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State of West Virginia Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

## Request for Quotation

a-IO

ITECH10

ADDRESS CORRESPONDENCE TO ATTENTION OF

304-558-8802

JO ANN ADKINS

\*618152355 301-721-0100 PLANET TECHNOLOGIES INC 20400 OBSERVATION DR STE 204 GERMANTOWN MD 20876

ALL STATE AGENCIES AND POLITICAL SUBDIVISIONS VARIOUS LOCALES AS INDICATED BY ORDER

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ADDRESS CORRESPONDENCE TO ATTENTION OF

JO ANN ADKINS 304-558-8802

ALL STATE AGENCIES
AND POLITICAL SUBDIVISIONS
VARIOUS LOCALES AS INDICATED
BY ORDER

\*618152355 301-721-0100 PLANET TECHNOLOGIES INC 20400 OBSERVATION DR STE 204

GERMANTOWN MD 20876

| DATE PRINT<br>11/18/ | 61616601661660190                             | JER<br>JER                           | MS OF SAL  | L  | SHIP VIA   |   | Jan San San San San San San San San San S            | <b>9</b> .B  | 30000000000000000000000000000000000000  | REIGHTSTEHMS |
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State of West Virginia
Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
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PAGE 3

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BY ORDER .

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AND POLITICAL SUBDIVISIONS
VARIOUS LOCALES AS INDICATED

\*618152355 301-721-0100 PLANET TECHNOLOGIES INC 20400 OBSERVATION DR STE 204

GERMANTOWN MD 20876

DATE PRINTED TERMS OF SALE SHIP VIA FREIGHT TERMS F.O.B. 11/18/2009 BID OPENING DATE 01/07/2010 BID OPENING TIME 01:30PM CAT LINE QUANTITY UOP ITEM NUMBER UNIT PRICE AMOUNT CANCELLATION: THE DIRECTOR OF PURCHASING RESERVES THE

RIGHT TO CANCEL THIS CONTRACT IMMEDIATELY UPON WRITTEN NOTICE TO THE VENDOR IF THE COMMODITIES AND/OR SERVICES SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM TO THE SPECIFICATIONS OF THE BID AND CONTRACT HEREIN.

OPEN MARKET CLAUSE: THE DIRECTOR OF PURCHASING MAY AUTHORIZE A SPENDING UNIT TO PURCHASE ON THE OPEN MARKET, WITHOUT THE FILING OF A REQUISITION OR COST ESTIMATE, ITEMS SPECIFIED ON THIS CONTRACT FOR IMMEDIATE DELIVERY IN EMERGENCIES DUE TO UNFORESEN CAUSES (INCLUDING BUT NOT LIMITED TO DELAYS IN TRANSPORTATION OR AN UNANTICIPATED INCREASE IN THE VOLUME OF WORK.)

QUANTITIES: QUANTITIES LISTED IN THE REQUISITION ARE APPROXIMATIONS ONLY, BASED ON ESTIMATES SUPPLIED BY THE STATE SPENDING UNIT. IT IS UNDERSTOOD AND AGREED THAT THE CONTRACT SHALL COVER THE QUANTITIES ACTUALLY ORDERED FOR DELIVERY DURING THE TERM OF THE CONTRACT, WHETHER MORE OR LESS THAN THE QUANTITIES SHOWN.

ORDERING PROCEDURE: SPENDING UNIT(S) SHALL ISSUE A WRITTEN STATE CONTRACT ORDER (FORM NUMBER WV-39) TO THE VENDOR FOR COMMODITIES COVERED BY THIS CONTRACT. THE ORIGINAL COPY OF THE WV-39 SHALL BE MAILED TO THE VENDOR AS AUTHORIZATION FOR SHIPMENT, A SECOND COPY MAILED TO THE PURCHASING DIVISION, AND A THIRD COPY RETAINED BY THE SPENDING UNIT.

BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE CONTRACT NULL AND VOID, AND TERMINATE SUCH CONTRACT WITHOUT FURTHER ORDER.

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301-721-0100

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VENDOR

State of West Virginia
Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130 Charleston, WV 25305-0130

# Request for REONUMBER Quotation

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JO ANN ADKINS 304-558-8802

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GERMANTOWN MD 20876

| DATE PRINT        | ED                | TEF      | IMS OF SALE      |        | SHIP VIA            |   | F.C          | ).B.     | FREIGHTTERMS  |
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State of West Virginia
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2019 Washington Street East
Post Office Box 50130
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JO ANN ADKINS
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GERMANTOWN MD 20876

ALL STATE AGENCIES
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VARIOUS LOCALES AS INDICATED
BY ORDER

| DATE PRINTED                            |   | TER                                     | MS OF SAL                              | E             | SHIPV  | Α                                       | F.O.B             | FREIGHT TERMS         |
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# Request for Quotation

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ITECH10

PAGE 1

JO ANN ADKINS
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AND POLITICAL SUBDIVISIONS
VARIOUS LOCALES AS INDICATED
BY ORDER

| DATE PRIN                              | (ED                     | TER                                | MS OF SAL              | E  |                               | SHIP VIA  |                                       | FO.B.            |         | FREIGHTTERMS   |
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## ITECH10 Questions and Answers

| 1Q. | Deloitte Consulting was qualified under the ITECH07 RFQ. We would like to confirm that our qualification remains valid. Are we still qualified even without submission under  |
|-----|---|
| 1A. | ITECH10? ITECH10 is a new contract so you'll have to re-qualify by submitting qualifications for all applicable categories.   |
| 2Q. | If our qualification under ITECH07 remains valid, and we would like to qualify for additional service categories provided in ITECH10 which were not in ITECH07, should we submit qualifications for just those additional services? |
| 2A. | See number 1.   |
| 3Q. | I've just received the subject RFQ. Does this mean the ITECH06/07 contract is being recompeted and all current ITECH vendors must submit a new proposal?  |
| 3A. | Yes   |
| 4Q. | When we respond with the required information where do we or should we also submit our rates at that time?  |
| 4A. | You do not submit rates at this time. After you are qualified, mini-RFP's will be sent to the vendors under the requested category at which time you will submit your rates.  |
| 5Q. | Desktop support. Can you please tell me if the state has an Enterprise Desktop/Server Management tool e.g., LANDesk/SMS/Altiris/Zenworks ect  |
| 5A. | We currently use System Center Configuration Manager 2007 R2 SP2 as our primary management tool, as well as 1E's power management and distribution suite (Nomad).   |
| 6Q. | HelpDesk Support. Can you please tell me if the state if using a Enterprise HelpDesk application like Remedy/HEAT/Magic?  |
| 6A. | WVOT uses a modified version of HEAT.   |
| 7Q. | Enterprise Services. Can you please tell me if certifications in SixSigma or The Balance Scorecard are important?   |
| 7A. | In some instances, agencies will request these types of certifications in their Statement of Work.  |
| 8Q. | Is it possible to send us a copy of the ITech10 bid req in MS Word format?  |
| 8A. | The Purchasing Division is unable to process this request.  |
| 9Q. | We have a question regarding Supplemental Staffing Attachment I. The RFP asks us to provide the "general value of the project." How do you quantify general value?  |
| 9A. | The general value is how much you received in response to the project.  |

| i       |  |
|---------|--|
| 10Q.    | What if there are multiple consultants billing at the client site at the same time?  |
| 10A.    | That will happen from time to time.  |
| 1071.   |  |
| 11Q.    | What if the billing is on a Time and Materials basis and not as a Statement of Work?   |
| 11A.    | All supplemental staffing and project-based services will be awarded from a Statement of Work.   |
|         | WOIK   |
| 12Q.    | Can we use the same reference to establish qualifications and experience for multiple Supplemental Staffing Categories and/or Service Categories? (p16-17, Section II and Section III)   |
| 12A.    | Yes  |
| 13Q.    | Is renewal of the contract limited to two (2) one (1) year periods as specified on page 2 or for three (3) one year renewals as specified on page 15 (1.5.7)?  |
| 13A.    | Three (3) one year renewals.   |
|         |  |
| 14Q.    | What is the due date and time for the quote?   |
| 14A.    | January 7, 2010, 1:30 p.m.   |
|         | 1 21 1 4.1 4.5% a catagories to be   |
| 15Q.    | Does the contractor have to respond to all 21 supplemental staffing categories to be considered for an award?  |
| 15A.    | No. Only bid the categories that you want to be qualified to bid.  |
|         |  |
| 16Q.    | If we have one client that we have placed people across a number of categories, is the same reference permissible as long as details are provided?   |
| 16A.    | Yes  |
|         |  |
| 17Q.    | The RFQ indicates that SOW will be listed on the state website site, will they also be emailed to the contractors that have received awards?   |
| 17A.    | The vendor will be responsible for accessing the state website for this contract and bidding on the projects for which they are qualified to bid.  |
|         |  |
| 18Q.    | I did not see the confidentiality agreement with the RFQ, will it be provided with the SOW online?   |
| 18A.    | The vendor winning the bid will be provided with the agency's confidentiality to sign.   |
|         | 6 16 1 10  |
| 19Q.    | RFQ indicates that the contractor is to provide a summary of work for each month by the 10 <sup>th</sup> of the following month, what specifically will the Contracting officer be looking for under the supplemental staffing portion of this contract? Will they be looking for a log of everything the employee has done for the moment, a summary of work, or a signed off timesheet from the contractor supervisor? |
| 19A.    | 1 1 1 manufacture the total house  |
| <b></b> |  |

