

Management Systems Inc.

CORPORATE HQ

691 N. High Street, 2nd Floor Columbus, OH 43215

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Visit us at...
www.emsi.com

January 14th, 2009

State of West Virginia
Department of Administration
Purchasing Division
2019 Washington Street East
Charleston, WV 25305-0130

Subject: Request for Quotation ITECH10

Ms. Adkins:

EXCEL Management Systems Inc. (EXCEL) is pleased to submit this proposal in response to the Request for Quote (RFQ) ITECH10, Statewide Contract for Technical Services. EXCEL meets all mandatory requirements of this RFQ.

Project oversight is supported by *EXCEL's* Field-based IT Services Program Office, staffed by Project Management Professionals (PMP) certified by the Project Management Institute, Field Services Technicians with a broad array of industry and vendor certifications, Help Desk technicians, and service management professionals.

EXCEL's technicians possess the right combination of network, computer, and telecommunications skills to perform the work quickly and effectively. Our technicians routinely deliver on-site technical support to State of Ohio offices in all 88 counties, and we are prepared to extend this same level of service to the State of West Virginia.

EXCEL has in-place proven processes and management methodologies that are applied to each and every customer's project by an experienced team of professionals. This team of professionals has a proven record of completing projects on-time and within budget.

In summary, the EXCEL team brings the following values to this project:

- We recognize the extreme importance of uninterrupted operation for your operations.
- Our extensive knowledge of the general IT and Telecommunications environments, accrued from our twenty years of service, enables EXCEL to quickly and effectively respond to requests for support.
- Our Field-based IT Services Program Office infrastructure, which includes project management, help desk, and service management professionals and will provide direct support to this project.
- EXCEL's Project Team, support infrastructure, and extensive knowledge will provide the best value for maintaining the optimal balance between cost, schedule, and quality.

We greatly appreciate the opportunity to present our proposal for consideration and look forward to continuing a mutually beneficial relationship with the State of West Virginia.





Should you require additional information or clarification, please feel free to contact me at (614) 224-4007 x226 or via email at sharpj@emsi.com. Please direct any technical questions to Bob Beatty at (614) 224-4007 x235 or via email at beattyb@emsi.com

The Executive Summary that follows highlights *EXCEL*'s ability to meet and exceed the requirements of this RFQ.

Respectfully,

Jan Sharp

Director of Contracts

Date:

01/13/2010



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JO ANN ADKINS 304-558-8802

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GENERAL TERMS & CONDITIONS REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)

- 1. Awards will be made in the best interest of the State of West Virginia.
- 2. The State may accept or reject in part, or in whole, any bid.
- 3. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee.
- 4. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods this Purchase Order/Contract becomes void and of no effect after June 30.
- 5. Payment may only be made after the delivery and acceptance of goods or services.
- 6. Interest may be paid for late payment in accordance with the West Virginia Code.
- 7. Vendor preference will be granted upon written request in accordance with the West Virginia Code.
- 8. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
- 9. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
- 10. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern the purchasing process.
- 11. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
- 12. BANKRUPTCY: In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order.
- 13. HIPAA BUSINESS ASSOCIATE ADDENDUM: The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, is available online at www.state.wv.us/admin/purchase/vrc/hipaa.htm and is hereby made part of the agreement. Provided that the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
- 14. CONFIDENTIALITY: The vendor agrees that he or she 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, set forth in http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf.
- 15. LICENSING: Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, and the West Virginia Insurance Commission. The vendor must provide all necessary releases to obtain information to enable the director or spending unit to verify that the vendor is licensed and in good standing with the above entities.
- 16. ANTITRUST: In submitting a bid to any agency for the State of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will 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 the bidder.

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, or person or entity submitting a bid for the same material, supplies, equipment or services and is in all respects fair and without collusion or Fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

INSTRUCTIONS TO BIDDERS

- 1. Use the quotation forms provided by the Purchasing Division. Complete all sections of the quotation form.
- 2. Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as **EQUAL** to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
- **3.** Unit prices shall prevail in case of discrepancy. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
- **4.** All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications: Department of Administration, Purchasing Division, 2019 Washington Street East, P.O. Box 50130, Charleston, WV 25305-0130
- 5. Communication during the solicitation, bid, evaluation or award periods, except through the Purchasing Division, is strictly prohibited (W.Va. C.S.R. §148-1-6.6).



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1. EXECUTIVE SUMMARY - Why EXCEL

EXCEL Management Systems, Inc., Corporate Profile

EXCEL Management Systems, Inc. (EXCEL) is an Ohio Certified Minority Business Enterprise (MBE), incorporated in the State of Ohio by Mr. Curtis Jewell in 1989 with 100+ FTE professionals on staff. The company has an excellent 21-year history, (see Attachment 3) and a demonstrated record with the State of Ohio and its various departments and agencies, as well as the Department of Defense and commercial organizations throughout the United States. Examples of EXCEL's clients list as prime contractor and subcontractor includes:

- United States Environmental Protection Agency (EPA)
- United States Air Force Materiel Command (AFMC)
- United States Defense Information Systems Agency (DISA)
- National Institute of Environmental Health Sciences (NIEHS)
- Ohio Department of Public Safety (ODPS)
- Ohio Department of Job and Family Services (ODJFS)
- Ohio Secretary of State (SOS)
- Ohio Department of Administrative Services (DAS)

EXCEL is a full-service solutions provider with specialized capabilities in delivering Information Technology solutions. EXCEL provides Project Management, Systems Integration, Field and Site Maintenance, and Telecommunication solutions and service for our customers. We operate from our major offices in Columbus and Dayton, Ohio and Raleigh, North Carolina. EXCEL's success comes from always adding high values to all of our customers and strategic partners, as well as dedicating significant attention and resources to serving several major customers: U. S. Air Force, Environmental Protection Agency (EPA), and Ohio's State and Local agencies. Our relationship with this core set of customers and partners has lasted for over twenty years with new and long term projects. We EXCEL in customer retention which is a reflection of our dedication to high quality services.

