

Cost Proposal for Information Governance Implementation Consulting Services

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UV PURCHASING DIVISION



March 5, 2021

Presented by:
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Los Altos, CA USA 94022

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Confidentiality

The information in this document contains confidential and proprietary information including technical or financial information constituting trade secrets or information the disclosure of which would result in substantial injury to Contoural's competitive position.

Contoural submits the enclosed with the express understanding that it will be held in strict confidence and will not be disclosed, duplicated or used, in whole or in part, for any purpose other than evaluation of the proposal, but understand that any disclosure will be limited to the extent that the West Virginia State Treasurer's Office (Agency or the Agency or WV-STO) considers proper under the law. If the Agency enters into an agreement with Contoural, the Agency shall have the right to use or disclose such information as provided in the agreement, unless otherwise obligated by law.

Disclaimer

Legal Information Is Not Legal Advice. Contoural provides information regarding business, compliance and litigation trends and issues for educational and planning purposes. However, legal information is not the same as legal advice -- which is the application of law to an individual or organization's specific circumstances. Contoural and its consultants do not provide legal advice. Clients should consult with competent legal counsel for professional assurance that our information, and any interpretation of it, is appropriate to each client's particular situation.

Personal Information and non-Third Party

During the course of our engagement, we will ask questions and help the Agency address the management of personal information. However, Contoural does not access, store, transmit, or process any client personal data or information in the process of delivering our services or in the creation of deliverables.

Working Through Social Distancing

The safety of both your team members as well as our consultants is paramount during the COVID-19 threat. To that end, we are prepared to be flexible in how Contoural delivers services. As needed, the Contoural team is fully prepared to do our work via teleconferencing using either your or our teleconferencing capabilities. This may include video, virtual whiteboards or other web-enabled tools. We believe we can be effective working remotely conducting interviews, review sessions, workshops or presentations, delivering the same high-quality deliverables. We are currently working through social distancing with a number of clients.

Cover/Title Page

**RFP Subject: Comprehensive Records Assessment Consultant
Solicitation Number: CRFP STO2100000001**

Vendor Name: Contoural, Inc.

Business Address: 335 Main Street, Suite B, Los Altos, CA 94022

Telephone Number: 650/390-0800

Fax Number: 650/390-0303

Contact: Mark Diamond, CEO

Email: mdiamond@contoural.com

By signing below, I certify that I have reviewed this Request for Proposal in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship ; and that, bidder will, upon contract award, properly register with any State agency that may require registration.

Contoural, Inc. _____
(Company)

Mark Diamond, CEO _____
(Printed/Typed Representative Name, Title)

Mark Diamond

Signature

650/390-0800 _____
(Contact Phone/Fax Number)

3/5/21 _____
(Date)

Proposal Overview

See Technical Proposal for details.

Project	Description	Client Resource Impact	Consulting Hours
Project 1: Information Governance Organization	Provides assistance in the creation, development, or refining of an Information Governance Organization, along with development of roles and responsibilities of major contributors.	Medium	82
Project 2: IG Processes and Procedures	Provides development of procedures, process documents, and other materials to support the Policy and Schedule in an overall Information Governance Program.	Low	116
Project 3: Data Security Classification Standard	Provides development of guidelines for the classification of company information of all sensitivity levels.	Low	46
Project 4: Change Management Communications and Training	Provides development of Change Management, Communications and Training program elements for introducing the Information Governance Program and Data Placement Strategy to users. Also provides development of Information Governance 201 and Microsoft 365 Training Content and Training Sessions.	High	194
Project 5: Paper Reduction - Go Forward Strategy	Resolve long-standing questions regarding the creation and retention of paper when an electronic record exists. Change operational procedures to eliminate paper or prevent the creation of paper when electronic records exist.	Medium	116
Project 6: Paper Reduction-Legacy Cleanup	After reviewing for hold orders, assist in the disposition of paper that is eligible based on the retention period, or that has been made redundant as a result of imaging.	Medium	92
Project 7: Privacy Assessment	Compares WV-STO current Data Privacy policies and practices with minimum California Consumer Privacy Act requirements and identifies existing risks in those areas assessed. Develops a Gap Analysis, Remediation Plan and Strategic Roadmap. Provides an executive level presentation to review all findings and roadmap.	High	96
Project 8: Unstructured Data Placement and Email Management Strategy	Provides a comprehensive framework for defensible, compliant management and storage of unstructured data in M365 and other repositories.	Medium	146
Project 9: Microsoft 365 (M365) Knowledge Transfer and Configuration	Provides a knowledge transfer of how to use Microsoft 365 (M365) capabilities for information governance and establishes the foundation for future migration of data into M365 through configuration of information management policies or retention labels.	Medium	34
Project 10: Unstructured Data Strategy Implementation - Pilot Groups	This project is the implementation of the M365 strategy and provides "boots on the ground" production support for execution of the strategy across multiple business units.	High	111
Project 11: Structured Data Retention and Remediation Strategy	Provides analysis of Structured Data and development of a strategy for the utilization and management of structured electronic repositories.	Medium	122
Project 12: In-House Discovery and FOIA Response Program	Provides organizational and information guidance and support to those involved in litigation response and FOIA requests. The project establishes how an organization approaches litigation, its discovery posture and response capabilities, internally and externally.	Medium	88
Project 13: Data Map and Population Procedures	Provides the development of a Data Map structure and Population Procedures for primary repositories.	Medium	130