| 20Q.         | General: How many copies of our proposal response are required with our proposal submission?   |
|--------------|--|
| 20A.         | The vendor should provide one original and two copies of their proposal.   |
| 21Q.         | Page 4 – Purchasing Card Acceptance: Please confirm that the use of a purchasing card is not applicable to this RFQ.   |
| 21A.         | The Purchasing card is applicable if the payment falls within the Purchasing guidelines.   |
| 22Q.         | <u>Page 5 – End of RFO:</u> Are bidders to fill in the "Total" line? If so, please clarify what "total" is referring to (e.g., total categories being bid).  |
| 22A.         | This should be deleted. There will be no "Total" in response to this RFQ.  |
| 23Q.         | Page 6 - last full paragraph "Attachments 1 through 11:" Please confirm this should read Attachments 2 through 16.   |
| 23A.         | Yes, this should read "Attachments 2 through 16".  |
| 24Q.         | Page 8 - Section 1.3.4 (4): a) What are the requirements of the training of our candidates? b) Please clarify what is meant by "industry-recognized" security training?  |
| 24A.         | The Statement of Work will be specific on the type of security training will be required. In all instances, the vendor's personnel will be required to take the State's security training after they report to work.   |
| 25Q.         | Page 8 - Section 1.3.4 (5) Expense reimbursement: It is suggested the vendor manage and process pre-approved, State-authorized expenses incurred by the vendor employee. Is it possible to reimburse the vendor employee's expenses using the State Expense System? The State manager must adjudicate the expenses and is more familiar with the State's requirements. Ultimately, the vendor will be required to pay B&O taxes on the expenses. |
| 25A.         | No, the vendor must pay the employee for travel expenses. If travel expenses are to be incurred, this will be noted in the original Statement of Work.   |
| 26Q.         | Page 12 – Section 1.4 Third paragraph beginning with "Technical Services: Reference; "State Project Management Methodology:" What are the details of this methodology and what is required of the Vendor?  |
| 26A.         | Please review the information at <a href="http://www.technology.wv.gov/ProductsAndServices/pmo/Pages/ProjectLifeCycle.aspx">http://www.technology.wv.gov/ProductsAndServices/pmo/Pages/ProjectLifeCycle.aspx</a>   |
| 27Q.         | 1-year renewals. This conflicts Page 2 of the RFQ, which states (1) year with (2) one year optional renewals.  |
| 27A.         | The contract term is one year with three (3) one year renewals.  |
| 28Q.<br>28A. | Has the State purchased any ERP applications to date?  No.   |
| 29Q.         | Does the State have any ERP applications currently live and running any areas of business?   |

| 29A. | No  |
|------|---|
|      |   |
| 30Q. | If so, which ERP applications are live?   |
| 31A. | Not applicable.   |
|      |   |
| 32Q. | If so, which versions of the relevant application is the State running?   |
| 32A. | Not applicable.   |
| 220  | If so, which areas of business are being covered by ERP applications?   |
| 33Q. |   |
| 33A. | Not applicable.   |
| 34Q. | Which areas of business is the State planning on implementing ERP applications?   |
| 34A. | Not applicable.   |
|      |   |
| 35Q. | Page 6, Section 1.2: This section states that no placement fees will be awarded in the event that a vendor-placed resource is offered a full time position with the State. Is there a typical minimum contract engagement time period before an offer for direct employment would be made?            |
| 35A. | No  |
|      |   |
| 36Q. | Page 8, Section 1.3.3 Service Category Requirements: Some of our newly hired employees have great personal reference stories from their prior employment (either through another company or as an independent contractor). Are those references acceptable to include if they are designated as such? |
| 36A. | Yes   |
|      |   |
| 37Q. | Can one reference be used for multiple categories?  |
| 37A. | Yes   |
| 38Q. | Does "Reference" = "Client" or "Project"? For example, can a single customer be used for multiple references for the same category if multiple projects were conducted over time?   |
| 38A. | Yes   |
|      | CC Di-  |
| 39Q. | provide some examples of what types of "industry-recognized information security training"  |
| 39A. |   |
| 40Q. | will be conducted onsite? Or will offsite or remote staff also be acceptable in certain situations (depending on the scope of work)?  |
| 40A. | CC 1 111  |

| 49Q.         | Can we use the same reference to establish qualifications and experience for multiple Supplemental Staffing Categories and/or Service Categories? (p16-17, Section II and Section   |  |  |  |  |
|--------------|---|--|--|--|--|
|              |   |  |  |  |  |
| 48Q.<br>48A. | Section 4 mentions a No Debt Affidavit – Could you provide additional information on this requirement? Is there a form available?  The No Debt Affidavit is at <a href="http://www.state.wv.us/admin/purchase/vrc/pAffidavit.pdf">http://www.state.wv.us/admin/purchase/vrc/pAffidavit.pdf</a> .  |  |  |  |  |
| 47A.         | The Statement of Work will be specific on the type of security training will be required. In all instances, the vendor's personnel will be required to take the State's security training after they report to work   |  |  |  |  |
| 47Q.         | We understand that all consultants must have completed industry recognized security training.  Does the State of WV have preferred training or example training that would qualify?   |  |  |  |  |
| 46A.         | Yes   |  |  |  |  |
| 46Q.         | Page 13, Section 1.4 (Technical Services): This section speaks to the importance of effective project management from the Agency Project Manager and the WVOT Project Manager, but there does not appear to be mention of a Vendor Project Manager. We assume that a Vendor Project Manager is expected to be included as part of every scoped project performed. Is that a correct assumption? |  |  |  |  |
| 45A.         | Some part-time supplemental staff engagement references are acceptable.   |  |  |  |  |
| 45Q.         | Do you require that the references for the Supplemental Staffing categories be for 40 hour/week engagements only, or are some part time supplemental staff engagement references acceptable?  |  |  |  |  |
| 44A.         | Most engagements will be 40 hours per week but some will be part-time or as-needed.   |  |  |  |  |
| 44Q.         | Page 12, Section 1.4 (Supplemental Staffing scope): Are all Supplemental Staffing engagements expected to be 40 hours per week? Or might there be some engagements requiring part time work effort?   |  |  |  |  |
| 43A.         | In most instances, the vendor will be required to provide installation scripts for a State infrastructure team to deploy.   |  |  |  |  |
| 43Q.         | Will the Vendor be permitted to promote code and applications to the State's production environment, or will the vendor be required to provide installation scripts for a State infrastructure team to deploy?  |  |  |  |  |
| 42A.         | This will be acceptable only if noted in the original Statement of Work.  |  |  |  |  |
| 42Q.         | Is it acceptable for the Vendor to conduct development within their own environment and transfer it to the State environment for testing and production?  |  |  |  |  |
| 41A.         | Yes   |  |  |  |  |
| 41Q.         | Page 10, Section 1.3.12: This section describes that the State will provide all data processing equipment and computer resources necessary for completion of the project. Does this mean that the State will provide the development and testing environments as well as production?  |  |  |  |  |
| i            |   |  |  |  |  |

|      | III)  |
|------|---|
| 49A. | Yes   |
| 50Q. | Is renewal of the contract limited to two (2) one (1) year periods as specified on page 2 or for three (3) one year renewals as specified on page 15 (1.5.7)?   |
| 50A. | See number 27.  |
| 51Q. | What is the due date and time for the quote?  |
| 51A. | The due date has been changed to January 14, 2010 and must arrive by 1:30 PM.   |
| 52Q  | Page 8 – Section 1.3.4 (3) Paragraph Two – The section groups several different levels of background check services as referenced the WV State Police and the FBI. How are the services identified and requested? |
| 52A  | The required background checks will be identified in the Statement of Work.   |



State of West Virginia Department of Administration Quotation Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

# Request for

RFQ NUMBER ITECH10

| PAGE | · ; |
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ADDRESS CORRESPONDENCE TO ATTENTION OF:

JO ANN ADKINS B04-558-8802

301-721-0100 \*618152355 PLANET TECHNOLOGIES INC 20400 OBSERVATION DR STE 204 GERMANTOWN MD 20876

ALL STATE AGENCIES AND POLITICAL SUBDIVISIONS VARIOUS LOCALES AS INDICATED BY ORDER

FREIGHT TERMS F.O.B. DATE PRINTED TERMS OF SALE SHIP VIA 12/29/2009 BID OPENING DATE: BID OPENING TIME 01:30PM 01/14/2010 CAT. UOP UNIT PRICE: AMOUNT QUANTITY ITEM NUMBER ADDENDUM NO. 2 WHAT IS THE FORMAT THAT YOU NEED FOR REFERENCES? on supplemental staffing, you should do a page per REFERENCE WITH THE FORMAT AS FOLLOW: PROJECT DESCRIPTION (A PARAGRAPH DESCRIBING THE PROJECT); DESCRIPTION OF DUTIES (DESCRIPTION OF THE FUNCTIONS PROVIDED); GENERAL VALUE (DOLLAR AMOUNT); ENGTH OF PROJECT (TOTAL HOURS INVOLVED); CUSTOMER NAME AND ADDRESS, CONTACT NAME, TELEPHONE NUMBER AND E-MAIL ADDRESS OF CONTACT. PROJECT-BASED SERVICES! YOU SHOULD DO A PAGE REFERENCE WITH THE FORMAT AS FOLLOWS: PROJECT DESCRIPTION (A PARAGRAPH DESCRIBING THE PROJECT); GENERAL VALUE (DOLLAR AMOUNT); LENGHT OF PROJECT (TOTAL TIME INVOLVED); TYPE OF CONTRACTORS USED (DESCRIBE WHAT TYPES OF CONTRACTORS USED, I.E., MAINFRAME PROGRAMMER, INTERNET DEVELOPER); CLIENT NAME AND ADDRESS, CONTACT NAME, TELEPHONE NUMBER AND E-MAIL ADDRESS OF CONTACT. \*\*\*\*\* QUESTION AND ANSWER PERIOD HAS BEEN EXTENDED UNTIL JANUARY 6, 2010. NOTE: NO QUESTIONS WILL BE ACCEPTED OR RESPONDED TO AFTER THIS DATE. END OF ADDENDUM NO. 2 SEE REVERSE SIDE FOR TERMS AND CONDITIONS TELEPHONE ADDRESS CHANGES TO BE NOTED ABOVE 52-2062401



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State of West Virginia Request for Department of Administration Quotation Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

# Request for |

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RFQ NUMBER ITECH10

JO ANN ADKINS 304-558-8802

\*618152355 301-721-0100 PLANET TECHNOLOGIES INC 20400 OBSERVATION DR STE 204

GERMANTOWN MD 20876 ALL STATE AGENCIES AND POLITICAL SUBDIVISIONS VARIOUS LOCALES AS INDICATED BY ORDER

ADDRESS CORRESPONDENCE TO ATTENTION OF

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## ITECH10 Questions & Answers 01/07/2010

|     | in the arrival" on it rolates to temporary staffing   |
|-----|---|
| ιQ. | We need a definition/calculation for "general value of the project" as it relates to temporary staffing that is contracted on a Time and Materials basis (hourly rates and durations) and not in a Statement of Work (total project costs.  |
| A.  | On the Supplemental Staffing, the General Value would be the "hourly rate" times the hours contracted.  |
|     |   |
| 2Q. | This question also relates to "project value" definition. Project value can also vary on the number of consultants hired at one time. Moreover, the project may have 5 consultants each with a different technology. So, "project value" will be greater than the hourly wages of the consultants |
| 2A. | per technology On the Project-based portion, the General Value would be the total amount of the Project for that particular vendor (including all job locations) with a clarification of what job categories are included in the General Value  |
|     |   |
| 3Q. | We have sent one original and one copy. Can we send an additional copy to be attached to our original package?  |
| 3A. | Yes, if received prior to the mandatory bid opening date and time. Please have a cover letter stating that the additional package is to be added to original. List RFQ – ITECH10 bid, on the outside of the envelop.  |
|     | de la   |
| 4Q. | Addendum #2 state the revised format on the supplemental staffing categories. Please see the sample excerpt below from our response and advise if this format is acceptable.  STAFFING CATEGORY: WEB PROGRAMMING  |
|     | Client: Wachovia Bank, a Wells Fargo Company  |
|     | <u>Contact</u> : Mr. Brian Richter<br>Email: <u>brian.richter@wachovia.com</u><br>Phone: 704-590-6426   |
|     | Project Description: Enhancements, upgrades and development of a financial services Wealth Management application.  |
|     | Consultant Role:  Resource for ongoing application development, support and upgrades as directed by the client. Responsibilities include all aspects of coding, enhancements, testing, debugging, and management of applications.   |
|     | <u>Value of Project</u> : @ \$250,000.00  |
|     | Length of Assignment: @ 18 months   |
| 4A. | This is acceptable.   |
|     | Will there be any special preference given to local companies or to minority owned companies?   |
| 5Q. | Resident Vendor Preference form was included with the original RFQ- ITECH10.  |
| 5A. | Resident Vendor Preference form was included with the original Para 112011151   |
|     | Section 1.6 Proposal format – Section II Qualification supplemental staffing – Do we need a   |
| 6Q. | I CAMBAN 3 K PEANAGSI INTIBS! — DECILOR II QUARRICAROR SUPPRINTERIAL STARRING - 20 110 11000 A  |

## ITECH10 Questions & Answers 01/07/2010

|     | separate title page for each category we are applying for? Do we also need a separate page from the title page for each category with reference, duties, description, etc.?                       |
|-----|---|
| 6A. | Do a title page for each category and provide a page for each category with the information provided.   |
| 7Q. | If I understand Addendum 2 correctly, we could eliminate: description of work performed, problems encountered and performance results from the Project Based Services references. Please confirm. |
| 7A. | Yes, if the vendor has references in the old format, they will also be accepted.  |



## **RFQ-ITECH10**

#### Prepared for:



## State of West Virginia

By:

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| PROOF OF REGISTRATION                                      |       |
| FROOF OF REGISTRATION                                      | ,     |

# **Section I-Corporate Description**

### **About Planet Technologies**

Planet Technologies is pleased to present this proposal in response to The State of West Virginia's request for support. Planet Technologies, a corporation based in Maryland and founded in 1997, was formed as a system integration and networking firm focused on meeting the needs of the mid-size enterprise and federal customer. With over 120 employees worldwide, we have since evolved into an international professional consulting firm that provides expert knowledge in policy, process management, and the integration and customization of Microsoft technologies in diverse business environments.

Planet Technologies was built around investing in and developing long term relationships with our customers and corporate partners. We work hard to keep our staff trained on the latest technologies, policy and operational issues impacting today's federal and corporate environments.

Planet provides our worldwide client base with project-based engineering and development as well as IT and business consulting support and services. Planet offers our clients flexibility in engagement models to meet every business need. The models range from Blanket Purchase Agreements (BPAs), Large Federal Government Contracts, Dedicated staffing or on a per project basis.

Planet understands the driving issues and concerns that government agencies face today. To each engagement, we bring a proven track record with civilian and defense agencies, extensive planning and implementation experience, and the passion to help agencies succeed. Our combination of state-of-art methodologies, flexible solutions, and expertise enables our professionals to help agencies meet critical challenges rapidly, keep them in the forefront of technology, and maintain the operational excellence that is the hallmark of top performing organizations.

Planet also understands that as a result of this proposal process, the State of West Virginia will narrow the vendor field down and that these approved vendors will then have the ability to bid on future projects. Within this proposal, Planet Technologies will show our past project experiences and expertise qualify us in the functional areas listed above.

We welcome this opportunity to assist the State of West Virginia with the creation of a strategic path that makes sense for their business and technology needs.

Our success is in helping the businesses of the State of West Virginia achieve their goals in a technologywise, timely and cost-effective manner.

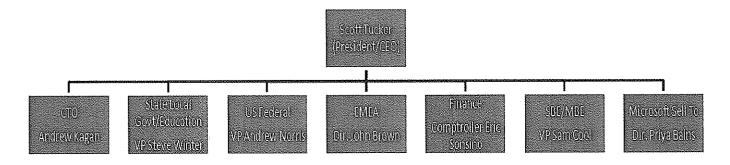
#### Offeror General Information

Planet Technologies, a Microsoft Gold Certified Partner, is an international IT consulting, services and solutions firm with expertise in the integration and customization of Microsoft technologies and data center solutions in diverse business environments.

With a 100% Microsoft focus, we provide expert knowledge in policy, process management, and the integration and customization of Microsoft based solutions around unified communications, enterprise search, records management, portal development and collaboration, systems management and CRM.

Our clients include some of the largest education, federal, state and local government and commercial organizations in the world.

#### **Corporate Organizational Chart**



### **Contacts for Planet Technology:**

- 1) Steve Winter Vice-President swinter@go-planet.com
- 2) Mike Crowley Infrastructure Technologies Architect mcrowley@go-planet.com
- 3) Dan Nelson Director of Development dnelson@go-planet.com

#### **Vital Statistics and Offices**

#### Type of Business

Planet Technologies, incorporated since 1997, is a private Delaware Corporation with headquarters in Germantown, Maryland USA. We are a small business, with approximately 120 employees worldwide. Planet Technologies is an Equal Opportunity Employer.

