

**Vitech Systems Group, Inc.**

**CPR12026 Best And Final Offer**

**for a New Line of Business Solution**  
for the

**West Virginia Consolidated  
Public Retirement Board**

BAFO Technical Proposal  
June 19, 2013



**Vitech V3**

06/19/13 10:45:30 AM  
West Virginia Purchasing Division





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

GENERATION

CPR12026

1

ADDRESS CORRESPONDENCE TO ATTENTION OF

KRISTA FERRELL  
304-558-2596

RFO COPY

VENDOR

Vitech Systems Group, Inc.  
Attn: James Vitiello  
401 Park Avenue South, 12th Floor  
New York, NY 10016

SHIP TO

CONSOLIDATED PUBLIC RETIREMENT  
BOARD  
BUILDING 5, ROOM 1000  
1900 KANAWHA BOULEVARD, EAST  
CHARLESTON, WV  
25305-0720 558-3570

DATE PRINTED

05/31/2013

BID OPENING DATE:

06/19/2013

BID OPENING TIME

1:30PM

LINE	QUANTITY	UOP	CAT NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
				ADDENDUM NO. 7 REQUEST FOR BEST AND FINAL OFFER (BAFO)		
				THE WEST VIRGINIA STATE PURCHASING DIVISION FOR THE AGENCY, THE WEST VIRGINIA CONSOLIDATED PUBLIC RETIREMENT BOARD, IS REQUESTING BEST AND FINAL OFFERS FROM ALL VENDORS QUALIFIED TO SUBMIT SAID OFFERS PER THE SPECIFICATIONS CONTAINED IN RFP CPR12026 AND THE ATTACHED BEST AND FINAL OFFER REQUEST. THIS REQUEST IS LIMITED SOLELY TO THOSE VENDORS AND NO OTHER OFFERS WILL BE CONSIDERED.		
0001	1	IS		920-49		
				NEW LINE OF BUSINESS SOLUTION FOR CPRB		
				***** THIS IS THE END OF RFQ CPR12026 ***** TOTAL:		

SIGNATURE

TELEPHONE

646-344-5233

DATE

June 19, 2013

TITLE

Sr. Vice President

FEIN

13-378-5492

ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO SOLICITATION, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'





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

# Solicitation

NUMBER
CPR12026

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF
KRISTA FERRELL 304-558-2596

Mr. James Vitiello  
Vitech Systems Group, Inc.  
401 Park Avenue Avenue, South 12th Floor  
New York, NY 10016

V  
E  
N  
D  
O  
R

S  
H  
I  
P  
T  
O

CONSOLIDATED PUBLIC RETIREMENT  
BOARD  
BUILDING 5, ROOM 1000  
1900 KANAWHA BOULEVARD, EAST  
CHARLESTON, WV  
25305-0720 558-3570

DATE PRINTED
06/12/2013

BID OPENING DATE: 06/19/2013

BID OPENING TIME 1:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
ADDENDUM NO. 8						
THIS ADDENDUM IS ISSUED TO ANSWER ALL TECHNICAL QUESTIONS SUBMITTED IN ACCORDANCE WITH THE BEST AND FINAL OFFER (BAFO) DOCUMENT RELEASED AS ADDENDUM 7 TO THIS SOLICITATION.						
001	1	LS	920-49	NEW LINE OF BUSINESS SOLUTION FOR CPRB		
***** THIS IS THE END OF RFQ CPR12026 ***** TOTAL:						

SIGNATURE 	TELEPHONE 646-344-5233	DATE June 19, 2013
TITLE Sr. Vice President	FEIN 13-378-5492	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO SOLICITATION, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



**SOLICITATION NUMBER: CPR12026**  
**Addendum Number: 8**

---

The purpose of this addendum is to modify the solicitation identified as ("Solicitation") to reflect the change(s) identified and described below.

**Applicable Addendum Category:**

- ☐ Modify bid opening date and time
- ☐ Modify specifications of product or service being sought
- ☒ Attachment of vendor questions and responses
- ☐ Attachment of pre-bid sign-in sheet
- ☐ Correction of error
- ☐ Other

**Description of Modification to Solicitation:**

To provide answers to all technical questions submitted in accordance with the Best and Final Offer document added to this solicitation per Addendum No. 7.

**Additional Documentation:** Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

**Terms and Conditions:**

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.



## **BAFO for a New Line of Business Solution – RFP CPR12026 West Virginia Consolidated Public Retirement Board**

---



## VITECH BAFO RESPONSE

Vitech is pleased to submit our best and final offer to the West Virginia Consolidated Public Retirement Board. We believe that Vitech and V3 offer the highest-reward, lowest-risk solution for WVCPRB and that our organizations would work well together

The V3 System is the choice of nearly 50 multi-employer benefit organizations across North America. V3 is vastly configurable and extremely scalable. It includes employer reporting, loan processing, retirement calculations and benefits payroll capabilities along with workflow, ECM, CRM and self-service features in a single, integrated system.

Vitech is the leader in the delivery of administration solutions to public pension plans. As we have been serving such organizations for over 20 years, we are extremely intimate with WVCPRB's business requirements, technical needs and project objectives.

The new system will be tightly tailored to WVCPRB's most specific needs and requirements. This is not a one-size-fits-all solution. This is a best-of-both-worlds approach that provides the depth of capabilities only available through a true product solution with the degree of fit more commonly associated with a bespoke application. This is made possible by the extreme configurability of the V3 System and the tremendous expertise of Vitech's delivery team.

Vitech is extremely well qualified to support WVCPRB in this critical undertaking and our V3 software is extremely well suited to WVCPRB functional requirements. We are most hopeful that we will have the opportunity to partner with WVCPRB on this exciting endeavor.

Please find our acknowledgements to the BAFO within the below table and all referenced updated sections or Exhibits in the following attachments. Thank you for the opportunity to participate in this procurement. Please let us know if you have any further questions. We are hopeful that WVCPRB will select Vitech as your technology solution partner.

BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
<b>2.1.1 Vendor Bound by Terms</b> Clarification is provided for Section 1.2 of the RFP with respect to WVCPRB expects the proposals to remain valid for at least one hundred eighty (180) days from the proposal receipt deadline as noted in Section 1.3 of this BAFO document.	I-1.2 Statement of Understanding	Acknowledged.
<b>2.1.2 Schedule of Events</b> Clarification is hereby provided that vendors should adjust their proposed phasing and timeline to conform to WVCPRB's revised Procurement Schedule as noted in Section 1.3 of this BAFO document.		Acknowledged. Our proposed project plan, project phasing, timeline, milestones, and all related activities have been updated.
<b>2.1.3 Initial Plan</b> As a result of the clarification provided in this document, vendors should provide an updated initial high level work plan (RFP Section 5.3.1.5, Exhibit 7), clearly identifying that the implementation is phased according to the requirements and	III-Exhibit 7 High Level Work Plan	Acknowledged. Our proposed solution includes phasing in accordance with the RFP Section 5.3.1.5, Exhibit 7. Please find the high level work plan and the detailed



BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
clarification provided for Appendix D Section 2.6.1.8, and indicate the elements included in each project phase. Vendors should also include a high-level project schedule based on the target dates stipulated in Appendix D (see Section 2.3), presented in a Gantt chart or other suitable format.		description of the elements included in each phase within attachment "WBCPRB_I-2.6.1.8 Phasing the Project.doc".
<b>2.1.4 Vendor Certifications and Affirmations</b> Clarification is hereby provided in reference to Section 5.3.1.3 of the RFP in that vendors should provide updated responses to the Vendor Certifications and Affirmations as detailed in Section I-1.1 of the vendor's technical proposal.	I-1.1 Vendor Certifications and Affirmations	Acknowledged. Please find a recommitment of Vitech's certifications and affirmations within attachment "WBCPRB_I-1.2 and 2.1 Vendor Information.doc".
<b>2.1.5 Corporate Background</b> Clarification is hereby provided with reference to Section 5.3.1.3 of the RFP in that vendors should provide updates to Section I-2.1 of the vendor's proposal with respect to certain corporate background information:  A. The names, titles, and length of tenure of the top five officers of the company (or its subsidiary or operating division responsible for this project). For any whose time in the position is less than a year, provide the name of his or her predecessor and the reason for the change in position.  B. Any change in the ownership status of the company in the past three years (or any forthcoming change).  Vendors should also provide updated corporate background information for all proposed sub-contractors:  A. A description of all work to be subcontracted to and/or products to be provided by third parties.  B. Descriptive information relating to the nature and duration of the previous relationship of all subcontractors and/or third parties with the prime contractor.  C. Explanation of any existing contractual relationships between the prime and subcontractors, or among subcontractors	I-2.1 Corporate Background	Acknowledged. Please find updated corporate background information within attachment "WBCPRB_I-1.2 and 2.1 Vendor Information.doc".
<b>2.1.6 Project Staffing and Key Personnel</b> Clarification is hereby provided in reference to Section 2 of Appendix D, and Section 5.3.1.3 of the RFP, that vendors should provide updated project staffing information.  Vendors should provide updated Preliminary Project Staffing Plan (RFP Section 5.3.1.5, Exhibit 13) and Resource Summary By Phase (RFP Section 5.3.1.5, Exhibit 23).  Vendors should also update the staffing plan to identify key personnel, including, but not limited to, the Project Manager, the lead analyst or Deputy Project Manager, and at least one additional senior full-time staff member. Updated team members' resumes should also be provided (RFP Section 5.3.1.5, Exhibit 14).  The vendor should confirm its understanding that these designated key staff members should not be reassigned for at least a year following the commencement of the portion of the project for which they are responsible without WVCPRB's prior written agreement.  For all key personnel being proposed to WVCPRB, the vendor is requested to identify all other projects /	II-2.8 Project Staffing  III-Exhibit 13, III-Exhibit 23, III-Exhibit 14	Acknowledged. Please find updated Exhibit 13 and Exhibit 23 attached.  Unfortunately due to another commitment that arose in the past 2 months, Brian McKinney will only be available 50% through August 2014. Therefore, we have included a newly proposed project manager, Ed Caseres, who will be available to start in full capacity for the beginning of this project. We have included his resume in the attachments to this response. We are proposing to keep Brian engaged in this WVCPRB project for the 50% time he is available. Together with Chris Lodge as Account Executive, we are confident that this project management team will deliver

BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
<p>procurements on which the same staff members are currently working and / or for which the same staff members are being proposed.</p> <p>The vendor should provide a list of all its active retirement projects (development and implementation) that are ongoing at the time the BAFO response is submitted to WVCPRB and describe its approach for supporting this project in view of those prior commitments.</p>		<p>successfully at WVCPRB.</p> <p>Our proposed three key resources are project manager Ed Caseras, development manager Tom Cheng, and business lead Varia Lvova. Ed will be completing his IPERS and GERS activities by the end of September 2013 and will be available full time for the beginning of this project. Tom also supports MTRS, which will be a part time capacity and will be available for the start of this project. Varia will be available starting in January 2014. This team is available to start in accordance with our proposed staffing plan and is proposed to remain engaged in the project until their phase is complete.</p>
<p><b>2.1.7 Sub-Contractors</b></p> <p>Clarification is hereby provided in reference to Section 2.2.2.2 of Appendix D in that vendors should provide an updated list of proposed sub-contractors. The updated information should specifically identify the tasks that each sub-contractor is to perform. Vendors should provide an updated listing of sub-contractors, including Subcontractor Letter of Commitment (reference RFP Section 5.3.1.5, Exhibit 21), examples of Subcontractor Agreements (reference RFP Section 5.3.1.5, Exhibit 22) key subcontractor personnel, and provide updated resumes for these key sub-contractor staff (reference RFP Section 5.3.1.5, Exhibit 14).</p>	<p>II-2.2.2.2 Sub-contractors III-Exhibit 21, III-Exhibit 22, III-Exhibit 14</p>	<p>Acknowledged. Please find the attached Exhibits 21 and 22. As Vitech is not proposing any sub-contractors no updates were required.</p>
<p><b>2.1.8 Cost Schedules</b></p> <p>Clarification is hereby provided in reference to Section 5.3.2 of the RFP in that vendors should complete the attached BAFO Cost Proposal Schedules reflecting the effect of all revisions made by the vendor in response to clarifications provided by the State or other revisions that the vendor determined were necessary for their Best and Final Offer. Vendors should take care to assure that their BAFO Technical Proposal and BAFO Cost Proposal reflect the solution being offered.</p>	<p>Cost Proposal</p>	<p>Acknowledged.</p>
<p><b>2.1.8.1 Cost Proposal Format</b></p> <p>Clarification is provided that the vendor's BAFO Cost Proposal should be in the format as provided in Section 3.2 of this BAFO document.</p>	<p>Cost Proposal</p>	<p>Acknowledged.</p>
<p><b>2.1.8.2 WVCPRB Bid Summary</b></p> <p>Clarification is provided that Functional Project Elements on which the cost proposal will be evaluated, are limited to the following:</p> <ol style="list-style-type: none"> <li>Hardware</li> <li>Commodity Software</li> <li>Services</li> <li>LOB Application License Fee</li> </ol>	<p>Cost Proposal</p>	<p>Acknowledged.</p>



BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
e. LOB Application Source Code (WV Specific) Other line items should not be added to the Functional Project Elements of the Bid Summary.		
<b>2.1.8.3 Schedule 1 – Hardware Costs for Functional Project Elements</b> Clarification is provided that Schedule 1 is to be used by the vendor to list all hardware components required to effect the functional requirements portion of the proposed solution. Contingency budgets are not acceptable line items for inclusion.	Cost Proposal	Acknowledged.
<b>2.1.8.4 Schedule 2 – Commodity Software Costs for Functional Project Elements</b> Clarification is provided that Schedule 2 is to be used by the vendor to list all commodity software components required to effect the functional requirements portion of the proposed solution. Contingency budgets are not acceptable line items for inclusion.	Cost Proposal	Acknowledged.
<b>2.1.8.5 Schedule 3 – Services (Functional Project Elements)</b> The following clarifications are provided with respect to Schedule 3 - Services (Functional Project Elements): <ul style="list-style-type: none"> <li>Hourly rates identified on Schedule 3 should be fully loaded to capture all direct and overhead expenses, travel, per diem, and any other travel-related expenses.</li> <li>Separate line items designating hours and hourly rates for vendor staff travel should not be included in this schedule.</li> <li>Cost Elements with associated hourly rates and estimated hours are anticipated to be staff related positions which correspond to the vendor's preliminary project staffing plan.</li> <li>Clarification is hereby provided in reference to Section 5.3.2 of the RFP that vendors are expected to provide a description for any cost items included on rows in the Cost Proposal which include a generic "Other" description.</li> </ul>	Cost Proposal	Acknowledged.
<b>2.1.8.6 Schedule 3A – Out Year Support</b> Clarification is provided that while Cost Elements and Hours are not required for each year during the Out Year Support period, vendors should propose levels of service, and years of support, based on the average costs experienced by previous implementation clients, with IT staffing levels similar to WVCPRB. Any years left blank will be assumed to be zero. To clarify Section 2.13.2.4 of Appendix D, any annual increases in hourly rates, base maintenance and support and/or license fees in total shall not exceed 3% of the initial year one purchase price compounded annually. While the Schedule 3A cost sheet includes a 3% multiplier in the formulae, the formulae may be edited so vendors may propose a percentage increase of less than 3%. Vendors shall bid on Schedule 3A their actual increases proposed. Proposals including any annual increases greater than 3% will be disqualified.	Cost Proposal	Acknowledged.  Thank you for this clarification as we misunderstood and through WVCPRB was seeking the vendor to price 4,000 hours per year.  Our Upgrade Subscription plan includes 500 all-purpose hours per year and it is our experience that after the conclusion of warranty these hours are enough to meet typical support needs (not including changes such as legislative changes). We have not included any additional support in the out years, however if additional hours are needed they can be purchased on a Time & Materials basis.

BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
<b>2.1.9 Rates for BAFO</b> Clarification is hereby provided in reference to Section 6.2.4 of the RFP that vendors may not increase the hourly rates proposed in the BAFO Cost Proposal for any position above the hourly rate proposed for that position in the vendor's original Cost Proposal.	Cost Proposal	Acknowledged.
<b>2.1.10 Phasing the Project</b> Clarification is provided to Section 2.6.1.8 of Appendix D, to express that WVCPRB strongly desires the order of Phase 4 of the implementation to address Membership before Benefits.	II-2.6.1.8 Phasing the Project	Acknowledged.
<b>2.1.11 Assumptions</b> Following a review of the assumptions submitted by vendors in their Technical Proposals and Cost Proposals, the following clarifications are offered to vendors for their consideration to make any necessary adjustments to their Technical and Cost Proposals.		Acknowledged.
<b>2.1.11.1 Invoices, Progress Payments and Retainage</b> One or more vendors assumed: <ul style="list-style-type: none"> <li>The specified 15% holdback on each invoice would be reduced to 5%.</li> <li>Project management services will be paid for on a monthly basis,</li> <li>A deliverable-based payment schedule would be adopted that provides more payment points than described in the RFP,</li> <li>Consideration will be given to a payment schedule to better align cash receipts with delivered results, effort expended and costs incurred.</li> <li>Fees related to any third party hardware/software purchased through the vendor will be payable without retainage and split into 50% upon order placement and the remaining 50% upon delivery.</li> <li>The license fee for the vendor's solution would be paid in full upon contract execution, without holdback.</li> </ul> WVCPRB offers the following clarification with regard to Section 4.8 of the RFP: <ul style="list-style-type: none"> <li>WVCPRB intends to follow the payment schedule and procedure as described in the referenced Section.</li> <li>The vendor is responsible for specifying all HW/SW needed for its product and the installation. The timing of the payment for HW/SW, regardless of the supplier, will be in accordance with the schedule in Section 4.8 of the RFP.</li> <li>WVCPRB does not intend to pay software license fees until delivery of a working solution (the earliest of which would be completion of a working conference room pilot).</li> </ul> One or more vendors indicated a requirement for the State to procure "upgrade subscription" fees at the first production phase rollout. To clarify, the State is anticipating a complete system solution at the final phase production rollout, we would anticipate these "upgrade subscription" fees would only be viable at the		Acknowledged. Vitech assumes the V3 license fee will be paid in full at the completion of the Conference Room Pilot.



BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
beginning of the "Warranty Period".		
<p><b>2.1.11.2 Business Process Engineering</b></p> <p>One or more vendors assumed WVCPRB will modify business processes to accommodate the vendor's framework, technical architecture and existing practices already incorporated into the proffered LOB solution.</p> <p>While WVCPRB acknowledges and embraces the prospect of business process reengineering through the implementation of the new LOB solution, clarification is provided to Section 2.6.1.1 of Appendix D in that some business processes may require customization of the vendor's product, as opposed to revision of the existing business practice. WVCPRB anticipates some current processes are unique and will be automated in the new solution, but may retain a workflow that mirrors the existing process.</p>	II-2.6.1.1 Relationship	Acknowledged.
<p><b>2.1.11.3 Expansive Requirements</b></p> <p>One or more vendors indicated that they have priced their proposal based on the specific requirements presented in the RFP with the attendant assumption that any expansive requirements that include phrases such as "at a minimum", "not limited to" and "etc." will be subjected to the Change Control Process if additional requirements are identified outside of the specific requirements presented.</p> <p>Clarification is provided for Appendix D Section 2.6.1.4 (Vendor Responsibility for Detailed Requirements Definition) that WVCPRB's environment is governed by a myriad of rules, regulations, "standard" operating procedures, and long-standing practices (formal and informal, documented and undocumented). Developing a full set of all of the rules, regulations, procedures, and practices that need to be accommodated in the new solution is a critical, integral part of the project – and the key to its eventual success. Vendors should factor into their proposals, in terms of manpower, cost, and schedule, their responsibility to completely explore and define all such rules, regulations, policies, procedures, practices, and calculations – both written and unwritten (i.e., policy of long standing) – that currently exist and those to be added in the new environment. WVCPRB wishes to clarify that phrases such as "at a minimum", "not limited to" and "etc." were used to avoid long enumerated lists and were not meant to be limited by context, feasibility, suitability or commonly accepted standards of reason, nor is usage of such phrases alone sufficient to invoke the Change Control Process.</p>	II-2.6.1.4 Vendor Responsibility for Detailed Requirements Definition	Acknowledged.
<p><b>2.1.11.4 Project Timetable – Major Deliverables and Detailed Business Requirements</b></p> <p>One or more vendors assumed WVCPRB can and will provide the RTM sooner than 90 days after the project start date. One or more vendor also assumes a thirty day period to deliver the updated RTM (Table 1, NBR 9b) is not adequate or desirable.</p> <p>WVCPRB wishes to clarify, as specified in Section 2.3 of Appendix D, WVCPRB will develop and provide to the vendor the Requirements Traceability Matrix (RTM) within the time period referenced in Table 1. WVCPRB desires that the</p>	II-2.3 Project Timetable – Major Deliverables 9B, Vendor Update of RTM	Acknowledged.

BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
<p>vendor update and return it to WVCPRB, also within the time period indicated in Table 1.</p> <p>One or more vendors assumed that all general statements of objectives and requirements, such as those in RFP Section 4.4 and Appendix D, Section 1, are for summary purposes and the actual requirements are those set out in Appendix D, Section 2.4 and as supplemented, defined and/or responded to in the vendor's proposal.</p> <p>WVCPRB offers clarification that the more detailed requirements provided in Appendix D, 2.4 are to be fulfilled in conjunction with the general objectives and requirements as provided in RFP Section 4.4 and Appendix D, not in lieu of such objectives and requirements.</p>		
<p><b>2.1.11.5 High Level Deliverables</b></p> <p>One or more vendors identified acceptance criteria for high level deliverables and included a payment schedule in conjunction with the acceptance criteria.</p> <p>To clarify, WVCPRB has identified acceptance criteria for the high level deliverables as cross-referenced in the narrative summaries in Appendix D, Section 2.3. Also, the schedule for progress payments has been defined in Section 4.8 of the RFP.</p>	II-2.3 Project Timetable – Major Deliverables	Acknowledged.
<p><b>2.1.11.6 Interfacing, Bridging, and Legacy Systems</b></p> <p>One or more vendors assumed that WVCPRB will be responsible for any additional licensing costs required to expose documents or other content from the Imaging System to members, retirees, or employers via the web.</p> <p>To clarify, WVCPRB expects the vendor to be responsible for all licensing issues outside of the existing applications in use today, up to and including any Imaging license fee necessary for public facing exposure.</p>		Acknowledged.
<p><b>2.1.11.7 Benefit Estimates</b></p> <p>One or more vendors assumed that the metric desired by WVCPRB regarding the ability to quantify hits and/or determine the most/least popular tool(s) used regarding benefit estimates would be satisfied by the ability to measure, for a given time period, the number of benefit estimates generated with further breakout by plan, type, age.</p> <p>WVCPRB would like to clarify that with regard to Appendix D, Section 2.4.4.5 (Benefit Estimates), what is meant by the ability to quantify the most/least popular tools is the ability to gauge the utility of a particular facet of the benefit estimate calculator provided on the member self-service website.</p>	II-2.4.4.5 Benefit Estimates	Acknowledged.
<p><b>2.1.11.8 Death</b></p> <p>One or more vendors assumed with regard to Requirement ID 14 in Appendix D, Section 2.4.4.7 (Death Processing), that "determine all information" includes the ability to capture the information required for death processing in the vendor's baseline LOB solution.</p> <p>WVCPRB would agree that the information captured by the baseline LOB solution be included, but we would also clarify that death processing information be determined using relevant West Virginia statute and WVCPRB policy guidelines.</p>	II-2.4.4.7 Death	Acknowledged.



BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
<p><b>2.1.11.9 Qualified Domestic Relation Orders (QDROs)</b></p> <p>One or more vendors assumed QDRO Requirements 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 14 and WVCPRB's desire to have such requirements exposed via the web pertains to the ability to view the updated account status by WVCPRP staff.</p> <p>WVCPRB offers clarification that regarding Appendix D, Section 2.4.4.21 (QDRO), it is intended that the updated account status be available for view via web by both WVCPRB staff and the affected member(s) subject to the Qualified Domestic Relations Order.</p>	<p>II-2.4.4.21 Qualified Domestic Relations Order (QDRO)</p>	<p>Acknowledged.</p>
<p><b>2.1.11.10 Reporting</b></p> <p>One or more vendors assumed the LOB solution baseline functionality provided by the correspondence module enabling WVCPRB users to generate ad-hoc correspondence to individual members, will meet the WVCPRB desire for the ability to generate correspondence to members who appear on a report.</p> <p>WVCPRB would like to clarify Appendix D, Section 2.4.5.4 (Reporting), in that the envisioned ability is to generate a report identifying members who meet specified criteria, generate correspondence in a batch for those members by linking the report results to the desired correspondence module, as opposed to generating the correspondence on a one-by-one basis</p> <p>One or more vendors assumed the desired functionality of Requirement ID 21, in Appendix D, Section 2.4.5.4 will be satisfied by the ability to use the Windows 7 Snipping Tool or export the report to Excel and delete/redact the information.</p> <p>In clarifying Appendix D, Section 2.4.5.4, while both of those tools may be of use in various situations, neither gets to the pith of the desired ability. WVCPRB would like to be able to easily and securely redact various pieces of information from a report in order to limit access to sensitive data while still retaining a version of the un-redacted report. The redacted report should also allow for WVCPRB to easily and quickly identify which portions of the data on the report have been redacted for printing or display.</p> <p>One or more vendors assumed the standard reports provided by their baseline LOB solution which include a default format, sort and filter, meets the desired functionality of Requirement ID 27 in Appendix D Section 2.4.5.4.</p> <p>WVCPRB offers clarification that the ability to summarize the report output as well as the ability to save a format for later use is still desired, as well as the ability to format, sort and filter query results into a report.</p>	<p>II-2.4.5.4 Reporting</p>	<p>Acknowledged.</p>
<p><b>2.1.11.11 Reports/Correspondence</b></p> <p>One or more vendors agreed to facilitate the redesign of all current WVCPRB forms and correspondences with the assumption that if the vendor trains WVCPRB staff on the correspondence process and toolset, then WVCPRB will be responsible for generating the form and correspondence templates, including the finalization of all wording.</p> <p>WVCPRB would like to offer clarification to Appendix D Section 2.4.6.3.3 (Paper and Electronic Forms [eForms] and</p>	<p>II-2.4.6.3.3 Paper and Electronic Forms (eForms) and the Web</p>	<p>Acknowledged.</p>

BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
the Web) that WVCPRB desires the selected vendor to redesign all existing forms and letters (and/or combine where appropriate to reduce their number – subject to agreement from WVCPRB), and to design all new forms and letters.		
<b>2.1.11.12 Print on Demand</b> One or more vendors assumed that access to publications and information via links on the self-service or organization web-site where PDF files can be downloaded meets the requirements regarding the desired ability to support a web-based ordering system to permit customers (with appropriate security) to request information, educational materials, etc. WVCPRB would like to clarify that in Appendix D, Section 2.4.6.3.4 (Print on Demand), refers not only to the ability of a single individual to print a single document, but also to a participating employer with thousands of member employees to be able to order bulk amounts of a publication from the website or a self-service portal.	II-2.4.6.3.4 Print on Demand	Acknowledged.
<b>2.1.11.13 Hardware</b> <b>2.1.11.13.1 General</b> One or more vendors assumed: <ul style="list-style-type: none"> <li>• WVCPRB will be responsible for any necessary or required upgrades to the infrastructure during the project to meet performance criteria.</li> <li>• WVCPRB IT will use its existing network management tools, processes and be responsible for monitoring hardware performance, security threats, backups, disaster recovery, etc.</li> <li>• The specification "ability to provide end-to-end performance monitoring and control" referred to the ability of WVCPRB to utilize their existing network and server monitoring software such as Orion to meet this requirement.</li> </ul> To clarify, as outlined in Section 2.5 (Technical Requirements) of Appendix D, WVCPRB considers it essential that the vendor propose and implement application, capacity and performance monitoring capabilities for all components of its solution. The vendor's proposal should indicate agreement that the vendor accepts the responsibility to acquire, install, configure, test and make ready for use the full hardware environment. Additionally, WVCPRB considers it critical for the vendor to accept responsibility for acquiring, installing, configuring and testing the required software on the hardware already installed by the vendor at the WVCPRB-specified location(s). In providing its recommended hardware configuration and recommended commodity software, the vendor should clearly delineate existing hardware components/software that are usable as is vs. existing hardware/software that requires upgrade vs. new hardware components/software that WVCPRB needs to purchase to support the proposed solution. Vendors should provide updated List and Specification of Required Hardware (reference RFP 5.3.1.5, Exhibit 1) and List of Required Commodity Software (reference RFP 5.3.1.5, Exhibit 2), as necessary.	II-2.5 Technical Requirements III-Exhibit 1 III-Exhibit 2	Acknowledged. Please find the attached Exhibits 1 and 2. No updates were required.
<b>2.1.11.13.2 Alternative Hardware</b>	II-2.14.1	Acknowledged.



BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
<p>One or more vendors assumed both parties (the successful vendor and WVCPRB) would work together to identify alternative hardware and software when change is dictated by the marketplace.</p> <p>To clarify, as stated in Section 2.14.1 of Appendix D, the vendor is requested to provide in its proposal detailed specifications and configuration information for all of the hardware components necessary to support the proposed solution, including separate environments required in accordance with Section 2.5.2 Separate Production, Development, Test, Training and Query Environments. The vendor's recommended hardware configuration should support all RFP requirements and be capable of expansion to support future functionality as described in this RFP. Additionally, as stated in Section 4.4.5 of the RFP, WVCPRB greatly desires a solution which meets or exceeds all functional and performance requirements set forth in this RFP for 10 years after the end of the warranty period defined herein.</p>	Hardware Procurement	
<p><b>2.1.11.13.3 Hardware and Software Budgets</b></p> <p>One or more vendors assumed the Hardware and Software costs presented will be used to establish a single budget for the project for use in procuring any necessary component for the project. Additionally, one or more vendors assumed the vendor will not be liable for additional hardware costs unless the proposed fixed price budget is exhausted, even if more equipment is acquired than originally estimated or WVOT is able to acquire equipment at lower prices.</p> <p>To clarify, as outlined in Section 2.5.5 (Hardware) and Section 2.5.6 (Software) of Appendix D, WVCPRB considers it critical for the vendor's proposal to indicate agreement that the vendor accepts the responsibility to acquire, install, configure, test and make ready for use the full hardware environment. Additionally, WVCPRB considers it critical for the vendor to accept responsibility for acquiring, installing, configuring and testing the required software on the hardware already installed by the vendor at the WVCPRB-specified location(s). Should the vendor's proposed hardware configuration and/or commodity software (or the version specified or the number of copies / licenses indicated) prove inadequate to support the new solution – in terms of functionality, performance, availability or scalability – WVCPRB greatly desires the vendor to be responsible for acquiring such additional hardware and software as may be necessary to bring the solution in to compliance with RFP requirements at no additional cost to WVCPRB.</p>	II-2.14.1 Hardware Procurement	Acknowledged.
<p><b>2.1.11.13.4 Hardware Procurement</b></p> <p>One or more vendors assumed that if WVCPRB were to exercise the options related to Hardware and Commodity Software procurement by the vendor, there would be no associated holdback and the vendor would be able to invoice, upon delivery, for the full amount. Additionally, one or more vendors assumed that in the event the vendor is requested to provide any third party product, it shall do so via a dedicated reseller within its organization. Additional terms will be required in connection with such resell and WVCPRB shall</p>	II-2.14.1 Hardware Procurement	Acknowledged.

BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
<p>enter into all license and maintenance agreements directly with the third party vendors.</p> <p>To clarify, as stated in Sections 2.5.5 and 2.14.1 of Appendix D, WVCPRB considers it critical for the vendor to acknowledge and accept the responsibility to acquire, install, configure, test and make ready for use the full hardware environment. In addition, in the situation in which the vendor acquires the hardware/software items, WVCPRB would expect the vendor to provide assistance in the negotiation and provision of license and maintenance agreements. Additionally, any payment schedule will follow the guidelines set forth in Section 4.8 of the RFP.</p>		
<p><b>2.1.11.13.5 Network Vulnerability Assessment</b></p> <p>One or more vendors agreed to rectify, at their expense, any reasonable vulnerabilities identified in their technical architecture. Additionally, one or more vendors assumed that WVCPRB would be responsible for costs associated with correcting any infrastructure or network computing environment related vulnerabilities (i.e., operating systems, switches, firewalls, etc.).</p> <p>To clarify, as highlighted in Section 2.5.8.1.7 of Appendix D, WVCPRB believes that all costs associated with any rectification effort relating to the implementation of the LOB solution and</p> <p>the WVCPRB internal network should be borne by the successful vendor. If appropriate, vendors should adjust their proposals to reflect this clarification.</p> <p>One or more vendors assumed that WVCPRB will be independently contracting the NVA vendor separately from this procurement and did not include costs for this activity in their cost proposal. Additionally, one or more vendors assumed that the NVA vendor is able to test all corrections within five (5) business days from receipt and that said obligation shall be included in the NVA vendor contract, will be enforced by WVCPRB and that the NVA vendor shall remit to WVCPRB for payment to the LOB vendor all delay related costs/impacts.</p> <p>To clarify, the WVCPRB does intend to independently contract with an NVA vendor, separate from this RFP. As of this date no NVA vendor has been contracted. As such, no negotiations have taken place, nor are there stipulations or restrictions in place. Once an NVA vendor has been selected and a contract negotiated, the successful LOB vendor will be notified.</p>	II-2.5.8.1.7	Acknowledged.
<p><b>2.1.11.13.6 Third Party Hardware and Software</b></p> <p>One or more vendors assumed WVCPRB will procure all third party hardware and software and WVCPRB will enter into a separate purchase and license agreements with any other software vendor(s) related to the commodity third-party components that are part of the vendor's solution architecture as well as for the required hardware as identified by the vendor. Additionally, one or more vendors assumed that all specified hardware and software will be acquired, duly licensed and made available in the timeframes outlined in the RFP.</p>		Acknowledged.



BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
<p>To clarify, as noted in Sections 2.5.5 and 2.5.6 of Appendix D, WVCPRB considers it critical for the vendor to accept responsibility for acquiring, installing, configuring, and testing all (including accounting and imaging) required hardware in the West Virginia Office of Technology (WVOT) data center and in the separate Disaster Recovery site, as well as the required software. Only if WVCPRB chooses to exercise Options 1 and/or 2 will WVCPRB be responsible for the acquisition of the hardware and/or software for the LOB solution.</p>		
<p><b>2.1.11.13.7 System Availability</b></p> <p>One or more vendors assumed given the four hour per week scheduled down-time guideline, the State did not intend, as stated on page 219, that 90% of the .1% downtime should be scheduled.</p> <p>To clarify, as provided on page 219 of Appendix D (Section 2.5.8.1), the four hours per week scheduled down time referenced pertains to the <b>public portal web site only, not the internal LOB solution.</b></p>	II-2.5.8.1 System Sizing and Performance Requirements	Acknowledged.
<p><b>2.1.11.13.8 Technical Requirements</b></p> <p>One or more vendors assumed:</p> <ul style="list-style-type: none"> <li>• The second geographically separated data center will be hosted and managed at the vendor's data center outside the borders of West Virginia.</li> <li>• WVOT has software and/or hardware devices that can be leveraged to transmit data from the Production environment to the Disaster Recovery Instance on a periodic basis.</li> </ul> <p>To clarify Appendix D, Section 2.5.2, WVCPRB desires that any redundant components be located at two geographically separated data centers (West Virginia's primary and secondary data centers) to ensure system availability/business continuity in the case of the loss of either data center, or LOB solution failure of any single component failure (i.e. failover capability), or to perform routine migration activities.</p> <p>Additionally, WVCPRB considers it critical for the vendor to accept responsibility for acquiring, installing, configuring and testing all required hardware in the West Virginia Office of Technology (WVOT) data center and in the separate Disaster Recovery site. (Note: The power at both the WVOT site in Charleston and at the Disaster Recovery site is fully conditioned. Although the list of specified hardware is expected to include an estimate of the amount of power and air conditioning required, there is no need for any UPS or surge protection on equipment installed at those sites.) In providing its recommended hardware configuration, the vendor should clearly delineate existing hardware components that are usable as is vs. existing hardware that requires upgrade vs. new hardware components that WVCPRB needs to purchase to support the proposed solution.</p> <p>Vendors should provide an updated List of Required Commodity Software (reference RFP 5.3.1.5, Exhibit 2).</p>		Acknowledged.
<b>2.1.11.14 Electronic Signatures</b>		Acknowledged.

BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
<p>One or more vendors assumed with regard to electronic signatures, that since the vendor solution contains functionality that has been acceptable in other states, the same functionality is acceptable and meets the requirements in the State of West Virginia.</p> <p>To clarify, functionality rendered in another state may not satisfy the functional requirements of West Virginia. Vendors should refer to the applicable passage of the WV Code referenced in Appendix D, Section 2.5.3.5 (Directory Services Security Architecture), to ensure their solution complies with WV Code.</p>		
<p><b>2.1.11.15 Changes to Requirements</b></p> <p>One or more vendors assumed that should either WVCPRB or the vendor identify a change that would affect the timing, price, schedule, scope or other aspects related to this engagement, that party will inform the other party and the parties will discuss and agree on a change order to address any adverse impact to the vendor before implementing such changes.</p> <p>WVCPRB wishes to clarify that should either party identify a change that would affect the timing, price, schedule, scope or other aspects of the proposed project, adverse impact to either party should be discussed and agreed to by both the vendor and WVCPRB, not just those impacts which could adversely affect the vendor alone. WVCPRB offers clarification that Appendix D Section 2.6.1.5 (Multiple Products, Services, and Methodologies) indicates that each vendor should be proficient in risk management, the identification of and mitigation strategies related to all facets of risks associated with the project.</p>	II-2.6.1.5 Multiple Products, Services, and Methodologies	Acknowledged.
<p><b>2.1.11.16 Credit Memos</b></p> <p>One or more vendors made a general assumption that while they have quoted blended hourly rates for bundled services, credit memos will be calculated based on the hourly rates quoted for "Customization of Scripts."</p> <p>WVCPRB would clarify that "Customization of Scripts" is considered an incremental cost which may not necessarily be reflective of the dollar value of effort avoided by virtue of eliminating a particular requirement. WVCPRB would suggest the hourly rates quoted in the corresponding Cost Elements categories on Schedule 3 (e.g. Requirements Analysis, Software Modifications Development, etc.) should be used as the basis for credit memo calculation.</p> <p>One or more vendors assumed that when there is a change order such that both the vendor and WVCPRB agree to remove a design requirement resulting in a "credit memo", then the vendor will be able to set a time by which the WVCPRB must request the deleted requirement be re-introduced in order to utilize the prior "credit memo".</p> <p>To clarify, WVCPRB has indicated in Appendix D, Section 2.6.3.6 (Requirements Analysis), that CPRB intends to use credit memos to offset any Change Control Request (CCR), regardless of whether or not the credit memo was for the same or previously eliminated requirement. Being that a credit memo can be used for any CCR, credit memos are not</p>	II-2.6.3.6 Requirements Analysis	Acknowledged.



BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
expected to expire until the end of the warranty period.		
<b>2.1.11.17 Change Orders</b> One or more vendors assumed change orders will be billed on payment schedules to be negotiated with each change order. To clarify Section 2.6.3.7 of Appendix D, payments for work related to change orders will be included in the phase deliverable in which it is implemented, accepted by the agency, and paid when the payment for that phase is appropriate.		Acknowledged.
<b>2.1.11.18 Conformity</b> One or more vendors assumed the information and guidance provided by WVCPRB will conform to applicable statutes, code, policies and procedures and that once a design is approved by WVCPRB, any subsequent changes to that design (caused by changes in the foregoing or the correction of erroneous input from WVCPRB or initiated by an external governing body) will be subjected to the change control process. Clarification is provided for Appendix D Section 2.6.1.4 (Vendor Responsibility for Detailed Requirements Definition) that WVCPRB's environment is governed by a myriad of rules, regulations, "standard" operating procedures, and long-standing practices (formal and informal, documented and undocumented). Developing a full set of all of the rules, regulations, procedures, and practices that need to be accommodated in the new solution is a critical, integral part of the project – and the key to its eventual success. Vendors should factor into their proposals, in terms of manpower, cost, and schedule, their responsibility to completely explore and define all such rules, regulations, policies, procedures, practices, and calculations – both written and unwritten (i.e., policy of long standing) – that currently exist and those to be added in the new environment.		Acknowledged.
<b>2.1.11.19 Legacy System Maintenance</b> One or more vendors assumed there will be no new (or changes to) legacy systems workflows or spreadsheets, and databases during the course of the project that will materially alter the RFP requirements during the implementation effort. WVCPRB offers clarification that in accordance with Appendix D Section 2.6.3.6 (Requirements Analysis), throughout the course of the project the RFP requirements ALWAYS pertain, unless during GAP analysis, the users agree to eliminate an RFP requirement AND a written agreement to that effect is prepared by the vendor and signed by the WVCPRB Project Manager. Also in accordance with Appendix D Section 2.6.3.7.2 (Legislative Changes) it is the vendor's responsibility to ensure the "currency" of the LOB application software for any legislation that is in effect at the time of contract signing, regardless of whether or not the legislation existed at the time the vendor's proposal was submitted.		Acknowledged.
<b>2.1.11.20 Project Governance</b> One or more vendors assumed the project team will agree to define a 'material' standard regarding deliverable acceptance,		Acknowledged.

BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
<p>and will agree that deliverables will be accepted with immaterial defects or deficiencies, and also assumes the project schedule and resulting payments will not be delayed as a result of them.</p> <p>To clarify, throughout Appendix D, WVCPRB has identified acceptance criteria for deliverables. WVCPRB does not anticipate refining those criteria further to incorporate acceptable levels of deficiency in order to facilitate payment to the vendor.</p>		
<p><b>2.1.11.21 Project Schedule</b></p> <p>One or more vendors assumed that activity start and end dates, acceptance criteria and other such constraints would be discussed as part of the final contract and be based on criticality.</p> <p>To clarify, for the various implementation activities identified in the RFP, WVCPRB has defined objective criteria for the transition of such processes.</p>		Acknowledged.
<p><b>2.1.11.22 Prompt Deliverable Sign-off</b></p> <p>One or more vendors assumed that if formal sign-off or feedback is not received by the vendor from WVCPRB within a specified timeframe, a vendor submitted deliverable will be considered accepted.</p> <p>To clarify, in Section 2.6.1.7.1 of Appendix D, WVCPRB acknowledges the need for the prompt review of written deliverables. However, the vendor cannot assume that an absence of formal sign-off or feedback within five business days of deliverable submittal constitutes WVCPRB's acceptance of that deliverable.</p> <p>One or more vendors assumed that once WVCPRB has accepted a deliverable, that deliverable prevails in the event of any conflict and is controlling.</p> <p>WVCPRB offers clarification to Appendix D, Section 2.6.3.6 (Requirements Analysis), that vendors should take note of, and confirm in their proposals, the following: under no circumstances may WVCPRB's approval of system design and/or specifications abrogate the RFP requirements. WVCPRB staff invested a great deal of time in developing the RFP requirements. The vendor, not WVCPRB staff, is responsible for ensuring that all RFP requirements are correctly reflected in vendor design and/or specification documents. Absent a specific written agreement to eliminate or modify an RFP requirement, signed by the WVCPRB Project Manager, that RFP requirement remains operative.</p>		Acknowledged.
<p><b>2.1.11.23 Time Limit for Decisions</b></p> <p>One or more vendors included the following assumptions:</p> <ul style="list-style-type: none"> <li>• If WVCPRB has been formally requested in writing to communicate a critically required decision needed to continue the work plan that WVCPRB will respond with a decision within five workdays, empowering the WVCPRB Project Manager to make the decision if WVCPRB fails to respond in the time allotted by the vendor.</li> <li>• The project leadership team will agree to define a decision tree for escalating decisions and that those decisions will be resolved within 5 business days.</li> </ul>		Acknowledged.



BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
<p>To clarify, as noted in Section 2.6.1 of Appendix D, while WVCPRB expects the vendor's project management approach to ensure, among other items, that there is an established path to escalate project issues, no provisions have been made in the RFP for a time limit by which decisions must be reached.</p>		
<p><b>2.1.11.24 Vendor Responsibility for All Contractual Activities, Products, and Deliverables</b></p> <p>One or more vendors assumed circumstances outside the vendor's control would require cost, schedule, scope or other issues related to this engagement to be amended through the change order process.</p> <p>WVCPRB wishes to clarify RFP Section 5.3.1.3, with regard to Vendor Certifications and Affirmations, in that WVCPRB desires the vendor to affirm their responsibility for the life of the contract for all contractual activities, products, and deliverables offered in the proposal whether or not that contractor directly performs or provides them.</p>		Acknowledged.
<p><b>2.1.11.25 Work Process Manual</b></p> <p>One or more vendors assumed a single Work Process Manual can be delivered after the last, large internal staff implementation.</p> <p>To clarify, as noted in Section 2.9.1.3 of Appendix D, the work process manual and on-line help facility should be delivered in final draft form at least three weeks prior to the time of each functional cutover, with a corrected version delivered at least one week prior to cutover. Further, WVCPRB desires that a working draft of both hardcopy and on-line help be available at the beginning of User Training and User Acceptance testing so that WVCPRB staff responsible for testing the applications can have access to the help facilities during their testing.</p>		Acknowledged.
<p><b>2.1.11.26 Training</b></p> <p>One or more vendors assumed that a core WVCPRB training team members will be available during the Build phase to provide course reviews, define WVCPRB specific exercises and data, assist with resolving issues, and assist in the development of the Business Process Overviews that will be developed as part of the process training.</p> <p>To clarify, as noted in Section 2.10.3 of Appendix D, WVCPRB desires the vendor to be responsible for every part of this task but the actual delivery of the training which will be done by the four-five members of WVCPRB staff trained by the vendor. WVCPRB has not committed to the availability of core WVCPRB training team members during the Build phase.</p>		Acknowledged.
<p><b>2.1.11.27 Change Management</b></p> <p>One or more vendors assumed WVCPRB will designate at least one resource in a full-time capacity to assist with change management activities. Additionally, one or more vendors assumed WVCPRB will be responsible for any additional costs that may be associated with mailings, awareness campaigns, newsletters, etc. with regards to delivering communications.</p>		Acknowledged.

BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
As provided in Pre-Bid Question 8, in Addendum 5, WVCPRB has not requested a formal change management program.		
<b>2.1.11.28 Vendor and User Acceptance Testing</b> One or more vendors assumed: <ul style="list-style-type: none"> <li>The approved detailed project work plan will apply the 4:1 design to testing ratio and identify the agreed upon duration and end-date for this testing.</li> <li>During acceptance testing, WVCPRB may find a need to expand the testing group in order to complete testing in the prescribed timeframes.</li> <li>WVCPRB will have completed their testing by the UAT end-date, with the exception of re-testing defects in achieving the established criteria and that all such re-testing shall proceed promptly and without delay.</li> </ul> With regard to Section 2.11 of Appendix D, WVCPRB would clarify the desire that training and testing activities not be abbreviated in order to meet project implementation schedules; it cannot be assumed by the vendor that when testing commences WVCPRB can allocate 100% of its resources to this effort. Therefore, WVCPRB requires that a fixed ratio apply to the time devoted to WVCPRB training and testing relative to the time devoted to vendor requirements definition, design, and development. We propose a 4:1 ratio – i.e., if the time required for the vendor to design, build, and test a particular functional rollout phase is eight months, then up to two months should be allocated to WVCPRB staff for training and test execution. WVCPRB does not anticipate allowing deviations from the fixed ratio during the course of the project, except by express written approval of WVCPRB. Also, WVCPRB acknowledges the importance of testing. Section 2.6.1.9.1 (Initial Plan) of Appendix D advises the vendors when developing their work plans to be sensitive to the fact that the months of January through March (annuity payroll and legislative session); July, August, September (TRS and annuity payroll), and October through January (PERS) are periods of high levels of business activity for WVCPRB. WVCPRB wishes to clarify Appendix D, Section 2.11.3, in that regardless of the project schedule, User Acceptance Testing for a rollout phase is anticipated to achieve a 99 percent success rate of the major processes run to completion without major error or issue for the testing to be considered complete. WVCPRB reserves the right to exercise UAT until the desired criteria for cutover are met with satisfaction.		Acknowledged.
<b>2.1.11.29 Criteria for Final Cutover</b> With regard to Criteria for Final Cutover, one or more vendors have made the following assumptions: <ul style="list-style-type: none"> <li>Checking account, reserve balances and General Ledger account reconciling is an utmost priority and can be met by two approaches to meet this requirement: 1) Including these requirements as part of the LCT test cases which can be executed in a controlled environment as needed, 2) Referencing including checking account, reserve balances and General Ledger accounts as part of Parallel Testing.</li> <li>The PIR statement should be removed because it rarely</li> </ul>		Acknowledged.



BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
<p>makes sense to delay a project and incur additional costs for non-critical PIRs that can be prioritized and resolved as part of a broader, mutually-agreed Release management strategy.</p> <p>To clarify, WVCPRB expects the vendor to follow the criteria for final cutover as outlined in Section 2.11.4 of Appendix D. In addition to the referenced criteria, there should be no critical PIRs outstanding and no more than 25 non-critical PIRs outstanding.</p>		
<p><b>2.1.11.30 Programmer Support</b></p> <p>One or more vendors assumed the hourly rates for extending any vendor resources providing additional service the programmer support beyond the one-year warranty period will include a 3% annual escalation effective every July 1st starting July 1, 2016.</p> <p>To clarify Section 2.13.2.4 of Appendix D, any annual increases in hourly rates, base maintenance and support and/or license fees in total shall not exceed 3% of the prior year. While the Schedule 3A cost sheet includes a 3% multiplier in the formulae, the formulae may be edited so vendors may propose a percentage increase of less than 3%. Vendors shall bid on Schedule 3A their actual increases proposed. Proposals including any annual increases greater than 3% will be disqualified.</p> <p>Throughout the duration of WVCPRB's use of the vendor's implemented solution, WVCPRB expects any annual increases in hourly rates, base maintenance and support and/or license fees in total to be limited to 3% of the prior year.</p> <p>WVCPRB would also provide clarification that, as noted in Section 2.13.2.1 of Appendix D, the warranty period encompasses a twelve-month period after the final turnover and acceptance of the last phase of the project, the date of which is yet to be determined.</p>		Acknowledged.
<p><b>2.1.11.31 Production Support</b></p> <p>One or more vendors assumed that WVCPRB will have primary responsibility for the daily operating and maintaining the implemented environment (with the exception of defect resolution and operations support) upon "Go-Live" of the last implementation into production. To meet the Post Implementation IT Support requirements, the vendor proposed one full-time solution developer for the 12-month period beginning immediately upon final system cutover and acceptance, and ending 12 months later. To meet the Post Implementation Operations Support requirements, the vendor proposed one full-time solution operator for the 12-month period beginning immediately after final system cutover and acceptance, and ending 12 months later. The vendor assumed any additional resource requirements above the levels stated will be provided on a time and materials basis utilizing the costs for additional services provided in the cost proposal.</p> <p>Clarification is provided, as noted in Sections 2.13.2.2 and 2.13.2.4 of Appendix D, that WVCPRB desires, during the 12 month post-implementation period beginning immediately after final system cutover and acceptance and ending 12</p>		Acknowledged.

BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
months later, a constant, uninterrupted 12 month period of on-site, full-time programmer support and a constant, uninterrupted 12 month period of on-site, operations support beginning with the date of final cutover to and acceptance of the new environment. For each type of support, the vendor should provide one or more persons who provided programming support and operations support during implementation. The vendor may provide alternates so long as the person assigned to the support effort is not new to the project.		
<b>2.1.11.32 Miscellaneous Additional Topics</b> One or more vendors assumed: <ul style="list-style-type: none"> <li>• WVCPRB will provide appropriate access to WVCPRB systems and data required to accomplish project tasks including access to the building and facilities during working hours and as required during non-working hours such as nights, weekends and holidays.</li> <li>• Vendor project team members (onsite and remote) will have access to necessary environments 20 hours each day, including weekends and holidays, except for predefined, and limited, periods for required maintenance.</li> </ul> To clarify, as outlined in Section 2.13.3.6 of Appendix D, any access to WVCPRB systems and data required to accomplish project tasks including access to the building and facilities during working hours and as required during non-working hours such as nights, weekends and holidays will be provided in accordance with stated WVCPRB and WVOT policies and with WVCPRB Project Manager (and when appropriate WVOT) approval.		Acknowledged.
<b>2.1.11.33 IT Security Certification and Accreditation</b> One or more vendors assumed WVCPRB will be independently contracting the independent security contractor separately from this procurement and did not include costs for this activity in their cost proposal. Additionally, one or more vendors assumed that the independent security contractor is able to test all corrections within five (5) business days from receipt. To clarify Section 2.13.3.4 of Appendix D, WVCPRB does intend to contract with an independent security contractor, separate from this RFP. As of this date no independent security contractor has been selected. As such, no negotiations have taken place, nor are there stipulations or restrictions in place. Once an independent security contractor has been selected and a contract negotiated, the successful LOB vendor will be notified.		Acknowledged.
<b>2.1.11.34 Options</b> One or more vendors assumed the vendor would be able to invoice WVCPRB on a monthly basis, in full, for hours expended on Options 4, 5, and 7, Post-Implementation IT support, Post-Implementation operations support, and Out Year Support. To clarify, if WVCPRB authorizes the referenced Options, the payments for those options are expected to be added to the vendor's quoted prices for the phases in which the work was incorporated and that the phase-related payments be made		Acknowledged.



BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
<p>as proposed in Section 4.8 of the RFP.</p> <p>One or more vendors assumed the scope of work for options concerning data cleansing or the defined contribution plan will be constrained by the hours identified in their cost proposal.</p> <p>To clarify, Section 2.14.4 of Appendix D does specify the data cleansing and data quality effort is anticipated to consist of seven (7) stages, totaling 2,000 man-hours of effort.</p> <p>Requirements pertaining to the defined contribution plan are provided in Appendix D Section 2.4.4.8. However, should the vendor's assumption be addressing the DROP option, Section 2.14.7 includes the desired functionality related to the option, without regard to man-hours necessary to accomplish the requirements.</p>		
<p><b>2.1.11.35 WVCPRB Involvement on Project Team</b></p> <p>One or more vendors assumed in their Proposed Staff Loading By Phase:</p> <ul style="list-style-type: none"> <li>• An over reliance on WVCPRB staff participation on the project team.</li> <li>• A greater level of technical expertise than current WVCPRB staff possess.</li> </ul> <p>To clarify, Section 2.13.3.5 of Appendix D indicates eight CPRB staff members are expected to be assigned to the project. Vendors should not expect a broad variance from this proposed commitment.</p> <p>To clarify, as provided in Section 4.2.4.1 of the RFP, WVCPRB currently utilizes an old, VSAM-based legacy system. A staff of two programmers currently is responsible for supporting the system. The system lacks an integrated relational database, is comprised of many old batch COBOL, on line CICS, VISION RESULTS (DYL), and SAS programs.</p>		<p>Acknowledged.</p>

## **Attachments Index**



BAFO Section Reference	Proposal Reference	Response to Clarification or Explanation
<p>as proposed in Section 4.8 of the RFP.</p> <p>One or more vendors assumed the scope of work for options concerning data cleansing or the defined contribution plan will be constrained by the hours identified in their cost proposal.</p> <p>To clarify, Section 2.14.4 of Appendix D does specify the data cleansing and data quality effort is anticipated to consist of seven (7) stages, totaling 2,000 man-hours of effort.</p> <p>Requirements pertaining to the defined contribution plan are provided in Appendix D Section 2.4.4.8. However, should the vendor's assumption be addressing the DROP option, Section 2.14.7 includes the desired functionality related to the option, without regard to man-hours necessary to accomplish the requirements.</p>		
<p><b>2.1.11.35 WVCPRB Involvement on Project Team</b></p> <p>One or more vendors assumed in their Proposed Staff Loading By Phase:</p> <ul style="list-style-type: none"> <li>• An over reliance on WVCPRB staff participation on the project team.</li> <li>• A greater level of technical expertise than current WVCPRB staff possess.</li> </ul> <p>To clarify, Section 2.13.3.5 of Appendix D indicates eight CPRB staff members are expected to be assigned to the project. Vendors should not expect a broad variance from this proposed commitment.</p> <p>To clarify, as provided in Section 4.2.4.1 of the RFP, WVCPRB currently utilizes an old, VSAM-based legacy system. A staff of two programmers currently is responsible for supporting the system. The system lacks an integrated relational database, is comprised of many old batch COBOL, on line CICS, VISION RESULTS (DYL), and SAS programs.</p>		Acknowledged.

## **Attachments Index**

---

The following sections and exhibits to the BAFO are included as listed below.

<b>Certifications and Affirmations/Corporate Background ...</b>	<b>Section I-1.1 &amp; I-2.1</b>
<b>Phasing the Project.....</b>	<b>Section II-2.6.1.8</b>
<b>List &amp; Specifications of Required Hardware.....</b>	<b>Exhibit III-1</b>
<b>List of Required Commodity Software .....</b>	<b>Exhibit III-2</b>
<b>Project Plan with and without Options .....</b>	<b>Exhibit III-7</b>
<b>Preliminary Project Staffing Plan.....</b>	<b>Exhibit III-13</b>
<b>Staff Resumes .....</b>	<b>Exhibit III-14</b>
<b>Subcontractor Letters of Agreement.....</b>	<b>Exhibit III-21</b>
<b>Subcontractor Agreements .....</b>	<b>Exhibit III-22</b>
<b>Resource Summary by Phase .....</b>	<b>Exhibit III-23</b>



**Sections I-1.1 & I-2.1**

## **I-1.1 Vendor Certifications and Affirmations**

### **Vitech General Information**

#### *Legal Structure*

- Vitech Systems Group, Inc. is a privately held corporation.
- Vitech System Group's principle place of business is:  
401 Park Avenue South, New York, NY, 10016.
- The company's Federal Tax Identification Number is 13-378-5492.

#### *Response Preparers*

The following team members were involved in the preparation of this proposal:

- Frank Vitiello – President
- Jamie Vitiello – Vice President
- Chris Lodge – VP, Operations, Practice Services
- Paul Kelly – Director, Infrastructure
- Anurag Yagnik – Director, Product Development
- Bob Vedilago – Project Management
- London Matusiak – Marketing Manager
- Irene Gordon – Training Services
- Brian McKinney – Delivery
- Karen Stevenson – Corporate Development

#### *Proposal Contact*

The following individuals have the authority to answer questions regarding this response.

Chris Lodge, VP, Operations, Practice Services  
Vitech Systems Group, Inc.  
401 Park Avenue South  
New York, NY 10016  
Tel: 646-344-5284; Fax: 646-746-8590  
clodge@vitechinc.com

James E. Vitiello, Vice President  
Vitech Systems Group, Inc.  
401 Park Avenue South  
New York, NY 10016  
Tel: 646-344-5233; Fax: 646-746-8590  
jamesvitiello@vitechinc.com



**WVCPRB RFP Affirmations***Subcontractors*

Vitech is not intending to use any subcontractor firms.

*Project Manager Confirmation*

Ed Caseres is proposed as the Vitech Project Manager and Ed is a full-time Vitech employee.

*Additional Vitech Affirmations*

1. If selected as the new solution vendor, Vitech affirms its commitment to being responsible for the development of a full set of all the rules, regulations, procedures, and practices as described in the RFP Appendix D, Section 2.6.1.4.
2. If selected as the new solution vendor, Vitech affirms it will take sole responsibility for all contractual activities, products, and deliverables through the life of the contract. Such services and deliverables include the overall project plan and for each functional rollout phase, the detailed requirements definition, all necessary hardware and software components (if those options are authorized), including fully integrated workflow and imaging capabilities (as defined within), an LOB solution, system integration services, enablement of all interfaces described in this RFP, test preparation and execution (including training and assisting WVCPRB with its testing responsibilities) of all elements of the offeror's solution (not just customized elements), data conversion, training for users, employers, and IT staff, documentation, process change recommendations, organizational recommendations, and implementation of any other proposed technologies, as well as first-line problem resolution during transition support (as defined within).
3. If selected as the new solution vendor, Vitech affirms that as the prime contractor we will be the sole point of contact with regard to contractual matters; Further, should any third party subcontracted or engaged by Vitech become unable to fulfill its obligations, Vitech will make sure that such obligations are met through delivery of the same or equivalent products and services at the contractually agreed upon price.
4. Vitech affirms the "Current 'As Is' Business Functionality," as provided in the RFP has been reviewed.
5. If selected as the new solution vendor, Vitech affirms that all requirements expressed in the RFP will be met by the proposed solution as per this proposal and as implemented by Vitech unless an explicit written agreement to delete one or more of the requirements is signed by both WVCPRB and Vitech.

6. For the period of time starting on the issuance date of the RFP and up until the award of a resulting contract, Vitech affirms that no contact has been made in any manner related to this procurement by Vitech or lobbyists and any other third-party retained by Vitech, with WVCPRB staff, WVCPRB Board members, West Virginia legislators, the office of the Governor of West Virginia or the legislative or gubernatorial staff.

### **WVCPRB RFP Certifications**

1. Vitech certifies that it has not had a contract terminated for default or cause.
2. Vitech certifies that it has never been assessed a penalties in excess of five thousand dollars (\$5,000), including liquidated damages, under any of its existing or past contracts with any organization (including any governmental entity).
3. Vitech certifies that it never has had a performance bond or bid bond demanded for payment.
4. Vitech certifies that it never has been subject to any governmental action limiting its rights as a bidder to do business with that entity or any other governmental entity.
5. Vitech is privately held, therefore has never had its stock suspended.
6. Vitech certifies that Vitech itself, its officers, and its owners who have a 20% interest or greater, have never filed for bankruptcy, reorganization, a debt arrangement, moratorium, or any proceeding under any bankruptcy or insolvency law, or any dissolution or liquidation proceeding.
7. Vitech certifies that Vitech itself, its officers, and its owners who have a 20% interest or greater, have never been convicted of a felony or currently under indictment of a felony charge.



## I-2.1 Corporate Background

### *Organization*

Vitech Systems Group, Inc. is headquartered in New York City at 401 Park Avenue South and this is Vitech's principle place of business. Vitech operates additional offices in Oklahoma City, London, Paris, Dublin and Hyderabad. Work on behalf of WVCPRB will occur primarily out of Vitech's New York and Oklahoma City offices.

Vitech's top five officers are as follows:

Officer	Title	Vitech Tenure
Frank Vitiello	President	20+ Years
Jamie Vitiello	Vice President – Business Development	20+ Years
Chris Lodge	Vice President – Operations	14 Years
Anurag Yagnik	Vice President – Software Development	14 Years
Hope Nawada	Director – Strategic Development	9 Years

Vitech is incorporated in New York State and operates in conjunction with Vitech Systems Group Hosting Service, Inc. and Vitech Systems Asia Private, Ltd.

There have been no changes of ownership in the past three years nor are there any foreseen forthcoming changes.

### *Key Statistics*

Vitech has experienced no changes of ownership in the past three years.

Vitech presently employs approximately 650 professionals. Over the past 5 years we have averaged approximately 500 full-time professional employees and 20 contractors.

Vitech has been in continuous operations for over 20 years.

Vitech does not plan to employ any subcontractors in your work with WVCPRB.

### *Brief History*

Vitech was founded as Info-Mation in 1986 and restructured as Vitech Systems Group, Inc. in 1996. In 1990 the firm began specializing in the delivery of custom benefit solutions. In 1995, Vitech recognized the vast potential for domain specific, off-the-shelf software and what it could offer the benefit administration marketplace. This led to our

development of the V3 System, a true COTS solution. Vitech now serves an ever growing list of almost 50 benefit administration organizations.

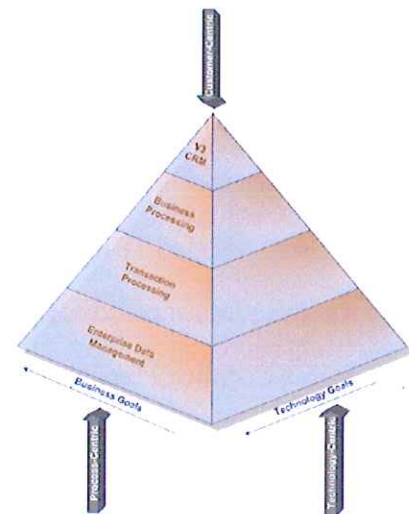
### *Vision, Leadership, Innovation*

Vitech is a retirement benefit industry's leader and visionary with regard to software solutions. We pioneered the product-based solution approach with the original introduction of the V3 system in the early 1990s. For over 20 years we have continued to lead the industry with product and service innovations.

We work relentlessly to help our clients achieve their ultimate objectives of efficient operations, organizational responsiveness and world-class customer service. We have recently revolutionized the administration systems model with our introduction of V3 10.X and business centric computing. With the latest release of V3 10.X we do more than ever to help you put your customer first and to help you achieve the full potential of system-enabled business processing.

The experience and success of our clients reflects our commitment to the industry and our relentless pursuit of excellence. Our history of innovation speaks for itself.

V3 is a living solution offering clients the benefit of future product enhancements and upgrades. New V3 releases are available several times per year and do not require re-integration. They are simply installed by Vitech, at the client's request, as part of paid maintenance. After an upgrade is installed, all prior specific configurations and customizations for the client will continue to operate as originally implemented. This is an extremely powerful solutions model, and one that is unique to the V3 System.



