deliverables that are low effort and high impact. Our data-driven programs

help justify IT spending to provide the most value to the organization as a whole by focusing on the end-user. Info-Tech's programs are the key to comprehensive, top-to-bottom alignment with the business.

Three important goals are achieved:

1. Increased transparency into and satisfaction with IT with clear performance metrics
2. Business support for IT projects aligned with business goals
3. Increased investment in IT resources

Info-Tech's Diagnostic Programs enable our members to collect the data they need to make key IT decisions. Info-Tech's proposal includes Diagnostic Programs throughout the term of the contract targeted towards the executive members and programs designed specifically for department managers and technical leads. The Diagnostic Programs are provided in more detail below.

With data from over 45,000 business leaders, we understand what activities correlate with high IT performance and can help you successfully complete these activities in your own organization.

Unlimited access to diagnostic/benchmarking programs are available with the proposed subscription.

## IT STAFFING ASSESSMENT & IT BUDGET BENCHMARKING

Our comprehensive report shows you exactly where IT staff time is going and whether or not it's effectively driving results. Communicate how IT staff support the business and use included feedback from your staff to guide improvement exercises.

- Visualize what IT staff are working on
- Evaluate 20 IT functions across 9 areas of IT
- Determine if IT is allocating resources appropriately
- Understand IT effort by activity type
- Evaluate 10 activity types ranging from Improvement to Maintenance
- Use staff feedback to free up more time for improvement initiatives

## BUDGET METRICS

Info-Tech believes that data-driven decision making simply produces better results. Our benchmarking program (MeasureIT) is easy to use and provides immediate results that you can use to receive budget metrics. Info-Tech provides access to IT Key Metrics Data which covers a comprehensive database of the industry's most definitive IT spending levels in addition to key technology cost and performance metrics.

The benchmarking program produces tailored and specific reports to reflect the metrics, data and information specific to your organization.

Over 4,000 companies have already completed a MeasureIT survey, so we can provide meaningful results instantly with the data relevant to the United States public sector.

## CIO BUSINESS VISION

An organization cannot perform effective Strategic Planning without first understanding the needs of its stakeholder's i.e. building stakeholder management practices. Our CIO Business Vision program is a low

effort, high impact program that will give the IT Leadership Team detailed report cards on the organization's satisfaction with IT's core services by department/work-group category. Use the insights, report cards, and advice gained from the CIO Business Vision program to understand your key business stakeholder's important needs and improve your interaction with them.

## IT MANAGEMENT & GOVERNANCE

Info-Tech's IT Management and Governance Diagnostic is a newer and innovative program available to The West Virginia Lottery which allows you to understand your team's perception of the importance and effectiveness of your technology processes. Build consensus around which processes are important and ineffective by conducting an IT team alignment exercise.

The program enables the IT organization to create a customized process improvement roadmap to maximize impact and focus time and resources more efficiently and accurately.

## CEO-CIO ALIGNMENT

At Info-Tech Research Group we are dedicated to providing our clients with innovative products and research that is relevant to their needs and challenges they are currently facing. I would encourage the IT Leaders take advantage of this program at the beginning of the membership so we can effectively set up an engagement plan over the course of the year that will provide the most value to your department and the organization as a whole. For decades, IT-business alignment has been touted as the next dimension of effective IT. Yet many IT leaders are still without the tools they need to understand and support business priorities.

Decipher business needs by understanding the Head of the Business Service's Branch perspective. Automate IT-business alignment so IT can operate effectively and generate tangible value for your business. As leader of an IT department, you recognize that your ideas, priorities, and perspectives differ from those of business leaders. This program eliminates the guesswork and starts closing the gaps between these perspectives.

## APPLICATION PORTFOLIO ASSESSMENT

The End User Application Assessment and Satisfaction Programs are diagnostic tools we encourage Info-Tech customers to participate in to decide which applications to retire, upgrade, re-train on, or maintain.

Application Portfolio Management and Service Optimization are nearly impossible to perform without an honest and thorough understanding of end user sentiment toward IT services and software. The End User Application Portfolio Assessment Program is administered through Info-Tech to find out what users really think of IT's applications. Our Analysts will work with you to decipher the results and provide an action plan to improve in this area.