EXCEL has the financial strength and stability to address the needs and growth that develop as we move forward. Our president and owner, Mr. Curtis Jewell, along with EXCEL's advisory board, led and built the company with a strong financial base that is confirmed by the 3A1 rating with Dunn & Bradstreet.

EXCEL has proven processes and management methodologies that are applied to each and every customer's project by a team of experienced professionals. The EXCEL team has a proven record of completing projects on time and within budget.

EXCEL's Key Attributes: In our proposal, we have addressed all the required information as requested and have provided substantial reason why we believe that our services will be the best value for the State of West Virginia. In our long-term partnership with our customers, we have demonstrated that we can provide high-quality and vendor-certified support that is repeatable and proven. We have the experience with the field sites operations to continue to provide quality services. These valuable relationships give us the insights into their issues and objectives. We are aware that the State will receive competitive bids from other vendors interested in providing



similar services. As you evaluate this and other proposals, we hope that you will focus on the following attributes that differentiate the *EXCEL* team.

- ➤ **Proven methodology:** *EXCEL* has a proven process that is standardized, repeatable, and consistent, which has resulted in high quality services to ODPS and the agencies that it supports. This methodology has been the backbone to our reliable and cost conscious performance over the years and has resulted in a great amount of success and customer satisfaction.
- ➤ EXCEL's Four-R's of Service Delivery: EXCEL's service delivery model is based upon our Four-R's: Reach, Range, Richness, and Robustness. Reach describes our ability to quickly and effectively deliver services, regardless of geography. Range describes the broad variety of services offered, which includes the entire scope of work described within this RFQ. Richness refers to the people, the tools, and the processes that EXCEL has developed over the years to ensure the quality and effectiveness of our solutions. Robustness describes our ability to deliver these services when and where they are needed, regardless of the place, the time, the season, or the technology.
- ➤ Regionally-Based Staff: EXCEL's technical staff is regionally based to provide prompt response, increased capacity, and reduced travel costs (Figure 1). All regionally-based candidates to support this project will have resumes and background checks submitted for approval prior to performing any work.

Figure 1: EXCEL's regionally-based technical staff enables a quick and effective response

to emergency service requests and reduces costs associated with routine service requests.

Coordinate States State

Proven Project Management: *EXCEL* has a strong project management focus, supported by management

toolsets that help keep projects on track and deliver services that are always of high quality. Our project manager for this effort has four years of experience delivering support for projects, working in the field, and performing the actions that constitute the work requested by this RFQ. This experience has enabled *EXCEL* to build a field services capability that is customized to meet the most demanding needs of all our customers.

EXCEL's Applicable Experience: EXCEL has supported the Environmental Protection Agency and the Ohio DPS on both the BMV Deputy Registrar IT Support and Relocation projects and the Clerk of Courts Title Offices Moves, Adds and Changes for over four years. We have gained significant insight into the objectives and the scope of these services required by these field sites. The objectives, the scope, and the requirements are well described in this RFQ. We understand these requirements and we have similar prior customer experiences that are directly applicable to

this project as specified in the RFQ. This work is well-represented in Excel's Past Performance sections of this proposal.

2. TRANSITION PLAN AND EMPLOYEE MANAGEMENT APPROACH

EXCEL's primary goal for the State of West Virginia support is, and always will be, total support with no disruptions to services. We will attempt to recruit those incumbent employees who fully meet the contract requirements if desired, but our normal approach would be to provide incumbent *EXCEL* personnel.

EXCEL views transition as a process that can be defined and measured, similar to the Key Process Areas of ISO 9000 certification. We offer a low-risk approach with extensive up-front planning, immediately available key managers, an effective and fair incumbent hiring plan, and the ability to assume all contract management and task responsibilities quickly. Our transition organization will rely on the in-place infrastructure and resources of EXCEL. We will be able to provide the State of West Virginia with immediate management and administrative support, human resources/recruiting, and security clearances.

We feel it is important to discuss the subtle differences between a "classical" transition and the transition activities that must be provided specifically for State of West Virginia. As a multi site multi activity contract we must provide transition services for varying locations and varying tasks. The benefit of choosing *EXCEL* is our capability to be fully prepared to handle the peaks and valleys associated with this type of transition of an extended area and extended functional requirements. To effectively meet these requirements as well as the stated RFQ requirements, *EXCEL* will:

- Have our Program Manager and transition team in place within 48 hours of contract award
- Have management and administrative support in place to receive State of West Virginia and employee requests within 48 hours of contract award.
- Have complete supporting infrastructure operational within 48 hours of contract award

In summary, *EXCEL* will consider the specific impact of the non-traditional nature of the State of West Virginia contract as we prepare to conduct our transition efforts.