Our true product platform has created a vibrant user community. To foster sharing and education across our client base and as a sign of our enduring commitment to the industry Vitech will hold its 9<sup>th</sup> Users Conference in March 2013 in Sarasota, Florida. Please see Attachments 13 for prior user conference brochures.

Vitech's success is grounded in a contemporary technology, highly-configurable, enterprise class benefit software product that includes extensive benefit-specific capabilities and natively integrated enterprise, non-benefit specific capabilities such as workflow, imaging, correspondence management, call center and more. V3 began as a client-server application with a limited set of benefit-only capabilities in the mid 1990's and it is now an n-tier, browser-based application with benefit features that range from



enrollment to health to loans to retirement to life and more, and enterprise features that include imaging, self-service, CRM, doc management, batch processing, query and more.

### *Representative Client List*

Vitech's proposed solution leverages the lessons and best practices we have learned through our experience at nearly 50 other multi-employer benefit organization including the 18 public pension funds listed below.

- Bahamas National Retirement System
- Boston Employees Retirement System
- Hawaii Employees Retirement System
- Iowa Public Employees Retirement System
- Maine Public Employees Retirement System
- Massachusetts Teachers Retirement System
- Milwaukee County Employees Retirement System
- New Mexico Teachers Retirement System
- NYC Board of Education Retirement System
- NYC Police Pension Fund
- Ohio Police and Fire Pension Fund
- Ohio Teachers Retirement System
- Orange County Employees' Retirement System
- Pennsylvania Teachers Retirement System
- United Nations International Pension Fund
- US Virgin Islands Employees Retirement System
- Ventura County Employees Retirement System
- Wichita Employees Retirement System

The lessons and best practices garnered through our experience with these organizations inform all aspects of our solution to IMRF. This includes, but is certainly not limited to, our solution decisions related to COTS, timeline, methodology, phasing, staffing, enterprise features, communication channels and infrastructure.

## **Section II-2.6.1.8**

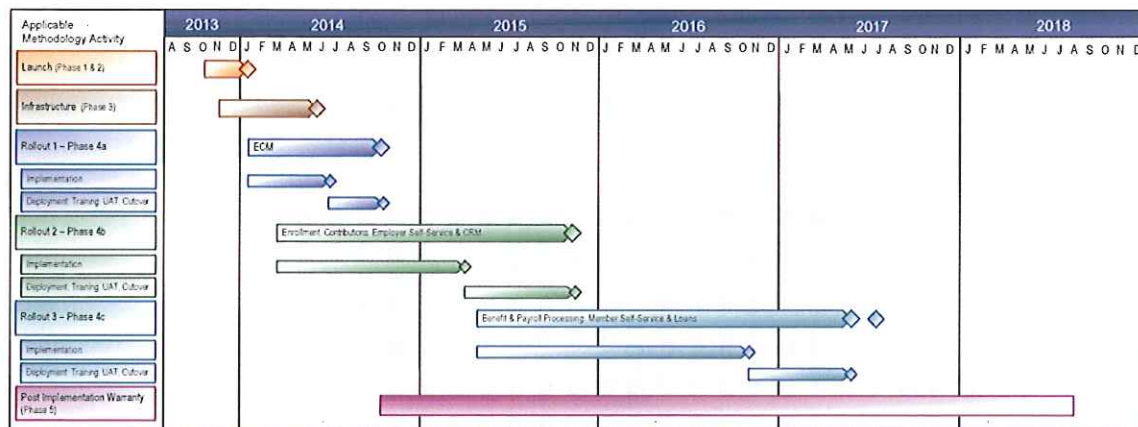


### II-2.6.1.8 Phasing the Project

A phased approach for a large system implementation is the preferred approach in order to keep organizational-wide concurrent change to manageable levels that position for success in achieving your vision and to reduce risk. Vitech is pleased to propose a delivery plan consistent with WVCPRB's preferred phasing as noted in the RFP and with which Vitech has a great deal of previous retirement system implementation experience.

#### Implementation Schedule

The diagram below illustrates this phased approach to the high level project plan for addressing the mandatory elements of this project. This comprehensive plan addresses all WVCPRB phasing requirements, time constraints, required deliverables, and solution objectives.



#### Implementation Plan Phasing

Specifically, we propose a carefully crafted initial project plan for the implementation of WVCPRB's new pension system, with the following components.

**RFP Phase 1** and **RFP Phase 2** correspond to the same Launch activities from Vitech's implementation methodology. Included in this phase is orientation training for WVCPRB project team members on Vitech's implementation methodology. We will determine key project operating standards such as agreeing to the weekly reporting format, the communication plan, the risk management plan, change control/management plan and establishing the document repository.

**RFP Phase 3** corresponds directly to Vitech's Infrastructure activities. We will confirm the architecture and deployment plan, procure and install the associated hardware and software infrastructure for the project. The System Security Plan and Disaster Recovery Plan are also drafted in this phase.

**RFP Phase 4** is Implementation and Deployment of WVCPRB's new pension system. During this rollout phase Vitech will manage the project, complete

requirements capture, configure/customize the requirements in the V3 solution, data capture, conduct training, and rollout the system. This phase of the implementation also includes execution of formal Validation Tests at intervals of 3-5 months, throughout the project to confirm confidence in the solution and its integration points long before UAT. The WVCPRB organization goes live with its new system in phases:

- **Rollout 1 (RFP Phase 4a)** – Rollout 1 is focused on V3 World (basic), Imaging integration to Documentum ApplicationXtender, and V3 Workflow for Go-forward Imaging Processing. Inclusive in this rollout is the delivery of the following business areas: World (basic); Imaging Integration with associated Workflow, Ad-hoc Query and Security.

Rollout 1 goes live 12 months from project start. At the conclusion of this rollout WVCPRB will be able to use V3 to look up customers in World, view read-only converted demographic data, see and launch any associated imaged documents.

- **Rollout 2 (RFP Phase 4b)** – Rollout 2 focuses on Membership by implementing V3 World, Enrollment, Employer Reporting, Defined Contributions, Employer Self-Service, Beneficiary Maintenance, Member/Pensioner/Employer Maintenance, Purchase of Service and Multiple Service, and Call Center Management. Going live 12 months after Rollout 1. A 19 month phase, Rollout 2 delivers all remaining World capabilities; Enrollment; Contributions; Employer Self-Service; Funds Management; plus all related Workflow, Ad-hoc Query, Correspondence Management, Security, Reports, Documents; and Call Center and Activity Tracking.

At the conclusion of this rollout V3 will be the live system of record for all Employer data, pension related contribution processing, work and contribution data, and Employer Self-Service. Related integration with external systems and integration partners (e.g. banks, employers), and data bridges from and to the legacy system will be in place. Existing Employer Self-Service capabilities will have been replaced by V3 keeping with WVCPRB branding as much as possible, while legacy Member Self-Service capabilities will remain as is. At this stage, the end users' access to the legacy system will continue to be via terminal emulation capabilities as provided by WVCPRB.

- **Rollout 3 (RFP Phase 4c)** – Rollout 3 focuses on Benefits including Pension, Benefits Processing, Member Self-Service, and Loans. It is a 25 month phase that goes live 19 months after Rollout 2. This phase delivers Benefit Estimates, Benefit Processing and Calculations, Death, Disability, Hearing



Administration and Appeals, QDRO, LTHS and Court Orders, Refunds, Return to Work, Annuity Payroll and other Payments, Refunds, and Power of Attorney. Funds Management, Tax Reporting and Member Self-Service are also included, along with additional Workflow; Ad-hoc Query; Security; Reports; Documents.

At the conclusion of this rollout WVCPRB's new system of record will be live on the V3 platform for all Member related data, pension, benefits, and refund processing, loans and Member Self-Service functionality and for related integration with external systems and integration partners (e.g., banks, insurance carriers, IRS). Member Self-Service capabilities will have been fully replaced by V3, enabling full retirement of the end-user terminal emulation. With the full functionality now live on WVCPRB's new system, the data bridges from and to the legacy system will be ready for decommissioning. Further, upon this Rollout WVCPRB will begin decommissioning of the legacy system itself.

**Phases 5 - Post-Implementation Warranty.** Vitech's proposal includes a comprehensive warranty that covers WVCPRB from the first system go-live date through 12 months post final go-live. During the Warranty Period Vitech will fix any logged bugs at no additional charge. A bug is defined as the system not operating in conformance with the system specifications or final design documents.

**Phases 6 - Post-Implementation Support.** Vitech will provide 12 months of IT and Operations support following go-live using WVCPRB experienced Vitech resources. Vitech is looking to be a long-term WVCPRB partner, proposing ongoing out-year support after the initial 12-month post-implementation support period.

## **Exhibit III-1**

## List and Specifications of Required Hardware

---



West Virginia Consolidated Public Retirement Board - Exhibit 1  
Required Hardware for Functional Project Elements

(The vendor should replicate this table as necessary to account for all components.)

1	2	3	4	5
ITEM NO	QTY	MANUFACTURER	MODEL	DESCRIPTION
1	2	HP	583967-001	HP DL380G7 E5640 Base US Svr
2	2	HP	587480-B21	HP E5640 DL380G7 Kit
3	8	HP	500658-B21	HP 4GB 2Rx4 PC3-10600R-9 Kit
4	8	HP	512547-B21	HP 146GB 6G SAS 15K 2.5in DP ENT HDD
5	2	HP	500579-B21	HP DL380G6/G7 PCI-E 1x8 2x4 Riser Kit
6	4	HP	AP769A	HP StorageWorks 81B PCI-e Fibre Channel Host Bus Adapter
7	2	HP	412648-B21	HP NC360T PCIe Dp Gigabit Server Adapter
8	2	HP	503296-B21	HP 460W CS Gold Ht Plg Pwr Supply Kit
9	2	HP	U9737E	HP 5y 6h 24x7 CTR ProLiant DL38x HW Supp
10	3	HP	633407-001	HP DL380G7 E5645 Base US Svr
11	3	HP	633420-B21	HP E5645 DL380G7 Kit
12	24	HP	500666-B21	HP 16GB 4Rx4 PC3-8500R-7 Kit
13	12	HP	512547-B21	HP 146GB 6G SAS 15K 2.5in DP ENT HDD
14	3	HP	500579-B21	HP DL380G6/G7 PCI-E 1x8 2x4 Riser Kit
15	6	HP	AP769A	HP StorageWorks 81B PCI-e Fibre Channel Host Bus Adapter
16	12	HP	412648-B21	HP NC360T PCIe Dp Gigabit Server Adapter
17	3	HP	503296-B21	HP 460W CS Gold Ht Plg Pwr Supply Kit
18	3	HP	U9737E	HP 5y 6h 24x7 CTR ProLiant DL38x HW Supp
19	1	HP	579243-001	HP DL360G7 E5506 Entry US Svr
20	1	HP	588074-B21	HP E5506 DL360G7 Kit
21	4	HP	507125-B21	HP 146GB 6G SAS 10K 2.5in DP ENT HDD
22	1	HP	503296-B21	HP 460W CS Gold Ht Plg Pwr Supply Kit
23	1	HP	U9735E	HP 5y 6h 24x7 CTR ProLiant DL36x HW Supp
24	2	Dell	225-2858	Dell EqualLogic PS6110XV, 10Gb, High Performance, 15K SAS Drives
25	2	Dell	342-4517	PS6110XV, 14.4TB capacity, 15K SAS, 24x 600GB
26	2	Dell	331-6722	Dual Controllers, 10Gb, HA with failover
27	2	Dell	468-8817	EqualLogic array may not be returned
28	2	Dell	468-7110	Asynchronous Replication
29	2	Dell	468-7155	Snaps/Clones with integration for MS SQL, Exchange, Hyper V and VMware
30	2	Dell	468-7156	SAN HQ multi group monitoring software
31	2	Dell	330-6048	RackRails, RapidRails for Dell Rack
32	2	Dell	937-9093	ProSupport: 7x24 HW / SW Tech Support and Assistance, 5 year
33	2	Dell	968-3590	Mission Critical Package: 4-Hour 7x24 On-Site Service with Emergency Dispatch, 4 year Extended
34	2	Dell	968-3591	Dell Hardware Limited Warranty Initial Year
35	2	Dell	968-3595	Dell Hardware Limited Warranty Extended Year
36	2	Dell	968-3628	Mission Critical Package: 4-Hour 7x24 On-Site Service with Emergency Dispatch, Initial Year
37	2	Dell	989-3439	Dell ProSupport. For tech support, visit <a href="http://support.dell.com/ProSupport">http://support.dell.com/ProSupport</a> or call 1-800-945-3355
38	2	Dell	995-4008	EqualLogic Advanced Software Warranty and Service, 7x24 Access, 5 year
39	2	Dell	995-4048	MISSION CRITICAL PACKAGE: Enhanced Services, 5 year
40	2	Dell	961-3859	Remote Implementation of a Dell Equallogic Array
41	2	Dell	926-2979	Proactive Maintenance Service Declined
42	2	Dell	996-7559	EqualLogic Non-Standard Reference Architecture
43	2	Dell	330-3151	Power Cord, C13 to C14, PDU Style, 12 Amps, 2 meter, Qty 1
44	2	Dell	330-3151	Power Cord, C13 to C14, PDU Style, 12 Amps, 2 meter, Qty 1
45	2	Dell	905-6109	Dell Education Services - EqualLogic PS Series Advanced Features and Management 2day-PRICE PEF
46	4	Dell	225-2477	Force10, S4810P, 48 x 10GbE SFP+, 4 x QSFP 40GbE, 1 x AC PSU, 2 x Fans, IO Panel to PSU Airflow
47	4	Dell	331-9233	No Returns Allowed on Dell Force10 Switches
48	4	Dell	331-6279	Force10, User Documentation for S4810, DAO/BCC
49	4	Dell	931-3806	ProSupport: Next Business Day Parts Delivery, Initial Year
50	4	Dell	935-0093	ProSupport: Next Business Day Parts Delivery, 4 year Extended
51	4	Dell	935-0103	SW Support, Force10 Software, 5 years
52	4	Dell	935-0143	ProSupport: 7x24 HW / SW Tech Support and Assistance, 5 years
53	4	Dell	989-3439	Dell ProSupport. For tech support, visit <a href="http://support.dell.com/ProSupport">http://support.dell.com/ProSupport</a> or call 1-800-945-3355
54	4	Dell	996-2670	Dell Hardware Limited Warranty Initial Year
55	4	Dell	996-2760	Dell Hardware Limited Warranty Extended Year(s)
56	4	Dell	934-9097	Install and Implement of a Dell Network Switch, Layer 1, 1 Force10 S/ MXL-Series or 1 PowerConnect
57	4	Dell	331-5996	Force10, Power Cord, 125V, 15A, 10 Feet, NEMA 5-15/C13, S-Series
58	4	Dell	332-0139	Force10 Customer not deploying this switch in iSCSI or FCoE environment.
59	4	Cisco	WS-C4948-10GE-S	Cisco Catalyst 4948 10 Gigabit Ethernet Switch - switch - 48 ports - manage - LAYER 3
60	4	Cisco	CAB-US515-C15-US	NEMA 5-15 to IEC-C15 8ft US



1	2	3	4	5
ITEM NO	QTY	MANUFACTURER	MODEL	DESCRIPTION
61	16	Cisco	X2-10GB-SR	10GBASE-SR X2 Module
62	4	Cisco	PWR-C49-300AC	Catalyst 4948 300-Watt AC Power Supply
63	4	Cisco	CON-SNTP-C4948GES	Cisco SMARTnet Premium - Extended service agreement - replacement - year 1 - 24x7 - 4 h
64	4	Cisco	CON-SNTP-C4948GES	Cisco SMARTnet Premium - Extended service agreement - replacement - year 2 - 24x7 - 4 h
65	4	Cisco	CON-SNTP-C4948GES	Cisco SMARTnet Premium - Extended service agreement - replacement - year 3 - 24x7 - 4 h
66	4	Cisco	CON-SNTP-C4948GES	Cisco SMARTnet Premium - Extended service agreement - replacement - year 4 - 24x7 - 4 h
67	4	Cisco	CON-SNTP-C4948GES	Cisco SMARTnet Premium - Extended service agreement - replacement - year 5 - 24x7 - 4 h
68	4	FortiNet	2538906	FortiBalancer 400 4PT
69	4	FortiNet	2570547	1YR FortiBalancer 400 24x7 Year 1
70	4	FortiNet	2570547	1YR FortiBalancer 400 24x7 Year 2
71	4	FortiNet	2570547	1YR FortiBalancer 400 24x7 Year 3
72	4	FortiNet	2570547	1YR FortiBalancer 400 24x7 Year 4
73	4	FortiNet	2570547	1YR FortiBalancer 400 24x7 Year 5
74	1	HP	583966-001	HP DL380G7 X5650 Perf US Svr
75	8	HP	500658-B21	HP 4GB 2Rx4 PC3-10600R-9 Kit
76	4	HP	512547-B21	HP 146GB 6G SAS 15K 2.5in DP ENT HDD
77	2	HP	AP769A	HP StorageWorks 81B PCI-e Fibre Channel Host Bus Adapter
78	2	HP	412648-B21	HP NC360T PCIe Dp Gigabit Server Adapter
79	1	HP	U9737E	HP 5y 6h 24x7 CTR ProLiant DL38x HW Supp
80	1	HP	583967-001	HP DL380G7 E5640 Base US Svr
81	1	HP	587480-B21	HP E5640 DL380G7 Kit
82	8	HP	500658-B21	HP 4GB 2Rx4 PC3-10600R-9 Kit
83	4	HP	512547-B21	HP 146GB 6G SAS 15K 2.5in DP ENT HDD
84	1	HP	500579-B21	HP DL380G6/G7 PCI-E 1x8 2x4 Riser Kit
85	2	HP	AP769A	HP StorageWorks 81B PCI-e Fibre Channel Host Bus Adapter
86	2	HP	412648-B21	HP NC360T PCIe Dp Gigabit Server Adapter
87	1	HP	503296-B21	HP 460W CS Gold Ht Plg Pwr Supply Kit
88	1	HP	U9737E	HP 5y 6h 24x7 CTR ProLiant DL38x HW Supp
89	2	HP	633407-001	HP DL380G7 E5645 Base US Svr
90	2	HP	633420-B21	HP E5645 DL380G7 Kit
91	16	HP	500666-B21	HP 16GB 4Rx4 PC3-8500R-7 Kit
92	8	HP	512547-B21	HP 146GB 6G SAS 15K 2.5in DP ENT HDD
93	2	HP	500579-B21	HP DL380G6/G7 PCI-E 1x8 2x4 Riser Kit
94	4	HP	AP769A	HP StorageWorks 81B PCI-e Fibre Channel Host Bus Adapter
95	8	HP	412648-B21	HP NC360T PCIe Dp Gigabit Server Adapter
96	2	HP	503296-B21	HP 460W CS Gold Ht Plg Pwr Supply Kit
97	2	HP	U9737E	HP 5y 6h 24x7 CTR ProLiant DL38x HW Supp
98	1	HP	579243-001	HP DL360G7 E5506 Entry US Svr
99	1	HP	588074-B21	HP E5506 DL360G7 Kit
100	4	HP	507125-B21	HP 146GB 6G SAS 10K 2.5in DP ENT HDD
101	1	HP	503296-B21	HP 460W CS Gold Ht Plg Pwr Supply Kit
102	1	HP	U9735E	HP 5y 6h 24x7 CTR ProLiant DL36x HW Supp
# DESCRIPTION				
1	Sequential item number			
2	Quantity - how many are required			
3	Who the manufacturer is			
4	Specific model number			
5	Item description			



**Exhibit III-2**

## List of Required Commodity Software

---



West Virginia Consolidated Public Retirement Board Commodity Software for Functional Project Elements (The vendor should replicate this table as necessary to account for all components.)				
1 ITEM NO	2 # OF COPIES	3 MANUFACTURER	4 MODEL	5 DESCRIPTION
1	8	Oracle	ENT/DB/PROC	DBMS Enterprise Edition - Processor License
2	8	Oracle	ENT/DB/PROC-SI	DBMS Product Support (Incl. Technical Support and Updates) 24x7 Year 1
3	8	Oracle	ENT/DB/PROC-SI	DBMS Product Support (Incl. Technical Support and Updates) 24x7 Year 2
4	8	Oracle	ENT/DB/PROC-SI	DBMS Product Support (Incl. Technical Support and Updates) 24x7 Year 3
5	8	Oracle	ENT/DB/PROC-SI	DBMS Product Support (Incl. Technical Support and Updates) 24x7 Year 4
6	8	Oracle	ENT/DB/PROC-SI	DBMS Product Support (Incl. Technical Support and Updates) 24x7 Year 5
7	8	Oracle	ENT/RAC/PROC	Real Application Cluster (RAC) - Processor License (11g)
8	8	Oracle	ENT/RAC/PROC-SI	RAC Product Support (Incl. Technical Support and Updates) 24x7 Year 1
9	8	Oracle	ENT/RAC/PROC-SI	RAC Product Support (Incl. Technical Support and Updates) 24x7 Year 2
10	8	Oracle	ENT/RAC/PROC-SI	RAC Product Support (Incl. Technical Support and Updates) 24x7 Year 3
11	8	Oracle	ENT/RAC/PROC-SI	RAC Product Support (Incl. Technical Support and Updates) 24x7 Year 4
12	8	Oracle	ENT/RAC/PROC-SI	RAC Product Support (Incl. Technical Support and Updates) 24x7 Year 5
13	10	Oracle	STD/AS/PROC	Oracle WebLogic Server Standard Edition - Processor
14	10	Oracle	STD/AS/PROC-SI	Oracle WebLogic Server Standard Edition Support 24x7 Year 1
15	10	Oracle	STD/AS/PROC-SI	Oracle WebLogic Server Standard Edition Support 24x7 Year 2
16	10	Oracle	STD/AS/PROC-SI	Oracle WebLogic Server Standard Edition Support 24x7 Year 3
17	10	Oracle	STD/AS/PROC-SI	Oracle WebLogic Server Standard Edition Support 24x7 Year 4
18	10	Oracle	STD/AS/PROC-SI	Oracle WebLogic Server Standard Edition Support 24x7 Year 5
19	2	Adobe	65083591AD01A00	Adobe Acrobat X Pro - (v. 10) - license - 1 user
20	2	Adobe	10004466AD02A12	Adobe Gold Support - technical support - Year 1 - for Adobe Acrobat Pro
21	2	Adobe	10004466AD02A12	Adobe Gold Support - technical support - Year 2 - for Adobe Acrobat Pro
22	2	Adobe	10004466AD02A12	Adobe Gold Support - technical support - Year 3 - for Adobe Acrobat Pro
23	2	Adobe	10004466AD02A12	Adobe Gold Support - technical support - Year 4 - for Adobe Acrobat Pro
24	2	Adobe	10004466AD02A12	Adobe Gold Support - technical support - Year 5 - for Adobe Acrobat Pro
25	4	Allround Automation	n/a	PLUSOL Developer 8.0
26	4	Allround Automation	n/a	PLUSOL Developer 8.0 Annual Support Year 1
27	4	Allround Automation	n/a	PLUSOL Developer 8.0 Annual Support Year 2
28	4	Allround Automation	n/a	PLUSOL Developer 8.0 Annual Support Year 3
29	4	Allround Automation	n/a	PLUSOL Developer 8.0 Annual Support Year 4
30	4	Allround Automation	n/a	PLUSOL Developer 8.0 Annual Support Year 5
31	7	Microsoft	P73-04849	Microsoft Windows Server 2008 R2 Standard - includes 5 CALs
32	7	Microsoft	P73-01423	Microsoft Windows Server Standard Edition - software assurance Year 1
33	7	Microsoft	P73-01423	Microsoft Windows Server Standard Edition - software assurance Year 2
34	7	Microsoft	P73-01423	Microsoft Windows Server Standard Edition - software assurance Year 3
35	7	Microsoft	P73-01423	Microsoft Windows Server Standard Edition - software assurance Year 4
36	7	Microsoft	P73-01423	Microsoft Windows Server Standard Edition - software assurance Year 5
37	5	Red Hat	n/a	Red Hat Linux - 2-sockets with unlimited guests Premium Subscription (Year 1)
38	5	Red Hat	n/a	Red Hat Linux - 2-sockets with unlimited guests Premium Subscription (Year 2)
39	5	Red Hat	n/a	Red Hat Linux - 2-sockets with unlimited guests Premium Subscription (Year 3)
40	5	Red Hat	n/a	Red Hat Linux - 2-sockets with unlimited guests Premium Subscription (Year 4)
41	5	Red Hat	n/a	Red Hat Linux - 2-sockets with unlimited guests Premium Subscription (Year 5)
42	4	Red Hat	n/a	Red Hat Linux - 2-sockets with up to 1 virtual guests Premium Subscription (Year 1)
43	4	Red Hat	n/a	Red Hat Linux - 2-sockets with up to 1 virtual guests Premium Subscription (Year 2)
44	4	Red Hat	n/a	Red Hat Linux - 2-sockets with up to 1 virtual guests Premium Subscription (Year 3)
45	4	Red Hat	n/a	Red Hat Linux - 2-sockets with up to 1 virtual guests Premium Subscription (Year 4)
46	4	Red Hat	n/a	Red Hat Linux - 2-sockets with up to 1 virtual guests Premium Subscription (Year 5)
47	1	Solarwinds	n/a	SolarWinds Network Performance Monitor SL500 (up to 500 elements) - License with 1st-year Maintenance
48	1	Solarwinds	n/a	SolarWinds NetFlow Traffic Analyzer Module for SolarWinds Network Performance Monitor SL500 - License with 1st-year Maintenance
49	1	Solarwinds	n/a	SolarWinds Server & Application Monitor (formerly Application Performance Monitor) AL150 (up to 150 monitors) - License with 1st-year Maintenance
50	1	Solarwinds	n/a	SolarWinds Virtualization Manager up to 50 powered on VMs - License with 1st-year Maintenance
51	1	Solarwinds	n/a	SolarWinds Storage Manager powered by Profler STM50 (up to 50 Disks) - License with 1st-year Maintenance
52	1	Solarwinds	n/a	Synthetic End User Monitor with 1st year Maintenance
53	1	Solarwinds	n/a	Log & Event Manager LEM50 (up to 50 nodes) - License with 1st Year Maintenance
54	1	Solarwinds	n/a	SolarWinds Support and Maintenance Year 2
55	1	Solarwinds	n/a	SolarWinds Support and Maintenance Year 3
56	1	Solarwinds	n/a	SolarWinds Support and Maintenance Year 4
57	1	Solarwinds	n/a	SolarWinds Support and Maintenance Year 5
58	24	Symantec	12706485	Symantec Endpoint Protection 11.0 + 12 Months Essential Support Year 1
59	24	Symantec	12706485	Symantec Endpoint Protection 11.0 12 Months Essential Support Year 2
60	24	Symantec	12706485	Symantec Endpoint Protection 11.0 12 Months Essential Support Year 3
61	24	Symantec	12706485	Symantec Endpoint Protection 11.0 12 Months Essential Support Year 4
62	24	Symantec	12706485	Symantec Endpoint Protection 11.0 12 Months Essential Support Year 5
63	10	VMware	V55-ENT-C	VMware vSphere 5 Enterprise for 1 processor
64	10	VMware	V55-ENT-P-SSS-C	VMware Support and Subscription Production - 24x7 - 30 min year 1
65	10	VMware	V55-ENT-P-SSS-C	VMware Support and Subscription Production - 24x7 - 30 min year 2
66	10	VMware	V55-ENT-P-SSS-C	VMware Support and Subscription Production - 24x7 - 30 min year 3
67	10	VMware	V55-ENT-P-SSS-C	VMware Support and Subscription Production - 24x7 - 30 min year 4
68	10	VMware	V55-ENT-P-SSS-C	VMware Support and Subscription Production - 24x7 - 30 min year 5
69	2	VMware	VC5-STD-3A	VMware vCenter Server Standard for vSphere
70	2	VMware	VC5-STD-A	VMware vCenter Server Standard for vSphere Production Support for year 1
71	2	VMware	V55-ENT-P-SSS-C	VMware vCenter Server Standard for vSphere Production Support for year 2
72	2	VMware	V55-ENT-P-SSS-C	VMware vCenter Server Standard for vSphere Production Support for year 3
73	2	VMware	V55-ENT-P-SSS-C	VMware vCenter Server Standard for vSphere Production Support for year 4
74	2	VMware	V55-ENT-P-SSS-C	VMware vCenter Server Standard for vSphere Production Support for year 5
75	1	WebWorks	Epubexp	ePublisher Express
76	1	WebWorks	Epubexp	ePublisher Express - Annual Maintenance Year 1
77	1	WebWorks	Epubexp	ePublisher Express - Annual Maintenance Year 2
78	1	WebWorks	Epubexp	ePublisher Express - Annual Maintenance Year 3
79	1	WebWorks	Epubexp	ePublisher Express - Annual Maintenance Year 4
80	1	WebWorks	Epubexp	ePublisher Express - Annual Maintenance Year 5
81	250	Oracle	ENT/DB-NAM	DBMS Enterprise Edition - Processor License
82	250	Oracle	ENT/DB-NAM-SI	DBMS Product Support (Incl. Technical Support and Updates) 24x7 Year 1
83	250	Oracle	ENT/DB-NAM-SI	DBMS Product Support (Incl. Technical Support and Updates) 24x7 Year 2
84	250	Oracle	ENT/DB-NAM-SI	DBMS Product Support (Incl. Technical Support and Updates) 24x7 Year 3
85	250	Oracle	ENT/DB-NAM-SI	DBMS Product Support (Incl. Technical Support and Updates) 24x7 Year 4
86	250	Oracle	ENT/DB-NAM-SI	DBMS Product Support (Incl. Technical Support and Updates) 24x7 Year 5
87	1	EMC	n/a	ApplicationXtender
Total				
6 DESCRIPTION				
1 Sequential item number				
2 # of copies / licenses required				
3 Who the manufacturer is				
4 Specific model number				
5 Item description				
6 Estimated cost of 1 copy / license (including all ancillary charges for freight, insurance while in transit, etc.)				

**Exhibit III-7**



## **High Level Work Plan (with and without Options)**

---

Confidential and proprietary information not for public disclosure.

**NOTICE REGARDING CONFIDENTIALITY**

This information is Confidential Property of Vitech Systems Group, Inc., and has been provided pursuant to a request within West Virginia Consolidated Public Retirement Board's BAFO for a Line of Business Solution – RFP CPR12026.

Because release of this information would provide a competitive advantage to certain third parties, it is generally prohibited from release under West Virginia's Freedom of Information Act as well as Federal Freedom of Information laws, and may not be divulged to any third party without the express written permission of Vitech Systems Group, Inc.