## PORTFOLIO MANAGEMENT DIAGNOSTIC

The Project Portfolio Management Diagnostic Program is a low effort, high impact program designed to help project owners assess and improve their PPM practices. Gather and report on all aspects of your PPM environment in order to understand where you stand and how you can improve.

## SECURITY DIAGNOSTIC

Info-Tech's Security Governance and Management scorecard lets you measure your performance against industry standard best practices. The West Virginia Lottery can use this report to understand their current

strengths and weaknesses then follow Info-Tech's customized roadmap of practical and prioritized action items to improve and optimize their security governance management.

Info-Tech's Security Framework Model is derived from COBIT and TOGAF, two globally-accepted frameworks used by businesses to optimize the value of IT. This program will enable your department to justify the allocation of resources and efforts towards these security management goals.

## RESEARCH ANALYST ADVISORY SERVICES

Info-Tech has over 250 Analysts within Canada available to guide members through the research on the web-portal and discuss IT topics in more detail to ensure best practices are in place. Members can initiate a call through the web-portal or by contacting their dedicated Account Management and/or Research Services Team. Unlike other vendors, calls and research requests do not have to be administered through a "Librarian" administrator.

Info-Tech's analysts are not revenue driven but customer service driven and ultimately, customer focused. The only goal of our analysts is to provide the right advice when our clients need it in a tailored manner to best suit the specific needs of our member's particular environment.

Analyst calls can be requested through your dedicated Account Manager or the Research Assistant Team. These calls are scheduled through our Advisory Coordinators who will find an appropriate time for the call that is mutually agreeable for both parties. We offer a 48-hour turnaround for our Analyst Inquiry Service but in many cases we can meet a 24-hour timespan depending on analyst availability and the complexity of the request. Multiple staff can be on one call with Info-Tech's Expert Analysts.

## GUIDED IMPLEMENTATIONS

As a major component of Info-Tech's written research, our World Class Operations Framework Blueprints and Guided Implementations provide a detailed and step-by-step outline to optimize, implement and manage The West Virginia Lottery's core IT processes. Info-Tech's World Class Operations materials are based on a COBIT 5 and ITIL Framework and the processes outlined are extremely important to any Senior Technology department head's job.

The published research is made up of process modules broken down into step-by-step plans to lead your members from the opening phase of the process such as assessments, current state analysis and corporate goal identification, all the way to the final and ideal state with the assistance of a formalized strategy roadmap, stakeholder buy-in strategy, a communication plan and final deliverables.

## CONTRACT & DOCUMENT REVIEWS

Info-Tech offers a program called Purchase Optimization. This service is very popular with our clients as they are able to send our analysts their particular contracts and documents (Microsoft, SAN Storage, Data Center Co-location, Enterprise Networks etc.) for us to review. This process includes an initial review of the contract by our analysts and then a call, similar to an advisory call with the analyst that reviewed the document. Document Reviews also include Business Cases, Business/IT Policies, Strategic Plans, EA Frameworks, RFP's, Job Descriptions, etc.

Info-Tech reviews thousands of hardware, software, telecom and services contract every year. We find hard-dollar savings or compliance issues in 90% of the contracts we review. We do not take a percentage of savings realized. Info-Tech does not place a page limit on document reviews or a limit on the number of document reviews completed during the term of a subscription.

## DEDICATED EXECUTIVE ADVISOR

The West Virginia Lottery's Advisory seat members will receive a dedicated Executive Advisor from the Research and Consulting Practice that will help shape the engagement plan and have regularly scheduled calls to complete a Key Initiative Plan. The Executive Advisor will be a senior member of our research practice with qualifications similar to the Analysts highlighted in the previous section. The Executive Advisor will have previous experience specific to your role (ex. CIO, Enterprise Architect, CISO, etc.). The Executive Partner will develop a deep understanding of the leader and his/her key issues, and the leader will develop a trust in the views of the partner. As a result of this partnership, decisions can be made more confidently and actions can be taken to resolve issues. Quarterly strategy sessions will be scheduled with the Executive Advisor.

## KEY INITIATIVE PLANS

Get support for your IT leadership team. Our Roadmaps help you build and manage core IT functions to systematically improve performance.

Each Roadmap includes a series of diagnostics to help you assess strengths and weaknesses of your current state as well as help you envision your target.

We provide you with tools and training to help you succeed at key projects that are proven to enhance your department's capability and drive increased business satisfaction.