Cost Proposal

These services are being offered on a Time and Material basis¹, as follows:

Project	Price Model	Consulting Hours	Project Rate	Fees Under 2020 ² Incentive Pricing
Project 1: Information Governance Organization	Straight Time & Materials	82	\$277/hr	\$22,714
Project 2: IG Processes and Procedures	Straight Time & Materials	116	\$277/hr	\$32,132
Project 3: Data Security Classification Standard	Straight Time & Materials	46	\$277/hr	\$12,742
Project 4: Change Management Communications and Training	Straight Time & Materials	194	\$277/hr	\$53,738
Project 5: Paper Reduction - Go Forward Strategy	Straight Time & Materials	116	\$277/hr	\$32,132
Project 6: Paper Reduction-Legacy Cleanup	Straight Time & Materials	92	\$277/hr	\$25,484
Project 7: Privacy Assessment	Straight Time & Materials	96	\$277/hr	\$26,592
Project 8: Unstructured Data Placement and Email Management Strategy	Straight Time & Materials	146	\$277/hr	\$40,442
Project 9: Microsoft 365 (M365) Knowledge Transfer and Configuration	Straight Time & Materials	34	\$277/hr	\$9,418
Project 10: Unstructured Data Strategy Implementation - Pilot Groups	Straight Time & Materials	111	\$277/hr	\$30,747
Project 11: Structured Data Retention and Remediation Strategy	Straight Time & Materials	122	\$277/hr	\$33,794
Project 12: In-House Discovery and FOIA Response Program	Straight Time & Materials	88	\$277/hr	\$24,376
Project 13: Data Map and Population Procedures	Straight Time & Materials	130	\$277/hr	\$36,010
Engagement Total				\$380,321

¹ These services are offered on a "Straight Time and Material" pricing model. This is Contoural's least expensive pricing model. Under this model we develop a list of tasks for the engagement and total hours anticipated for those tasks. Usually most of the tasks are completed in the target hours, a few tasks take longer, and more take, on average, a little less time. We continuously monitor, forecast and report during the project if we are on track, running under or running over on completing all the tasks and deliverables in the time allocated. In the event that during a project we are running a little over we often make some small, mid-course corrections. Overall, our projects for time-and-material priced projects are completed within or in fewer hours than forecasted 98% of the time.

² Incentive Rate applies for services delivered within 12 months of signing. Specifically, hours purchased under a given rate may be used anytime within the next twelve months.

The fees illustrated in this document represent net fees to Contoural. Any required third-party administration fees, such as client-required payment processing fees, agency fees, vendor set-up fees, et al will be in addition to the rates quoted herein.

Attachment A: Cost Sheet

	Vendor Hourly Fee	Estimate of Hours	Total
1: Offsite Services	\$277/hour	1373	\$380,321
2: Onsite Services	\$		\$
3: Total			\$380,321

NOTES:

Due to the COVID pandemic, it is anticipated that all services associated with this engagement will be performed offsite. If COVID restrictions are lifted during the course of services delivery, Contoural will be happy to discuss potential services that would be better performed on-site.

2 - Contoural has extended to the Agency our 2020 Incentive Rate pricing for this engagement, a 2.5% savings over our 2021 Incentive Rate.