If such request is made of these materials, or a request is made questioning the confidentiality of these materials, the request shall be made to:

Mr. James Vitiello, Sr. Vice President  
Vitech Systems Group, Inc.  
401 Park Ave South, 12th Floor  
New York, NY 10016  
Tel: +1-212-868-0900



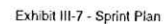




Exhibit III-7 - Sprint Plan



Exhibit III-7 - Sprint Plan











Exhibit III-7 - Sprint Plan Page III-7-6  
June 19, 2013















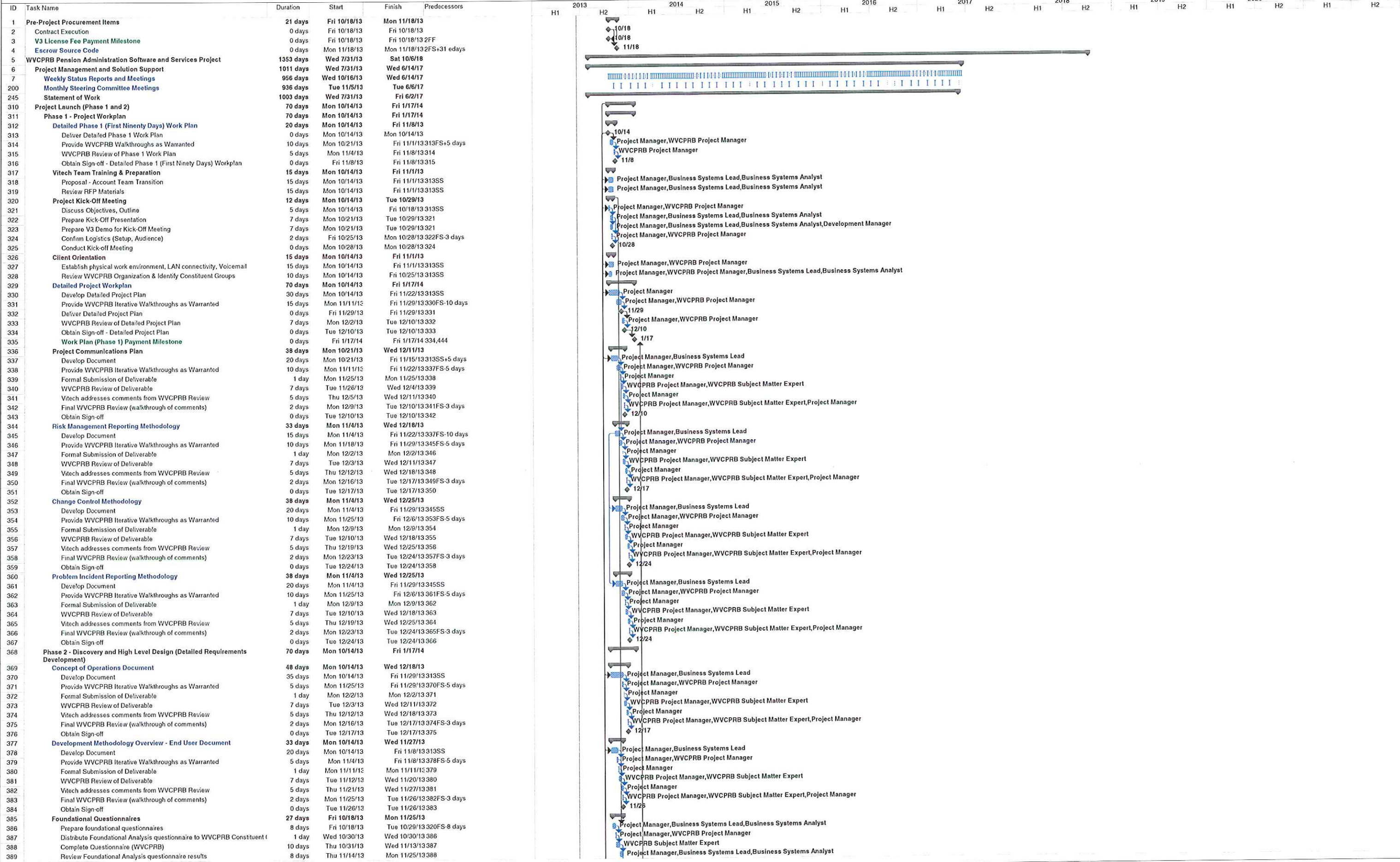
### Exhibit III-7 - Sprint Plan



Exhibit III.7 - Sprint Plan Page III-7-11 June 19, 2013

WVCPRB - V3 Implementation		44		45							
Revised as of 6/15/13		0		0							
Week Starting	4/3	4/10	4/17	4/24	5/1	5/8	5/15	5/22	5/29	6/5	6/12
Week Ending	4/7	4/14	4/21	4/28	5/5	5/12	5/19	5/26	6/2	6/9	6/16
W. Funds Management and Member Statement											
Sprint 1	Financials Preparation (paper-based sprint)										
Sprint 2	Financial Management Setup										
Sprint 3	Reconciliation ??										
Sprint 4	Annual Closing 1										
Sprint 5	Annual Closing 2										
Sprint 6	Annual Closing 3										
X. Financial & Tax Reporting											
Sprint 1	1099 Paper Deliverable										
Sprint 2	1099 Process										
Sprint 3	Deduction Remittance										
Y. Member Self-Service											
Sprint 1	Login, Security and Accounts										
Sprint 2	Member Demographic Updates										
Sprint 3	Pension Estimates										
Sprint 4	SCP?										
Sprint 5	Loans?										
Sprint 6	Other Processing										
Sprint 7	News, Alerts and Home Page										
Segment: Docs, Reports, Interfaces & Data Conversion											
Z. Reports											
Cycle 1	Spec										
	Configure										
	Test										
Cycle 2	Spec										
	Configure										
	Test										
Cycle 3	Spec										
	Configure										
	Test										
Cycle 4	Spec										
	Configure										
	Test										
Cycle 5	Spec										
	Configure										
	Test										
Cycle 6	Spec										
	Configure										
	Test										
Cycle 7	Spec										
	Configure										
	Test										
AA. Interfaces											
Cycle 1	WV Education Information System (WVEIS) - for loans payments withheld										
	New ERP System - for loans payments withheld										
	WVDOT SSA Death Master File										
Cycle 2	New ERP System - for PEIA (Public Employees Insurance Agency) data										
	New ERP System - for FBMC (Fringe Benefits Management Corporation)										
	Third Party Interfaces (e.g. manual, Insurance Carriers, 29 listed)										
Cycle 3	State Tax (WV State Tax Department)										
	New ERP System - IRS (Internal Revenue Service) 1099 R										
	Pittsburgh Mailing										
	Microsoft Dynamics financial application - for payroll payments data										
	New ERP System - WVFIMS										
Cycle 4	State Legislature										
	New ERP System - IMB data										
	New ERP System - State Auditor's Office (SAO) and State Treasurer's Office (ST										
Cycle 5	Buck Consulting (actuarial services)										
	New ERP System - STO/WVCPRB website - for MSS link										
AB. Data Conversion											
	Data Conversion Detailed Planning										
	Data Conversion for Val 4										
	Data Conversion for Val 5										
	Data Conversion for Val 6										
	Data Conversion for Val 7										
	Data Conversion Ongoing for Go-Live										
Segment: Testing, Training and Go-Live											
	E2E System Test Test Prep										
	E2E System Testing										
	Training Materials Prep										
	Training										
	WVCPRB User Acceptance Testing										
	Cutover / Ready for Go Live										