Step-by-step initiatives ensure that your IT leadership team has a plan in place for creating real improvement over the course of your membership.

Pick the Roadmaps that are right for you so you can tackle your most pressing IT issues.

## INFO-TECH ACADEMY AND TALENT & LEADERSHIP RESOURCES

The West Virginia Lottery's membership also includes access to The Info-Tech Academy which is a built-in learning management platform based around Info-Tech Research. The Academy enables you to assign Info-Tech learning materials and training to yourself or your staff around 45 COBIT-compliant core IT processes. These 45 core IT Processes have been made into Courses that make up 9 certificates that can be earned by completing the built-in coursework and tests within each course. We understand that IT departments struggle to develop their staff. This is a unique opportunity to increase the utilization and value of an IT research service. The Info-Tech Academy is available to all seat-holding Members (both Reference and Advisory as well as any non-seat-holder within The West Virginia Lottery.

Below is a graphic depicting the process to assign and track Info-Tech Academy to/for yourself and/or members of your team at The West Virginia Lottery:

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## Assign Courses to Your Team & Track Progress

The "Assign" function is designed to allow Members to assign courses out to their teams or enroll themselves in courses.

- The "Select Employee(s)" field will auto-populate as Members begin to type in the names of other Info-Tech Members in their organization

- Members can "Add New Employees" who do not hold Info-Tech Memberships, at which point a three month trial membership is launched where they have full access to Academy content and can take any courses they desire

- Members must set a due date to allow themselves to time box their coursework. Courses do not shut down after the set due date, and Members are welcome to continue courses until they are complete

- Upon Assigning a Course, Assignees will receive an email with instructions on how to launch and complete their coursework

## Track Progress

**Stay on top of your and your team's activity and progress, and maintain oversight over your team's learning journey.**

Courses Assigned to me

- In this view, you can keep track of your own courses, whether you enrolled or you were assigned them

Courses Assigned by Me

- Here, you can monitor the progress of courses you assigned to your team members

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## INFO-TECH ON-SITE WORKSHOPS

As an additional and optional product offering, Info-Tech will provide 4/5 day on-site workshops to The West Virginia Lottery on technology topics of their choosing.

Over the course of five days, our expert facilitators help you complete a key initiative, work through critical project deliverables, and train your team. We use a learning-based approach to implement Info-Tech methodologies tailored to your unique situation. Why Workshops?

Get 90% of any project done in five days: intense and focused days designed to collapse project timelines and make project decisions

Utilize our proven and road-tested methodologies to get your project done quickly and effectively

Proven Results:

Since launching the products Info-Tech has delivered over 200 on-site workshops with an overall satisfaction rating of 9.8/10

96% of workshop participants rate the effectiveness of the expert facilitators at an 8 out of 10 or higher

On average, workshops save our members $56,411 per five-day engagement

For example, the City of Santa Fe recently utilized a five-day workshop to work with our team on their IT Strategic Plan. The CIO acknowledged over **$13,000 in cost-savings** from the engagement and provided the following testimonial.

"Having an experienced and neutral facilitator for the IT strategy/development is the best aspect of the experience. The facilitator has such a pleasant personality; he challenges in a respectful way and engages the participants in a positive way. Now we have a document that we can reference and that's helpful. The workshop was an effective way to get a high level strategic roadmap. You can spend months and lots of time developing the perfect strategic plan and of course it's out of date as soon as you put it on paper. Now we have a high level plan that we can drill down into and communicate, which is exactly what I wanted to get."

Info-Tech has recently completed Workshops for our members on the following Technology Topics:

- Disaster Recovery Planning
- IT Strategy
- Program Project Management
- Service Desk Strategy
- Risk Management
- Organizational Design
- Cost & Budget
- Application Rationalization
- Innovation
- Budget Deconstruction
- Strategic Workforce Planning

- Change and Problem Management
- Information Security
- Service Catalogue
- Project Management
- Business Continuity Planning
- Vendor Management
- Portfolio Management
- Data Architecture
- Portfolio Management
- IT Service Management
- Requirements Gathering

# Exhibit C – ADDITIONAL VENDOR DOCUMENTS

# Info-Tech GSA Approved Terms of Use

## Exhibit A

This document states the terms and conditions under which you may use this website and the Services, which are the property of Info-Tech Research Group Inc., ("Info-Tech"). Executing this Agreement or the accompanying purchase order in writing constitutes acceptance of these terms and conditions.