Incumbent Contractor Employees

In transitioning the State of West Virginia contract support (by Project or Staffing requirement) *EXCEL*'s can provide retention of incumbent contract employees and minimize program disruption. During transition, we will focus on quickly identifying, recruiting, and hiring all incumbent personnel who are performing well and are qualified to execute contract tasks, preserving the maximum amount of institutional experience. Our experience of quickly transitioning incumbent staff is exceptional.

The PM, Transition Coordinators, Human Resources and other functional transition team leaders will establish a consistent process for recruiting and hiring incumbent personnel that will:

- Provide all incumbent personnel with standardized information
- Hasten hiring by using a coordinated, organized approach



 Ensure a smooth transition through effective communication between recruiters and managers

All *EXCEL* personnel will sign a non-disclosure agreement when they are assigned and briefed on their duties. They will be briefed on how to handle sensitive or competitive information that they may be exposed to during the course of their duties.

EXCEL employees will be debriefed when reassigned, transferred or cease employment. This is standard procedure, (in accordance with) Industry Security Program Management and is tracked by the Facility Security Officers (FSO) of EXCEL. EXCEL has been and is currently working in secure environments for the Federal Government, and we hold a Top Secret facility clearance.

Staffing

EXCEL maintains an extensive pool of qualified resumes to ensure adequate future surge support.

For example from 11/1/07 thru 11/1/08, EXCEL has made 36 full time hires, these do not include subcontract or temporary positions. All have been in professional positions across 5 states. Our average time for to backfill of vacant positions &/or newly created positions is 9.88 or just under 10 days.

Employee Orientation

At the time of hire all new employees will receive orientation to *EXCEL*, and the State of West Virginia contract, and their specific work assignment, at no cost to State of West Virginia. Human Resources will provide orientation packages, and the contract managers will be responsible for providing training in corporate organization and policies, contract policies and regulations (including State of West Virginia's standards of conduct), *EXCEL* Quality program, philosophy and procedures, and procurement integrity awareness.

Expected Rate of Retention

Historically EXCEL has maintained about a 94% retention rate.

Retaining technically competent incumbent personnel in a volatile and demanding market is quite a challenge. The benefits in retaining these professionals are many, including lower recruiting costs, greater customer satisfaction, and higher quality from retention of institutional knowledge. *EXCEL's* size and growth, geographic and socioeconomic diversity increase our employee retention opportunities and successes. Incumbent staff will want to transition to *EXCEL* to take advantage of our competitive salary structure, exceptional industry <u>benefits</u>, and opportunities for professional growth.



EXCEL's Benefit Program

EXCEL Management Systems, Inc. offers multiple benefits to its employees. Each year during open enrollment, an employee has the opportunity to add, change, or delete benefits. Open enrollment covers the following benefits: healthcare, dental care, vision care, and supplementary and dependent life insurance.

EXCEL Management Systems is committed to the health and well being of all employees. In that spirit EXCEL pays 100% of the premium on \$15,000 of Life Insurance and AD&D coverage for all eligible employees. EXCEL pays 100% of the premium for short-term disability coverage for, all eligible employees, that equals 60% of weekly earnings up to a maximum of \$400/week after 15 days.

EXCEL pays 100% of the premium for long-term disability coverage for, all eligible employees, that equals 60% of monthly earnings up to a maximum of \$5000/month after 90 days.

HSA/HRA (Health Savings Account/Health Reimbursement Account) stacked plan. We believe this design enables both the employer and employees to benefit from everyone being fiscally responsible, knowledgeable, and most important – a healthy consumer. EXCEL continues to absorb the greatest risk & cost of healthcare. This plan offers a change that permits employees to partner with EXCEL by taking responsibility and reaping the rewards of a healthy lifestyle while stabilizing the risk.

Flexible Spending Account (FSA) – the FSA plan is provided through Chard Snyder Associates. An FSA offers you the opportunity to pay for out of pocket healthcare or dependent care expenses with pre-tax dollars. Healthcare Spending Accounts are limited to \$3,000 per year and Dependent Care Accounts to \$5,000 per year.

Voluntary Life Insurance – EXCEL offers supplemental life insurance for the employee, spouse, and/or children. The employee pays for the competitive premium. This portable coverage allows the employee to convert it to an individual plan with no increase in premium, should the employee leave EXCEL coverage can be up to \$300,000 or 5 times their annual salary whichever is less. New employees have 30 days to sign up for coverage without providing evidence of insurability. During open enrollment, employees who are currently covered may increase their benefit amount by \$10,000 & their spouse's benefit amount by \$5,000 without medical underwriting up to your plan maximum.

401(k) Plan - Our 401(k) plan will be administered by The Hartford.

Paid Time Off – EXCEL believes that employees should have opportunities to enjoy time away from work to help balance their lives. The Company recognizes that employees have diverse needs for time off and has established a Paid Time Off (PTO), vacation, and holiday policies to meet these needs. Each January employees with less then 5 years of service will receive 10 vacation days, 8 or 10 holidays depending on whether they work government or commercial contracts, and 8 or 10 PTO days depending on their work calendar.



Timekeeping & Pay

Accurate reporting of time worked is the responsibility of every employee. Federal and State laws require EXCEL to keep records of time worked in order to calculate employee pay and benefits. Time worked is all the time actually spent on the job performing assigned duties.

Employees are expected and responsible for completing weekly time sheets. Employees should record their time daily.

Supervisors will review and sign the time record of employees before submitting it for payroll processing. Employees will receive pay in accordance to what is stated and verified on their timesheets.

If corrections need to be made to the time record, both the employee and supervisor must verify the accuracy of the changes by initialing the time record.