Federal Employer Identification Number: 52-2062401

Company Headquarters Planet Technologies 20400 Observation Drive, Suite 204 Germantown, MD 20876

Tel: 301.721.0100 Fax: 301.721.0189

\*Planet leases space in Montgomery County Maryland – Germantown. We have been in our current office space since 2006. We currently have approximately 10,000 square feet office space.

#### **Additional Domestic Offices:**

Mid West Office Planet Technologies, Inc. 10 S. Riverside Plaza, Suite 1800 Chicago, Illinois 60606 Phone: (312) 474 6443

West Coast Office 14400 Bel-Red Road Bellevue, WA 98007 Phone: 425 703-2481

Fax: 425 936-7329

Office on Microsoft Campus One Microsoft Way, 25/1465 Redmond, WA 98052 Phone: 425-703-2481

Fax: 425-936-7329

**Business Representation throughout Europe** 

### CERTIFICATE OF INCORPORATION

#### OF

## PLANET TECHNOLOGIES, INC.

FIRST: THE UNDERSIGNED, Lynn Bozentka Taylor, whose mailing address is 1920 N Street, N.W., Suite 800, Washington, D.C. 20036, acting as incorporator, does hereby form a corporation under and by virtue of the General Corporation Law of the State of Delaware.

SECOND: The name of the corporation (hereinafter called the "Corporation") is:

## PLANET TECHNOLOGIES, INC.

THIRD: The address of the registered office of the Corporation in the State of Delaware is 1209 Orange Street, Wilmington, Delaware 19801. The name of the registered agent of the Corporation at such address is The Corporation Trust Company.

FOURTH: The purposes for which the Corporation is formed are as follows:

- (1) To develop, design, implement, assemble, integrate, handle, maintain, service, repair or otherwise deal with electronic, computer, and security systems, equipment, supplies, services, configurations and networks.
- (2) To engage in any lawful act or activity for which corporations may be organized under the General Corporation Law of the State of Delaware.

FIFTH: The total number of shares of capital stock which the Corporation has authority to issue is Ten Thousand (10,000), divided into Eight Thousand (8,000) shares of Class A Common Stock without par value, and Two Thousand (2,000) shares of Class B Common Stock without par value.

The following is a description of each class of stock of the Corporation with the preferences, conversion and other rights, restrictions, voting powers, and qualifications of each class:

- Except as hereinafter provided with respect to voting powers, the Class A Common Stock and the Class B Common Stock of the Corporation shall be identical in all respects.
- (2) With respect to voting powers, except as otherwise required by the General Corporation Law of the State of Delaware, the holders of Class A Common Stock shall possess all voting powers for all purposes, including by way of illustration and not of limitation, the election of directors, and the holders of Class B Common Stock shall have no voting power whatsoever, and no holder of Class B Common Stock shall vote on or otherwise participate in any proceedings in

which actions shall be taken by the Corporation or the stockholders thereof or be entitled to notification as to any meeting of the Board of Directors or the stockholders.

<u>SIXTH</u>: The name and mailing address of the person who is to serve as the sole director of the Corporation until the first annual meeting of the stockholders and until his successor is elected and qualified, is as follows:

Name

Mailing Address

Scott Tucker

2139 Dominion Way Falls Church, Virginia 22043-2538

SEVENTH: In furtherance of and not in limitation of powers conferred by statute, it is further provided that:

- (1) the election of directors need not be by written ballot except to the extent provided in the By-laws of the Corporation;
- (2) the Board of Directors of the Corporation is expressly authorized to adopt, amend or repeal the By-laws of the Corporation; and
- (3) meetings of stockholders may be held within or without the State of Delaware, as the By-laws may provide. The books of the Corporation may be kept, subject to any provisions contained in the General Corporation Law of the State of Delaware, outside the State of Delaware at such place or places as may be designated from time to time by the Board of Directors of the Corporation.

**EIGHTH**: The Corporation is to have perpetual existence.

NINTH: Whenever a compromise or arrangement is proposed between this Corporation and its creditors or any class of them and/or between this Corporation and its stockholders or any class of them, any court of equitable jurisdiction within the State of Delaware may, on the application in a summary way of this Corporation or of any creditor or stockholder thereof, or on the application of any receiver or receivers appointed for this Corporation under the provisions of Section 291 of Title 8 of the Delaware Code or on the application of trustees in dissolution or of any receiver or receivers appointed for this Corporation under the provisions of Section 279 of Title 8 of the Delaware Code, order a meeting of the creditors or class of creditors, and/or of the stockholders or class of stockholders of this Corporation, as the case may be, to be summoned in such manner as the said court directs. If a majority in number representing three-fourths in value of the creditors or class of creditors, and/or of the stockholders or class of stockholders of this Corporation, as the case may be, agree to any compromise or arrangement and to any reorganization of this Corporation as a consequence of such compromise or arrangement, the said compromise or arrangement and the said reorganization shall, if sanctioned by the court to which the said application has been made, be

binding on all the creditors or class of creditors, and/or on all the creditors or class of creditors, and/or on all the stockholders or class of stockholders, of this Corporation, as the case may be, and also on this Corporation.

TENTH: Except to the extent that the General Corporation Law of the State of Delaware prohibits the elimination or limitation of liability of directors for breaches of fiduciary duty, no director of the Corporation shall be personally liable to the Corporation or its stockholders for monetary damages for any breach of fiduciary duty as a director, notwithstanding any provision of law imposing such liability. No amendment to or repeal of this provision shall apply to or have any effect on the liability or alleged liability of any director of the Corporation for or with respect to any acts or omissions of such director occurring prior to such amendment.

ELEVENTH: It is hereby expressly provided that the Corporation shall protect and indemnify, and advance related expenses to, directors and officers and former directors and officers of the Corporation and their heirs, executors and administrators, to the full extent that the Corporation shall have power to do so under the General Corporation Law of the State of Delaware as it exists on the effective date of this Certificate of Incorporation and as it may hereafter be amended or supplemented by law. Employees and agents of the Corporation other than such directors or officers shall be so indemnified to the extent required by the laws of the State of Delaware and to such further extent permitted by such laws, if any, as shall be provided pursuant to resolution of the Board of Directors. Whether or not and to what extent the Corporation shall purchase and maintain insurance on behalf of any such directors, officers, employees or agents, to the extent it shall have power to do so under the said General Corporation Law of the State of Delaware as so existing or as it may hereafter be amended or supplemented, shall be in the full discretion of the Board of Directors.

TWELFTH: The Corporation reserves the right to amend, after, change or repeal any provision contained in this Certificate of Incorporation in the manner now or hereafter prescribed by statute, and the Certificate of Incorporation and all rights conferred upon stockholders herein are granted subject to this reservation.

The undersigned incorporator hereby acknowledges this 22<sup>nd</sup> day of October, 1997 that the foregoing Certificate of Incorporation is her act and deed.

Jyuu ) Jou 5 yu Bozentka Taylor, Incoppo ator

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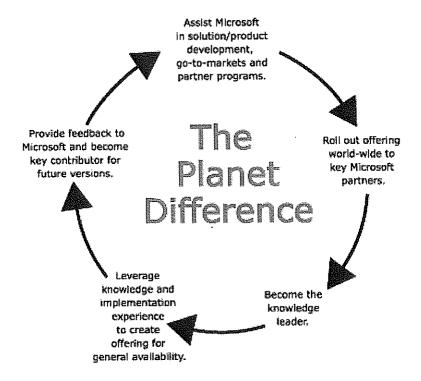
#### **Qualifications:**

### Planet Technologies and Microsoft: The Power of Partnership

From its inception, Planet Technologies has worked closely with Microsoft field, vertical, consulting and solution teams to develop new solutions and deliver engagements based on best practices. Our longstanding relationship with Microsoft combined with our deep understanding of the role that technology plays in building a successful business means we can offer unmatched depth of knowledge and expertise. The result—affordable solutions that enable our customers to expand their infrastructure and enhance the support technology provides to the mission of any organization.

In recent years, we have worked closely with Microsoft to co-develop, manage, and deliver technical and marketing programs focused on Federal Enterprise Architecture, Mobile Messaging, Business Desktop Deployment (BDD), and Microsoft Solutions for Windows Hosting, ASP.NET Jumpstart, Windows Web Hosting Program, Hosted Messaging and Collaboration, High Volume Exchange, Hosted Messaging and Collaboration and SharePoint Portal Server 2003/Microsoft Office SharePoint Server 2007.

Planet has been requested on multiple occasions by Microsoft to provide technical support, design expertise and development, in support of many of the solutions mentioned above.