### 1. General Use Restrictions

Info-Tech services, advice, materials, products, websites and network (collectively the "Services") are to be used for the User's (meaning a named individual user that uses the publicly available Services, or is authorized by Info-Tech in a service agreement to use the Services that require paid access) use and benefit only pursuant to the terms and limitations of the paid subscription and may not be disclosed, disseminated or distributed to any other party, except as Info-Tech otherwise agrees in writing. The User will not circumvent any encryption or otherwise gain access to Services for which the User has not been expressly granted the appropriate rights of access.

The User will not use the Services for or knowingly transmit to Info-Tech or upload to any Info-Tech site or network any illegal, improper or unacceptable material or use them for illegal, improper or unacceptable practices including without limitation the dissemination of any defamatory, fraudulent, infringing, abusive, lewd, obscene or pornographic material, viruses, Trojan horses, time bombs, worms, or other harmful code designed to interrupt, destroy, or limit the function of any software, hardware or communications equipment, unsolicited mass email or other internet-based advertising campaigns, privacy breaches, denial of use attacks, spoofing, or impersonation.

### 2. Copyright

The Services are © Info-Tech Research Group Inc. All rights reserved.

The Services are owned by and copyrighted by Info-Tech and other parties and may contain trademarks of Info-Tech or others. They are protected by Canadian, U.S. and international copyright and trademark laws and conventions.

User may use the Services solely for their own information purposes pursuant to the terms and limitations of the paid subscription. The User may download any of the Service's tools or templates for their individual use, but may not distribute any articles, tools, templates or blueprints internally, subject to the exceptions below.

Info-Tech is proud of and believes in the value of the Services it provides to Users. Info-Tech also appreciates referrals that Users generate by forwarding articles, tools and templates downloaded from the Services to non-Users. Info-Tech encourages Users to forward copies of individual articles, tools, templates and blueprints contained in the Services to colleagues and others who may be interested Info-Tech's Services in order for the recipient to evaluate Info-Tech's Services ("Evaluation Copy"), provided all copyright, trademark and other notices are not altered or removed. For greater

certainty, Users may forward Evaluation Copies of articles, tools, templates and blueprints contained in the Services to other non-User individuals both internal and external to the User's organization strictly for the purpose of the recipient's evaluation of Info-Tech's Services and not for any other purpose or use.

User acknowledges and agrees that they will forward Evaluation Copies to non-Users for the sole purpose of the recipient non-User's evaluation of Info-Tech's Services. Info-Tech reserves the right to review, at its sole discretion, User's account for forwarding activity, including but not limited to reviewing the quantity and description of any Evaluation Copies forwarded as well as the identification and contact information of the recipients of all Evaluation Copies. The User acknowledges that Info-Tech views Evaluation Copies as a referral system and understands that Info-Tech may attempt to contact the recipient non-User in order to assess their satisfaction with the Evaluation Copy and interest in Info-Tech's Services. User also acknowledges and agrees that Info-Tech reserves the right, at Info-Tech's sole discretion, to limit or disable User's ability to forward Evaluation Copies of articles, tools, templates and blueprints upon review of User's forwarding activities.

Any other reproduction or dissemination of the Services in any form or by any means is forbidden without Info-Tech's written permission, and without limiting the generality of the foregoing, the User will not:

a. record and re-transmit the Service over any network (including any local area network), except as otherwise stated above;
b. use any Service in any timesharing, service bureau, bulletin board or similar arrangement or public display;
c. post any Service to any other online service (including bulletin boards or the Internet);
d. sublicense, lease, sell, offer for sale or assign the Service; or
e. use Info-Tech's name or any excerpts from the Services in the promotion of its products or services.

## 3. Users

Users must be authorized to use the Services by Info-Tech. Users must maintain and protect the confidentiality of

any password(s) and are responsible to ensure that the passwords are effective. Users shall advise Info-Tech immediately if they discover that their password has been compromised, at the following number 1-888-670-8889 (US) or 1-844-618-3192 (CAN).

## 4. User Submissions

Info-Tech's research services include the ability for clients to contribute content for publication on Info Tech's web- sites. If your account is used to submit, post, or add content to Info-Tech's websites, (collectively "User Submissions"), you agree to accept sole responsibility for those User Submissions, including the information, statements, facts, and material contained in any form or medium (e.g., text, audio, video, and photographic) therein.