In the event that there is an error in the amount of pay, the employee should promptly bring the discrepancy to the attention of their supervisor and the payroll department so that corrections can be made as quickly as possible.

Altering, falsifying, tampering with time records, or recording time on another employee's time record may result in disciplinary action, up to and including termination of employment.

The law requires that EXCEL make certain deductions from every employee's compensation. Among these are applicable federal, state, and local taxes. EXCEL must also deduct Social Security and Medicare taxes on each employee's earnings up to specified limits.

Temporary – employees who are hired for a specific task on a short-term basis. These employees will receive all legally mandated benefits such as Social Security and Workers' Compensation, but will not be eligible for any other company benefits.

3. State of West Virginia Account Management

Primary:	Bob Beatty		
Phone:	614-224-4007 x235	_ FAX:	614-224-4995
Email:	beattyb@emsi.com		
Alternate:	Tom Watts	••••	
Phone:	614-224-4007 x240	_ FAX:	614-224-4857
Email:			



Supplemental Staffing

Appendix 1 - Web Programming

Supplement Staffing



Project or Contract Title: Information Technology Services for the EPA (ITS EPA) Period of Performance: November 2002 – Currently Ongoing in 2010			
Environmental Protection	Dick Monn		
Agency (EPA), National	919-767-7339		
Computing Center, RTP,	rmonn@csc.com		
North Carolina 27709	John McQuaid	į	
	919-541-7679	***************************************	
	mcquaid.john@epa.gov		
	Wayne Eason		
	919-541-3082		
	eason.wayne@epa.gov		

Project Description

EXCEL's Application and Business Process Management staff has supported Environmental Protection Agency (EPA) for 20 years. Our staff experience with the custom and COTS applications, IBM mainframe, COBOL, CICS, DB2, Oracle, and MS SQL offers a unique skill mix ideally aligned with supporting both critical and non-critical EPA applications. Below is a broad overview of the work performed by the Application and Business Process Management staff.

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Current projects are centered on the conversion to a state-of-the-art Web-based document and database management system. The web-based solution will provide full text search capability for all documents as well as the import of documents in their native electronic format. The project also involves the backfile conversion of 42 million TIFF format files to PDF with hidden, searchable text.

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The team supports and maintains code for the SDMS.2.CD application in PowerBuilder, adding new features as required. Addition support includes the automation of SDMS.2.PDF application allowing



conversion of TIFF files to searchable PDF on CD-ROM. Members of the team convert and enhances code from PowerBuilder to Visual Studio .NET for EPA's Grants Imaging Processing System (GRIPS) for conversion of TIFF images to searchable PDF. They also incorporate ABBYY FineReader scripting APIs for the conversion of data. Additional responsibilities in the development and maintenance of JSP/ASP, XML, Servlets, applets and Java applications for SDMS Next Generation application using Oracle JDevelper, JBuilder, Visual Studio .NET, and Documentum. This includes automation of the OCR and PDF conversion of TIFF files in SDMS. The team is also responsible for installation and maintenance of Microsoft IIS, Apache and Jrun Internet server software suites in the Imaging Lab.

Business Processes and Customer Communicatin Support

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Responsible for the weekly Change Management Meeting including; preparing agenda, opening telephone bridge line, chairing meeting, and providing follow-up as needed. This meeting is for both EPA and Contractor personnel in which system changes and impacts are identified and discussed. Client Coordinate agenda, record and post minutes and provide follow-up for on minutes for ad-hoc customer meetings. Information Channel and Distribution (Web) – Post stories/articles/memos etc. to EPA NTSD's Front Page Web site. Create News Alerts, Memos, convert text and post hardware/software changes and items of interest as approved by EPA. Support Notes Mail-In Database and Oracle databases and develop test applications for use on Development Server 'Betty Jetty' prior to going production. Information Security Officers Forum- Provide total support including the planning, preparation, and execution of an EPA sponsored conference. This includes identifying hotels, agendas, registering attendees, arranging travel, speakers, materials etc.

Provide conference planning and support including gathering and providing information on hotel sites, and locations, as well as the planning, preparation, and execution of the EPA IT Security and Operations Conference. This support includes coordination with the customer, host conference hotel, procurement of materials and supplies, web site development, communication, agendas, speakers, and information needed to ensure a successful conference as well as post conference follow-up.

Application Platform and Deployment Support

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Database Support

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Appendix 2 - PC Programming

Supplement Staffing



Project or Contract Title: Information Technology Services for the EPA (ITS EPA) Period of Performance: November 2002 – Currently Ongoing in 2010			
Environmental Protection	Dick Monn		
Agency (EPA), National	919-767-7339		
Computing Center, RTP,	rmonn@csc.com		
North Carolina 27709	John McQuaid		
	919-541-7679		
	mcquaid.john@epa.gov		
	Wayne Eason		
	919-541-3082		
· 特殊的人	eason.wayne@ena.gov		

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Appendix 3 - Main Frame Programming

Supplement Staffing

Project or Contract Title: Information Technology Services for the EPA (ITS EPA) Period of Performance: November 2002 – Currently Ongoing in 2010				
Customer:	Contact:	Value:	65 Million	
Environmental Protection	Dick Monn			
Agency (EPA), National	919-767-7339			
Computing Center, RTP,	rmonn@csc.com			
North Carolina 27709	John McQuaid			
	919-541-7679			
	mcquaid.john@epa.gov			ļ
	Wayne Eason			
	919-541-3082			
	eason.wayne@epa.gov			

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Appendix 4 - Database Programming

Supplement Staffing

Project or Contract Title: Information Technology Services for the EPA (ITS EPA) Period of Performance: November 2002 – Currently Ongoing in 2010			
Environmental Protection	Dick Monn		
Agency (EPA), National	919-767-7339		
Computing Center, RTP,	rmonn@csc.com		
North Carolina 27709	John McQuaid		
	919-541-7679		
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	Wayne Eason		
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eason.wayne@epa.gov

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The team manages monitors, maintains, and supports COTS platforms, including ColdFusion, Oracle Database, Oracle Internet Application Server, Oracle Business Intelligence, EMC Documentum, and Business Objects.