By being part of the initial design and development and then delivering many of the training sessions in support of these solutions, Planet has grown to become one of the worldwide knowledge leaders in Microsoft Solutions. We provide this knowledge to our valued customers. As we assist our customers with deployments we learn many valuable lessons, lessons we feed back, due to our close ongoing relationship, to the Microsoft product teams that leverage this operational insight to improve new releases. This is the Planet Difference.

#### Microsoft Awards and Accomplishments:

- Microsoft Gold Certified Partner
- The Microsoft State and Local Government Award Winner for 2008
- A four time Federal Partner of the Year Award Winner (2005 2008)
- A Microsoft Managed Partner in Education vertical. Only US partner to be managed across all of Microsoft US Public Sector (State & Local, Federal and Education)
- One of 50 U.S. based Microsoft Partners to be managed as a member of the National Systems Integrator Program (NSI). This program recognizes Planet's superior service delivery as well as our close relationship to Microsoft. Benefits include access to Marketing and direct product group Technical support.

Planet has, on behalf of Microsoft, developed solutions such as BDD in a box and SMS in a box to allow customers worldwide the chance to deploy these critical desktop management and deployment solutions for a standard fee. Eliminating much of the risk of deployment and minimizing impact upon an organizations operational baseline cost.

Planet is a regular partner and sub-contractor to Microsoft Consulting Services. This partnership has taken us across the U.S. and into 12 countries worldwide. Projects have ranged from Identity Management to Migrations of Exchange 5.5 and NT4. Many projects have contained custom application development leveraging specialized Planet skills in Microsoft Provisioning System and ASP.Net.

In addition to partnering with Microsoft on projects, Planet also has an office on the Microsoft campus where we are able to collaborate with managerial, technical and product teams on a daily basis. We are regularly selected by Microsoft to evaluate new product releases as part of their Early Adopter Programs (EAP) and Technical Adopter Programs (TAP). Presently we are part of the System Center TAP program. Microsoft is one of our largest clients and we regularly support large internal projects for Microsoft as well as supporting a number of their largest worldwide clients in the areas of development, infrastructure and collaboration.

Developed, in conjunction with Microsoft, custom programs for rapid technology deployments in the areas of BizTalk, Microsoft Operations Manager, SharePoint, SMS, MS Exchange Messaging and Collaboration w/AD, BDD, and MIIS.

Developed automated identity management and provisioning tools which are utilized regularly in conjunction with Microsoft's Identity Integration Server (MIIS) solution for Microsoft strategic clients worldwide. Planet has also participated in the development and delivery of Microsoft's Business Desktop Deployment (BDD) solution

## **Technology Expertise**

Planet has experience architecting and deployment experience in Microsoft solutions to customers ranging in size from 100 users to over one million users. We are experts in the areas of design, deployment, development and migrations of:

| Technology Focus:  |                              |
|--|------------------------------|
| Active Directory   | Exchange Server              |
| System Center Family                                       | SharePoint Portal Server     |
| Live@EDU and BPOS  | Office Communications Server |
| Hyper-V  | Remote Desktop Services      |
| SQL Server   | Deployment Automation        |
| Windows Server and Desktop Operating<br>Systems            | Microsoft CRM                |
| Microsoft Identity Lifecycle Manager                       | Forefront Technologies       |
| Windows-based Hosting / Hosted Messaging and Collaboration | Visual Studio .NET Framework |

The State of West Virginia can be assured that Planet Technologies Inc. has the experience and will meet every business' challenges with great expertise and dedication, proven not only through our prior project experience, but through our partnership with a proven leader in the information technology world, Microsoft.

## **Qualifications and Experience**

## **Attachment 1-Supplemental Staffing**

| Web Programming                   | Oakride National Laboratories   |
|-----------------------------------|---------------------------------|
| PC Programming                    | Oakridge National Laboratories  |
| Computer Systems Analysis         | Department of Energy            |
| Computer Systems/Network Security | Department of Energy            |
| Database Management               | Oak Ridge National Laboratories |
| IT Support Staff                  | Department of Energy            |
| Electronic Document Management    | Oakridge National Laboratories  |
| Business Anaylst Services         |                                 |
| Enterprise Services               | Oak Ridge National Laboratories |

## **Web Programming:**

Client: Oak Ridge National Laboratories

Contact: Wade McNair Title: Chief Architect Telephone: 865.574.2171

#### Address:

PO BOX 2008 MS6416 Oak Ridge, TN 37831-6416

Project Value: 12 months Length of Project: \$400,000

**Project Description**: Planet Technologies has been providing support to ORNL since 2006. During this time, Planet has delivered tremendous value to ORNL, demonstrating our expertise in Microsoft based technologies and delivering solutions that have successfully met ORNL's goals within these key areas:

- Systems Review and Architecture
- Strategic Planning Assistance
- Technology Assessment and Implementation

### **Systems Review and Architecture**

ORNL has a vast collection of enterprise data that they wanted to be able to visualize in a geospatial manner. They also have a geospatial research team that had a significant amount of raw data and custom imagery in various formats. They needed assistance in "marrying" these two sets of data in an easy-to-use tool that can be exposed to the end users in rapid time while also being easy for their development staff to integrate various other data sources.

**Description of Duties**: Resource provided web development to customer. This included requirements gathering and analysis, design, development, testing, documentation, build processes and implementation. Resource led web development team in developing SDLC processes and was instrumental in key web initiatives.

#### **PC Programming**

**Client: Oak Ridge National Laboratories** 

Contact: Wade McNair Title: Chief Architect Telephone: 865.574.2171

#### Address:

PO BOX 2008 MS6416 Oak Ridge, TN 37831-6416

Project Value: 6 months Length of Project: \$210,000

**Project Description:** Planet Technologies has been providing support to ORNL since 2006. During this time, Planet has delivered tremendous value to ORNL, demonstrating our expertise in Microsoft based technologies and delivering solutions that have successfully met ORNL's goals within these key areas:

- Systems Review and Architecture
- Strategic Planning Assistance
- Technology Assessment and Implementation

#### **Systems Review and Architecture**

ORNL has a vast collection of enterprise data that they wanted to be able to visualize in a geospatial manner. They also have a geospatial research team that had a significant amount of raw data and custom imagery in various formats. They needed assistance in "marrying" these two sets of data in an easy-to-use tool that can be exposed to the end users in rapid time while also being easy for their development staff to integrate various other data sources.

**Description of Duties:** Resource provided desktop programming to develop a desktop authorization and audit tool. This includes a high security code review and well as the design, development and implementation of the tool.

#### **Computer Systems Analysis**

Client: Department of Energy
Contact: Dishecal "Tinker" Manley

Title: Former Acting Director, DOE OCIO Office of Cyber Security, Policy and Planning Division Currently

on Detail to NNSA

Telephone: (202) 586 -1843

Address: 1000 Independence Ave., SW

Washington, DC 20585

Project Value: 3,000,000 Length of Project: on-going

**Project Description:** We needed to form an integrated project team that would work with DOE to provide total cyber security support to a complex nationwide operation. This support included activities related to the secure transmission and storage of electronic information, drafting cyber security policy and procedures, providing user awareness training, risk management, internal or external auditing, and support for certifications and accreditations. As a result, our Cyber Security team supports all aspects of the DOE HQ's cyber security operations to manage and implement security technologies, practices, and procedures to protect DOE HQ's IT assets. We completely transformed the help desk supporters' response metrics and created an efficient database of all pertinent information about incidents and solutions.

**Description of Duties**: Multiple resources supporting client in all aspects of systems analysis. Resources assist in gathering requirements, building internal proposals and recommendations, designing systems and major system upgrades. Planet resources are enterprise architects and support many broad initiatives inside client.

### **Computer Systems/Network Security**

Client: Department of Energy Contact: Dishecal "Tinker" Manley

Title: Former Acting Director, DOE OCIO Office of Cyber Security, Policy and Planning Division Currently

on Detail to NNSA

**Telephone:** (202) 586 -1843

Address: 1000 Independence Ave., SW

Washington, DC 20585

Project Value: 3,000,000 Length of Project: on-going

**Project Description:** We needed to form an integrated project team that would work with DOE to provide total cyber security support to a complex nationwide operation. This support included activities related to the secure transmission and storage of electronic information, drafting cyber security policy and procedures, providing user awareness training, risk management, internal or external auditing, and support for certifications and accreditations. As a result, our Cyber Security team supports all aspects of the DOE HQ's cyber security operations to manage and implement security technologies, practices, and procedures to protect DOE HQ's IT assets. We completely transformed the help desk supporters' response metrics and created an efficient database of all pertinent information about incidents and solutions.

**Description of Duties**: Multiple resource supporting client in handling networking, security, firewalls and client support systems.