No Options - Page III-7-2

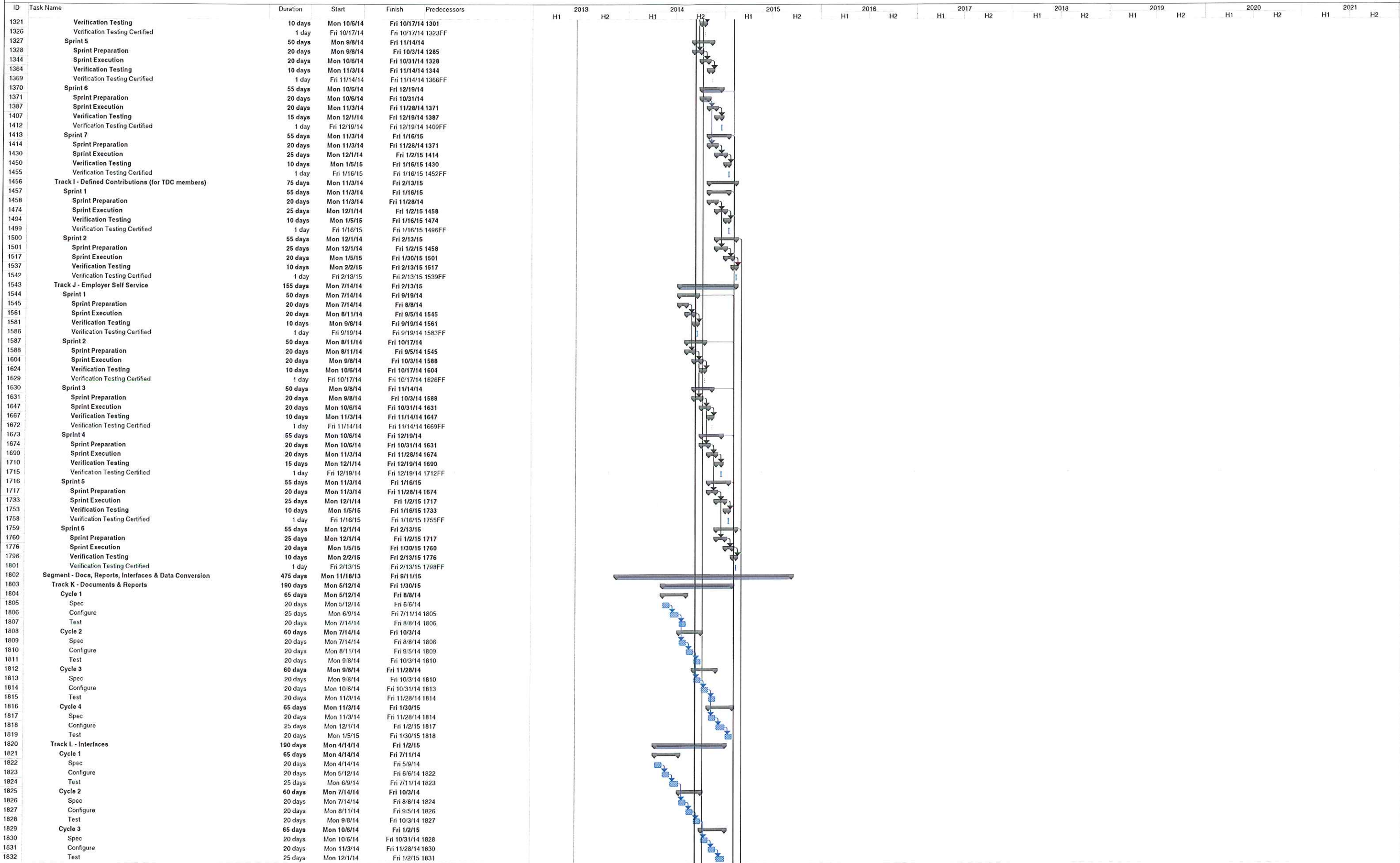


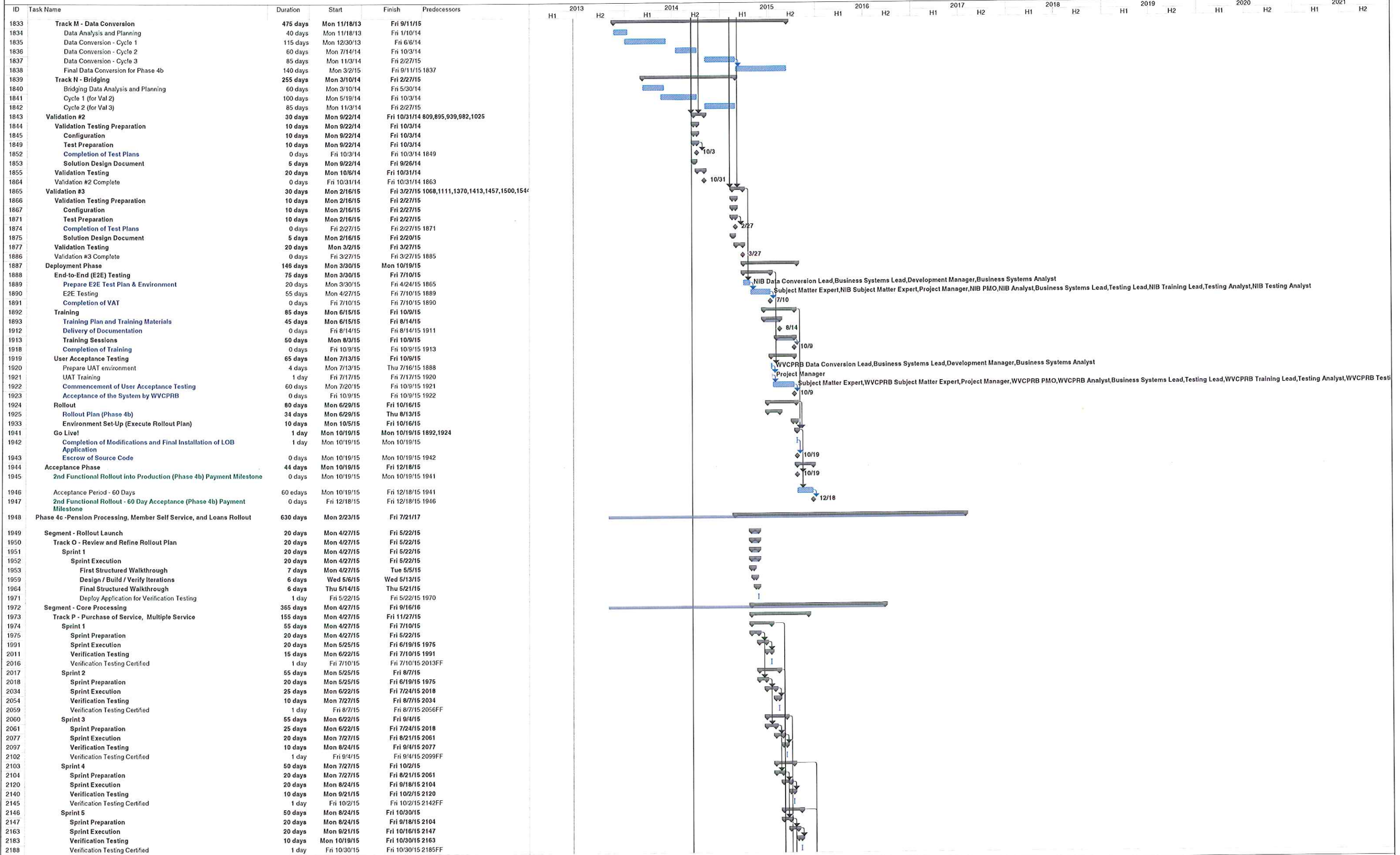




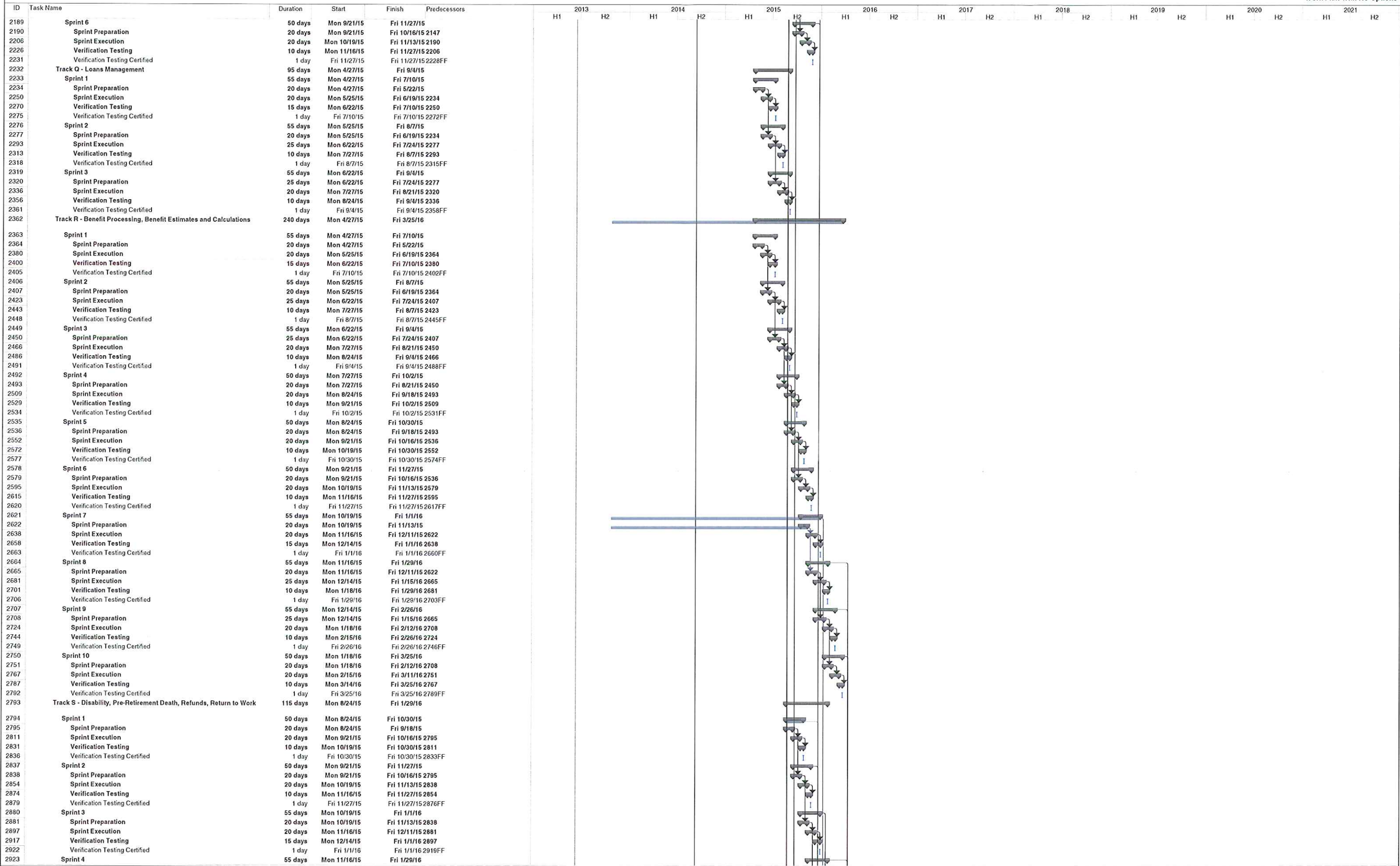


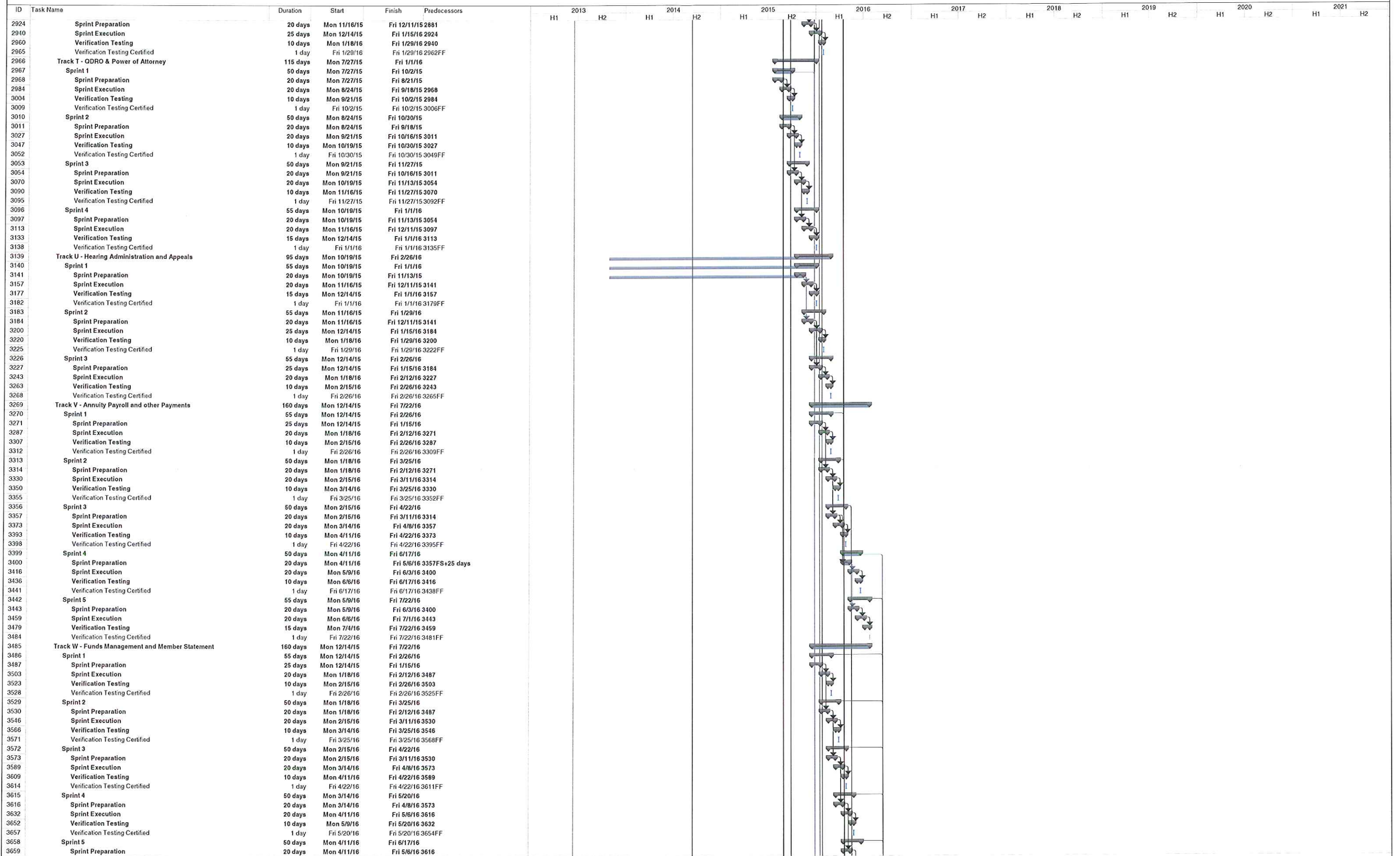




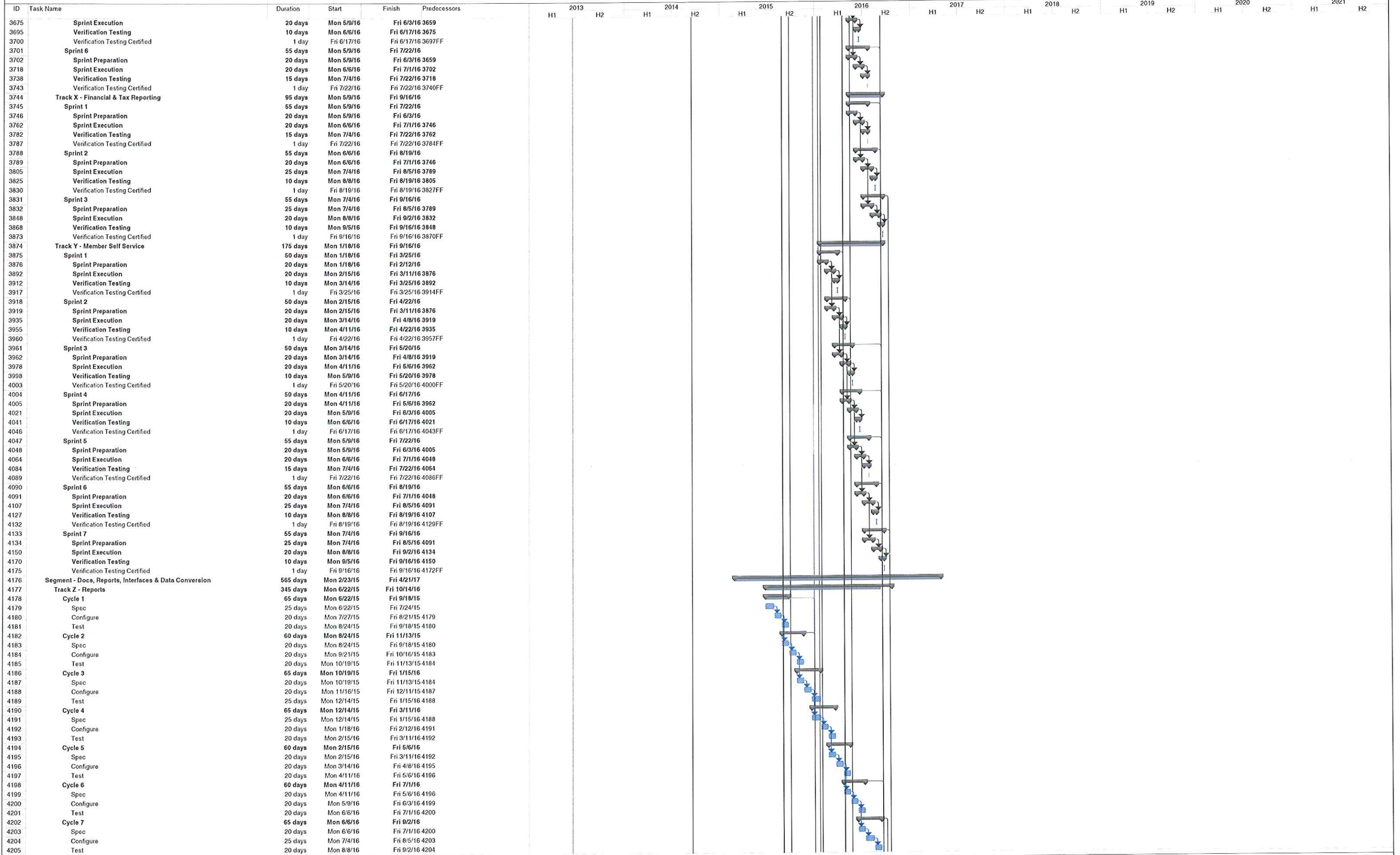


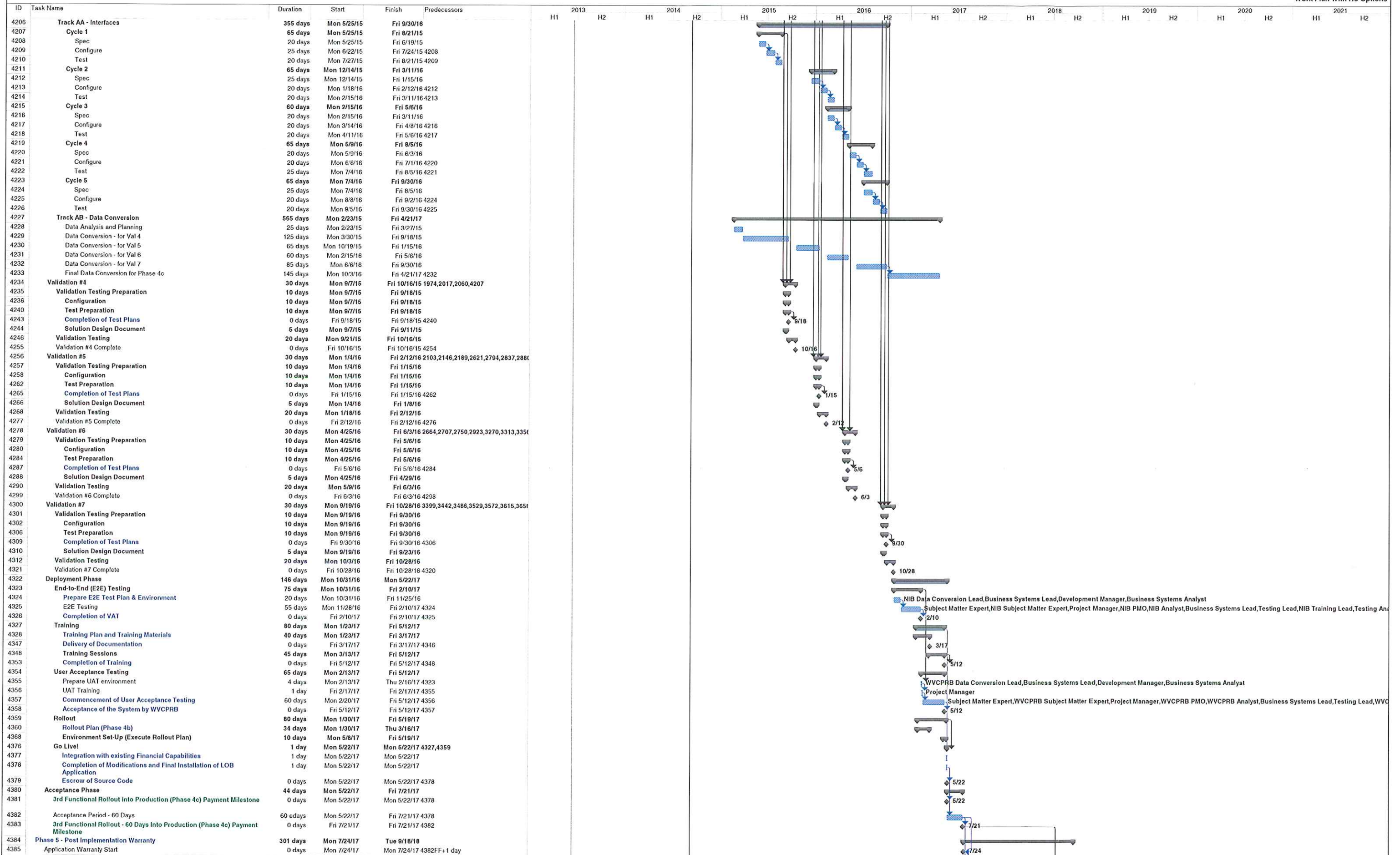




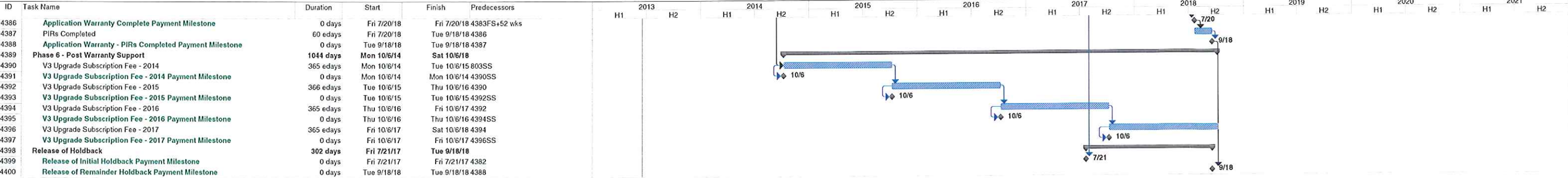


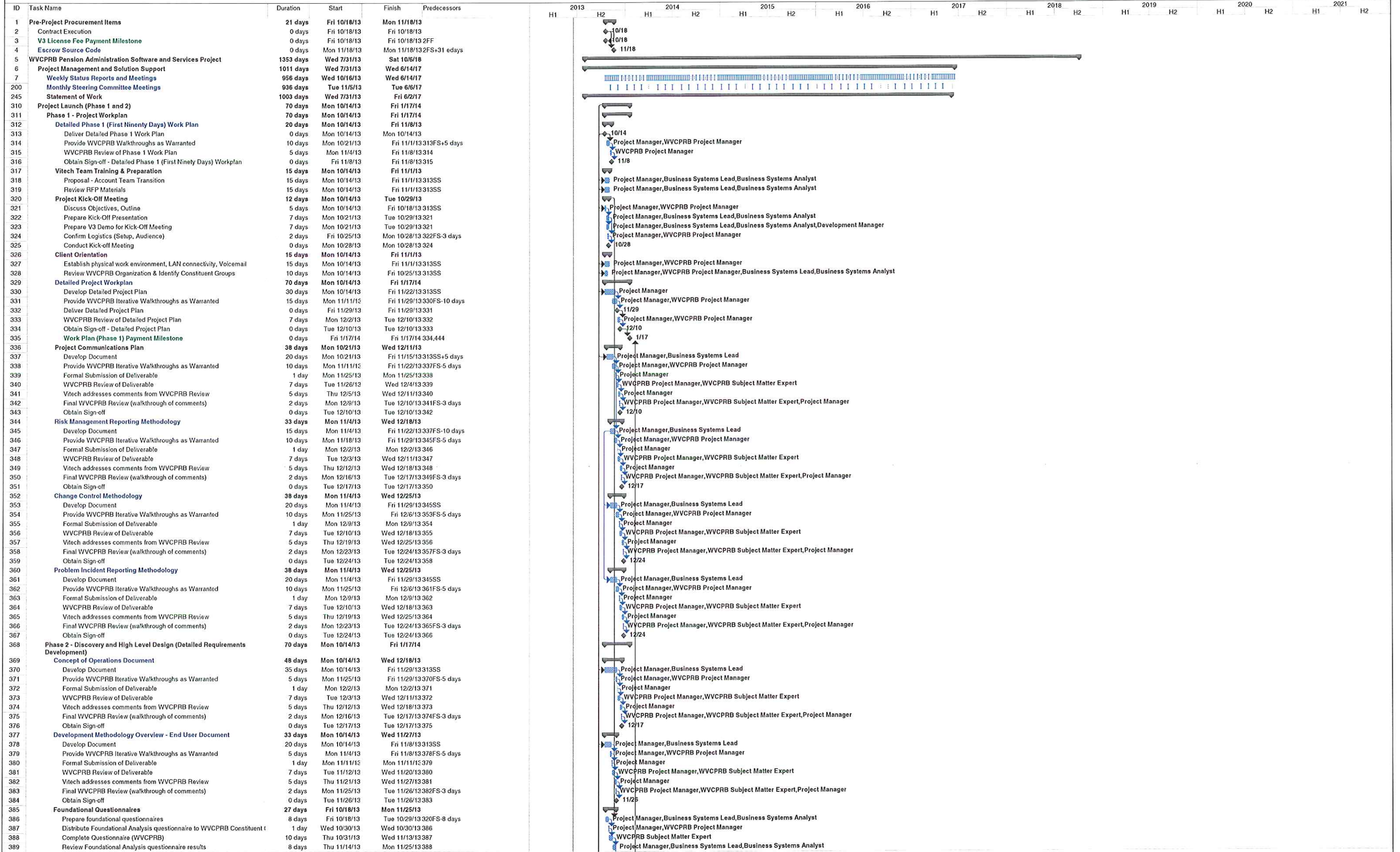












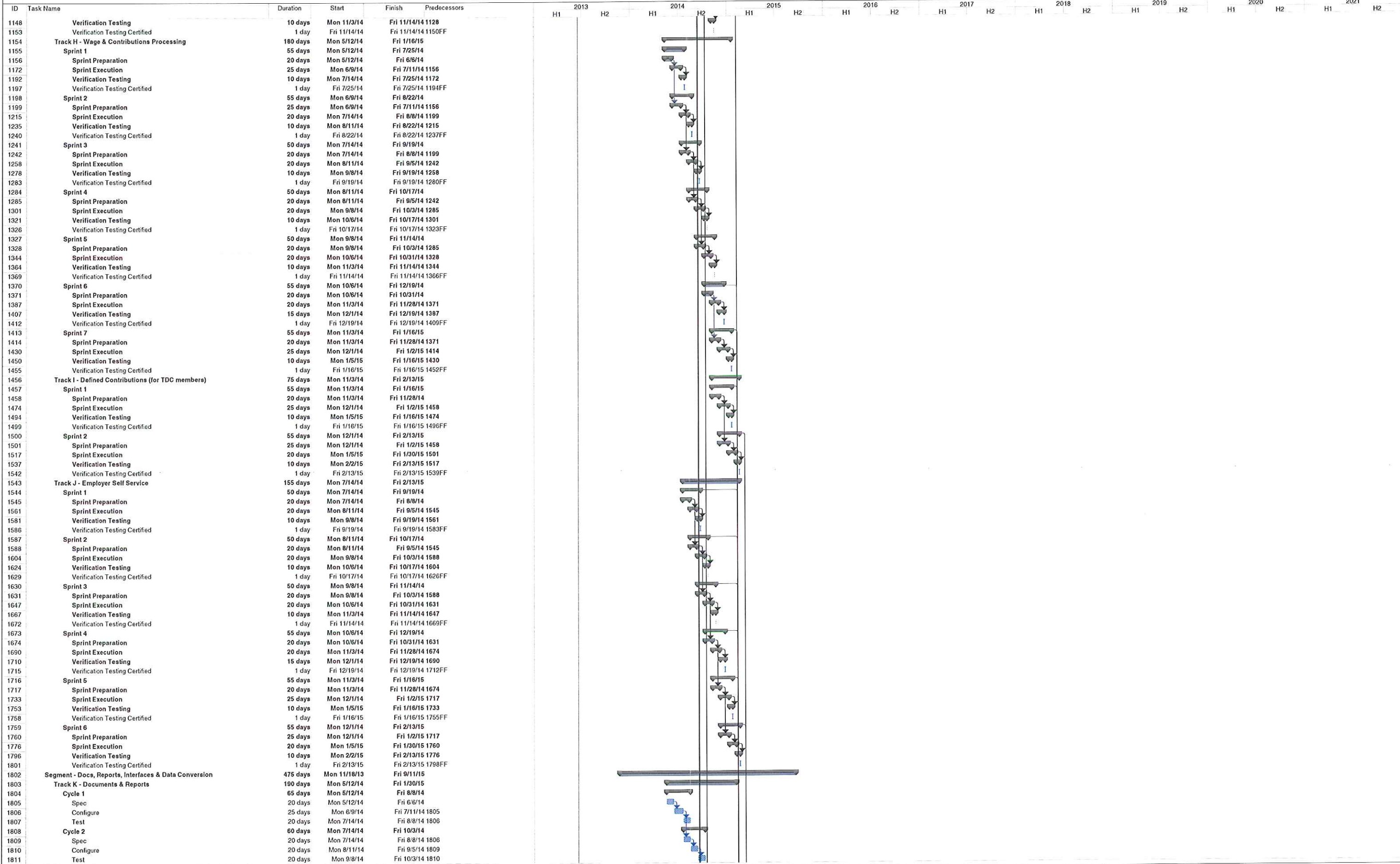


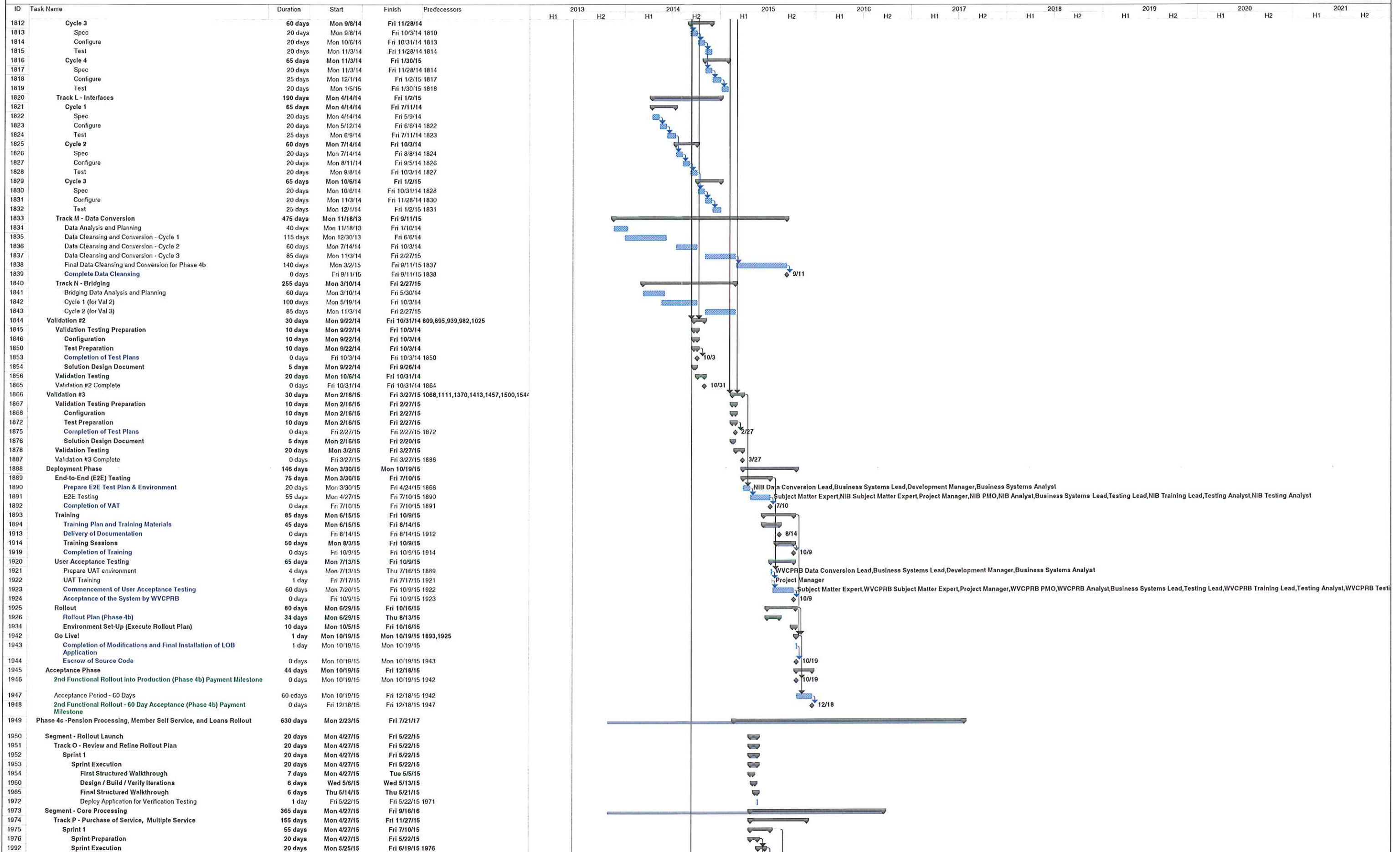




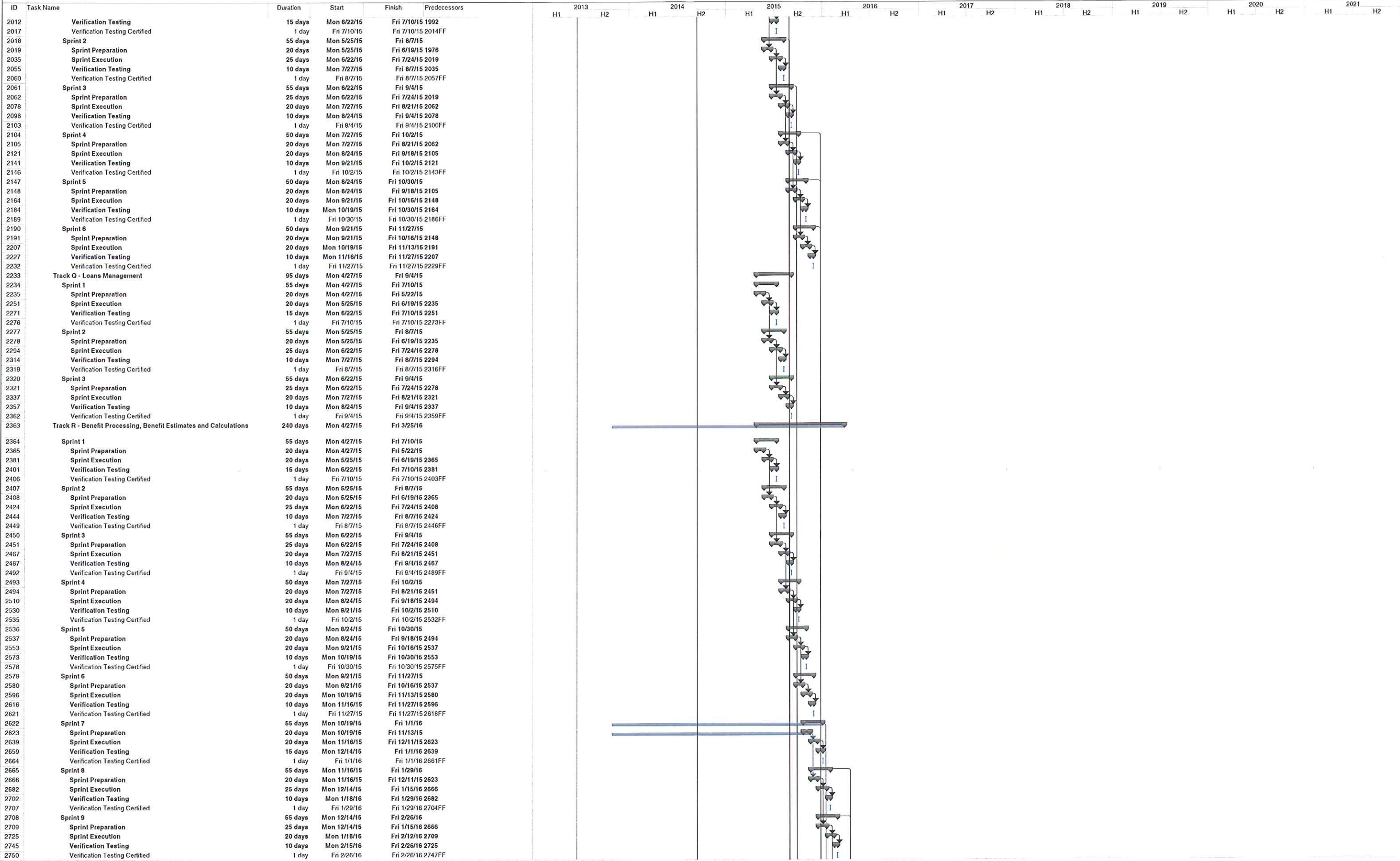


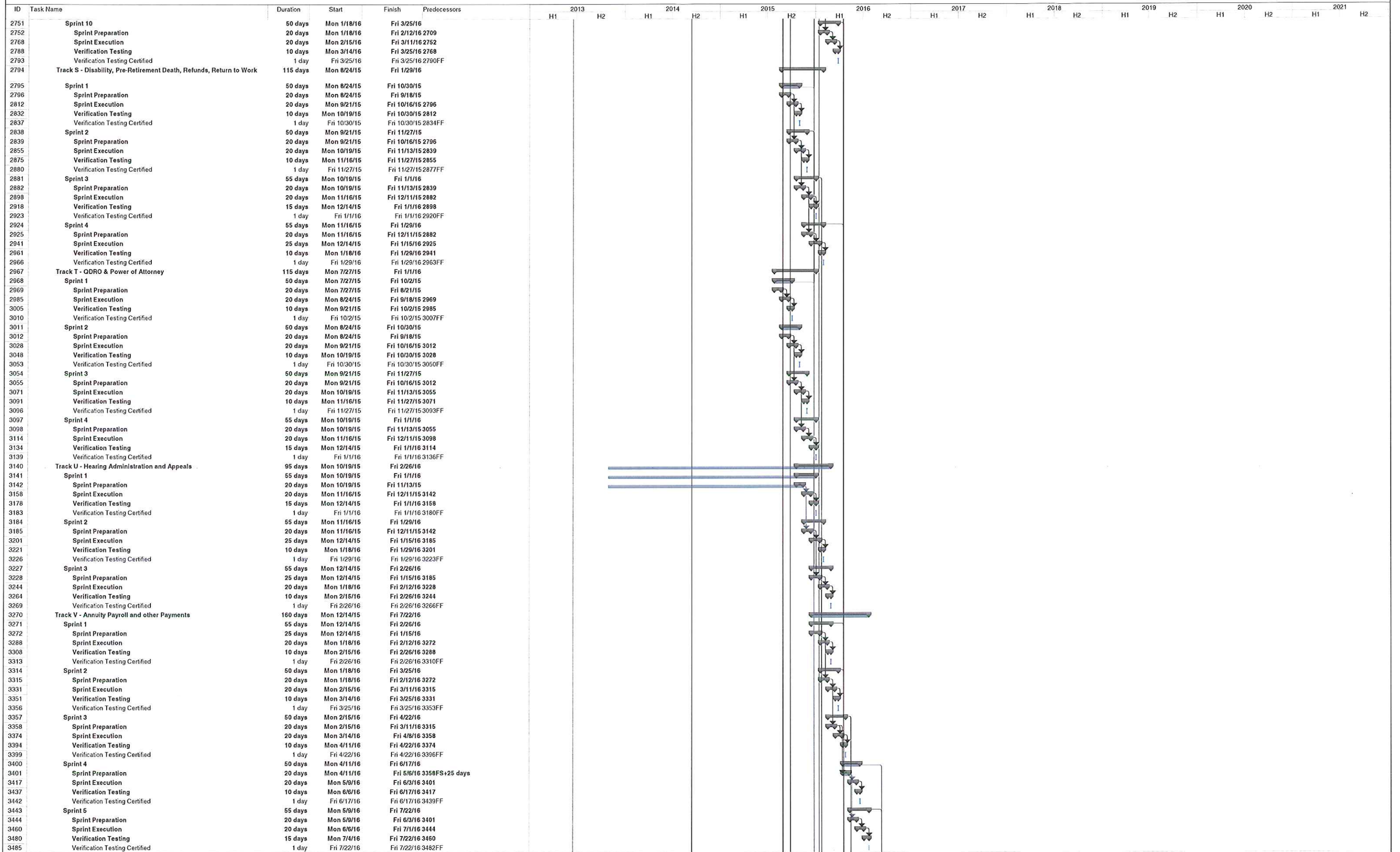




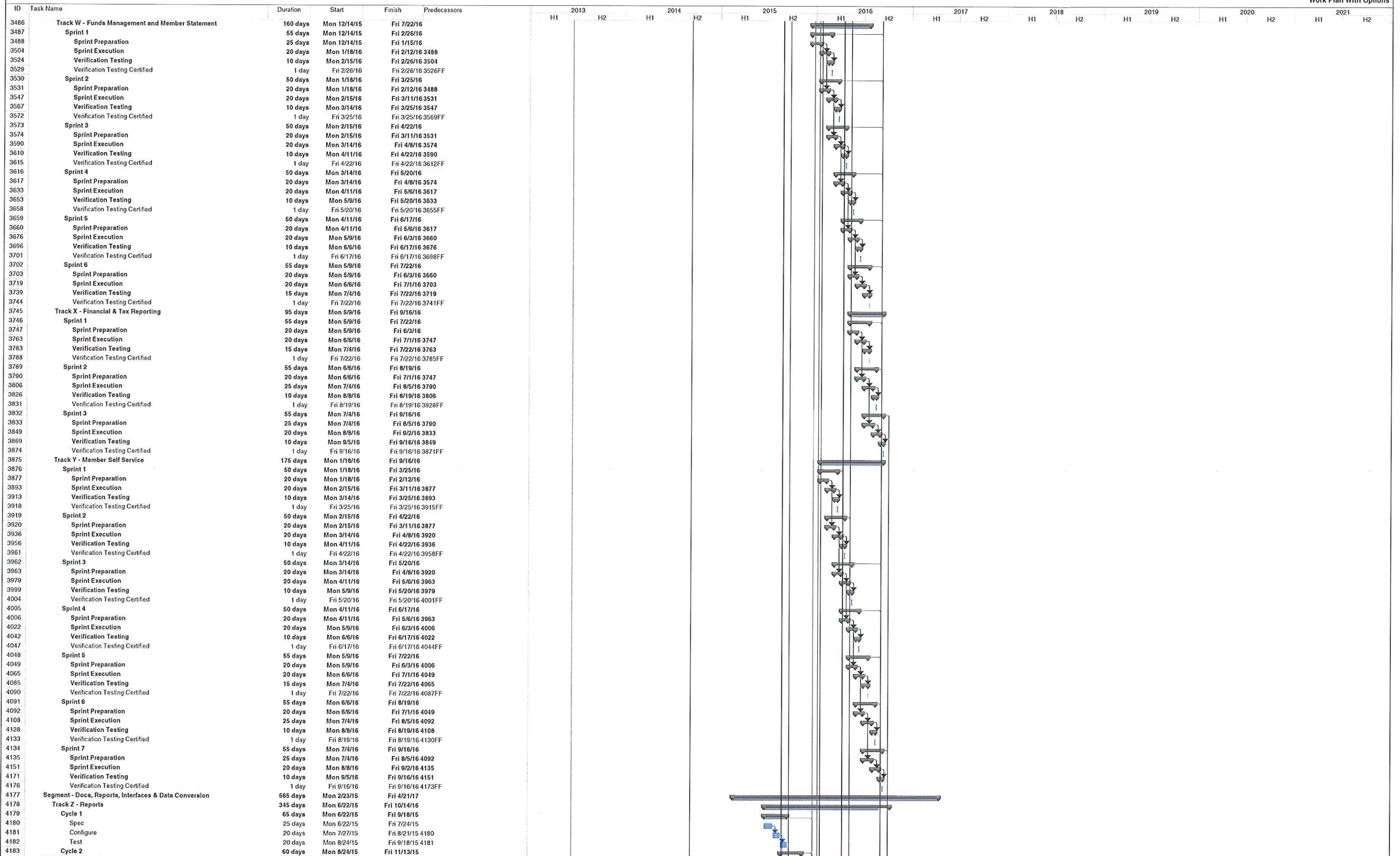


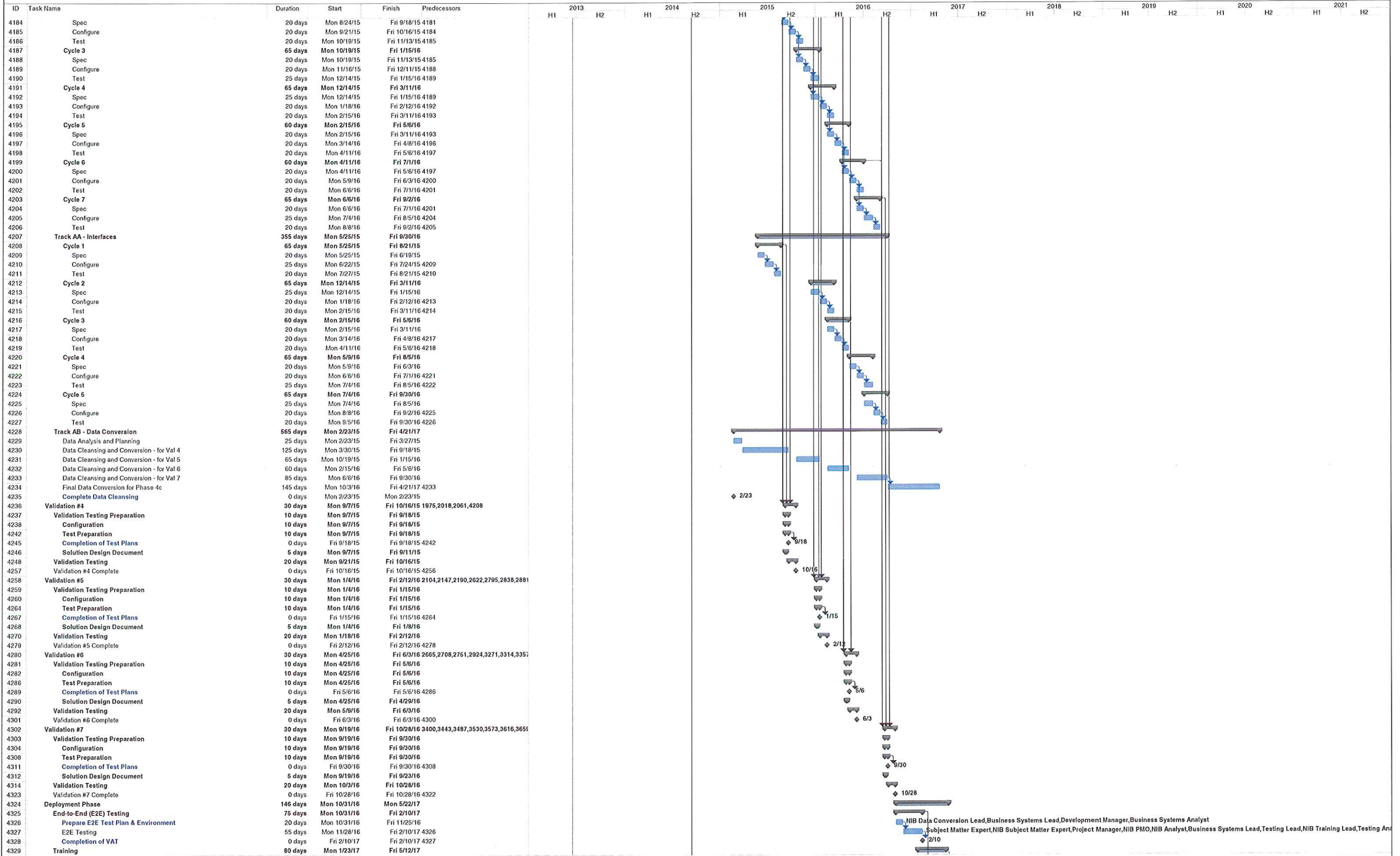




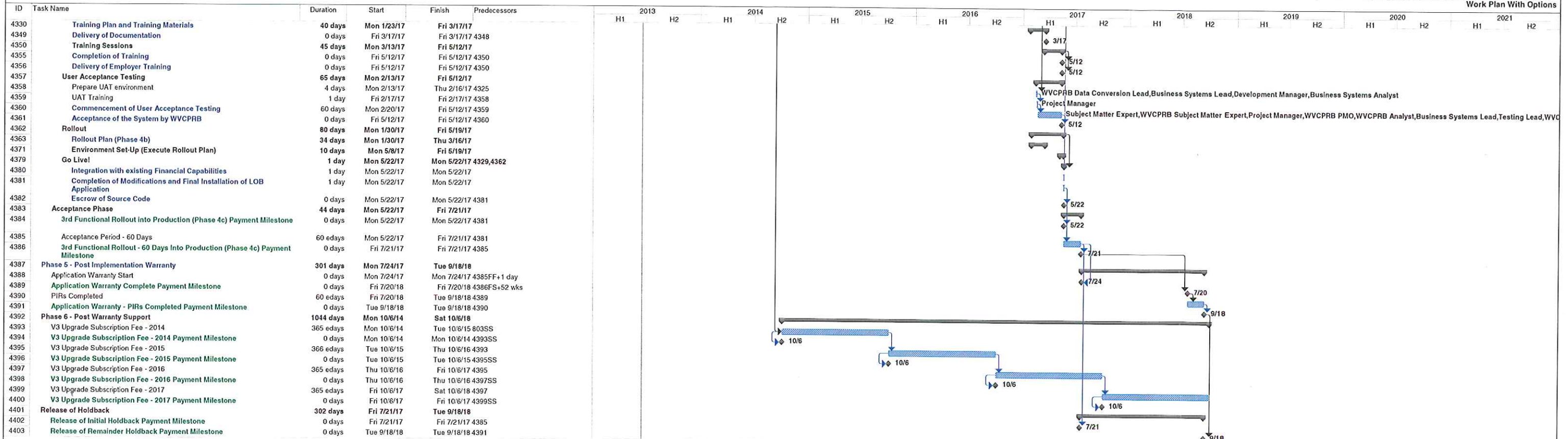












**Exhibit III-13**



## **Preliminary Project Staffing Plan**

---

Confidential and proprietary information not for public disclosure.

**NOTICE REGARDING CONFIDENTIALITY**

This information is Confidential Property of Vitech Systems Group, Inc., and has been provided pursuant to a request within West Virginia Consolidated Public Retirement Board's BAFO for a Line of Business Solution – RFP CPR12026.

Because release of this information would provide a competitive advantage to certain third parties, it is generally prohibited from release under West Virginia's Freedom of Information Act as well as Federal Freedom of Information laws, and may not be divulged to any third party without the express written permission of Vitech Systems Group, Inc.

If such request is made of these materials, or a request is made questioning the confidentiality of these materials, the request shall be made to:

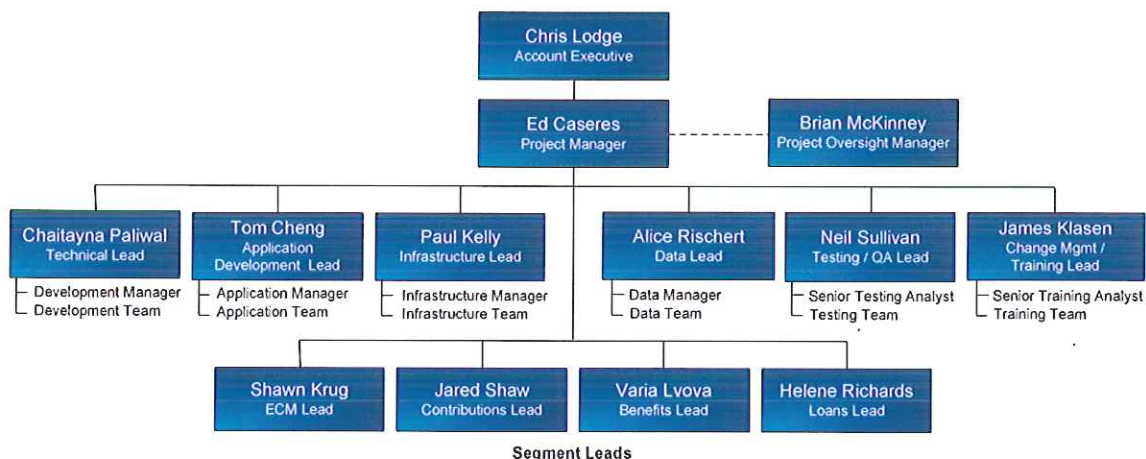
Mr. James Vitiello, Sr. Vice President  
Vitech Systems Group, Inc.  
401 Park Ave South, 12th Floor  
New York, NY 10016  
Tel: +1-212-868-0900



### Exhibit 13 – Preliminary Project Staffing Plan

Vitech is pleased to propose such a highly skilled and experienced project team for the WVCPRB engagement. Chris Lodge is the proposed Account Executive and has ultimate responsibility for the project within Vitech. During Chris's 14 year tenure at Vitech he has worked on over a dozen complex V3 implementations including the following public pension projects where V3 was implemented in accordance with a LRWL RFP and oversight: Pennsylvania Schools ERS, Maine PRS, Iowa PERS, Mass TRS, the US Virgin Islands, and the National Insurance Board of the Bahamas.

The team will report to Vitech's proposed Project Manager, Ed Caseres. Ed is a systems implementation veteran with over 20 years of experience managing large software implementation projects, the last 3.5 of which have been Vitech/V3 projects. Ed has experience working on similar public pension projects where V3 was implemented in accordance with a LRWL RFP and oversight including Iowa PERS and the US Virgin Islands.



Ed has the day-to-day responsibilities of the project and the team reports up into him. Chris Lodge as the account exec, and also a member of the Vitech executive team, can get all required executive support from the Vitech side. Ed and Chris have successfully partnered together on past projects including IPERS and GERS.

Working for Ed, a team of Leads manage and support the delivery of requirements within their area of subject matter expertise. They will work across phases of the project and their job, in addition to meeting WVCPRB requirements, is overall solution assurance. This team has worked the last 4+ years together on the MTRS implementation of V3 and we are leveraging those partnerships and experiences to benefit the WVCPRB project. The MTRS project was an also based on an LRWL RFP and included LRWL oversight, giving this team particularly valuable experience.

Each delivery Phase has been planned into logical Segments of work which will be managed by a dedicated Segment Lead. Each Segment Lead has a team comprised of business analysts, oracle developers, java developers, and testers. These segments work through all configurations for all requirements defined for their segment. The Sprint Plan provides Sprint level details on the segments functional scope and planning.

The data conversion and integration teams work on phase-related activities in parallel with and supporting the segment work.

This team's tremendous Vitech/V3 related experience is summarized as follows, including the three staff members who meet the "key" requirements.

Team Member	Proposed Role	Key	Vitech Exp
Chris Lodge	Account Executive		14
Brian McKinney	Project Oversight Manager		10
Ed Caseres	Project Manager	✓	3.5
Shawn Krug	Segment Lead – ECM		9
Jared Shaw	Segment Lead – Contributions		8
Varia Lvova	Segment Lead – Benefits	✓	8
Helene Richards	Segment Lead – Loans		6.5
Chaitanya Paliwal (CP)	Solution Architect / Technical Lead		8
Tom Cheng	Application Development Lead	✓	6
Alice Rischert	Data Lead		8
Paul Kelly	Infrastructure Lead		14
Neil Sullivan	Testing / QA Lead		9.5
James Klasen	Change Management / Training Lead		6.5



## Detailed Staffing Plans

### Vitech Staff Plan

Vitech's detailed staffing plan includes all required resources, including project management, technical leadership, data conversion, interfaces, business analysts, oracle developers, java developers, testers, documentation experts, trainers, and IT support personnel. Vitech is estimating almost 150,000 total hours for Vitech resources to deliver the proposed three implementation phases inclusive of the Warranty Period.

The below figure is the high-level staffing plan proposed.