Database Support

The team supports well over 100 applications on all of the above platforms. The staff assists application owners and development contractors in the choice of software (to comply with EPA-NTSD standards) and the design and development of applications. Technical consultants review database designs on behalf of NTSD and recommend acceptance or rejection. They implement accepted designs and code in the development, quality assurance, and production environments. They assist in security design and set up each application's security structure.

In addition, the team provides DBA support to MS SQL and Oracle databases and applications on Windows NT platforms located in EPA regional offices and administrative centers. Services include DBMS installation, monitoring, assistance with application performance analysis and problem resolution.



These databases support many of the Agency's public-access applications. DBSS provides DBA support to Oracle databases and applications on several UNIX platforms - Compaq Tru64 UNIX, Solaris, and AIX. Services include database management system (DBMS) installation, maintenance, monitoring, security administration, and assistance in the analysis of performance problems.

The team also provides programming services in various languages such as Natural, Cobol, and PL/SQL, and with development tools such as Oracle Developer. These services develop in-house applications for NTSD and do program maintenance and application re-engineering work for other EPA Offices.

The team provides DBA services on a 24x7 basis for production databases, and on an 8x5 basis for development and quality assurance. Technical consulting is normally on an 8x5 basis with exceptions by arrangement, for example to install production code changes during evening or weekend hours to minimize the impact on users.

DBSS also provides assistance to new applications that are in the Application Development Checklist (ADC) process. This assistance includes both DBA services like getting disk space allocated for new databases, and technical consulting services such as design assistance and initial reviews of the applications' logical and physical designs.

On the Enterprise Server (mainframe), the team provides database administration (DBA) services to Adabas databases under the z/OS operating system and to Oracle under Linux. The Adabas databases support several of the Agency's primary financial systems and several applications for the Office of Enforcement and Compliance Assurance. DBSS also provides DBA services for DB2 databases on the Enterprise Server and to the Oracle Transparent and Procedural Gateways. (The Transparent Gateway allows Oracle instances to connect to DB2 databases; the Procedural Gateway allows Oracle applications to invoke CICS transactions on the Enterprise Server, and is used by several financial applications for access to Adabas files.)



Appendix 5 - Desktop Support

Supplement Staffing



Project or Contract Title:			
Period of Performance: July 1st, 2006 through July 2009			
Customer:	Prime Contact:	Value:	
Ohio Department of Job and Family Services (ODJFS), 30 East Broad Street, 40th Fl, Columbus, Ohio 43215	Galen Bock CGI Inc. 88 East Broad Street, STE 1470 Columbus, OH 43215	\$732,760.00	
	614.228.2245		

Project Description

EXCEL provided between 4,000 to 7,000 person computer technology refreshes per year on this contract. To meet organizational timelines we have refreshed as many as 40 PCs per day.

Contract detail.

EXCEL Management Systems Inc. provided project management support, hardware and software installation, configuration, testing, implementation and support for the upgrade of approximately 5,000 workstations to Windows XP and an additional technical depot hardware refresh and installation of approximately 5,000 new workstations and monitors during year 1 of the contract, or 10,000 systems total.

During the next two fiscal years, EXCEL provided hardware depot and installation services for 5,000 workstations in year 2 and 4,000 workstations in year 3 for a total of almost 20,000 systems to date. This contract has been extended and it is expected that an additional 3,000 systems will be depot hardware refreshed and installed in the July-June 2009-2010 timeframe.

Project management services were provided by the Project Manager, whose roles and responsibilities included interfacing with the ODJFS project representative and staff to ensure effective and efficient communication throughout the project. The Project Manager also interfaced with the ODJFS project representative to develop the detailed installation schedule for the needed workstation upgrades and replacements. The Project Manager was responsible for developing the detailed project plan and detailed installation schedule, coordinating project activities, conducting status meetings and providing status reports, participating in key management reviews, and tracking and resolving project-related issues.

The Technical Lead coordinated the activities of the five technical teams, providing assistance to the teams' Task Leaders, and identifying to the Project Manager, any project-related issues that arose and helped to resolve them. The Task Leaders of each team performed Site Surveys of each site and provided input into the development of the detailed installation schedule, as well as acting as the point of contact for the team, and overseeing the team's activities to ensure that the new and upgraded workstations were implemented smoothly and on schedule were properly installed, configured, and tested, and properly identify and resolve all issues.

EXCEL performed the upgrades/replacements in accordance with ODJFS' specified imaging instructions and technology upgrade process, including restoration of end users' files and settings and remapping of printers. EXCEL will also provided inventory listings of desktop units replaced, removed equipment, installed equipment, and newly imaged equipment, and moved replaced workstations to specified staging locations for pickup by ODJFS. If a county choose to retain de-installed equipment, EXCEL ran a program to disable and remove files from the relevant workstations.