#### **Electronic Document Management**

**Client: Oak Ridge National Laboratories** 

Contact: Wade McNair Title: Chief Architect Telephone: 865.574.2171

#### Address:

PO BOX 2008 MS6416 Oak Ridge, TN 37831-6416

Project Value: 8 months Length of Project: \$320,000

**Project Description**: Planet Technologies has been providing support to ORNL since 2006. During this time, Planet has delivered tremendous value to ORNL, demonstrating our expertise in Microsoft based technologies and delivering solutions that have successfully met ORNL's goals within these key areas:

- Systems Review and Architecture
- Strategic Planning Assistance
- Technology Assessment and Implementation

#### **Systems Review and Architecture**

ORNL has a vast collection of enterprise data that they wanted to be able to visualize in a geospatial manner. They also have a geospatial research team that had a significant amount of raw data and custom imagery in various formats. They needed assistance in "marrying" these two sets of data in an easy-to-use tool that can be exposed to the end users in rapid time while also being easy for their development staff to integrate various other data sources.

**Description of Duties**: Multiple resources providing leadership in the design and implementation of document management. This includes file plans, data retention and disposition, workflow processes and security.

#### **Business Analyst Services**

Client: Department of Energy Contact: Dishecal "Tinker" Manley

Title: Former Acting Director, DOE OCIO Office of Cyber Security, Policy and Planning Division Currently

on Detail to NNSA

Telephone: (202) 586 -1843

Address: 1000 Independence Ave., SW

Washington, DC 20585

Project Value: 3,000,000 Length of Project: on-going

**Project Description:** We needed to form an integrated project team that would work with DOE to provide total cyber security support to a complex nationwide operation. This support included activities related to the secure transmission and storage of electronic information, drafting cyber security policy and procedures, providing user awareness training, risk management, internal or external auditing, and support for certifications and accreditations. As a result, our Cyber Security team supports all aspects of the DOE HQ's cyber security operations to manage and implement security technologies, practices, and procedures to protect DOE HQ's IT assets. We completely transformed the help desk supporters' response metrics and created an efficient database of all pertinent information about incidents and solutions.

**Description of Duties**: Business Analyst Services – DOE – Multiple resources assist customer in ensuring functional business requirements are being met by the technology solutions. This includes but is not limited to requirements gathering and documentation, technical specification, testing and consulting to business customers.

#### **Enterprise Services**

**Client: Oak Ridge National Laboratories** 

Contact: Wade McNair Title: Chief Architect Telephone: 865.574.2171

Address:

PO BOX 2008 MS6416 Oak Ridge, TN 37831-6416

Project Value: 2 years

Length of Project: \$750,000

**Project Description**: Planet Technologies has been providing support to ORNL since 2006. During this time, Planet has delivered tremendous value to ORNL, demonstrating our expertise in Microsoft based technologies and delivering solutions that have successfully met ORNL's goals within these key areas:

- Systems Review and Architecture
- Strategic Planning Assistance
- Technology Assessment and Implementation

#### **Systems Review and Architecture**

ORNL has a vast collection of enterprise data that they wanted to be able to visualize in a geospatial manner. They also have a geospatial research team that had a significant amount of raw data and custom imagery in various formats. They needed assistance in "marrying" these two sets of data in an easy-to-use tool that can be exposed to the end users in rapid time while also being easy for their development staff to integrate various other data sources.

**Description of Duties:** Enterprise Services – ORNL – Planet resource was part of the strategic technology leadership team. The resource was responsible to advice business customers on handling workflow modeling, strategic systems planning, business process engineering, security reviews and delivery of key technology solutions.

Qualifications and Experience Project Based Technology Services

Attachment 2 – Data Warehousing and Implementation

Client: WV OIT

Contact: Richard J. "Rick" Pickens

**WVFIMS Project Manager** 

One Davis Square

321-323 Capitol Street

Charleston, WV 25301

Office: 304-558-8142

Richard.J.Pickens@wv.gov

Description: To provide a Business Intelligence (BI) solution to the State of WV – Office of Technology

that will address the self-service capability where State Agency managers, Cabinet Secretaries, and the

Governor's office will be able access a summary of expenses and trending for all agencies by the types of

expenses over a certain time period effortlessly. The source of the data is stored on an IBM mainframe

within the DB2 data warehouse. I, E, W document type expenses will be reported on. The data

gathered in the BI solution will be presented in the form of Excel Pivot tables and graphs and charts

inserted into Performance Point dashboards and accessed through a SharePoint portal. The goal is to

provide a solution that is sustainable, which would include development, scalability, auditing,

automation, and knowledge transfer.

Consultant Role: To design, architect and implement a sustainable data warehouse solution and

provide knowledge transfer to OIT.

Value of Project: 40,000

Length of Project: 6 weeks

**Client:** Federal Mediation Conciliation Service (FMCS)

Contact: Will Shields Address: 2100 K St, NW

Washington, DC 20427

Phone: (202) 606-3635 wshields@fmcs.gov

Description: The Federal Mediation and Conciliation Service (FMCS), an independent agency of the US Government whose mission is to preserve and promote labor-management peace and cooperation, enlisted the assistance of Planet's software development team to architect and implement their Case and Contact Management System (CCMS). From this transactional application, a data warehouse was built to handle the complex reporting requirements of the organization. As part of establishing the warehouse, data had to be imported from both the current transactional DB schema as well as 2 historical data sources and the data underwent multiple cleaning process to ensure valid data. The data gathered in the data mart was then used to create a number of SQL reporting services reports.

**Consultant Role:** To design, architect and implement a sustainable data warehouse solution. Clean the data and pull it in from multiple sources. Create the necessary reports based on this data.

Value of Project: 75,000 Length of Project: 6 months

Client: VA DOT

Contact: Bill Cannell Address: 1401 E. Broad St Richmond, VA 23219 Office: (804) 786-3402

Bill.Cannell@VDOT.Virginia.gov

**Description:** VDOT had numerous metrics they track both internally and externally related to transportation. Planet was engaged to evaluate in assisting in evaluating next generation presentation tools. This was accomplished by using data provided from the existing data warehouse, building a cube and then presenting the data in various ways. A significant part of this project was knowledge transfer to the customer regarding the use of these tools.

**Consultant Role:** To design and implement a presentation solution and provide knowledge transfer to VDOT.

Value of Project: 25,000 Length of Project: 6 weeks

| Attachment 5 – Electronic Commerce – Web based Development |
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|  |
|  |
|  |
|  |

Client: University of Washington

Contact: Colleen Butler 3903 Brooklyn Ave NE Seattle, WA 98105 Phone: (206)543-9202

butlerce@u.washington.edu

**Description:** Planet developed a solution for the University of Washington to allow alumni sign up for a live@edu account. The solution was designed to provide the end users with a self service web application so they can manage their mailboxes at any time anywhere as long as they can get on line. It also facilitates the Admin and Support personnel's management of the mailboxes. The solution uses forms authentication to authenticate user domain accounts. In order to give flexibility for possible extension of this feature, the solution uses a custom user principal which implements the IPrincipal interface. It overrides the IsInRole method of IPrincipal to execute the user authentication tailored to specific needs. For basic user information such as first name, last name etc, the solution uses LDAP to query the Active Directory so as to avoid storing duplicate data in the database. The scope of this project was design, development, testing and deployment. Technologies used in this application were asp.net, AJAX, SQL, Powershell and XML.

**Consultant Role:** Planet Technologies was responsible to design, develop, test and deploy the solution as well as provide documentation and knowledge transfer.

Value of Project: 30,000 Length of Project: 8 weeks

**Client: Wharton School of Business** 

Contact: Lou Metzger

Address: 3733 Spruce Street

102 Vance Hali

Philadelphia, PA 19104-6301

Phone: 215.573.2230

metzgerl@wharton.upenn.edu

**Description:** Planet was asked to assist Wharton in development of internet properties for several of their educational programs. This involved gathering requirements and building tools to allow collaboration between students and faculty as well as incorporating "web 2.0" style collaboration capabilities. The solution involved using SharePoint, asp.net, sql and other technologies.

**Consultant Role:** Planet Technologies was responsible to design, develop, test and deploy the solution as well as provide documentation and knowledge transfer.

Value of Project: 80,000 Length of Project: 5 months

**Client:** International Raw Materials

Contact: Michael Carribine

Address: 150 South Independence Mall West

Philadelphia, PA 19106-3407 Phone: (215) 928-1010

mjc@irmteam.com

Description: IRM is an international vendor for the sale of various fertilizer products. In order to further streamline and enhance the business and services they are providing a technology initiative was undertaken. Planet developed a custom warehouse portal. Warehouse personnel could use this portal for load scale tickets and tracking. On the internal side, reporting was built and some of the information was integrated into IRM SAP system. The scope of this project was to gather requirements, build the

infrastructure, write the specification, develop the tools, test and deploy them in production.

Consultant Role: Planet Technologies was responsible to design, develop, test and deploy the solution as well as provide documentation and knowledge transfer.