By using Info-Tech's research services, you agree that none of your User Submissions will:

- infringe on the intellectual property, trade secret, privacy, publicity, or other rights of others;
- contain false statements or misrepresentations that could damage Info-Tech or any third party;
- include obscene, libelous, defamatory, threatening, harassing, abusive, hateful, sexually explicit, sexually oriented, profane, or embarrassing material, as determined by Info-Tech in its sole discretion;
- be illegal or otherwise objectionable;
- contain the personal information of any third party, including, without limitation, addresses, phone numbers, email addresses, Social Security numbers, and credit card numbers;
- encourage or facilitate insider trading or anticompetitive behavior;
- include commercial advertisements or solicitations; or
- purport to or actually provide legal or professional advice.

Because Info-Tech's websites are available to the public, we cannot guarantee that User Submissions on Info-Tech's websites will remain confidential.

Although you are solely responsible for the content you provide and we do not have a policy of reviewing or monitor- ing all User Submissions, we reserve the right to pre-screen and/or monitor User Submissions.

If you believe that any User Submissions appear to violate these Terms of Service, or if you believe any other user is engaged in illegal, harassing, or objectionable behavior, please contact us.

You acknowledge, consent and agree that Info-Tech may access, preserve and disclose your account information and content if required to do so by law or in a good faith belief that such access, preservation, or disclosure is reasonably necessary to (i) comply with legal process; (ii) enforce these Terms; (iii) respond to claims that any content violates the rights of third parties; (iv) respond to your requests for customer service; or (v) protect the rights, property, or personal safety of Info-Tech, its users and the public.

## 5. Non-Disclosure of Confidential Information

In consideration of, and reliance upon, the covenants of Company and Info-Tech herein contained, the parties have or will disclose to each other certain information (hereinafter referred to as "Confidential Information"), including, without limitation, information concerning future or proposed products, financial performance and projections, customers, employees, contracts, strategic relationships, marketing plans and business plans and other information disclosed by a party (the "Disclosing Party") to the other party (the "Receiving Party"). Information which is disclosed orally shall not be considered Confidential Information unless (i) it is identified as Confidential Information prior to such disclosure, and (ii) it is memorialized in writing within fifteen (15) days following such disclosure by the Disclosing Party. Information which is disclosed visually or in tangible form (whether by document, electronic media or other form) shall not be considered Confidential Information unless it is clearly marked as Confidential Information, whether disclosed orally, visually or in tangible form (whether by document, electronic media or other form). Information shall not be considered Confidential Information if such information is actually non-confidential:

- It was in the public domain at the time of communication to the Receiving Party or is later placed in the public domain by the Disclosing Party;
- It entered the public domain through no fault of the Receiving Party subsequent to the time of disclosure hereunder to the Receiving Party;

- It was in the Receiving Party's possession free of any obligation of confidence prior to disclosure hereunder; or
- It was developed by employees or agents of the Receiving Party independently of and without reference to any Confidential Information.

Except as provided herein, Confidential Information shall include, without limitation, proprietary, technical, marketing, operating, performance, cost, business pricing policies, programs, inventions, discoveries, trade secrets, techniques, processes, source code, unlinked object modules, computer programming techniques, and all record bearing media containing or disclosing such information and techniques disclosed pursuant to this Agreement. Information regarding current products shall be treated as non-Confidential Information unless marked "Confidential".

The Receiving Party shall not disclose, publish or communicate the Confidential Information to any third party without the prior written consent of the Disclosing Party. However, the Receiving Party may disclose the Confidential Information to a third party who has a need to know the Confidential Information and (i) is an accountant, attorney, underwriter or advisor under a duty of confidentiality; or (ii) is under a written obligation of confidentiality at least as restrictive as this Agreement.

Info-Tech recognizes that Federal agencies are subject to the Freedom of Information Act, 5 U.S.C. 552, which requires that certain information be released, despite being characterized as "confidential" by the vendor.

## 6. Term

Many of the Services are "subscription" services that have a fixed term. When the End User is an instrumentality of the U.S., recourse against the United States for any alleged breach of this Agreement must be made as a dispute under the contract Disputes Clause (Contract Disputes Act). During any dispute under the Disputes Clause, Info-Tech shall proceed diligently with performance of this Agreement, pending final resolution of any request for relief, claim, appeal, or action arising under the Agreement, and comply with any decision of the Contracting Officer.