Relevant Work Description

In accordance with the deliverables requirements in the XP and Workstation Upgrade Services Project



RFP, EXCEL will provided the following deliverables for this project:

- Detailed project schedule in MS Project format;
- Site Surveys for each installation in MS Word format;
- Weekly Status reports in MS Word format, accompanied by an inventory of installations for each site prepared in MS Excel;
- Conducted weekly meetings with the ODJFS project representative and project team or as necessary and minutes from each meeting in MS Word format; and
- Provided monthly invoices in Adobe PDF format.



Appendix 6 - Help Desk Support

Supplement Staffing

Project or Contract Title: EXCEL Corporate Help Desk 800-886-4925				
Period of Performance:				
Customer: Ohio State Department of Public Safety	Prime Contact: Tom Zwayer 614) 995-1732 tzwayer@dps.state.oh.us Other points of contact provided on request.	Value: As this project area is part of our core business and provided as staffing and internal business process, we value this at over 3 Million dollars annually, with approximately \$500,000 being attributed to the State of Ohio.		

Project Description

EXCEL provides an internal Help Desk for its customers and provides staffing on our customers Help Desks. The following is a combination of those past performances with our contact information being selected from our largest external and internal customer which is the State of Ohio.

Help Desk projects for EXCEL, noteworthy projects:

- With more than 5 years continuing help desk and field-based IT services provided to the ODPS supporting the Title and Clerk of Courts Offices and the Bureau of Motor Vehicles (BMV) through out Ohio's 88 counties.
- The help desk support for the Ohio Multi-Agency Radio Communications System (MARCS) for DAS and Office of Information Technology (OIT).
- The recently started help desk support to SARCOM and ODPS for the Automated Titling Processing System (ATPS).
- The help desk and field-based services to two major commercial clients on a national basis.
- The SACWIS Independent Validation and Verification (IV&V) support.

These projects have provided EXCEL with proven processes and management methodologies for help desk and service management support to Ohio clients on a state wide basis. EXCEL has successfully provided this support for hardware, software, network, and operations as well as state-wide application system such as ATPS, whose operation is just as complex and geographically dispersed as Ohio's SACWIS program.

Relevant Work Description

The *EXCEL* response center environment is staffed with a talented group of analysts who have a proven track record of being able to resolve issues on the first call. The services offered by the center include:



- ERP, CRM Applications
- Change Solutions
- Migrations Support
- Help Desk
- Customer Response Center Services
- 24X7X365 Support
- Proprietary Applications Support
- Manufacturer NOS & Applications Support
- Remote Support
- Dispatch Services

EXCEL offers a true Single-Point-of-Contact Help Desk solution through total call ownership and management. Once a support call is placed, the EXCEL Help Desk Analysts will resolve or track the resolution through to completion. The analyst's primary role is to ensure that each trouble ticket not resolved on the first call is dispatched and managed by the appropriate resource within the agreed-upon Services Level Agreements. Once a problem has been resolved, the Help Desk can then follow-up with the customer to ensure their complete satisfaction with the service.



Appendix 7 - IT Support Staff - Operations

Supplement Staffing



Project or Contract Title: Information Technology Services for the EPA (ITS EPA) Period of Performance: November 2002 – Currently Ongoing in 2010							
Environmental Protection	Dick Monn						
Agency (EPA), National	919-767-7339						
Computing Center, RTP,	rmonn@csc.com	***					
North Carolina 27709	John McQuaid	100					
	919-541-7679						
	mcquaid.john@epa.gov						
	Wayne Eason						
	919-541-3082						

Project Description

eason.wayne@epa.gov

EXCEL's Application and Business Process Management staff has supported Environmental Protection Agency (EPA) for 20 years. Our staff experience with the custom and COTS applications, IBM mainframe, COBOL, CICS, DB2, Oracle, and MS SQL offers a unique skill mix ideally aligned with supporting both critical and non-critical EPA applications. Below is a broad overview of the work performed by the Application and Business Process Management staff.

Custom Software Applications Support, Content Management, and Technical Consulting
The team develops codes, debugs and maintains document imaging software, for Superfund Records
Centers and Superfund Financial Management Centers in the US Environmental Protection Agency for the
10 EPA Regional Offices, 3 EPA laboratory locations and EPA Headquarters. The team also configures,
installs and supports document imaging hardware such as optical jukeboxes, high-speed scanners, highspeed image printers, CD recorders and duplicators, barcode readers, etc. The team also provides the
tools and technical support to produce and manage the electronic images and indexes and extract
relevant data. The EPA has scanned over 42 million pages providing content management with the tools
and services of the CLIN 12 Team.

Current projects are centered on the conversion to a state-of-the-art Web-based document and database management system. The web-based solution will provide full text search capability for all documents as well as the import of documents in their native electronic format. The project also involves the backfile conversion of 42 million TIFF format files to PDF with hidden, searchable text.

Relevant Work Description

The application systems team develops code, debugs and maintains document imaging programs in PowerBuilder 7.0 and Visual Studio .NET for Windows PCs and servers. They are responsibilities for developing imaging utilities for the EPA's SCORPIOS application, such as Image Move, Package Cache Services, Print Server, NOTIFY and SCORPIOS.2.CD. They maintain the code, debug and release new executables as necessary providing support to EPA's user community on these applications. In addition the team develops Optical Character Recognition (OCR) subsystem for EPA's Superfund Document Management System (SDMS) application using ABBYY FineReader Scripting APIs in Visual Studio .NET.