Role	Named Resource	Project Phase	Est Start	Est Stop	FT/PT	Bus/Tech	Skill Set
<b>Management and Assurance</b>							
Account Executive	Chris Lodge	All	10/21/2013	7/31/2018	PT	Business	10+ years of Project Management and 1+ V3 implementation to PRD
Project Manager	Ed Caseres	All	10/21/2013	7/31/2018	FT	Business	10+ years of Project Management and 1+ V3 implementation to PRD
Project Oversight Manager	Brian McKrney	All	10/21/2013	7/31/2018	PT	Business	5+ years of Vitech and 1+ V3 implementation to PRD
Technical Lead	Tom Cheng	All	1/20/2014	7/31/2018	PT	Technical	5+ years of Vitech and 1+ V3 implementation to PRD
Testing Lead	Neil Sullivan	All	5/26/2014	7/31/2017	FT	Technical	5+ years of Vitech and 1+ V3 implementation to PRD
Release Lead	TBD	All	1/20/2014	7/31/2018	FT	Technical	3+ years of Vitech
<b>Solution Team</b>							
<b>Delivery Team 1</b>							
Business Lead	Shawn Krug	Phase 4a	12/16/2013	11/25/2014	FT	Business	5+ years of Vitech and 1+ V3 implementation to PRD
Business Analyst	TBD	Phase 4a	12/16/2013	11/25/2014	FT	Business	3-5 years industry experience
QA Tester	TBD	Phase 4a	12/16/2013	11/25/2014	FT	Both	3-5 years industry experience
QA Tester	TBD	Phase 4a	12/16/2013	11/25/2014	PT	Both	3-5 years industry experience
Developer	TBD	Phase 4a	12/16/2013	11/25/2014	FT	Technical	3-5 years industry experience
Developer	TBD	Phase 4a	12/16/2013	11/25/2014	PT	Technical	3-5 years industry experience
<b>Delivery Team 2</b>							
Business Lead	Jared Shaw	Phase 4b & 4c	2/17/2014	7/31/2018	FT	Business	5+ years of Vitech and 1+ V3 implementation to PRD
Business Analyst	TBD	Phase 4b & 4c	2/17/2014	7/31/2018	FT	Business	3-5 years industry experience
Business Analyst	TBD	Phase 4b & 4c	2/17/2014	7/31/2017	FT	Business	3-5 years industry experience
QA Tester	TBD	Phase 4b & 4c	2/17/2014	7/31/2018	FT	Both	3-5 years industry experience
QA Tester	TBD	Phase 4b & 4c	2/17/2014	7/31/2017	PT	Both	3-5 years industry experience
Developer	TBD	Phase 4b & 4c	2/17/2014	7/31/2018	FT	Technical	3-5 years industry experience
Developer	TBD	Phase 4b & 4c	2/17/2014	7/31/2017	PT	Technical	3-5 years industry experience
<b>Delivery Team 3</b>							
Business Lead	Varia Lvova	Phase 4b & 4c	4/1/2014	7/31/2018	FT	Business	5+ years of Vitech and 1+ V3 implementation to PRD
Business Analyst	TBD	Phase 4b & 4c	4/1/2014	7/31/2018	FT	Business	3-5 years industry experience
Business Analyst	TBD	Phase 4b & 4c	4/1/2014	7/31/2017	FT	Business	3-5 years industry experience
QA Tester	TBD	Phase 4b & 4c	4/1/2014	7/31/2018	FT	Both	3-5 years industry experience
QA Tester	TBD	Phase 4b & 4c	4/1/2014	7/31/2017	PT	Both	3-5 years industry experience
Developer	TBD	Phase 4b & 4c	4/1/2014	7/31/2018	FT	Technical	3-5 years industry experience
Developer	TBD	Phase 4b & 4c	4/1/2014	7/31/2017	PT	Technical	3-5 years industry experience
<b>Delivery Team 4</b>							
Business Lead	Helene Richards	Phase 4c	4/27/2015	2/17/2016	FT	Business	5+ years of Vitech and 1+ V3 implementation to PRD
Business Analyst	TBD	Phase 4c	4/27/2015	2/17/2016	FT	Business	3-5 years industry experience
QA Tester	TBD	Phase 4c	4/27/2015	2/17/2016	FT	Both	3-5 years industry experience
QA Tester	TBD	Phase 4c	4/27/2015	2/17/2016	PT	Both	3-5 years industry experience
Developer	TBD	Phase 4c	4/27/2015	2/17/2016	FT	Technical	3-5 years industry experience
Developer	TBD	Phase 4c	4/27/2015	2/17/2016	PT	Technical	3-5 years industry experience
<b>Reports Team</b>							
Reports Lead	TBD	All	5/12/2014	7/31/2017	FT	Technical	3-5 years industry experience
Reports Developer	TBD	All	5/12/2014	7/31/2017	PT	Technical	3-5 years industry experience
<b>Documents Team</b>							
Documents Lead	TBD	All	5/12/2014	7/31/2017	FT	Technical	3-5 years industry experience
Documents Developer	TBD	All	5/12/2014	7/31/2017	PT	Technical	3-5 years industry experience
<b>Interface Team</b>							
Interface Lead	TBD	All	4/14/2014	7/31/2017	PT	Technical	3-5 years industry experience
Interface Developer	TBD	All	4/14/2014	7/31/2017	PT	Technical	3-5 years industry experience
<b>Data Conversion Team</b>							
Data Lead	Alice Richert	All	11/18/2013	7/31/2017	PT	Technical	3-5 years industry experience
Data Analyst	TBD	All	11/18/2013	7/31/2017	PT	Business	3-5 years industry experience
Data Developer	TBD	All	11/18/2013	7/31/2017	PT	Technical	3-5 years industry experience
<b>Training</b>							
Training Lead	James Klasen	All	8/18/2014	7/31/2017	PT	Business	3+ years V3 training and rollout experience
Training Analyst	TBD	All	8/18/2014	7/31/2017	PT	Business	3-5 years industry experience
<b>Infrastructure</b>							
Infrastructure Lead	Paul Kelly	All	10/21/2013	7/31/2017	PT	Technical	3+ years V3 infrastructure and deployment experience
IT Analyst	TBD	All	10/21/2013	7/31/2017	PT	Business	3-5 years industry experience

### WVCPRB Staff Plan

As it is important that both organizations partner on these projects, Vitech has proposed a WVCPRB staffing plan that assumes comingled teams. We have included all required resources including project management, technical leadership, data conversion, interfaces, subject matter experts, business leads, testers, and IT support personnel. Vitech is estimating about 65,000 total WVCPRB hours to deliver the proposed three implementation phases inclusive of the Warranty Period. The below figure is the high-level staffing plan proposed.

Role	Project Phase	Functional Area	Est Start	Est Stop	FT/PT	Bus/Tech	Skill Set
<b>Management and Assurance</b>							
Steering Committee	All	All	10/21/2013	7/31/2018	PT	Both	WVCPRB experienced executives that can direct the project
Project Sponsor	All	All	10/21/2013	7/31/2018	FT	Business	WVCPRB experienced executive that can direct the project
Project Manager	All	All	10/21/2013	7/31/2018	FT	Business	5+ years of Project Management
Testing Lead	All	All	10/21/2013	7/31/2018	FT	Technical	5+ years of industry experience
<b>Solution Team</b>							
<b>Delivery Team 1</b>							
Team Lead	Phase 4a	All	12/16/2013	11/25/2014	FT	Business	3+ years of WVCPRB experience, manager level
Analyst/Tester	Phase 4a	All	12/16/2013	11/25/2014	FT	Business	3-5 years industry experience, WVCPRB preferred
<b>Delivery Team 2</b>							
Team Lead	Phase 4b & 4c	All	2/17/2014	7/31/2017	FT	Business	3+ years of WVCPRB experience, manager level
Analyst/Tester	Phase 4b & 4c	All	2/17/2014	7/31/2017	FT	Business	3-5 years industry experience, WVCPRB preferred
<b>Delivery Team 3</b>							
Team Lead	Phase 4b & 4c	All	4/1/2014	7/31/2017	FT	Business	3+ years of WVCPRB experience, manager level
Analyst/Tester	Phase 4b & 4c	All	4/1/2014	7/31/2017	FT	Business	3-5 years industry experience, WVCPRB preferred
<b>Delivery Team 4</b>							
Team Lead	Phase 4c	All	4/27/2015	2/17/2016	FT	Business	3+ years of WVCPRB experience, manager level
Analyst/Tester	Phase 4c	All	4/27/2015	2/17/2016	FT	Business	3-5 years industry experience, WVCPRB preferred
<b>Business Subject Matter Expertise</b>							
WVCPRB SME	Phase 4a	ECM	12/16/2013	11/25/2014	PT	Business	Member Maint Employment/Personal Info
WVCPRB SME	Phase 4b	Enrollment, Contributions	2/17/2014	12/31/2016	PT	Business	Enrollment, Contributions, Employer Self Service, and CRM
WVCPRB SME	Phase 4c	Loans, Benefits, Payroll	2/1/2015	6/9/2017	PT	Business	Pension Processing, Member Self Service, and Loans
<b>Reports Team</b>							
Reports Lead	All	All	5/12/2014	7/31/2017	FT	Business	3+ years of WVCPRB experience, manager level
<b>Documents Team</b>							
Documents Lead	All	All	5/12/2014	7/31/2017	FT	Business	3+ years of WVCPRB experience, manager level
<b>Interface Team</b>							
Interface Lead	All	All	4/14/2014	7/31/2017	FT	Technical	5+ years experience with WVCPRB internal and external interface systems/partners
Interface Developer	All	All	4/14/2014	7/31/2017	PT	Technical	5+ years experience with WVCPRB Systems
<b>Data Conversion Team</b>							
Data Lead	All	All	11/18/2013	7/31/2017	FT	Technical	5+ years experience with WVCPRB Data
Data Developer	All	All	11/18/2013	7/31/2017	PT	Technical	5+ years experience with WVCPRB Data
<b>Training</b>							
Training Lead	All	All	8/18/2014	7/31/2017	PT	Business	3+ years of WVCPRB experience, manager level
Training Analyst	All	All	8/18/2014	7/31/2017	PT	Business	3-5 years industry experience
<b>Infrastructure</b>							
Infrastructure Lead	All	All	10/21/2013	7/31/2017	PT	Technical	3+ years of WVCPRB infrastructure experience, manager level
IT Analyst	All	All	10/21/2013	7/31/2017	PT	Business	3-5 years industry experience



### **Personnel Issues and Staffing Changes**

Vitech intends to keep key personnel assigned to the WVCPRB project through their proposed roles on the implementation. That said, sometimes there are situations that need to be addressed to ensure that the project is being executed as well as possible.

If a personnel issue/problem arises, the WVCPRB and Vitech project managers should discuss any specific feedback regarding the issue. The Vitech Project Manager will work with the Vitech member in question to address the feedback as offered. We appreciate feedback and will want to work with any given team member to help them to improve their performance. If an issue does not improve in a satisfactory fashion or an issue such that an immediate action must take place, Vitech will make the appropriate resource adjustment, allowing an overlap of resources to facilitate the ramp-up of the new resource. We would typically expect a minimum two-week period of time for such a transition. In these cases, Vitech creates a formal transition plan to facilitate the staff changes and minimize its impact to the project. When a person transitions onto a new project we overlap them by at least two weeks to allow for transfer of knowledge to get the new team member up to speed on the new project. They spend time reviewing the proposal, current project plans, system functionality, specs, and development for the area for which they will be responsible for. The new team member will transition with the person that they are replacing (if this is the situation) or they will simply be brought on board in this way if they are an additional resource added to the project.

Vitech would target to replace a key team member with a team member of equal skill set to that of a team member who is being replaced.

Some personnel situations could arise very quickly and unexpectedly, such as illness or death. In such cases, Vitech will replace the team member as quickly as possible.

**Exhibit III-14**



## **Staff Resumes**

---

Confidential and proprietary information not for public disclosure.

**NOTICE REGARDING CONFIDENTIALITY**

This information is Confidential Property of Vitech Systems Group, Inc., and has been provided pursuant to a request within West Virginia Consolidated Public Retirement Board's BAFO for a Line of Business Solution – RFP CRP12026.

Because release of this information would provide a competitive advantage to certain third parties, it is generally prohibited from release under West Virginia's Freedom of Information Act as well as Federal Freedom of Information laws, and may not be divulged to any third party without the express written permission of Vitech Systems Group, Inc.

If such request is made of these materials, or a request is made questioning the confidentiality of these materials, the request shall be made to:

Mr. James Vitiello, Sr. Vice President  
Vitech Systems Group, Inc.  
401 Park Ave South, 12th Floor  
New York, NY 10016  
Tel: +1-212-868-0900



**Exhibit 14 – Staff Resumes**

Christopher Lodge – Account Executive .....	5
Brian McKinney – Project Manager Oversight .....	9
Ed Caseres – Project Manager.....	13
Shawn Krug – Segment Lead – ECM.....	17
Jared Shaw – Segment Lead – Contributions .....	21
Varia Lvova – Segment Lead – Benefits.....	25
Helene Richards – Segment Lead – Loans .....	29
Chaitayna Paliwal – Solution Architect/Technical Lead .....	33
Tom Cheng – Application Development Lead .....	37
Alice Rischert – Data Lead .....	41
Paul Kelly – Infrastructure Lead.....	45
Neil Sullivan – Testing/Quality Assurance Lead .....	49
James Klasen – Change Management/Training Lead.....	53

## Chris Lodge

Account Executive

West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary	
<b>Staff Member Name:</b> Chris Lodge	
<b>Proposed Role on WVCPRB Project:</b> Account Executive	
<b>Number of years of professional experience –</b> Total: 20+      Retirement system: 14      In role proposed for WVCPRB project: 10	
<b>Education (indicate institutions attended and degrees obtained):</b> Bachelor of Science, Business Administration, University of Vermont	
Professional Reference #1	
<b>Client Name and Address:</b> Massachusetts Teachers' Retirement System One Charles Park, 2 <sup>nd</sup> Floor Cambridge, MA 02142-1206	<b>Project Title:</b> MyTRS – V3 Implementation
	<b>Staff Member's Role on Project:</b> Account Executive
<b>Contact Name:</b> Susan Morgan	<b>Description of Services Provided:</b> Chris is responsible for the successful delivery of V3. This includes oversight of the financial and operational aspects for V3 engagements, contractual obligations of V3 engagements, and overall staffing.
<b>Contact Title:</b> Director of Strategic Planning and Project Management	
<b>Contact Phone:</b> (617) 679-6834	
<b>Contact Email:</b> susan.morgan@trb.state.ma.us	
<b>Start Date:</b> June 2008	<b>End Date:</b> Present
Professional Reference #2	
<b>Client Name and Address:</b> Iowa Public Employees' Retirement System 7401 Register Drive Des Moines, IA 50321	<b>Project Title:</b> IPERS – V3 Implementation
	<b>Staff Member's Role on Project:</b> Account Executive
<b>Contact Name:</b> Rick Hindman	<b>Description of Services Provided:</b> Chris is responsible for the successful delivery of V3. This includes oversight of the financial and operational aspects for V3 engagements, contractual obligations of V3 engagements, and overall staffing.
<b>Contact Title:</b> Chief Technology Officer & Co-Chair for Iowa's Technology Coordinating Committee	
<b>Contact Phone:</b> (515) 281-0060	
<b>Contact Email:</b>	



West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary		
rick.hindman@ipers.org		
<b>Start Date:</b> August 2006	<b>End Date:</b> Present	
<b>Professional Reference #3</b>		
<b>Client Name and Address:</b> MetLife 535 Lovely Street Avon, CT 06001		<b>Project Title:</b> V3 Implementation
<b>Contact Name:</b> Riki Motes		<b>Staff Member's Role on Project:</b> Account Executive
<b>Contact Title:</b> Director		<b>Description of Services Provided:</b> Chris is responsible for the successful delivery of V3. This includes oversight of the financial and operational aspects for V3 engagements, contractual obligations of V3 engagements, and overall staffing.
<b>Contact Phone:</b> (860) 673-5364		
<b>Contact Email:</b> rmotes@metlife.com		
<b>Start Date:</b> June 2011	<b>End Date:</b> Present	

## Resume of Chris Lodge

### Summary of Experience

Christopher Lodge is the Vice President of Operations at Vitech Systems Group who also serves as an Account Executive for many of our largest clients. Chris has more than 14 years of experience assisting clients with their V3 implementations. Chris has experience attending Board meetings, Steering Committee Meetings, and critical project meetings for the largest and most complex V3 implementations.

He is primarily responsible for the successful delivery of V3 active implementations across all Vitech practices. This includes oversight of the financial and operational aspects for V3 engagements, contractual obligations of V3 engagements, and overall staffing. In addition to active implementation responsibilities, during his tenure at Vitech, Chris has been a key contact on proposal-related activities, managed proposal development, provided demonstrations of our V3 solution, negotiated contracts, and transitioned/onboarded new implementation teams. Chris's responsibilities include managing financial and operational activities such as the timely delivery and invoicing of project milestones, resource forecasting, cost forecasting, percent complete analysis, and profit/loss management.

Prior to this role, Chris served as our Director of Development where he managed the day-to-day priorities of our 45 person software development team responsible for software implementations for 27 of our clients. This role included building the team foundation as Vitech grew in clients and staff. It also included managing development managers and developers, on both the UI and database deliverables. Chris worked closely with the Delivery team to ensure projects were meeting their milestones and the development team was prioritized to meet milestones across all clients. As part of this role Chris implemented a Workflow system to add structure, reliability, efficiency, quality and repeatability to the issue development process and the build/deployment process. These processes have been enhanced over time and are still in place today. This development experience, and the relationships build during this time, provides an excellent foundation for Chris to ensure that the Project Management plans for Chris's projects are attainable and deliverable.

### Vitech Experience

As Account Executive, Chris is responsible for overall client satisfaction with our solution. He controls all contract and billing issues, manages and resolves any project risks, and ensures our teams have all appropriate development resources available throughout the course of each project. His work makes certain key project milestones are delivered on time and within budget.

Also, as a direct member of our Senior Executive Management Team, Chris develops strategies to best exploit our V3 system features to offer more to our clients with each project. He also acts as the internal escalation resource for our project team.

<b>Client:</b>	MetLife
<b>Role on Team:</b>	Account Executive
<b>Dates:</b>	May 2010 – Present



As Account Executive for this client Chris maintains overall responsibility within Vitech for the delivery of the V3 solution. Chris was a key contributor through the procurement process, negotiating the contract, finalizing the Statement of Work, and now during implementation. Within Vitech he hand-picked the delivery team and hired the other needed roles. Chris works closely with the Vitech Project Manager to understand project milestone and deliverable progress and understanding and resolving project risks. Chris communicates regularly with key client senior stakeholders, is a participant in weekly meetings and the monthly steering committee meeting.

<b>Client:</b>	State Boston Retirement System
<b>Role on Team:</b>	Account Executive
<b>Dates:</b>	July 2008 – December 2009

Chris worked closely with SBRB and the Vitech team to create a project operating model that would work for both organizations. Chris was a key contributor from the beginning, including the procurement process, contract negotiations, and our first V3 conference room pilots. He worked closely with the team at critical project phases to ensure both Vitech and the client understands the methodology and the roles and responsibilities of both the Vitech team and client team to deliver success. Both teams were restructured in order to maximize the available resources and were refocused with a more agile methodology. Chris put in place a day-to-day Project Manager to run the project and currently works in an oversight capacity only to assist with internal prioritization of tasks to ensure the development and delivery needs meet the project schedule.

<b>Client:</b>	Massachusetts Teachers' Retirement System
<b>Role on Team:</b>	Account Executive
<b>Dates:</b>	June 2008 – Present

Chris maintains overall responsibility within Vitech for the delivery of the V3 solution. Chris was a key contributor from the beginning, including the procurement process, contract negotiations, and project initiation activities. Within Vitech Chris hand-picked the delivery team, specifically the Project Manager, as they had been successful in prior engagements. Chris works closely with the Vitech Project Manager to understand project milestone and deliverable progress and understanding and resolving project risks. He assists with ensuring the team is sized accordingly to meet milestones and deliverables, including reallocating staff and hiring as needed. Chris is a participant in the monthly steering committee meetings and quarterly board meetings.

Chris has also served as Account Executive for the Iowa Public Employees' Retirement System.

### Prior Experience

Prior to joining Vitech, Chris was a Senior Programmer / Analyst at Donaldson, Lufkin & Jenrette and a Senior Programmer / Analyst at Ark Asset Management Corporation.

### Education

Bachelor of Science, Business Administration, University of Vermont

## Brian McKinney

Project Manager Oversight

West Virginia Consolidated Public Retirement Board	
Pension Administration Solution Project – Staff Experience Summary	
<b>Staff Member Name:</b> Brian McKinney	
<b>Proposed Role on WVCPRB Project:</b> Project Manager	
<b>Number of years of professional experience –</b> Total: 18      Retirement system: 10      In role proposed for WVCPRB project: 13	
<b>Education (indicate institutions attended and degrees obtained):</b> Bachelor of Science, Industrial Engineering, University of Iowa	
<b>Professional Reference #1</b>	
<b>Client Name and Address:</b> Massachusetts Teachers' Retirement System One Charles Park, 2 <sup>nd</sup> Floor Cambridge, MA 02142-1206	<b>Project Title:</b> MyTRS – V3 System Implementation
	<b>Staff Member's Role on Project:</b> Project Manager
<b>Contact Name:</b> Susan Morgan	<b>Description of Services Provided:</b> Brian is responsible for client satisfaction, proper resource allocation, risk mitigation, issue resolution, and project success. In addition he oversees the management of ongoing operations of the project for the client with regard to milestones, project progress, budget and quality; management of Vitech business and technical teams and allocating these team members to the appropriate tasks; status and plan updates for the client and Vitech; and participation in project activities.
<b>Contact Title:</b> Director of Strategic Planning and Project Management	
<b>Contact Phone:</b> (617) 679-6834	
<b>Contact Email:</b> susan.morgan@trb.state.ma.us	
<b>Start Date:</b> July 2008	<b>End Date:</b> Present
<b>Professional Reference #2</b>	
<b>Client Name and Address:</b> Massachusetts Teachers' Retirement System One Charles Park, 2 <sup>nd</sup> Floor Cambridge, MA 02142-1206	<b>Project Title:</b> MyTRS – V3 System Implementation
	<b>Staff Member's Role on Project:</b> Project Manager
<b>Contact Name:</b> Lisa Maloney	<b>Description of Services Provided:</b> Same as above.
<b>Contact Title:</b> Director – PMO	
<b>Contact Phone:</b> (617) 679-6811	
<b>Contact Email:</b> lisa.maloney@trb.state.ma.us	
<b>Start Date:</b>	<b>End Date:</b>



West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary		
July 2008	Present	
<b>Professional Reference #3</b>		
<b>Client Name and Address:</b> Iowa Public Employees' Retirement System 7401 Register Drive Des Moines, IA 50321		<b>Project Title:</b> IPERS – V3 System Implementation
<b>Contact Name:</b> Donna Mueller		<b>Staff Member's Role on Project:</b> Project Manager
<b>Contact Title:</b> CEO		<b>Description of Services Provided:</b> Brian was responsible for client satisfaction, proper resource allocation, risk mitigation, issue resolution, and project success through the High Level Design Phase of the project. In addition he oversaw the management of ongoing operations of the project for the client with regard to milestones, project progress, budget and quality; management of Vitech business and technical teams and allocating these team members to the appropriate tasks; status and plan updates for the client and Vitech; and participation in project activities.
<b>Contact Phone:</b> (515) 281-0055		
<b>Contact Email:</b> donna.mueller@ipers.org		
<b>Start Date:</b> August 2006	<b>End Date:</b> January 2007	

## Resume of Brian McKinney

### Summary of Experience

Brian McKinney is a Project Manager at Vitech Systems Group who has over 15 years of business systems experience, 10 of which have been with Vitech. In his role, Brian is responsible for working with the Account Executive to ensure overall client satisfaction with our solution. He manages and resolves any project risks, and ensures our teams have all appropriate development resources available throughout the course of each project. Brian offers senior project management and product knowledge and has developed a successful management track record through his work.

### Vitech Experience

<b>Client:</b>	Massachusetts Teacher's Retirement System (MTRS )
<b>Role on Team:</b>	Project Manager
<b>Dates:</b>	July 2008 – Present

<b>Client:</b>	Iowa Public Employees' Retirement System (IPERS)
<b>Role on Team:</b>	Project Manager
<b>Dates:</b>	August 2006 – January 2007

<b>Client:</b>	California Public Employees' Retirement System (CalPERS)
<b>Role on Team:</b>	Project Manager
<b>Dates:</b>	February 2002 – September 2003

For all of the projects listed above, Brian was responsible for ensuring the V3 application met the requirements, the deliverables were mapped and tracked to the project schedule, and providing constant, clear communication to and from the New York office. As the manager of the Vitech team, Brian ensured the team had all the information required for a successful systems implementation.

Brian was also responsible for client satisfaction, proper resource allocation, risk mitigation, issue resolution, and project success. In addition, he oversaw the management of ongoing operations of the project for the client with regard to milestones, project progress, budget and quality; management of Vitech business and technical teams and allocating these team members to the appropriate tasks; status and plan updates for the client and Vitech; participation in project activities; coordinate the activities of sub-teams; resolution with client Project Manager of problems and issues encountered by team members; and identification of risks and risk mitigation strategies.



Brian also served as the overall account manager for Central Valley Trust Fund (CVT), Hotel Employees and Restaurant Employees (HEREIU), UFCW and New Mexico Education Retirement Benefits (NMERB).

### Prior Experience

Prior to joining, Brian served as manager in a Big Five consulting firm with over eight years of business development, large program management, and company operations experience. His responsibilities included managing complex system implementations, creating strategic business alliance relationships, and leading bottom-line focused eCommerce initiatives.

Brian provided program level management expertise serving as the acting Director of eCommerce for a large telecommunications client. His accomplishments included creating a roadmap for company-wide eCommerce initiatives; estimating project resources, costs, and benefits; managing the completion of several eCommerce projects on time and within budget; and defining a standard vendor selection process. His broad based industry experience spans information technology, telecommunications, semiconductors, and consumer products.

From these experiences, Brian became familiar with analyzing client requirements, creating roadmaps for future business processes, identifying any potential project gaps, managing both schedules and budgets, and implementing sustainable client solutions.

### Education

Bachelors of Science, Industrial Engineering, University of Iowa

## Ed Caseres

### Project Manager

West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary		
<b>Staff Member Name:</b> Ed Caseres		
<b>Proposed Role on WVCPRB Project:</b> Project Manager		
<b>Number of years of professional experience –</b> Total: 25      Retirement system: 3.5      In role proposed for WVCPRB project: 10		
<b>Education (indicate institutions attended and degrees obtained):</b> Bachelors in Political Science, Claremont McKenna College Masters of Business Administration, California State University, Long Beach Certified Project Management Professional, Project Management Institute		
Professional Reference #1		
<b>Client Name and Address:</b> USVI – Government Employee Retirement System 3438 Kronprindsens Gade Ste. 1 St. Thomas, Virgin islands 00802		<b>Project Title:</b> V3 System Implementation
<b>Contact Name:</b> Jasmin Greaux		<b>Staff Member's Role on Project:</b> Project Manager
<b>Contact Title:</b> Special Assistant to the Administrator		<b>Description of Services Provided:</b> Ed oversees the management of ongoing operations of the project for the client with regard to milestones, project progress, budget and quality; management of Vitech business and technical teams and allocating these team members to the appropriate tasks; status and plan updates for the client and Vitech; participation in project activities; coordinate the activities of sub-teams; resolution with client PM of problems and issues encountered by team members; and identification of risks and risk mitigation strategies.
<b>Contact Phone:</b> (340) 776-7703 <b>Contact Email:</b> jgreaux@usvigers.com		
<b>Start Date:</b> May 2012	<b>End Date:</b> Current	
Professional Reference #2		
<b>Client Name and Address:</b> USVI – Government Employee Retirement System 3438 Kronprindsens Gade Ste. 1 St. Thomas, Virgin islands 00802		<b>Project Title:</b> V3 System Implementation
<b>Contact Name:</b> Austin Nibbs		<b>Staff Member's Role on Project:</b> Project Manager
<b>Contact Title:</b> Adminstrator		<b>Description of Services Provided:</b> Same as above.
<b>Contact Phone:</b> (340) 776-7703		
<b>Contact Email:</b> anibbscpa@usvigers.com		



West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary		
<b>Start Date:</b> May 2012	<b>End Date:</b> Current	
<b>Professional Reference #3</b>		
<b>Client Name and Address:</b> Iowa Public Employees' Retirement System 7401 Register Drive   P.O. Box 9117   Des Moines, IA 50306-9117		<b>Project Title:</b> V3 System Implementation
<b>Contact Name:</b> Rick Hindman		<b>Staff Member's Role on Project:</b> Project Manager
<b>Contact Title:</b> Chief Technology Officer & Co-Chair for Iowa's Technology Coordinating Committee		<b>Description of Services Provided:</b> Ed oversees the management of ongoing operations of the project for the client with regard to milestones, project progress, budget and quality; management of Vitech business and technical teams and allocating these team members to the appropriate tasks; status and plan updates for the client and Vitech; participation in project activities; coordinate the activities of sub-teams; resolution with client PM of problems and issues encountered by team members; and identification of risks and risk mitigation strategies.
<b>Contact Phone:</b> 515-281-0060 <b>Contact Email:</b> rick.hindman@ipers.org		
<b>Start Date:</b> Jan 2012	<b>End Date:</b> July 2013	

## Resume of Ed Caseres

### Summary of Experience

Ed Caseres is a Project Manager at Vitech Systems Group who has 20 years of experience in project management and the development of business systems, including the past three and a half years with Vitech. Ed has successfully managed V3 projects both during implementation phases and in production support mode. In recent years Ed's experience and projects have focused within public pension organizations including the Iowa Public Employees Retirement System and the Government of the US Virgin Islands.

### Vitech Experience

<b>Client:</b>	U.S. Virgin Islands Government Employees Retirement System (GERS)
<b>Role on Team:</b>	Project Manager
<b>Dates:</b>	June 2012 – September 2013

GERS, a public pension system with approximately 30,000 total lives, went live with the V3 System in February 2012 for all line of business functionality including membership, pension benefits, and loans benefits. GERS went live with Self-Service functionality in March 2013.

As the Project Manager for GERS, Ed has been responsible for managing the final delivery phase of the project, the warranty period, and post-implementation support. During this time Ed managed the day-to-day activities of the Vitech team and the related GERS team members during the implementation of the final phase and the help desk support during warranty and post implementation support.

<b>Client:</b>	Iowa Public Employees Retirement System (IPERS)
<b>Role on Team:</b>	Project Manager
<b>Dates:</b>	January 2012 – July 2013

IPERS, a public pension system with approximately 270,000 total lives, went live with the V3 System in December 2011 for all primary line of business functionality and self-service functionality. During the Warranty Period Vitech delivered additional annual processes including 1099s, member statements, and actuarial reports.

As the Project Manager for IPERS, Ed has been responsible for managing the warranty and post-implementation support phases of the project. During this time Ed managed the day-to-day activities of the Vitech team and the related IPERS team members to: 1) deliver fixes for issues tracked during the Warranty Period; 2) establish a Help Desk; and 3) deliver functionality for annual processes including 1099s, member annual statements, and actuarial reports.



<b>Client:</b>	Boilermakers National Fund (BNF)
<b>Role on Team:</b>	Project Manager
<b>Dates:</b>	September 2009– May 2011

At BNF, Ed was responsible for overseeing the implementation phase for the V3 implementation including Pension, Contributions, Imaging, CRM, Workflow and Disbursements.

### Prior Experience

Prior to joining Vitech, Ed worked for Sapient as both a Project Manager and a Release Manager. In these roles, he was responsible for managing integration testing of Sprint systems with the Amdocs billing system. He also managed a global delivery testing program overseeing teams of 90+ consultants across multiple geographies (U.S. and India) and provided test planning, vendor management, risk and issue management, communication planning, contingency planning, scope management and metric reporting. He was responsible for ongoing client satisfaction including managing peer-level client relationships (expectations, communications, negotiations, escalation, and feedback) and serving as the day-to-day project point of contact for the client.

Previous roles included Consultant on two separate CRM programs for KForce One, Director of Information Systems for Sphere Technology, and as Business Systems Manager, IT Project Lead, IT Manager, and Principal Program Manager for Sprint PCS. Ed also worked as a Manager – Sales Reporting Systems for PacifiCare Health Systems.

### Education

Masters of Business Administration, California State University Long Beach  
Bachelor of Arts, Political Science, Claremont McKenna College  
Certification: Project Management Professional, Project Management Institute

## Shawn Krug

Segment Lead - ECM

West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary	
<b>Staff Member Name:</b> Shawn Krug	
<b>Proposed Role on WVCPRB Project:</b> Segment Lead – ECM	
<b>Number of years of professional experience –</b> Total: 18      Retirement system: 7      In role proposed for WVCPRB project: 7	
<b>Education (indicate institutions attended and degrees obtained):</b> Extensive coursework in Mathematics, Fairleigh Dickinson University Certificate in Digital Electronics and Microprocessor Technology, DeVry Technical Institute	
Professional Reference #1	
<b>Client Name and Address:</b> 32BJ Benefit Funds 25 West 18th Street New York, NY 10011	<b>Project Title:</b> V3 Implementation
<b>Contact Name:</b> Sarah Padilla	<b>Staff Member's Role on Project:</b> Segment Lead – Imaging
<b>Contact Title:</b> Business Analyst	<b>Description of Services Provided:</b> Shawn served as the expert for the V3 imaging feature and seamlessly implemented the external enterprise content management systems now in use at the client.
<b>Contact Phone:</b> (212) 539-2916	
<b>Contact Email:</b> spadilla@32bjfunds.com	
<b>Start Date:</b> February 2011	<b>End Date:</b> Present
Professional Reference #2	
<b>Client Name and Address:</b> 32BJ Benefit Funds 25 West 18th Street New York, NY 10011	<b>Project Title:</b> V3 Implementation
<b>Contact Name:</b> Peter Cunningham	<b>Staff Member's Role on Project:</b> Segment Lead – Imaging
<b>Contact Title:</b> Project Manager (Consultant)	<b>Description of Services Provided:</b> Same as above
<b>Contact Phone:</b> (212) 539-2927	
<b>Contact Email:</b>	



West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary		
pcunningham@32bjfunds.com		
<b>Start Date:</b> February 2011	<b>End Date:</b> Present	
<b>Professional Reference #3</b>		
<b>Client Name and Address:</b> State Teachers Retirement System of Ohio 275 East Broad Street Columbus, OH 43215		<b>Project Title:</b> V3 Implementation
<b>Contact Name:</b> Mary Wiedemer		<b>Staff Member's Role on Project:</b> Segment Lead – Imaging
<b>Contact Title:</b> Member Benefits, IT Services		<b>Description of Services Provided:</b> Shawn served as the expert for the V3 imaging feature and seamlessly implemented the external enterprise content management systems now in use at the client.
<b>Contact Phone:</b> (614) 228-7233		
<b>Contact Email:</b> wiedemem@strsoh.org		
<b>Start Date:</b> June 2007	<b>End Date:</b> August 2008	

## Resume of Shawn Krug

### Summary of Experience

Shawn Krug is a Segment Lead with Vitech Systems Group who has 18 years of experience in the IT industry, 7 of which have been working with our V3 benefits administration solution. In this role, Shawn brings expertise with enterprise content management and many of our V3 functions with an emphasis on imaging, ad hoc query, workflow, call center and document generation. On a day-to-day basis, Shawn manages the development of product enhancements, which involves mapping business requirements to functionalities within the V3 system, creating technical specifications and ensuring we're meeting all technical requirements.