## 7. [Reserved]

## 8. [Reserved]

### 9. Accuracy of Information and Warranty

The information contained in the Services has been obtained from sources believed to be reliable but Info-Tech does not warrant the completeness, timeliness or accuracy of any information contained in the Services. The Services are intended to: help identify business risks; provide insights based on industry research; and to help you focus on certain matters which may be affecting your business. Info-Tech does not provide legal, accounting or other professional advice, nor should any advice from Info-Tech be construed as such. We encourage you to seek professional advice whenever necessary.

Info-Tech expressly excludes and disclaims all express or implied conditions, representations and warranties including, without limitation, any implied warranties or conditions of merchantability or fitness for a particular purpose, to the extent allowable by law.

Although Info-Tech takes reasonable steps to screen Services for infection by viruses, worms, Trojan horses or other code manifesting contaminating or destructive properties before making the Services available, Info-Tech cannot guarantee that any Service will be free of infection.

User assumes sole responsibility for the selection of the Services to achieve its intended results. The opinions expressed in the Services are subject to change without notice.

Info-Tech does not endorse third-party products or services. Info-Tech assesses and analyzes the effectiveness and appropriateness of information technology in the context of a general business environment only unless specifically hired by a User to assess in the context of their own environment.

*This agreement does not limit or disclaim any of the warranties specified in the GSA schedule 70 contract under far 52.212-4(O). In the event of a breach of warranty, the U.S. Government reserves all rights and remedies under the contract, the federal*

*acquisition regulations, and the contract disputes act, 41 U.S.C. 7101-7109.*

### 10. Limitation of Liability

In no event is Info-Tech liable for any direct, special, indirect, consequential, incidental, punitive or other damages however caused, whether in contract, tort, negligence, strict liability, operation of law or otherwise, (including without limitation damages for lost profits, business interruption or loss arising out of the use of or inability to use the Services, or any information provided in the Services, or claims attributable to errors, omissions or other inaccuracies in the Service or interpretations thereof), even if Info-Tech has been advised of the possibility of such damages. Info-Tech's total liability shall in no event exceed the amount paid by the User for the Service in question.

The User acknowledges that Info-Tech has set its prices and sold the Services in reliance on the limitations of liability and disclaimers of warranties and damages set forth herein and that the same form a fundamental and essential basis of the bargain between the parties. They shall apply even if the contract between the User and Info-Tech is found to have failed in its fundamental or essential purpose or has been fundamentally breached.

*This agreement shall not impair the U.S. Government's right to recover for fraud or crimes arising out of or related to this contract under any federal fraud statute, including the false claims act, 31 U.S.C. 3729-3733. Furthermore, this clause shall not impair nor prejudice the U.S. Government's right to express remedies provided in the GSA schedule contract (e.g., Clause 552.238-75 – Price reductions, clause 52.212-4(H) – patent indemnification, and GSAr 552.215-72 – Price adjustment – failure to provide accurate information).*

### 11. Links to Third-Party Sites

Any third-party sites that are linked to the Services are not under Info-Tech's control. Info-Tech is not responsible for anything on the linked sites, including without limitation any content, links to other sites, any changes to those sites, or any policies those sites may have. Info-Tech provides links as a convenience only and such links do not imply any endorsement by Info-Tech of those sites.

## 12. Investment Advice

The Services are not intended to be used for the purpose of, or as a basis for, making investment decisions or recommendations with respect to securities of any company or industry and Info-Tech assumes no liability for decisions made, in whole or in part, on the basis of any information contained in the Services.

## 13. Governing Law

This site and agreement is governed by the Federal laws of the United States, excluding any conflicts of law provisions and excluding the United Nations Convention on Contracts for the International Sale of Goods.

## 14. Privacy

A User's right to privacy is of paramount importance to Info-Tech. See our Privacy Policy below for more detail. The identity of our research clients is not considered personal or confidential information, and we may disclose that information for promotion and marketing purposes.

## 15. Contact Information

CORPORATE COUNSEL
Toll-free (US): 1-888-670-8889
Toll-free (CAN): 1-844-618-3192
International: +1-519-432-3550