The team supports and maintains code for the SDMS.2.CD application in PowerBuilder, adding new features as required. Addition support includes the automation of SDMS.2.PDF application allowing



conversion of TIFF files to searchable PDF on CD-ROM. Members of the team convert and enhances code from PowerBuilder to Visual Studio .NET for EPA's Grants Imaging Processing System (GRIPS) for conversion of TIFF images to searchable PDF. They also incorporate ABBYY FineReader scripting APIs for the conversion of data. Additional responsibilities in the development and maintenance of JSP/ASP, XML, Servlets, applets and Java applications for SDMS Next Generation application using Oracle JDevelper, JBuilder, Visual Studio .NET, and Documentum. This includes automation of the OCR and PDF conversion of TIFF files in SDMS. The team is also responsible for installation and maintenance of Microsoft IIS, Apache and Jrun Internet server software suites in the Imaging Lab.

Business Processes and Customer Communicatin Support

Provide 2nd Level IBM Mainframe and AQS Application Support. This includes posting News Alerts on the IBM and Outages Messages on the Outages Listserver. Provide access support for Remote Access, Secure Remote and other communications technologies. RACF Administration - Provide RACF Security Administration (RSA) Training, certification, and administration support to EPA ADP Coordinators, EPA and contractor Account Managers and EPA personnel on the registration and maintenance of their accounts and projects. This includes adhering to EPA's Security Policies and Procedures when granting systems rights and maintaining the administration processes. Provide support for the registration for IBM, UNIX, CRAY, AWS, OSC, SecuRemote, Storet, RAS, SAS, and Dial-Up customers. Provide support for RSA Tools Applications. Provide Mainframe development, modification and maintenance support for the User/Account Registration System. Monitor, verify, and support program/report changes from EPA customers.

Responsible for the weekly Change Management Meeting including; preparing agenda, opening telephone bridge line, chairing meeting, and providing follow-up as needed. This meeting is for both EPA and Contractor personnel in which system changes and impacts are identified and discussed. Client Coordinate agenda, record and post minutes and provide follow-up for on minutes for ad-hoc customer meetings. Information Channel and Distribution (Web) – Post stories/articles/memos etc. to EPA NTSD's Front Page Web site. Create News Alerts, Memos, convert text and post hardware/software changes and items of interest as approved by EPA. Support Notes Mail-In Database and Oracle databases and develop test applications for use on Development Server 'Betty Jetty' prior to going production. Information Security Officers Forum- Provide total support including the planning, preparation, and execution of an EPA sponsored conference. This includes identifying hotels, agendas, registering attendees, arranging travel, speakers, materials etc.

Provide conference planning and support including gathering and providing information on hotel sites, and locations, as well as the planning, preparation, and execution of the EPA IT Security and Operations Conference. This support includes coordination with the customer, host conference hotel, procurement of materials and supplies, web site development, communication, agendas, speakers, and information needed to ensure a successful conference as well as post conference follow-up.

Application Platform and Deployment Support

The team manages monitors, maintains, and supports COTS platforms, including ColdFusion, Oracle Database, Oracle Internet Application Server, Oracle Business Intelligence, EMC Documentum, and Business Objects.

Database Support

The team supports well over 100 applications on all of the above platforms. The staff assists application owners and development contractors in the choice of software (to comply with EPA-NTSD standards) and the design and development of applications. Technical consultants review database designs on behalf of NTSD and recommend acceptance or rejection. They implement accepted designs and code in the development, quality assurance, and production environments. They assist in security design and set up each application's security structure.

In addition, the team provides DBA support to MS SQL and Oracle databases and applications on Windows NT platforms located in EPA regional offices and administrative centers. Services include DBMS installation, monitoring, assistance with application performance analysis and problem resolution.



These databases support many of the Agency's public-access applications. DBSS provides DBA support to Oracle databases and applications on several UNIX platforms - Compaq Tru64 UNIX, Solaris, and AIX. Services include database management system (DBMS) installation, maintenance, monitoring, security administration, and assistance in the analysis of performance problems.

The team also provides programming services in various languages such as Natural, Cobol, and PL/SQL, and with development tools such as Oracle Developer. These services develop in-house applications for NTSD and do program maintenance and application re-engineering work for other EPA Offices.

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Appendix 8 - WAN/WAN Support

Supplement Staffing





Project or Contract Title: CLIN 9 – WAN/LAN Support

Information Technology Services for the EPA (ITS EPA)

Period of Performance: November 2002 - Currently Ongoing in 2010

Customer:

CLIN 9

Environmental Protection Agency (EPA), National Computing Center, RTP, North Carolina 27709 Contact:

Dick Monn 919-767-7339

rmonn@csc.com
John McQuaid
919-541-7679

mcquaid.john@epa.gov

Wayne Eason 919-541-3082

eason.wayne@epa.gov

Value:

not separately tracked

Project Description

EXCEL's Wide Area Network Telecommunications group includes the Network Control Facility (NCF) and Telecommunication Service Request (TSR) functions. Both are instrumental in implementing and supporting network related services for the Environmental Protection Agency (EPA). This includes various functions associated with project planning, cost analysis, and project management.