### Vitech Experience

<b>Client:</b>	32BJ Benefit Funds
<b>Role on Team:</b>	Imaging Lead
<b>Dates:</b>	February 2011 – Present
<b>Client:</b>	Iowa Public Employees' Retirement System
<b>Role on Team:</b>	Imaging Lead
<b>Dates:</b>	September 2008 – August 2009
<b>Client:</b>	Massachusetts Teachers Retirement System
<b>Role on Team:</b>	Imaging Lead
<b>Dates:</b>	August 2008 – July 2009
<b>Client:</b>	State Teachers Retirement System of Ohio
<b>Role on Team:</b>	Imaging Lead
<b>Dates:</b>	June 2007 – August 2008
<b>Client:</b>	Directors Guild of America Producers Pension & Health Plans
<b>Role on Team:</b>	Imaging Lead
<b>Dates:</b>	June 2008 – March 2009
<b>Client:</b>	Writers Guild of America Producers Pension & Health Plans
<b>Role on Team:</b>	Imaging Lead
<b>Dates:</b>	August 2006 – February 2007



<b>Client:</b>	Carpenters Fund Administrative Office
<b>Role on Team:</b>	Imaging Lead
<b>Dates:</b>	May 2006 – March 2007

For each of the clients listed above, Shawn served as the expert on our V3 imaging feature and seamlessly implemented the external enterprise content management systems now in use at each client. He worked heavily with vendors on back file conversion and developed the client's back file conversion process going forward. He has implemented the client's ad hoc query features. He also created the current quality assurance processes for these conversions, which began with the training of countless client staff.

### Prior Experience

Prior to joining Vitech, Shawn worked as a Senior Consultant for Island Computer Products where his largest client was the New York City Board of Education. In this role he implemented a web-based budgeting system to aid the client with meeting fiscal deadlines.

Before that, Shawn was a Senior Technical Associate with AT&T where he led two major projects: design and implementation of a change request tracking system, and design and development of a trouble tracking and reporting system.

### Education

Extensive coursework in Mathematics, Fairleigh Dickinson University

### Certifications

Certificate in Digital Electronics and Microprocessor Technology, DeVry Technical Institute

## Jared Shaw

### Segment Lead – Contributions

West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary		
<b>Staff Member Name:</b> Jared Shaw		
<b>Proposed Role on WVCPRB Project:</b> Segment Lead - Contributions		
<b>Number of years of professional experience –</b> Total: 15      Retirement system: 8      In role proposed for WVCPRB project: 8		
<b>Education (indicate institutions attended and degrees obtained):</b> Bachelor of Science, Business Administration, University of Alabama		
<b>Professional Reference #1</b>		
<b>Client Name and Address:</b> Hawaii Employee's Union Trust Fund 201 Merchant Street Suite 1520 Honolulu, HI 96813		<b>Project Title:</b> V3 Implementation
<b>Contact Name:</b> Nicole Wong		<b>Staff Member's Role on Project:</b> Business Systems Lead / Project Manager
<b>Contact Title:</b> Member Services Branch		<b>Description of Services Provided:</b> As Business Lead, Jared was responsible for ensuring that the delivered V3 system meets all of the requirements; outlining the overall high level design for the project; determining all of the detailed specification required to complete the project.  As the post implementation PM, ensured the project remained on schedule, within budget and within scope.
<b>Contact Phone:</b> (808) 587-5538		
<b>Contact Email:</b> nicole.l.wong@hawaii.gov		
<b>Start Date:</b> June 2008	<b>End Date:</b> May 2011	
<b>Professional Reference #2</b>		
<b>Client Name and Address:</b> Hawaii Employee's Union Trust Fund 201 Merchant Street Suite 1520 Honolulu, HI 96813		<b>Project Title:</b> V3 Implementation
<b>Contact Name:</b> Larry Nishihara		<b>Staff Member's Role on Project:</b> Business Systems Lead / Project Manager
<b>Contact Title:</b> Operations Manager (retired)		<b>Description of Services Provided:</b> Same as above
<b>Contact Phone:</b> (808) 221-3593		
<b>Contact Email:</b> lnishihara@yahoo.com		



West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary		
<b>Start Date:</b> June 2008	<b>End Date:</b> May 2011	
<b>Professional Reference #3</b>		
<b>Client Name and Address:</b> Hawaii Employee's Union Trust Fund 201 Merchant Street Suite 1520 Honolulu, HI 96813		<b>Project Title:</b> V3 Implementation
<b>Contact Name:</b> Donna Tonaki		<b>Staff Member's Role on Project:</b> Business Systems Lead / Project Manager
<b>Contact Title:</b> Financial Management Officer		
<b>Contact Phone:</b> (808) 586-1690		
<b>Contact Email:</b> donna.a.tonaki@hawaii.gov		
<b>Start Date:</b> June 2008	<b>End Date:</b> May 2011	<b>Description of Services Provided:</b> Same as above

## Resume of Jared Shaw

### Summary of Experience

Jared has over 18 years of systems development and implementation experience including almost 8 years of working at Vitech as a project manager and business analyst. He is experienced at forming and leading business and technology teams, and has excellent V3-specific implementation expertise. In addition, he possesses thorough knowledge and exposure in all SDLC phases and is an expert in 12 V3 modules: World, Enrollment, Contributions, Pension, Member Self Service, Employer Self Service, Workflow, Integration Tools, Query, Security, DataLoading, Compare Utility, Report, Imaging, Documents, and Batch Tools.

### Vitech Experience

<b>Client:</b>	MetLife
<b>Role on Team:</b>	Track Lead
<b>Dates:</b>	May 2011 – Present

In this role, Jared manages all sprint segments within the assigned tracks and is responsible for the solution design within the assigned tracks. Based on client requirements, Jared designs the solution and communicates the system updates or new features that are needed to development. He manages track resources to ensure that each task completed meets all of the requirements with a high level of quality, and meets with client track team often to demo the system changes and discuss requirements/issues.

<b>Client:</b>	Hawaii Employer-Union Health Benefits Trust Fund
<b>Role on Team:</b>	Project Manager
<b>Dates:</b>	August 2010 – May 2011

Jared ensured the project remained on schedule, within budget and within scope. He managed resources to ensure that each task completed met all of the requirements with a high level of quality, and estimated new work through the change order process and scheduled new tasks within the current workload/project plan. Jared routinely met with the client to communicate status and resolve issues and identified potential risks and outlined plans for risk mitigation.

<b>Client:</b>	Hawaii Employer-Union Health Benefits Trust Fund
<b>Role on Team:</b>	Business Systems Lead
<b>Dates:</b>	June 2008 – August 2010

In this role, Jared ensured that the delivered V3 system met all of the requirements with a high level of quality and routinely met with the client to understand the requirements and how they operate their business. He outlined the overall high level design for the project and determined all of the detailed specifications required to complete the project, assigning each specification to an analyst. Jared determined the priority and sequencing of all specifications within the project plan, reviewing and approving all specifications for correctness and completeness before work



was assigned to development. He worked with development to resolve issues and refine the design as feedback was received by the client, and he was involved in all other aspects of the project including test plans/ documentation, training, issue resolution, UAT, and data conversion.

<b>Client:</b>	Hawaii Employees' Retirement System
<b>Role on Team:</b>	Self-Service and Workflow Lead
<b>Dates:</b>	June 2007 – May 2008

Jared implemented V3's Self-Service functionality and configured the Member Self-Service product to allow all members on-line form submission, pension estimates, demographic data, contribution history and on-line access to all correspondence. He also configured the Employee Self-Service product, which allows users the ability to submit/process work history and correct file errors on-line.

<b>Client:</b>	State of Georgia Department of Health
<b>Role on Team:</b>	Enrollment Lead
<b>Dates:</b>	December 2004 – May 2007

Jared was in charge of all plan setup including life event enrollment rules, plan/option setup and option rate structure. He led the client team in gathering functional design requirements for the V3 product application and configured the Line-of-Business product allowing users to maintain benefits eligibility and enrollment information based on plan and event rules. He also configured the Member Self-Service product allowing 120,000 members direct access to benefits enrollment information and processing of life event.

### Prior Experience

Prior to working at Vitech, Jared was a Project Manager/ Project Lead at Viewlocity. In this role, he was responsible for the on-time delivery and creation of architecture specifications for the client's land based logistics system. He worked with clients and other application providers to integrate warehouse management, logistics, and Supply Chain Event Management systems. Jared also assisted clients with change management planning and execution, and managed the responsibilities of internal consultants, remote partner consultants and client employees to ensure the delivery of an integrated solution. He led a team that developed solutions to manage spare parts, service parts repair, logistics tracking, order tracking, forecasting, and inventory, and guided integration teams to develop a seamless combined system.

Prior to working at Viewlocity, Jared was Lead Technical Resource at Peoplesoft. In this role, Jared was responsible for modifying PeopleSoft applications and creating extensions to the product; creating new applications to fill gaps between PeopleSoft and client requirements; and creating interfaces to and from PeopleSoft for HR data, GL data, deductions instructions, recruiting data, tax amounts, benefit elections and other data needed by 3rd party applications. He also was tasked with analyzing conversion requirements and creating programs to load and verify client data; and developing and modifying reports based on client needs.

### Education

Bachelor of Science, Business Administration, University of Alabama

## Varia Lvova

### Segment Lead – Benefits

West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary		
<b>Staff Member Name:</b> Varia Lvova		
<b>Proposed Role on WVCPRB Project:</b> Segment Lead – Benefits		
<b>Number of years of professional experience –</b> <b>Total: 12      Retirement system: 7      In role proposed for WVCPRB project: 5</b>		
<b>Education (indicate institutions attended and degrees obtained):</b> Bachelor of Science, Business Administration, Pennsylvania State University Project Management Professional, Project Management Institute		
Professional Reference #1		
<b>Client Name and Address:</b> Massachusetts Teachers' Retirement System One Charles Park, 2 <sup>nd</sup> Floor Cambridge, MA 02142-1206		<b>Project Title:</b> MyTRS – V3 System Implementation
<b>Contact Name:</b> Susan Morgan		<b>Staff Member's Role on Project:</b> Senior Solutions Manager, Business Lead
<b>Contact Title:</b> Director of Strategic Planning and Project Management		<b>Description of Services Provided:</b> Varia manages detailed day to day planning and execution of the design phase activities, such as discovery, requirements and detailed design sessions, design documents delivery. She leads the team of Vitech analysts for multiple areas and develops some of the more complex design specifications; assists with data conversion functional mapping and issue resolution. Varia leads the following specific functional areas: Contributions, Employer Accounts, Service Purchases, Refunds and Transfers, Member Accounts, Creditable Service, Reinstatements, Tax Reporting, Annual Statements, Member and Employer Self-Services, Reports, Imports/Exports, Workflow, and Correspondence processing.
<b>Contact Phone:</b> (617) 679-6834		
<b>Contact Email:</b> susan.morgan@trb.state.ma.us		
<b>Start Date:</b> August 2008	<b>End Date:</b> Present	
Professional Reference #2		
<b>Client Name and Address:</b> Massachusetts Teachers' Retirement System One Charles Park, 2 <sup>nd</sup> Floor Cambridge, MA 02142-1206		<b>Project Title:</b> MyTRS – V3 System Implementation
<b>Contact Name:</b> Lisa Maloney		<b>Staff Member's Role on Project:</b> Senior Solutions Manager, Business Lead
<b>Contact Title:</b> Director – PMO		<b>Description of Services Provided:</b> Same as above.



West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary		
<b>Contact Phone:</b> (617) 679-6811 <b>Contact Email:</b> lisa.maloney@trb.state.ma.us		
<b>Start Date:</b> August 2008	<b>End Date:</b> Present	
Professional Reference #3		
<b>Client Name and Address:</b> Ohio Police and Fire Pension Fund 140 East Town Street Columbus, OH 43215		<b>Project Title:</b> NPAS - V3 System Implementation
		<b>Staff Member's Role on Project:</b> Solutions Manager
<b>Contact Name:</b> Keith Byrd		<b>Description of Services Provided:</b> Varia led design, implementation, and testing of several key functional areas, including: Contributions, Employer Accounts, Benefits Processing (DROP), Transfers and Refunds, Service Purchases, Court Orders and other Deductions, Tax Reporting, and Member and Employer Self-Services.
<b>Contact Title:</b> Deputy Executive Director		
<b>Contact Phone:</b> (614) 628-8413		
<b>Contact Email:</b> kbyrd@op-f.org		
<b>Start Date:</b> May 2004	<b>End Date:</b> August 2008	

## Resume of Varia Lvova

### Summary of Experience

Varia Lvova is a Business Systems Lead with Vitech Systems Group who has over 12 years of experience in the information technology industry, 7 of which have been with Vitech. In this role, Varia has the responsibility for the overall system business design and delivery, specifically the overseeing and drafting of system design and test documents, and working closely with client SMEs, other Vitech analysts, and Vitech development team to ensure that the installed solution meets the client system requirements. She manages detailed planning of the system design phase and assists clients with change management issues facing all organizations implementing major new systems, such as V3.

### Vitech Experience

<b>Client:</b>	Massachusetts State Teachers Retirement System (MTRS )
<b>Role on Team:</b>	Senior Solutions Manager
<b>Dates:</b>	August 2008 – present

As a Solutions Manager and later a Senior Solutions Manager with MTRS , Varia leads the overall design phase of the MTRS 'Contributions' and 'Pension' phases of the project. In this role, she manages detailed day to day planning and execution of the design phase activities, such as discovery, requirements, and detailed design sessions and design documents delivery, and assists with project planning to ensure the design phase is completed on time. She leads the team of Vitech analysts for multiple areas and develops some of the more complex design specifications. Specific areas under her leadership at MTRS included Contributions, Employer Accounts, Service Purchases, Refunds and Transfers, Member Accounts, Creditable Service, Reinstatements, Tax Reporting, Annual Statements, Member and Employer Self-Services, as well as various sub-areas, such as Reports, Imports/Exports, Workflows, and Correspondence processing.

Varia further manages system testing for her areas and ensures that the delivered system configuration meets the requirements from the design documents. She also assists client and Vitech project management in change control process introduced by legislative changes, by conducting gap analysis and developing specifications of the required changes.

Varia has consistently demonstrated her superior analytical, problem solving, management and leadership skills by providing solutions that fully meet the client's needs and adhere to the client system requirements. She quickly learns and understands client business and recommends the most effective solutions that improve current business processes and provide efficiencies for the agency. Varia consistently received high marks for her effective communication, written, and client management skills, as well as for her professionalism.



<b>Client:</b>	Ohio Police & Fire Pension Fund (OP&F)
<b>Role on Team:</b>	Solutions Manager
<b>Dates:</b>	May 2004 – August 2008

As a Senior Solutions Analyst and later a Solutions Manager with OP&F, Varia was a lead in several areas of the project. Her primary responsibilities included facilitating requirement gathering sessions, translating business requirements into system design, creating functional specification documents, communicating functional requirements to the development team, conducting quality assurance, creating test documents, and facilitating user acceptance testing and issue resolution.

From this project she has developed expertise in Contributions, Benefits Processing, Transfers and Refunds, Service Purchases, Court Orders and other Deductions, Disbursements, Tax Reporting, and Member and Employer Self-Services. She was also involved in client training on Active Workflow and was the primary contact for User Acceptance Testing for the designated functional areas.

Varia has demonstrated the ability to quickly learn client business and deliver effective solutions using V3. She is highly regarded by the OP&F client and peers for her effective analyst, communication and management skills, as well as for her professionalism.

### Prior Experience

Varia has over 6 years of experience as a Consultant and Senior Solutions Analyst for several IT system development and implementation projects for various public sector clients.

Prior to joining Vitech, Varia worked for American Management Systems (formerly AMS, currently AMS-CGI) as a Senior Consultant. She assumed a role of Functional Team Lead with a wide range of areas of expertise, including requirements definition, business and system analysis and design, implementation and outreach, quality assurance, user training, documentation, and project management. She was involved in several major procurements, including an Integrated Tax Revenue System for the Wisconsin Department of Revenue, an Unemployment Compensation System for the Pennsylvania Department of Labor and Industry, an Operations Management System for the Kentucky Transportation Council, and an Integrated Client Management system for the Ohio Department of Job and Family Services.

### Education

Bachelor of Science, Business Administration, Pennsylvania State University

### Certifications

Project Management Professional, Project Management Institute

## Helene Richards

### Segment Lead – Loans

West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary		
<b>Staff Member Name:</b> Helene Richards		
<b>Proposed Role on WVCPRB Project:</b> Segment Lead – Loans		
<b>Number of years of professional experience –</b> Total: 14      Retirement system: 6      In role proposed for WVCPRB project: 6		
<b>Education (indicate institutions attended and degrees obtained):</b> Bachelor of Science, Computer Information Systems, City University of New York Master of Science in Organizational Behavior, Polytechnic University		
Professional Reference #1		
<b>Client Name and Address:</b> Government Employees Retirement System of the Virgin Islands 3438 Kronprindsens Gade, 3rd Floor Charlotte Amalie, Virgin Islands 00802	<b>Project Title:</b> V3 Implementation	
	<b>Staff Member's Role on Project:</b> Subject Matter Expert	
<b>Contact Name:</b> Carmen Walters	<b>Description of Services Provided:</b> Helene analyzes existing business processes and recommended process changes to improve efficiency and performance. She also designs process flows and advises business process owners on proposed design considerations.	
<b>Contact Title:</b> Director of Loans		
<b>Contact Phone:</b> (340) 776-7703		
<b>Contact Email:</b> cwalters@usvigiers.com		
<b>Start Date:</b> June 2009		
Professional Reference #2		
<b>Client Name and Address:</b> New England Carpenters Benefit Fund 350 Fordham Road Wilmington, MA 01887	<b>Project Title:</b> V3 Implementation	
	<b>Staff Member's Role on Project:</b> Senior Solutions Analyst	
<b>Contact Name:</b> Ingrid Bieren	<b>Description of Services Provided:</b> Helene provides product domain knowledge support for multiple V3 modules, including Contributions, Loans, Pension, Annuity/Participant Cash Accounts, Disbursements, Member and Employer Demographics, and Employer Self-Service. She also has been creating and executing testing, training, cutover and post production support strategy documents and conducting	
<b>Contact Title:</b> Pension and Annuity Manager		
<b>Contact Phone:</b> (978) 752-1100		
<b>Contact Email:</b> ibieren@carpentersfund.org		



West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary		
<b>Start Date:</b> August 2006	<b>End Date:</b> Present	work sessions with users to define business requirements.
<b>Professional Reference #3</b>		
<b>Client Name and Address:</b> New England Carpenters Benefit Fund 350 Fordham Road Wilmington, MA 01887		<b>Project Title:</b> V3 Implementation
<b>Contact Name:</b> Sue Smith		<b>Staff Member's Role on Project:</b> Senior Solutions Analyst
<b>Contact Title:</b> Controller		<b>Description of Services Provided:</b> Same as above
<b>Contact Phone:</b> (978) 752-1100		
<b>Contact Email:</b> ssmith@carpentersfund.org		
<b>Start Date:</b> August 2006	<b>End Date:</b> Present	

## Helene Richards

### Summary of Experience

Helene Richards is a Business Team Lead for Loans with Vitech Systems Group who has over 14 years of business functional experience, 6 of which have been with Vitech. Helene offers broad experience with the V3 solution, including the loans, and employer reporting modules as well as experience with vesting and PSC. She has a demonstrated ability to improve business efficiency by redesigning procedures, automating tasks and boosting associate morale.

### Vitech Experience

<b>Client:</b>	New York City Board of Education Retirement System
<b>Role on Team:</b>	Subject Matter Expert
<b>Dates:</b>	January 2012 - June 2012

In this role, Helene analyzed existing business processes and recommended process changes to improve efficiency and performance. She also designed process flows and advised business process owners on proposed design considerations.

<b>Client:</b>	Government Employees' Retirement System of US Virgin Islands (USVI)
<b>Role on Team:</b>	Subject Matter Expert
<b>Dates:</b>	June 2009 – Present

In this role, Helene analyzed existing business processes and recommended process changes to improve efficiency and performance. She also designed process flows and advised business process owners on proposed design considerations.

<b>Client:</b>	New England Carpenters Benefit Funds
<b>Role on Team:</b>	Senior Solutions Analyst
<b>Dates:</b>	August 2006 – Present

In this role, Helene provides product domain knowledge support for multiple V3 modules, including Contributions, Loans, Pension, Annuity/Participant Cash Accounts, Disbursements, Member and Employer Demographics, and Employer Self-Service. She also has been creating and executing testing, training, cutover and post production support strategy documents and conducting work sessions with users to define business requirements. She organizes training in all modules to facilitate knowledge transfer and usage of applications and manages User Acceptance Tests (UAT) with clients, including the testing of integration points between all modules being implemented.

### Prior Experience



Prior to joining Vitech, Helene worked at Malcolm Pirnie Inc. as a Senior Benefits Analyst. In this role, Helene analyzed and documented business processes in order to determine the implementation strategy for the development and delivery of key process improvement initiatives and the execution of employee benefits administration policies and procedures. Helene's responsibilities included conducting interest interviews and interfacing with internal customers of varying levels in order to determine customer/stakeholder interests. She also was responsible for translating business requirements to functional specs for various information systems, participating in a PeopleSoft benefits administration process, data analysis, writing queries and generating reports, preparing project plans, and identifying project resources and project risks.

Before joining Malcolm Pirnie, Helene worked at Hewitt Associates as a Business Systems Analyst. Helene participated on a team that worked with clients to develop, implement and manage a Total Benefits Administration (TBA) System, which administered employee health and welfare, pension and 401(k) benefits. Her responsibilities included the analysis of plan requirements and system functionality, developing system specification documents and data flow diagrams, workflow analysis, data cleanup and conversion, interacting with 3rd party vendors, and developing functional specs for offshore processing. Helene participated in all phases of the SDLC, performed user acceptance and regression testing, benefit calculation validation, system functionality training and prepared end user documentation.

Prior to Hewitt, Helene served as a System Implementation Analyst at Royalblue Financial (name recently changed to Fidessa) a supplier of trading systems, market data and connectivity solutions to financial markets participants. She also worked as a Technical Assistant for Pfizer where she acted as a liaison between the technology and business units of the Corporate Environment, Health and Safety Department.

### Education

Bachelor of Science, Computer Information Systems, City University of New York

Master of Science in Organizational Behavior, Polytechnic University

## Chaitanya Paliwal

Solution Architect / Technical Lead

West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary	
<b>Staff Member Name:</b> Chaitanya Paliwal (CP)	
<b>Proposed Role on WVCPRB Project:</b> Solution Architect / Technical Lead	
<b>Number of years of professional experience –</b> <b>Total:</b> 18 <b>Retirement system:</b> 13 <b>In role proposed for WVCPRB project:</b> 8	
<b>Education (indicate institutions attended and degrees obtained):</b> Bachelor of Science, Electronics & Telecommunications Engineering, Devi Ahilya University Masters of Business Administration, Management Information Systems and Marketing, Institute of Management Studies	
Professional Reference #1	
<b>Client Name and Address:</b> Amalgamated Life Insurance Company 333 Westchester Ave White Plains, NY 10604	<b>Project Title:</b> V3 System Implementation
<b>Contact Name:</b> Robert Finocchio	<b>Staff Member's Role on Project:</b> Product Technical Lead
<b>Contact Title:</b> Executive Director	<b>Description of Services Provided:</b> CP was associated with the ALICO project as a Product Technical Lead and helped in design and implementation of enrollment and contributions systems. During the implementation he architected a solution to support multiple companies in V3.
<b>Contact Phone:</b> (914) 367-5375	
<b>Contact Email:</b> rfinocchio@amalgamatedlife.com	
<b>Start Date:</b> January 2009	<b>End Date:</b> July 2012
Professional Reference #2	
<b>Client Name and Address:</b> 32BJ Benefit Funds 25 West 18th Street New York, NY 10011-4676	<b>Project Title:</b> V3 System Implementation
<b>Contact Name:</b> Peter Cunningham	<b>Staff Member's Role on Project:</b> Product Technical Lead
<b>Contact Title:</b> Professional Services Manager	<b>Description of Services Provided:</b> CP was responsible for solutions design, product development management and implementation of World and Contributions modules.
<b>Contact Phone:</b> (212) 539-2927	
<b>Contact Email:</b> pcunningham@winmill.com	
<b>Start Date:</b>	<b>End Date:</b>



West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary		
January 2009	June 2012	
<b>Professional Reference #3</b>		
<b>Client Name and Address:</b> Ohio Police and Fire Pension Fund 140 East Town Street Columbus, Ohio 43215		<b>Project Title:</b> NPAS – V3 System Implementation
<b>Contact Name:</b> Keith Byrd		<b>Staff Member's Role on Project:</b> Development Manager
<b>Contact Title:</b> Deputy Executive Director		<b>Description of Services Provided:</b> CP was responsible for the design, development and implementation of V3. He supported the release management and quality assurance for the V3 System, as well as the analysis and conversion of legacy data to the V3 System.
<b>Contact Phone:</b> (614) 628-8413		
<b>Contact Email:</b> kbyrd@op-f.org		
<b>Start Date:</b> March 2003	<b>End Date:</b> December 2005	

## Resume of Chaitanya Paliwal

### Summary of Experience

Chaitanya Paliwal (CP) is a Product Technical Lead at Vitech Systems Group who has 18 years of experience in software design, development, and implementation as well as technical modeling. CP has spent the past 10 years using his analytical skills when implementing our V3 solution.

As Product Technical Lead, CP is responsible for performing tasks on all system implementations and module enhancements. Those tasks include acting as the liaison to the client team during the product release process, conducting post-build testing for all release issues prior to product release, managing the QA regression testing of any release and fixing regression bugs, as well as systems testing and risk management. He also works with business analysts to create new business requirements as well as organize and plan migration of many legacy systems, both for application and database.

He is responsible for release management, development and implementation of critical production issues, and enhancements to existing functionality. He debugs and QA tests client/server applications in Java, Oracle, Sybase, PowerBuilder, and Visual Basic.

Currently, CP works on the Product Team as a Technical Lead for V3's World and Contribution modules. In this capacity, he works with a team of developers for the timely delivery of product functionality enhancements to meet specific project milestones.

### Vitech Experience

<b>Client:</b>	Amalgamated Life Insurance Company (ALICO)
<b>Role on Team:</b>	Product Technical Lead
<b>Dates:</b>	January 2009 – July 2012

CP was associated with the ALICO project as a Product Technical Lead and helped in design and implementation of enrollment and contributions systems. During the implementation he architected a solution to support multiple companies in V3.

<b>Client:</b>	Writers Guild of America Pension Plan and Writers' Guild-Industry Health Fund
<b>Role on Team:</b>	Module Lead
<b>Dates:</b>	January 2006 – December 2008

For this client, CP was actively involved in the implementation of our V3 world and contribution modules. In this capacity, he worked with a team of developers to enhance product functionality while meeting specific project milestones.



<b>Client:</b>	Ohio Police and Fire Pension Fund (OP&F)
<b>Role on Team:</b>	Technical Lead
<b>Dates:</b>	March 2003 – December 2005

<b>Client:</b>	Oklahoma State and Education Employees' Group Insurance Board
<b>Role on Team:</b>	Technical Lead
<b>Dates:</b>	October 2001 – February 2003

For the OP&F and the Oklahoma State and Education Employees' Group Insurance Board, CP served as the Technical Lead for our enrollment and premium billing modules. In this role, he oversaw the architecture, design and development of these modules and managed a team of developers to enhance the functionality for each client.

CP has also worked on projects for the Central States Teamsters Health & Welfare Pension Funds, Electrical Insurance Trustees, 32BJ Benefit Funds and Steamfitters' Industry Funds.

### Prior Experience

Prior to joining Vitech, CP was a Lead Developer Consultant at Merck Medco Managed Care for three years. In this role, he designed the PowerBuilder application architecture and utilities for report generation. He also created a user-friendly interface, mapped security objects and controls to business functions, and was responsible for source code management during the application development process.

Prior to joining to Merck, CP served as Systems Analyst at Galaxy, Inc. In this position, he created financial accounting application software that could be further customized to client-specific requirements. Before that, CP had worked as Technical Lead and Developer on for various businesses and their applications and software packages using Informix and FoxPro. He also conducted systems analysis and design for a Human Resource Management software product created in Visual Basic.

### Education

Bachelor of Science, Electronics and Telecommunications Engineering, Devi Ahilya University – India

Masters of Business Administration, Management Information Systems and Marketing, Institute of Management Studies

## Tom Cheng

Application Development Lead

West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary	
<b>Staff Member Name:</b> Tom Cheng	
<b>Proposed Role on WVCPRB Project:</b> Application Development Lead	
<b>Number of years of professional experience –</b> Total: 16      Retirement system: 6      In role proposed for WVCPRB project: 6	
<b>Education (indicate institutions attended and degrees obtained):</b> Bachelor of Science, Civil Engineering, Syracuse University Master of Science, Computer Science, Polytechnic University Sun Certified Programmer for Java 2 Platform IBM Certified System Administrator - IBM WebSphere Portal V5.0	
Professional Reference #1	
<b>Client Name and Address:</b> Massachusetts Teachers' Retirement System One Charles Park, 2 <sup>nd</sup> Floor Cambridge, MA 02142-1206	<b>Project Title:</b> MyTRS – V3 System Implementation
<b>Contact Name:</b> Susan Morgan	<b>Staff Member's Role on Project:</b> Development Manager
<b>Contact Title:</b> Director of Strategic Planning and Project Management	<b>Description of Services Provided:</b> Tom serves as the primary technical contact on the project. His responsibilities include supervision/hiring/training of Vitech development and maintenance staff, release/environment management, setting up processes and procedures for testing the system, and recommending solutions for implementation of the client's requirements.
<b>Contact Phone:</b> (617) 679-6834 <b>Contact Email:</b> susan.morgan@trb.state.ma.us	
<b>Start Date:</b> September 2008	<b>End Date:</b> Present
Professional Reference #2	
<b>Client Name and Address:</b> Massachusetts Teachers' Retirement System One Charles Park, 2 <sup>nd</sup> Floor Cambridge, MA 02142-1206	<b>Project Title:</b> MyTRS – V3 System Implementation
<b>Contact Name:</b> Domenic Musto	<b>Staff Member's Role on Project:</b> Development Manager
<b>Contact Title:</b> Infrastructure Planning Officer	<b>Description of Services Provided:</b> Same as above.
<b>Contact Phone:</b> (808) 586-1711 <b>Contact Email:</b> domenic.musto@trb.state.ma.us	



West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary		
<b>Start Date:</b> March 2006	<b>End Date:</b> June 2009	
<b>Professional Reference #3</b>		
<b>Client Name and Address:</b> Hawaii Employees' Retirement System 201 Merchant Street, 14th floor Honolulu, HI 96813		<b>Project Title:</b> V3 System Implementation
		<b>Staff Member's Role on Project:</b> Development Manager
<b>Contact Name:</b> Keith Miyamoto		<b>Description of Services Provided:</b> Tom served as the primary technical contact during the implementation phase of the project. His responsibilities included supervision/hiring/training of Vitech development and maintenance staff, release/environment management, setting up processes and procedures for testing the system, and recommending solutions for implementation of the client's requirements.
<b>Contact Title:</b> Branch Chief for IS Department		
<b>Contact Phone:</b> (808) 586-1711		
<b>Contact Email:</b> miyamotok@hiers.org		
<b>Start Date:</b> March 2006	<b>End Date:</b> June 2009	

## Resume of Tom Cheng

### Summary of Experience

Tom Cheng is a Senior Technical Manager with Vitech Systems Group who has 14 years of experience in the IT industry, 8 of which have been with Vitech. He has specific experience with web-based, n-tier application development, and working with the J2EE Platform. As Technical Lead, he is involved in the full project life cycle including the analysis, design, programming, and implementation of various business applications. Tom brings a wealth of experience in the development of systems utilizing Java, J2EE (Servlets, JSP, EJB, JMS), XML, Struts, Spring, Hibernate, SQL, IBM WebSphere Portal, JBoss, Oracle, DB2. He also has experience in a large number of programming languages, operating systems, integrated development environments, application and web servers, databases, and other computer programs.

On a day-to-day basis, Tom manages the development of product enhancements, which involves mapping business requirements to functionalities within the V3 system, creating technical specifications and ensuring the technical team is meeting all technical requirements.