Value of Project: 70,000

Length of Project: 16 weeks

**Attachment 6 – Electronic Document Management** 

**Client:** Glastonbury School District

Contact: Chris Macca

**Address:** 1029 Neipsic Road Glastonbury, CT 06033

Phone: 860-652-4910 ext 363 MaccaC@GLASTONBURYUS.ORG

**Description:** Planet provides assistance to Glastonbury School District to build and support document management services. This involved gathering requirements, building and developing solutions to support district initiatives for students and faculty. The solution involved using SharePoint, asp.net, sql and other technologies.

**Consultant Role:** Planet Technologies was responsible to design, develop, test and deploy the solution as well as provide documentation and knowledge transfer.

Value of Project: 50,000 Length of Project: 6 months

**Client: Oak Ridge National Laboratories** 

Contact: Wade McNair Title: Chief Architect Telephone: 865.574.2171

#### Address:

PO BOX 2008 MS6416 Oak Ridge, TN 37831-6416

Planet Technologies has been providing support to ORNL since 2006. During this time, Planet has delivered tremendous value to ORNL, demonstrating our expertise in Microsoft based technologies and delivering solutions that have successfully met ORNL's goals within these key areas:

- Systems Review and Architecture
- Strategic Planning Assistance
- Technology Assessment and Implementation

#### **Systems Review and Architecture**

ORNL has a vast collection of enterprise data that they wanted to be able to visualize in a geospatial manner. They also have a geospatial research team that had a significant amount of raw data and custom imagery in various formats. They needed assistance in "marrying" these two sets of data in an easy-to-use tool that can be exposed to the end users in rapid time while also being easy for their development staff to integrate various other data sources.

Planet supported this effort in the following ways:

- Assisted ORNL in identifying a technology platform that would not only support the stated problem set but also be consistent with the technological direction set forth by the CIO's office.
- Provided team members to work with ORNL back office staff to deploy and configure the technology infrastructure needed to support this application.
- Coordinated training for 12 members of ORNL's development staff and ensured that the vendor
  provided training that was not only specific to the technology at hand, but tailored to the
  application set at ORNL.
- Coordinated with the geospatial researchers to integrate the custom data that they provided with the selected tool thereby enhancing the standard offering with hi-resolution imagery specific to the lab.
- Built an application, integrated into MOSS that allows users to search ORNL's chemical inventory
  for a specific chemical and have the location of said inventory overlaid on top of a map of the
  lab giving those users an idea of how close that chemical may be to their current location. They
  can then drill in to see the amount of that chemical in a given location and the disposition of the
  inventory there (i.e. is it marked as excess so I can go borrow some for my experiment).
- Built an application, integrated into MOSS that allows the management team to visually represent the locations of the monthly management observations across the lab and to then

drill into each observation and obtain the detail about the observation (date/time, what problem was seen, what action was taken, etc.). An unexpected outcome of this application is that the appropriate people were able to ascertain which areas of the lab had been slighted with respect to the observations performed and take corrective action.

Value and Results: ORNL now has a standards-based platform for displaying geo-tagged data directly in their existing SharePoint environment while also incorporating both enterprise data as well as custom imagery from their geospatial research team. Planet provided support to this effort in such a way as to have minimal impact on the existing staff and workload while providing examples of the technology (via the two applications built) that allowed the CIO's office to demonstrate the technology to the leadership team and other lines of business at the lab.

#### **Strategic Planning Assistance**

As part of their application modernization efforts, ORNL has assembled a team to focus on modernizing 16 of their top 141 enterprise applications. These applications span many disciplines and technology stacks. ORNL needed someone to be a technical lead on this team who could provide guidance and assistance across the Microsoft technologies being used in the modernization process. Planet provided a lead system architect to support the direction set by the CIO. This individual plays an active role on the ORNL IT Technical Review Board (TRB) – the internal organization responsible for setting IT technical standards at the lab. Planet also sits on the change management board and the IT leadership teams providing insight to the rest of the ORNL team with respect to how certain technology choices affect the application development and modernization efforts. Planet staff also spends time working with various development staff to provide solutions architecture support for various projects to properly leverage the Microsoft technology stack. Planet staff is also providing focused training on various Microsoft tools via articles written specific to ORNL, brown-bags, training sessions, etc.

**Value and Results:** Planet is continuing to support the application modernization efforts at ORNL in a specific leadership-driven fashion. By providing multi-disciplinary staff, Planet is helping ORNL to address the varied technology problems they are facing while maintaining a relatively small footprint with respect to the number of staff members required to support these efforts.

Project Value: 8 months Length of Project: \$320,000

**Client:** University of Louisville **Contact:** Mitzie O'Rourke Coyle

Address: MITC 109 F-13 (Miller Information Technology Center)

Louisville, KY 40292 Phone: 502-852-7146

mitzie.orourke@louisville.edu

**Description:** Planet was engaged by the University of Louisville to deploy SharePoint and a collaboration and document management solution. The University had faced several challenges around document organization and needed a standardized mechanism for storing and retrieving documents as well as a full text search mechanism. Document types were primarily MS office files and PDF needed for University administration of University and Accounting reviews.

**Consultant Role:** To design, architect, build and deploy a document management solution using Microsoft Office SharePoint Server (MOSS).

Value of Project: 40,000 Length of Project: 8 weeks

# Attachment 7 – Electronic Systems Management

Page 34

**Client: Prince George's County Government** 

Contact: Michelle Hunter

Title: Technical Enterprise Services Manager

**Address: Office of Information Technology and Communications** 

**Prince George's County Government** 

Office: 301.883.5344 mdhunter@co.pg.md.us

**Project Description:** 

The local government of Prince George's County, Maryland (PGC) recently engaged Planet Technologies in a System Center 2007 (SCCM) project. PGC had recently installed SCCM but was having difficulty getting it configured to deploy software and operating systems to their environment. Planet Technologies is a leader in the System Center space and therefore was recommended by Microsoft to

come on site and assist.

**Consultant Role:** 

Planet sent one of their SCCM subject matter experts (SME) to PGC's offices. Once on site, Planet adjusted and validated the SCCM configuration and then created software packages for use with the PGC workstation landscape. PGC was also having trouble with understanding SCCM's reporting capabilities, and therefore asked Planet for assistance on this as well. During Planet's time on site, the SME was able to create a golden image for OS deployment, package desktop productivity software, setup reporting and then train the resident IT staff on all related concepts pertaining to use and maintenance.

Value of Project: 15,000

Length of Project: 13 days

Client: Palm Beach Community College

Contact: Michael Merker

**Title:** Director of Technology Infrastructure **Address:** Palm Beach Community College

4200 Congress Ave Lake Worth, FL 33461 **Telephone:** (561) 868-3252

merkerm@pbcc.edu

**Project Description:** Palm Beach Community College (PBCC) contacted Planet Technologies to assist with a workstation and infrastructure upgrade. The current environment had a mix of Windows XP & Vista workstations as well as older versions of the Windows Server operating system, which they wanted replaced or migrated to Windows 7 and Server 2008 R2.

#### **Results:**

Planet provided a small team of subject matter experts to address the following technologies: Windows 7, System Center Configuration Manager 2007 (SCCM), PowerShell and Windows Server 2008 R2 as it relates to Active Directory and Enterprise Certificate services (PKI).

While on site, Planet created a "Golden Image" using SCCM and Windows 7 as well as many software packages and System Center customizations for use throughout their enterprise. This greatly reduced the administrative effort and overhead required to manage the 5000 workstations distributed throughout the campus. Planet also supplied advice and methodologies on overall systems management that saved time for the PBCC engineers.

PBCC also had several applications, including the abovementioned SCCM that required a certificate-based public key infrastructure (PKI). While they had an existing Windows 2000 Certificate Authority server, it was in disrepair and not functioning properly. Using Windows Server 2008 R2 Planet engineers were able to export necessary certificate data and re-implement a healthy cutting edge PKI environment. This unlocked additional feature sets within many of their enterprise applications as well as added potential for future, secure network evolution.

While on site, Planet also completed an upgrade of their multi-domain forest to the latest versions by migrating all domain controllers to the Server 2008 R2 operating system. Once this task was complete, Planet also assisted in crafting many new group policies and PowerShell scripts which were now available through the new server toolset as well as newly deployed Windows 7 environment. This

allowed for more dynamic control of user data as well as centralized storage and management elements.

Palm Beach Community College was happy with the work Planet preformed, and currently utilizes us for other miscellaneous projects and tasks as they arise.

**Project Value:** 200,000 **Length of Project:** 5 months

#### **United States Holocaust Memorial Museum**

**Contact:** Angelito Pangilinan

Title: Director of Technology Infrastructure

Telephone: (202) 488-6151

Address:

100 Raoul Wallenberg Place Southwest

Washington, DC 20024-2126

# **Project Description:**

The United States Holocaust Memorial Museum (USHMM) relies on Planet for our expertise in the Microsoft technologies they employ. Our focal areas there are around the Exchange Server, Hyper-V, Active Directory and SharePoint technologies. This support includes 24/7, 365 messaging and LAN infrastructure support.