Relevant Work Description

The NCF group is responsible for operating and maintaining the EPA's Wide Area Network (WAN) and Local Area Network (LAN). NCF provides on-site and 7 X 24 on-call level 2 support using a suite of network management tools including HP Open View. The TSR group is responsible for receiving, tracking, and managing customer requests for network related services. This includes conducting analysis of telecommunication systems in order to implement new network services and documenting results utilizing the EPA Telecommunications Service Request (TSR) System.



Appendix 9 - Telecommunications Services

Supplement Staffing



Juno Beach, FL 33408

State of West Virginia Department of Administration, Purchasing Division RFQ ITECH10 Statewide Contract for Technical Services

Project or Contract Title: TBC Dedicated Vendor Support:

Field IT support services to include telephone, and other telecommunications services

Period of Performance: 2004 - Ongoing support

Customer: Contact: Value: 2.6 Million

TBC Corporation Steve Budovsky

823 Donald Ross Road, (561) 383-3000 x2275

Project Description

TBC Corporation operates more than 700 retail locations throughout the United States. It continues to expand the number of facilities in operation by opening an average of 22 new facilities per year. EXCEL performs the installation of the technology suite at all new TBC stores throughout the United States. This project includes the installation of voice and data cable, installation and programming of a key telephone system, installation of paging systems and message-on-hold devices, installation of point-of-sale workstations, and configuration of the local area network. All work must be performed within stringent timelines to meet the objectives of the construction schedule and to ensure that the store is prepared for the grand opening on the scheduled date. In addition, EXCEL's EFITS program provides follow-on maintenance services for the complete technology suite installed.

Relevant Work Description

This reference is offered as another on-going support contract under EXCEL's EFITS program. Many of the activities we perform are directly related to the work required for relocations and new equipment installations. This work is also representative of the project management and documentation activities required by this RFP. This project is larger in scope, spanning the United States, but is very similar in that each location has the same size and complexity. Our process improvements and lessons learned during this project are often used to help improve our other EFITS service contracts.



Attachment 1 – Purchasing Affidavit

Attachment 2 – Exhibit 10 Addendum Acknowledgment

Attachment 3 - Incorporation Information

EXHIBIT 10

REQUISITION NO.:

ADDENDUM ACKNOWLEDGEMENT

I HEREBY ACKNOWLEDGE RECEIPT OF THE FOLLOWING CHECKED ADDENDUM(S) AND HAVE MADE THE NECESSARY REVISIONS TO MY PROPOSAL, PLANS AND/OR SPECIFICATION, ETC.

ADDENDUM NO.'S:
NO. 1
NO. 2
NO. 3
NO. 4
NO. 5

I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF BIDS. VENDOR MUST CLEARLY 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.

SIGNATURE
EXCEL MANAgement Systems Inc.

REV. 11/96

UNITED STATES OF AMERICA, STATE OF OHIO, OFFICE OF THE SECRETARY OF STATE.

I, Bob Taft, do hereby certify that I am the duly elected, qualified and present acting Secretary of State for the State of Ohio, and as such have custody of the records of Ohio and Foreign corporations and Miscellaneous filings; that said records show EXCEL MANAGMENET SYSTEMS, INC., an Ohio corporation, Charter No. 748644, having its principal location in Columbus, County of Franklin, was incorporated on May 8, 1989 and is currently in GOOD STANDING upon the records of this office.



WITNESS my hand and official seal at Columbus, Ohio this
16th day of August, 1994

Bob Taft Secretary of State EXHIBIT 10

REQUISITION NO.: TTECHIO

ADDENDUM ACKNOWLEDGEMENT

I HEREBY ACKNOWLEDGE RECEIPT OF THE FOLLOWING CHECKED ADDENDUM(S) AND HAVE MADE THE NECESSARY REVISIONS TO MY PROPOSAL, PLANS AND/OR SPECIFICATION, ETC.

ADDENDUM NO.'S:	
NO. 1	
NO. 2	
NO. 3	
NO. 4	
NO. 5	

I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF BIDS. MUST CLEARLY 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.

Excel Management systems Tre.

REV. 11/96

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STATE OF WEST VIRGINIA Purchasing Division

PURCHASING AFFIDAVIT

VENDOR OWING A DEBT TO THE STATE:

West Virginia Code §5A-3-10a provides that: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate.

PUBLIC IMPROVEMENT CONTRACTS & DRUG-FREE WORKPLACE ACT:

If this is a solicitation for a public improvement construction contract, the vendor, by its signature below, affirms that it has a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the **West Virginia Code**. The vendor **must** make said affirmation with its bid submission. Further, public improvement construction contract may not be awarded to a vendor who does not have a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the **West Virginia Code** and who has not submitted that plan to the appropriate contracting authority in timely fashion. For a vendor who is a subcontractor, compliance with Section 5, Article 1D, Chapter 21 of the **West Virginia Code** may take place before their work on the public improvement is begun.

ANTITRUST:

In submitting a bid to any agency for the state of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will 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 the bidder.

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership or person or entity submitting a bid for the same materials, supplies, equipment or services and is in all respects fair and without collusion or fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

LICENSING:

Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agencies or political subdivision. Furthermore, the vendor must provide all necessary releases to obtain information to enable the Director or spending unit to verify that the vendor is licensed and in good standing with the above entities.

CONFIDENTIALITY:

The vendor agrees that he or she 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, set forth in http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf.

Under penalty of law for false swearing (**West Virginia Code** §61-5-3), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

Vendor's Name:			 	••••••	
Authorized Signature:	The	Shan	Dat	te:	1-13-10
Purchasing Affidavit (Revised 0)	- / " "	T			