### Vitech Experience

<b>Client:</b>	Iowa Public Employees Retirement System (IPERS)
<b>Role on Team:</b>	Senior Technical Manager
<b>Dates:</b>	July 2011 – Present

As the Senior Technical Manager for IPERS, Tom leads a team of 12 developers. In this role he regularly organizes code reviews and enforces coding standards and best practices. He also helped with developing technical documentation, Java and Oracle development, quality assurance, and release management. His work continues to promote team collaboration during the development process.

<b>Client:</b>	Massachusetts Teacher's Retirement System (MTRS )
<b>Role on Team:</b>	Senior Technical Manager
<b>Dates:</b>	September 2008 – Present

As the Senior Technical Manager for MTRS , Tom hired and trained the technical team of 11 developers that he is currently leading. His team has successfully implemented V3's imaging, world, contributions, SCP, pension, disbursement, and self-service modules. Additionally, Tom assists with client requirements gathering, developing technical documentation, Java and Oracle development, quality assurance, and release management. He assisted in the infrastructure design and hosting support of the client's application environments. He also provided recommendations on product-level enhancements, which included data auditing, security, the development of accessibility standards and standards for performance testing and test automation.



<b>Client:</b>	Hawaii Employees Retirement System (HIERS)
<b>Role on Team:</b>	Technical Manager
<b>Dates:</b>	March 2006 – June 2009

As the Technical Manager for HIERS, Tom implemented the imaging, world, contributions, SCP, pension, disbursements, and self-service modules. In addition to leading a team of 11 developers, Tom regularly organized code reviews and provided recommendations on product-level enhancements, which included the creation of Interactive PDF Forms, 3D Bar Code integration to documents, and several Doc Shell Editor enhancements.

<b>Client:</b>	Wichita Employees Retirement System (WERS)
<b>Role on Team:</b>	Technical Manager
<b>Dates:</b>	October 2006 – April 2007

For this client, Tom implemented V3's world, contributions, pension, and disbursements modules. He was involved in hiring, training, and serving as the technical lead for a team of four developers. Again, he organized code reviews and also assisted with client requirements gathering, developing technical documentation, Java and Oracle development, quality assurance, and release management.

### Prior Experience

Prior to joining Vitech, Tom worked as a Project Manager and Software Architect with E2 Consulting Group. In these roles, Tom was responsible for use cases, UML diagrams, and gathering functional requirements using Rational Requisite Pro. He designed the data and object model using Rational Rose and led and trained a team of three developers in the Rational Unified Process and the implementation using Eclipse 2.1 and Maven. Additionally, he set up presentations for the client to review progress and attain feedback on functionality, and regularly organized code reviews to check progress and quality of work.

Before E2, Tom worked as a Senior Software Developer, Lead Software Developer, and Programmer-Analyst for three separate software development firms, including one mobile developer. Tom also worked as an Internet Technologist for the Polytechnic Research Institute.

### Education

Bachelor of Science, Civil Engineering, Syracuse University

Master of Science, Computer Science, Polytechnic University

### Certifications

Sun Certified Programmer for Java 2 Platform

IBM Certified System Administrator - IBM WebSphere Portal V5.0

## Alice Rischert

Data Lead

West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary	
<b>Staff Member Name:</b> Alice Rischert	
<b>Proposed Role on WVCPRB Project:</b> Data Lead	
<b>Number of years of professional experience –</b> Total: 25      Retirement system: 7      In role proposed for WVCPRB project: 15	
<b>Education (indicate institutions attended and degrees obtained):</b> Masters of Business Administration, Information Technology, Pforzheim University	
Professional Reference #1	
<b>Client Name and Address:</b> 1199 SEIU Benefit Plans 310 West 43rd Street New York, NY 10036	<b>Project Title:</b> V3 System Implementation
	<b>Staff Member's Role on Project:</b> Data Lead
<b>Contact Name:</b> Mr. Ivan Kolodny	<b>Description of Services Provided:</b> Alice led the data conversion for World, Contributions, Eligibility, COBRA, Pension, Disbursements, Imaging and Disability Claims which involved large data volumes involving multiple client systems.
<b>Contact Title:</b> Director, IT	
<b>Contact Phone:</b> (646) 473-6610	
<b>Contact E-mail:</b> Ivan.Kolodny@1199funds.org	
<b>Start Date:</b> October 2006	<b>End Date:</b> September 2011
Professional Reference #2	
<b>Client Name and Address:</b> Maine Public Employees Retirement System. 46 State House Station Augusta, ME 04333-0046	<b>Project Title:</b> V3 System Implementation
	<b>Staff Member's Role on Project:</b> Data Lead
<b>Contact Name:</b> Christine Gianopoulos	<b>Description of Services Provided:</b> Alice led the data conversion for World, Contributions, Part Acct, SCP, Pension, Disbursements, and Enrollment. This particular client had complex data requirements due to the large size of the pension fund, which Alice was able to from her experience using Vitech's proven testing methodology.
<b>Contact Title:</b> Deputy Executive Director	
<b>Contact Phone:</b> (201) 512-3107	
<b>Contact E-mail:</b> Christine.Gianopoulos@mainepers.org	
<b>Start Date:</b> January 2006	<b>End Date:</b> January 2012
Professional Reference #3	
<b>Client Name and Address:</b> Orange County Employees' Retirement	<b>Project Title:</b> V3 System Implementation



West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary			
System 2223 E. Wellington Ave., Ste. 100 Santa Ana, CA 92701		<b>Staff Member's Role on Project:</b> Data Lead	
<b>Contact Name:</b> Jenny Sadoski		<b>Description of Services Provided:</b> Alice is leading the data conversion for the pension system involving World, Contributions, Part Account, SCP, Pension, Disbursements, and Imaging. In this role, she is responsible for writing test case scenarios, mapping legacy data to the V3 solution, performing data audits using our Scorecard approach, and ensuring Vitech analysts are properly testing all scenarios.	
<b>Contact Title:</b> IT Operations Supervisor			
<b>Contact Phone:</b> (714) 569-.4856			
<b>Contact E-mail:</b> jsadoski@ocers.org			
<b>Start Date:</b> December 2010	<b>End Date:</b> Present		

## Resume of Alice Rischert

### Summary of Experience

Alice Rischert has over 20 years of experience managing systems integrations and working as a data architect. She has been a vital member of our team over the past 8 years by providing expertise on Oracle databases, structured design methodologies, data warehousing, systems integration and relational database design.

While she is focused on data conversion, testing and mapping of our V3 solution on a day-to-day basis, Alice is dedicated to being a leader within the information technology industry. She previously served as the Program Chair at Columbia University's School of Continuing Education where she oversaw the curriculum for the school's database application and design program. She's also the author of four bestselling Oracle SQL books published by Prentice Hall as well as the author of one of the top five most popular articles on the Oracle Technology Network in 2007.

As a leader within the industry, Alice's wealth of knowledge provides our clients with a greater sense of certainty that our solution will help support their business strategy years down the road.

### Vitech Experience

<b>Client:</b>	United Nations Joint Staff Pension Fund
<b>Role on Team:</b>	Data Lead
<b>Dates:</b>	June 2012 – Present

As the Data Lead for this client, Alice is responsible for analyzing data structures and identifying the sources for conversion. She also develops manual and automatic data cleansing strategies to help prevent incorrect data, and develops migration strategies for any issues that may occur.

<b>Client:</b>	Board of Education Retirement System of the City of New York
<b>Role on Team:</b>	Data Lead
<b>Dates:</b>	December 2009 – Present

For this client, Alice is responsible for ensuring technical data requirements meet the business requirements by developing technical specifications and managing data conversion efforts. She maps legacy client data to our V3 system and coordinates with a third party vendor to develop conversion data and system interface test plans, then document the results. She also works closely with business users and internal client staff to determine reconciliation target fields to ultimately ensure all data is correctly converted to our V3 solution.

<b>Client:</b>	MainePERS
----------------	-----------



<b>Role on Team:</b>	Data Lead
<b>Dates:</b>	July 2006 – September 2012

As the Data Conversion Lead for MainePERS, Alice analyzes current data structures and data dictionaries and documents the layout of the legacy system along with the requirements to successfully transition it to our V3 solution. She works closely with the client and our project team and leads the development of data conversion scripts while identifying overlaps, conflicts or missing source information to ensure data is correctly migrated to our solution. She also develops the clients test plans and coordinates the testing of converted data.

Alice also held similar responsibilities to those previously mentioned while working as Data Conversion Lead for the 1199 Service Employees International Union, UNITE HERE, and the Screen Actors Guild Producers Pension and Health Plans.

### Prior Experience

Prior to joining Vitech, Alice worked for Ecteon, Inc. in a number of roles for over 9 years including Senior Client Partner, Principal, Lead Data Architect and Database Administrator.

### Education

Masters of Business Administration, Information Technology, Pforzheim University

## Paul Kelly

Infrastructure Lead

West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary	
<b>Staff Member Name:</b> Paul Kelly	
<b>Proposed Role on WVCPRB Project:</b> Infrastructure Lead	
<b>Number of years of professional experience –</b> <b>Total:</b> 24 <b>Retirement system:</b> 14 <b>In role proposed for WVCPRB project:</b> 4	
<b>Education (indicate institutions attended and degrees obtained):</b> Bachelor of Science, Computer Science, Long Island University	
Professional Reference #1	
<b>Client Name and Address:</b> Massachusetts Teachers' Retirement System One Charles Park, 2 <sup>nd</sup> Floor Cambridge, MA 02142-1206	<b>Project Title:</b> MyTRS – V3 System Implementation  <b>Staff Member's Role on Project:</b> Infrastructure Lead
<b>Contact Name:</b> Domenic Musto	<b>Description of Services Provided:</b> Paul was responsible for all infrastructure related to the V3 implementation at MTRS . Continued Hosting Services.
<b>Contact Title:</b> Infrastructure Planning Officer	
<b>Contact Phone:</b> (808) 586-1711 <b>Contact Email:</b> domenic.musto@trb.state.ma.us	
<b>Start Date:</b> March 2009 <b>End Date:</b> Present	
Professional Reference #2	
<b>Client Name and Address:</b> Amalgamated Life Insurance Company 333 Westchester Avenue White Plains, NY 10604	<b>Project Title:</b> V3 Implementation  <b>Staff Member's Role on Project:</b> Infrastructure Lead
<b>Contact Name:</b> Mr. Robert Finocchio	<b>Description of Services Provided:</b> Paul was responsible for all infrastructure related to the V3 implementation.
<b>Contact Title:</b> Executive Director, IT	
<b>Contact Phone:</b> (914) 367-5375 <b>Contact E-mail:</b> rfinocchio@amalgamatedlife.com	
<b>Start Date:</b> March 2009 <b>End Date:</b> July 2010	
Professional Reference #3	



West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary	
<b>Client Name and Address:</b> Steamfitters Industry Fund Office 5 Penn Plaza, 19 <sup>th</sup> Floor New York, NY 10001	<b>Project Title:</b> V3 System – Hardware Replenishment
<b>Contact Name:</b> Sean Driscoll	<b>Staff Member's Role on Project:</b> Infrastructure Lead
<b>Contact Title:</b> Director of IT	<b>Description of Services Provided:</b> Paul worked with SIFO on a complete hardware upgrade of all systems at SIFO Headquarters. In addition he worked on the installation and configuration of Disaster Recovery at SIFO Satellite office.
<b>Contact Phone:</b> (917) 281-9536 <b>Contact E-mail:</b> seand@steamny.com	
<b>Start Date:</b> August 2010	

## Resume of Paul Kelly

### Summary of Experience

Paul Kelly is an Infrastructure Lead at Vitech Systems Group who has 13 years of experience working with clients to implement our V3 System. He's our in-house expert on network, server and SAN architecture who has been responsible for our transition into virtual infrastructures, resulting in more end-user support for our clients.

In his current role, Paul is responsible for infrastructure specifications listed in our new business proposals, infrastructure deployment and support for live projects, V3 client hosting, infrastructure benchmarking and research and development.

### Vitech Experience

<b>Client:</b>	Orange County Employees' Retirement System (OCERS)
<b>Role on Team:</b>	Infrastructure Lead
<b>Dates:</b>	September 2010 – Present

<b>Client:</b>	New York City Board of Education Retirement System (BERS)
<b>Roles on Team:</b>	Infrastructure Lead
<b>Dates:</b>	December 2009 – Present

<b>Client:</b>	State of Hawaii Employer-Union Health Benefits Trust Fund (HIERS)
<b>Role on Team:</b>	Infrastructure Lead
<b>Dates:</b>	July 2008 – July 2009

<b>Client:</b>	Government Employees' Retirement System of US Virgin Islands
<b>Role on Team:</b>	Infrastructure Lead
<b>Dates:</b>	March 2008 – January 2009

As Infrastructure Lead for OCERS, HIERS and GERS, Paul developed specifications for hardware and software platforms of our V3 solution. He also was responsible for outlining infrastructure needs at each operating hosting facility and developed the implementation plan for those needs while procuring all required system components.



<b>Client:</b>	Massachusetts Teachers' Retirement System (MTRS )
<b>Role on Team:</b>	Director of Hosting & Infrastructure Services
<b>Dates:</b>	June 2008 – February 2010

For this client, Paul was responsible for planning and implementing infrastructure needs at disaster recovery hosting facilities. He also developed the clients' disaster recovery plan, security plan, and operations playbook while working with the IT Division to ensure security policies met state requirements.

Paul also worked in various capacities for our OP&F, PSERS, and CSF clients, where his responsibilities included, technical and strategic infrastructure direction, product development, and interface design strategies. He worked directly with our senior analyst, data conversion, and testing team leads as they created technical configurations of our V3 system, including programming and design. This work ensured that our final installed solution was sustainable and met all client requirements.

### Prior Experience

Prior to joining Vitech, Paul worked as a Technical Project Manager and Lead Software Engineer for a large corporation focused on the real estate and travel industries.

### Education

Bachelor of Science, Computer Science, Long Island University, NY

## Neil Sullivan

### Testing/Quality Assurance Lead

West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary	
<b>Staff Member Name:</b> Neil Sullivan	
<b>Proposed Role on WVCPRB Project:</b> Testing / QA Lead	
<b>Number of years of professional experience –</b> <b>Total: 17      Retirement system: 9      In role proposed for WVCPRB project: 4</b>	
<b>Education (indicate institutions attended and degrees obtained):</b> Bachelor of Science, Economics, United States Military Academy at West Point Master of Business Administration, Finance and Operations, Indiana University Siebel 7 Certified Consultant and a Siebel 7 Certified Business Analyst	
Professional Reference #1	
<b>Client Name and Address:</b> Massachusetts Teachers' Retirement System One Charles Park, 2 <sup>nd</sup> Floor Cambridge, MA 02142-1206	<b>Project Title:</b> MyTRS – V3 System Implementation
	<b>Staff Member's Role on Project:</b> Testing Lead
<b>Contact Name:</b> Susan Morgan	<b>Description of Services Provided:</b> Neil led the first two Production Rollouts which include Imaging, Workflow, Contributions, Finance and Employer Self Service. He is currently leading the final Production Rollout of Pension, Disbursements, Healthcare, 1099, Service Credit Purchases and Member Self Service. His role includes working with the client to define requirements, prepare design specifications, develop the testing strategy, and lead the testing and production deploy efforts.
<b>Contact Title:</b> Director of Strategic Planning and Project Management	
<b>Contact Phone:</b> (617) 679-6834	
<b>Contact Email:</b> susan.morgan@trb.state.ma.us	
<b>Start Date:</b> July 2008	<b>End Date:</b> Present
Professional Reference #2	
<b>Client Name and Address:</b> Massachusetts Teachers' Retirement System One Charles Park, 2 <sup>nd</sup> Floor Cambridge, MA 02142-1206	<b>Project Title:</b> MyTRS – V3 System Implementation
	<b>Staff Member's Role on Project:</b> Testing Lead
<b>Contact Name:</b> Lisa Maloney	<b>Description of Services Provided:</b> Same as above.
<b>Contact Title:</b> Director – PMO	
<b>Contact Phone:</b> (617) 679-6811	
<b>Contact Email:</b>	



West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary		
lisa.maloney@trb.state.ma.us		
<b>Start Date:</b> July 2008	<b>End Date:</b> Present	
<b>Professional Reference #3</b>		
<b>Client Name and Address:</b> Ohio Police and Fire Pension Fund 140 East Town Street Columbus, OH 43215		<b>Project Title:</b> NPAS - V3 System Implementation
		<b>Staff Member's Role on Project:</b> Project Manager
<b>Contact Name:</b> Keith Byrd		<b>Description of Services Provided:</b> Neil led a broad V3 implementation of several modules, including Contributions, Pension, Disbursements, 1099s, Healthcare, Finance, Service Credit Purchases, Workflow, Imaging and Employer Self Service. His role included Project Management responsibilities along with leading the testing and production deploy efforts.
<b>Contact Title:</b> Deputy Executive Director		
<b>Contact Phone:</b> (614) 628-8413		
<b>Contact Email:</b> kbyrd@op-f.org		
<b>Start Date:</b> June 2004	<b>End Date:</b> July 2008	

## Resume of Neil Sullivan

### Summary of Experience

Neil Sullivan is a Testing / Quality Assurance Lead with Vitech Systems Group who has over 17 years of experience in the information technology industry, 9 of which have been with Vitech. Neil is experienced in the core areas of project management, software package enabled redesign, systems troubleshooting, and streamlining business applications for organizational effectiveness. Neil offers broad experience with the V3 solution with an emphasis on Contributions, Pension, Disbursements, 1099, Service Credit Purchases, Imaging, Active Workflow, Finance, Healthcare, Imports and Exports. He has established himself as a trusted advisor to many of our largest clients.

### Relevant Experience

<b>Client:</b>	Massachusetts Teachers' Retirement System
<b>Role on Team:</b>	Testing Lead
<b>Dates:</b>	June 2008 – Present

As the Testing Lead for the Massachusetts Teachers' Retirement System Neil has successfully led the first two Production Rollouts which include Imaging, Workflow, Contributions, Finance and Employer Self Service. He is currently leading the final Production Rollout of Pension, Disbursements, Healthcare, 1099, Service Credit Purchases and Member Self Service. His role includes working with the client to define requirements, prepare design specifications, develop the testing strategy, and lead the testing and production deploy efforts.

<b>Client:</b>	Ohio Police & Fire Pension Fund
<b>Role on Team:</b>	Project Manager
<b>Dates:</b>	June 2004 – June, 2008

As the Project Manager for the Ohio Police & Fire Pension Fund, Neil successfully led a broad V3 implementation of several modules, including Contributions, Pension, Disbursements, 1099s, Healthcare, Finance, Service Credit Purchases, Workflow, Imaging and Employer Self Service. His Role included Project Management responsibilities along with leading the testing and production deployment efforts.

<b>Client:</b>	Central States Funds
<b>Role on Team:</b>	Project Manager / Solutions Analyst
<b>Dates:</b>	June 2003 – June , 2004

For this client, Neil functioned as a Project Manager where he worked directly with the client to identify business process within the V3 application, and coordinated development efforts to insure timely and accurate software releases. In addition, Neil was the Solutions Analyst for the Field Audit Module and Oracle 9i Upgrade. This role included requirements gathering, writing



detailed business and technical specifications, quality insurance testing, and hands on training with the client.

<b>Client:</b>	Hotel & Restaurant International Union Health & Welfare & Pension Plans (HEREIU)
<b>Role on Team:</b>	Project Manager
<b>Dates:</b>	June 2003 – June 2004

For HEREIU, Neil served as a Project Manager. In this role, he identified business process priorities as they relate to the V3 solution and coordinated their Oracle 9i Upgrade efforts.

<b>Client:</b>	Laborers District Council of Chicago
<b>Role on Team:</b>	Solutions Analyst
<b>Dates:</b>	March 2004 – May 2004

As a Solutions Analyst for this client, Neil helped solve ongoing maintenance issues through quality assurance testing for our Import and Export modules.

### Prior Experience

Prior to joining Vitech, Neil was Project Manager and Consultant at Siebel Systems, Inc. for over three years. He served as both a Project Manager and Analyst on a variety of Siebel core and specialty products including, Call Center, Service, ERM, PRM, Web Service, and Web Sales. He was responsible for developing project plans and level of effort estimates, facilitating requirements gathering and integration workshops, developing gap analysis for functional requirements, resolving open issues, mitigating project risks, and submitting status reports. He also prepared Technical Design Documents and Test Plans and performed configuration and set-up tasks.

Prior to joining Siebel Systems, Inc., Neil worked for Deloitte Consulting Group as a Project Manager for four years. As Project Manager, he was responsible for the global development and rollout of a Sales and Operations Planning Process as part of a SAP software implementation. He also assisted in the implementation of Oracle Manufacturing Applications, including Inventory, MRP, and Purchasing .

Prior to his position with Deloitte, Neil served the United States Army as a Captain. For four years he was responsible for planning and leading the training for a platoon of 34 soldiers, coordinating logistics for field training exercises and graduating from Ranger School in both Airborne and Air Assault.

### Education

Bachelor of Science, Economics, United States Military Academy at West Point  
Master of Business Administration, Finance and Operations, Indiana University

### Certifications

Siebel 7 Certified Consultant and a Siebel 7 Certified Business Analyst

## James Klasen

### Change Management/Training Lead

West Virginia Consolidated Public Retirement Board Pension Administration Solution Project – Staff Experience Summary	
<b>Staff Member Name:</b> James Klasen	
<b>Proposed Role on WVCPRB Project:</b> Change Management / Training Lead	
<b>Number of years of professional experience –</b> <b>Total:</b> 13 <b>Retirement system:</b> 13 <b>In role proposed for WVCPRB project:</b> 7	
<b>Education (indicate institutions attended and degrees obtained):</b> Bachelor of Arts, Political Science, Lake Forest College	
Professional Reference #1	
<b>Client Name and Address:</b> Maine Public Employees Retirement System. 46 State House Station Augusta, ME 04333-0046	<b>Project Title:</b> V3 System Implementation  <b>Staff Member's Role on Project:</b> Testing Manager / Training Lead
<b>Contact Name:</b> Lindy Henninger  <b>Contact Title:</b> Project Manager  <b>Contact Phone:</b> (207) 512-3100 <b>Contact E-mail:</b> Lindy.Henninger@mainepers.org	<b>Description of Services Provided:</b> James served as the Training Lead for MainePERS, overseeing the creation of client user documentation and training materials as well as managing the design, development, and delivery of several new training modules. He created a series of client-customized, hands-on training materials and reference guides to enhance the classroom experience. He was also the User Acceptance Testing Manager and provided training on the UAT methodology.
<b>Start Date:</b> May 2008 <b>End Date:</b> September 2010	
Professional Reference #2	
<b>Client Name and Address:</b> State of Hawaii ERS 201 Merchant Street, Suite 1400 Honolulu, HI 96813-2980	<b>Project Title:</b> V3 System Implementation  <b>Staff Member's Role on Project:</b> Testing and Training Manager
<b>Contact Name:</b> Keith Miyamoto  <b>Contact Title:</b> ERS Project Manager  <b>Contact Phone:</b> (808) 586-1711 <b>Contact E-mail:</b>	<b>Description of Services Provided:</b> James served as the Testing and Training Manager for HIERS where he built a 6-month comprehensive training strategy covering all components of the V3 system to date. He was directly responsible for the development of all training materials, user documentation, and additional reference guides per the client



West Virginia Consolidated Public Retirement Board		
Pension Administration Solution Project – Staff Experience Summary		
miyamotok@hiers.org		requirements. He was also responsible for designing a testing strategy and ensuring client understanding of the testing methodology.
<b>Start Date:</b> June 2006	<b>End Date:</b> October 2008	
<b>Professional Reference #3</b>		
<b>Client Name and Address:</b> Government Employees' Retirement System of the US Virgin Islands 3438 Kronprindsens Gade, 3rd Floor St. Thomas, V.I. 00802		<b>Project Title:</b> V3 System Implementation
<b>Contact Name:</b> Evelyn R. Venner-Potter		<b>Staff Member's Role on Project:</b> Training Lead
<b>Contact Title:</b> COO		
<b>Contact Phone:</b> (340) 776-7703 x4930		
<b>Contact E-mail:</b> evpotter@usvigiers.com		
<b>Start Date:</b> April 2010	<b>End Date:</b> Present	<b>Description of Services Provided:</b> James was the lead on the project. He successfully delivered an intensive 5 week training program across an audience comprised of various departments and responsibilities. He facilitated the development of thousands of pages of supporting documentation and training guides, and helped manage a difficult organizational change.

## Resume of James Klasen

### Summary of Experience

James has over 12 years of experience with complex systems implementations, organizational strategy, and process consulting. In his career, he has held a broad range of roles from analyst to system testing and training manager. Most recently, James has been involved with Vitech's Training Strategy and Change Management services. He currently serves as Vitech's Organizational Development Manager. In that capacity he works closely with Vitech account teams to develop Change Management white papers for implementation projects. He has almost 8 years of experience specifically with V3 projects for retirement funds. He is also a regular presenter at Vitech's V3 Users Conference.

### Vitech Experience

Currently, James is a member of the Vitech Educational Services team which continuously develops and updates the company's V3 training implementation methodology and strategy. This encompasses writing the core training curriculum and Users' Guides for the V3 System and delivering application training to internal staff as well as new and existing clients. His Account Team experience brings a well-balanced perspective to Vitech's Training Strategy.

<b>Client:</b>	32BJ
<b>Role on Team:</b>	Training Strategy and Delivery Lead
<b>Dates:</b>	June 2012 – Present

In this role, James has been providing Vitech's Training Implementation Methodology and Strategy for the client training team. He continues to support the development and delivery of comprehensive Learning Guides and other training materials.

<b>Client:</b>	Government Employees' Retirement System of the US Virgin Islands
<b>Role on Team:</b>	UAT Champion and Training Lead
<b>Dates:</b>	September 2010 – June 2012

In this role, James trained the client team on UAT methodology and kicked-off the UAT testing phase. He provided Training Implementation Methodology and Strategy for the Vitech training team, and designed and delivered end-user training for over 80 staff members.

<b>Client:</b>	State Boston Retirement Board
<b>Role on Team:</b>	Organizational and Process Change Lead
<b>Dates:</b>	December 2008 – May 2009

In this role, James restructured the organization to maximize the efficiencies provided by the V3 system and led the effort to reengineer existing procedures and business processes capitalizing on the enhanced functionality. He also wrote Organizational and Process Change Position Papers,



that captured the current-state analysis, future-state design, and key recommendations for the implementation.

<b>Client:</b>	National Electrical Benefit Fund
<b>Role on Team:</b>	Trainer
<b>Dates:</b>	November 2008 – October 2010

In this role, James managed the design, development and delivery of end user, hands-on training materials, and reference guides for the V3 World, Contributions and Pension modules. He also conducted train the trainer and end-user training for over 50 V3 users.

<b>Client:</b>	Maine Public Employees' Retirement System
<b>Role on Team:</b>	Training Lead
<b>Dates:</b>	August 2007 – September 2010

In this role, James engineered and executed a comprehensive training strategy that included the design of materials, reference guides and delivery to more than 40 V3 users.

<b>Client:</b>	Iowa Public Employees' Retirement System
<b>Role on Team:</b>	Training Strategy Lead
<b>Dates:</b>	June 2007 – May 2008

In this role, James provided Training Implementation Methodology and Strategy for the Vitech training team and taught the trainers how to deliver complete line-of-business training to the client's users, as well as hundreds of client employers.

<b>Client:</b>	State Teachers Retirement System of Ohio
<b>Role on Team:</b>	Training Strategy Lead
<b>Dates:</b>	July 2008 – December 2008

In this role, James provided Training Implementation Methodology and Strategy for the client training team and acted as Subject Matter Expert providing oversight and strategic design support on how to design an effective training program for End-Users and Super-Users.

<b>Client:</b>	Carpenter Funds Administrative Office
<b>Role on Team:</b>	Training Lead
<b>Dates:</b>	September 2006 – May 2008

In this role, James successfully implemented and delivered end-user training to CFAO staff for Phase I of the implementation project.

<b>Client:</b>	Hawaii Employees' Retirement System
----------------	-------------------------------------

<b>Role on Team:</b>	Training Manager
<b>Dates:</b>	September 2005 – September 2006

In this role, James built and implemented a comprehensive 6 month training strategy, including modules supporting pension administration, and managed the onsite and offsite training process from inception to completion.

In addition to the clients mentioned above, James also worked on other V3 delivery teams including New Mexico Educational Retirement Board, UFCW-Employers Benefit Plans of Northern California, and ALICO.

### Prior Experience

Prior to joining Vitech, James was a Business Analyst, Benefits Call Center Manager and Benefits Consultant at Hewitt Associates.

### Education

Bachelor of Arts Degree, Political Science, Lake Forest College



<b>Role on Team:</b>	Training Manager
<b>Dates:</b>	September 2005 – September 2006

In this role, James built and implemented a comprehensive 6 month training strategy, including modules supporting pension administration, and managed the onsite and offsite training process from inception to completion.

In addition to the clients mentioned above, James also worked on other V3 delivery teams including New Mexico Educational Retirement Board, UFCW-Employers Benefit Plans of Northern California, and ALICO.

### Prior Experience

Prior to joining Vitech, James was a Business Analyst, Benefits Call Center Manager and Benefits Consultant at Hewitt Associates.

### Education

Bachelor of Arts Degree, Political Science, Lake Forest College

## **Subcontractor Letters of Commitment**

---

Note: Vitech is not currently planning to use subcontractors on the WVCPRB project.



**Exhibit III-22**

## **Subcontractor Agreements**

---

Note: Vitech is not currently planning to use subcontractors on the WVCPRB project.



**Exhibit III-23**

## **Resource Summary by Phase**

---

Contains confidential and proprietary information not for public disclosure.



### **NOTICE REGARDING CONFIDENTIALITY**

This information is Confidential Property of Vitech Systems Group, Inc., and has been provided pursuant to a request within West Virginia Consolidated Public Retirement Board's BAFO for a Line of Business Solution – RFP CPR12026.

Because release of this information would provide a competitive advantage to certain third parties, it is generally prohibited from release under West Virginia's Freedom of Information Act as well as Federal Freedom of Information laws, and may not to be divulged to any third party without the express written permission of Vitech Systems Group, Inc.

If such request is made of these materials, or a request is made questioning the confidentiality of these materials, the request shall be made to:

Mr. James Vitiello, Sr. Vice President  
Vitech Systems Group, Inc.  
401 Park Ave South, 12th Floor  
New York, NY 10016  
Tel: +1-212-868-0900

### Exhibit 23 – Resource Summary by Phase

The figure below summarizes total projected staff by staff category, by both month and project phase. Part I of the figure displays the project phases, as they fall across the time line. Part II summarizes the hours by Phase, and by either Vitech or WVCPRB within each phase. This section also provides a summary of the total Vitech and WVCPRB hours estimated for the project as well as FTE estimates per month.

Vitech Proposed Staff Loading – By Phase: estimates of manpower loading of project phases broken out by staff category.

Owner	Resource Category	Phases 1,2,& 3	Phase 4a	Phase 4b	Phase 4c	Phase 5	Phase 6	TOTAL
Vitech	Project Management	960	1,600	2,240	3,840	8,000		16,640
Vitech	Segment Leads	480	1,720	5,160	9,520	1,360		18,240
Vitech	Business Analysts	1,920	1,720	10,320	19,040	1,920		34,920
Vitech	Data Conversion / Interface Resources	120	430	2,420	2,935			5,905
Vitech	Technical Manager	480	860	3,720	3,948	960		9,968
Vitech	Oracle Resources	160	540	2,420	4,760	1,920		9,800
Vitech	Java Resources	160	540	2,420	4,760	1,920		9,800
Vitech	Testing & Dev Support Resources	480	3,120	12,360	19,280	1,920		37,160
Vitech	Training/Documentation Resources	240	600	840	720			2,400
Vitech	Infrastructure Resources	1,040						1,040
Vitech	Support Resources						3,840	3,840
<b>Vitech Total</b>		<b>6,040</b>	<b>11,130</b>	<b>41,900</b>	<b>68,803</b>	<b>18,000</b>	<b>3,840</b>	<b>149,713</b>
WVCPRB	Project Management	960	1,600	2,240	3,840	8,000		16,640
WVCPRB	Business Owners	1,440	860	4,480	9,120	2,720		18,620
WVCPRB	Testers		460	7,680	11,680	2,880		22,700
WVCPRB	Data Conversion Resources		670	3,680	4,080			8,430
WVCPRB	Infrastructure Resources	1,040						1,040
<b>Vitech Total</b>		<b>3,440</b>	<b>3,590</b>	<b>18,080</b>	<b>28,720</b>	<b>13,600</b>	<b>-</b>	<b>67,430</b>
<b>GRAND TOTAL</b>		<b>9,480</b>	<b>14,720</b>	<b>59,980</b>	<b>97,523</b>	<b>31,600</b>	<b>3,840</b>	<b>217,143</b>



[illegible]