#### **Consultant Role:**

Planet is responsible for the migration of users onto Exchange 2007, as well as ongoing support for the other Microsoft infrastructure technologies mentioned above. We are also responsible for all aspects of design and implementation of future versions of these technologies.

Value of Project: \$250,000

Length of Assignment: 18 Months

|   | Attachment 9 - Major Pro  | icat Implementation |  |
|---|---------------------------|---------------------|--|
|   | Attacimient 3 - Major Pro | gett implementation |  |
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**Client: FMCS** 

Contact: Will Shields Address: 2100 K St, NW

Washington, DC 20427

Phone: (202) 606-3635 wshields@fmcs.gov

**Project Description:** In November 2006, The Federal Mediation and Conciliation Service (FMCS), an independent agency of the US Government whose mission is to preserve and promote labor-management peace and cooperation, enlisted the assistance of Planet's software development team to architect and implement their Case and Contact Management System (CCMS). This software system is at the very core of their business, providing the organization with the necessary means to collect and manage broad scope information regarding negotiations between employers and trade unions. As part of this effort to architect, design and build a highly productive and efficient solution, Planet was also tasked with the remediation of the existing platform, a challenge that involved evaluation of the Agency's business processes and adherence to key industry standards and performance goals.

The challenge with this client was that the client had previously suffered from a project failure from another contractor and the organization faced data integrity and performance issues with the legacy system.

Upon examination of FMCS' original system requirements, Planet worked with the FMCS project team to conduct a formal a business process analysis from which Planet was able to determine feasibility and provide scope for modifications and additional features. An iterative or "evolving" design process was followed in order to allow for benefits that could not be realized under a traditional "waterfall" approach. For example, the process adheres to key aspects such daily builds, unit testing and frequent communication that provides the most value to customers. The approach acknowledges the significance of change in today's business world and recognizes that design is in reality a process. The results of this approach allowed FMCS to have high visibility into their project and the ability to work with their solutions much sooner in the process.

The scope of work entailed:

#### **Business and Requirements Analysis**

#### **Specification Documentation and Planning**

- Use Cases
- Business Rules
- Milestones establishment
- Project Management Plan
- Change Management Plan

#### **Design and Architecture**

- Logical Structure
- Physical Structure
- CSS Graphical Design
- System Workflows
- Database schema

#### **Implementation**

**Database Rebuild and Migration** 

- Database Creation Scripts
- Populated SQL 2005 Database
- Scripted 1-way "sync" (from current DB to new)
- Generated documentation on database design (DBSpecGen)
- UnitTests for validating database structure and operations (NUnit/MBUnit)

#### **Data Access Layer**

Planet Technologies built a C# library (or set of libraries) that provides a common interaction point between any business logic layers and the data source. This library complies with industry standards and focuses on consistency and performance.

• Compiled Code Libraries that provide a layer of indirection between the business logic layer and the actual data.

#### Testing/QA - Verification

Iterative testing process w/ build-out milestones

#### **Deployment and Maintenance**

#### Results:

The Planet Technologies team architected, developed, tested, deployed, documented and delivered the application across multiple phases in coordination with a client site team and performed these tasks to the success and satisfaction of the customer. This is an ongoing project to which Planet has committed its support at FMCS' request.

Value of Project: 1.5 million Length of Project: 28 months

**Client:** Liberty University

Contact: Christopher Shuji Hara Address: 1971 University Blvd. Lynchburg, VA 24502

Phone: (434) 515-1438 cshara@liberty.edu

#### **Project Description:**

Liberty University had been anticipating a tool that would enable the University to connect current and potential students with Alumni and donors throughout the world to build a community of individuals who have been fused

with the University. Planet Technologies implemented Microsoft Dynamics CRM.

"Microsoft Dynamics gives us a competitive CRM platform by which to stand on and develop functionality that differentiates us from our competitors. We are very excited about our future direction with this product and how it will enhance our ability to service our students and prospective students," commented Matthew Zealand, CIO at Liberty University.

In August 2009, the first and second phases of the project were implemented in the Resident Enrollment call center. The project has morphed the traditional Customer Relationship Management (CRM) tool into an Anything Relationship Management (XRM) Solution. An XRM is a modified or re-defined CRM that takes the shell and concept of the traditional CRM tool and morphs it to allow the University to focus on relationships, communication, and service providing a 360 degree view of the customer. At completion, the University was able to reach its customers on a more personal level.

"Other institutions are trying to implement a CRM solution and integrate it with their ERP to gain that holistic view of their student's data. Here at Liberty we have succeeded so far and anticipate additional success as we expand the tool and consolidate the information," stated Chris Hara, Project Manager.

"Liberty prides itself as being a leader in the industry. The complexities of this project have been a clear indication of the talent and quality of our IT staff."

Value of Project: 350,000 Length of Project: 9 months

**Client:** Pocono Mountain School District (PMSD)

Contact: Dr. David Zerbe

Address: 1 Pocono Mountain School Road

Swiftwater, PA

Phone: (570) 839-7121 Ext. 10153

dzerbe@pmsd.org

**Description:** Planet was engaged by PMDS to complete a total technology upgrade. This started with a new directory migration and has evolved to include mail, collaboration, provisioning and applications. Planet has provided knowledge leadership, design, planning, architecture, implementation and support for all of these technologies.

**Consultant Role:** Planet has assisted in the design and implementation of all major systems in the school district including Active Directory, Exchange, SharePoint, SCCM, desktop management, Identity Management, SQL and others. Planet continues to provide support and troubleshooting to the district.

Value of Project: 900,000 Length of Project: 10 months Attachment 16 – Microsoft Specialist

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Contact: Will Shields Address: 2100 K St, NW

Washington, DC 20427

Phone: (202) 606-3635 wshields@fmcs.gov

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Value of Project: 900,000 Length of Project: 10 months State of West Virginia Proof of Registration

STATE OF WEST VIRGINIA
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON STREET, EAST
POST OFFICE BOX 50130
CHARLESTON, WEST VIRGINIA 25305-0130
06/18/2009

STEVE WINTER
PLANET TECHNOLOGIES INC
20400 OBSERVATION DR STE 204

GERMANTOWN MD

20876

THIS IS TO CONFIRM RECEIPT OF YOUR VENDOR REGISTRATION FEE. PAYMENT OF THE FEE ENABLES YOU TO PARTICIPATE IN THE PURCHASING DIVISION'S COMPETITIVE BID PROCESS AND ENTITLES YOU TO A ONE-YEAR SUBSCRIPTION TO THE WEST VIRGINIA PURCHASING BULLETIN. A NEW ISSUE OF THE WEST VIRGINIA PURCHASING BULLETIN IS POSTED ON OUR WEB SITE EACH WEEK. BID OPPORTUNITIES ESTIMATED AT \$25,000 OR MORE ARE ADVERTISED IN THIS PUBLICATION. WE ENCOURAGE YOU TO LOG ON AND VIEW THE BULLETIN EVERY FRIDAY SO AS NOT TO MISS IMPORTANT BIDDING OPPORTUNITIES. OUR WEB ADDRESS IS:

HTTP://WWW.STATE.WV.US/ADMIN/PURCHASE

IN ORDER TO ACCESS THE WEST VIRGINIA PURCHASING BULLETIN, YOU WILL NEED YOUR VENDOR NUMBER, GROUP NUMBER (IF ANY), AND YOUR PASSWORD WHICH ARE PRINTED BELOW. YOUR ACCESS WILL BECOME EFFECTIVE ON THE FIRST MONDAY AFTER 06/18/2009, STATE HOLIDAYS EXCLUDED.

HELPFUL TIPS: YOUR COMPUTER-GENERATED VENDOR NUMBER BEGINS WITH AN ASTERISK, BUT DO NOT USE THE ASTERISK WHEN LOGGING IN. ALSO, OUR LOGIN SCRIPT IS CASE SENSITIVE. THEREFORE, IF YOUR VENDOR NUMBER CONTAINS A CHARACTER LIKE A, B, OR C, PLEASE TYPE IT IN UPPER CASE.

IF YOU HAVE QUESTIONS, FEEL FREE TO CONTACT US AT 304-558-2311 OR JEANNE.B.BARNHART@WV.GOV. THANK YOU.

SINCERELY YOURS.

Jeanne Boundard VENDOR REGISTRATION

VENDOR NUMBER :

\*618152355

GROUP NUMBER :

PASSWORD

18607

# 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: Planet | echnology, Inc |               |
|-----------------------|----------------|---------------|
| Authorized Signature: |                | Date: 1/19/16 |
|                       |                |               |

Purchasing Affidavit (Revised 01/01/09)

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|----|------|-----|---|--------|
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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 🗸  |        | 4Hack | reC |
| NO. 3 V  | /      |       |     |
| 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

Planet Technologo, Drac COMPANY

DATE

REV. 11/96