

Original

PROPOSAL BY

AVÈRO

ADVISORS

Guided Results.

Inc.
**Best
Workplaces
Honoree**
2021



RFP for OT Assessment and
Consulting Services (OT23016)

CRFP 0231 OOT2300000001

TECHNICAL PROPOSAL

Avèro Advisors Contact Person: Abhijit "AV" Verekar

Signature: Abhijit Verekar

Date: September 15, 2022

09/15/22 11:04:41
MV Purchasing Division

(865) 415-3848

info@averoadvisors.com

AveroAdvisors.com

MAIN OFFICE: 512 West Broadway Ave., Maryville, TN 37801

WEST COAST OFFICE: 1036 East Caribbean Lane, Scottsdale, AZ 85255



Cover Letter

September 15, 2022

Attn: Ms. Jessica L. Hovanec
Department of Administration, Purchasing Division
2019 Washington Street East
Charleston, WV 25305-0130
Fax: 304-558-3970

Dear Ms. Hovanec,

The West Virginia Office of Technology (WVOT) has a strong history of delivering high quality services to its residents. Recently, we've seen your organization make considerable strides in modernizing and improving the experience for citizens, and we're excited for the opportunity to present our qualifications for your consideration on this important endeavor. The OT Assessment and Consulting Services project is vital to your organization, and you need a dependable, enthusiastic, energetic, technically competent, and business savvy partner. More than anything, you need a partner and advisor that will support you through the inevitable tough times and see this project through to success. That partner is Avèro Advisors.

Avèro is on a mission to modernize the way public agencies operate internally and enable the public to make interactions with the government easier. We are committed to solving complex problems for our clients that ultimately benefit citizens and use their tax dollars most efficiently.

This proposal presents our unique approach to problem-solving and a methodology tailored to your specific needs. In addition, it includes stories from many similar relationships we have built with select clients over the last several years, which demonstrate our ability to collaborate and deliver guided results. Our team possesses expertise in delivering IT & cybersecurity assessments, ITSPs, business process analysis & redesign, infrastructure analysis, enterprise system consultation, and project management services for various government organizations. Our lasting, trust-based relationships with our clients are testimonials to our track record of providing outcome-based value to those we serve. In addition, we position our clients for success by providing strategic advisory services that help build intelligent organizations, streamline workforce operations, and achieve service excellence.

"As you know, many companies are technically strong in all things IT but not every firm can build the relationships necessary to help an organization navigate change. Avèro excelled in this aspect. Technically strong, depth of knowledge and an ability to speak in a language management can understand. They don't use only industry terms. They took us through some discovery to make sure we got the scope right. This was incredibly important to the overall project."

Greg McClain
City Manager | City of Maryville, TN



The Avèro team is completing/has completed similar scopes of work for various municipal governments across North America, such as Blount County (TN), Knox County (TN), Monroe County (NY), Pittsylvania County (VA), Union County (NC), City of Charlottesville (VA), City of Maryville (TN), City of Mequon (WI), and City of Piqua (OH), among others.

Our team contributes the following critical factors necessary for the deep-rooted success of this effort:

- We employ a diverse team structure and utilize an approach grounded in academic knowledge and practical experience.
- We have deep experience in end-to-end IT infrastructure modernization, IT strategic planning, and business process analysis & redesign.
- We emphasize our extensive knowledge base with government operations, infrastructure, and cultural dynamics.

Furthermore, Avèro is a 100% independent 3rd party consulting firm with no affiliation to software or hardware vendors - meaning we are always in your corner. Our firm is a certified Minority-owned Business Enterprise (MBE) in multiple states and is a financially stable, profitable enterprise that strives to deliver significant value to our clients nationwide.

I look forward to developing a supportive partnership with you and the WVOT. I believe we can establish a lasting, trust-based relationship that best displays our commitment to our clients in getting the job done right the first time. We will dedicate time to become familiar with your priorities and the recent strategies you have employed to help create an effective and collaborative environment with your team. Together, we can create improvements that best fit your team's needs and support the continued modernization efforts of the WVOT.

My cell phone number is 865-850-5451, and you can reach me at any time.

Sincerely,

Abhijit "AV" Verekar
Founder & CEO

Avèro Advisors

Home Office | 512 West Broadway Avenue, Maryville, TN 37801
West Coast Office | 10396 East Caribbean Lane, Scottsdale, AZ 85255
Office: 865-415-3848 | Email: av@averoadvisors.com





Table of Contents

Cover Letter	2
Company Profile	5
References	7
Key Personnel	10
Project Approach & Methodology	16



Company Profile

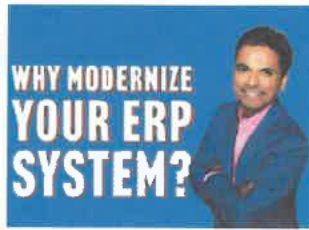
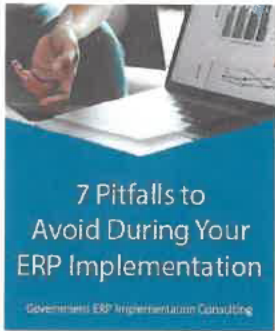
Avèro, LLC (dba Avèro Advisors) is a strategic technology advisory group that actively evaluates the individual needs of public agencies to provide technical and business services that lead to IT modernization. To do this, we incorporate methods that address urgent needs while formulating long-term strategies that achieve service excellence. Our team prides itself on being large enough to serve our valued clients yet small enough to know them well.

Founded in 2016 and headquartered in Maryville, Tennessee, Avèro Advisors started from humble beginnings to become a nationally recognized firm that enables its clients to optimize, maximize, and transform their business processes through technology.

Working with government agencies across North America, we have developed a strong presence in and beyond our local region by providing strategic advisory services that help build smart local government organizations and empower their workforces & operations. Our expertise spans across all operational aspects of national and international government & public agencies. Our main office is in Maryville, Tennessee at the address noted above, and our second office is in Scottsdale, Arizona.



With 15+ years of public sector experience, Avèro's leadership team has provided IT strategic advisory services to numerous municipal government agencies across the country and successfully delivered the right results on time and within budget, including but not limited to the following services: comprehensive IT infrastructure analysis, organizational & cybersecurity assessments, strategic planning, business process mapping & redesign, request for proposal (RFP) development, enterprise resource planning (ERP) system selection & implementation, and program/project management. Avèro currently consists of approximately 25 full-time employees.



Avèro is committed to being at the forefront of thought leadership in our industry and frequently publishes original content for our clients' benefit. We produce and publish a weekly podcast, ReThink IT

(podcast.averoadvisors.com), to discuss the general nature of technology and views on its applications for municipalities now and in the future. Our guests include City Managers, Mayors, Chief Information Officers, County Administrators, Judges, and other municipal executives and leaders.

Additionally, Avèro was recently recognized as one of America's fastest growing companies by Inc. Magazine and was recently recognized in Inc. Magazine's "Best Workplaces of 2021" for our commitment to our employees as well as our clients. Avèro was also recognized as 2019's



AMERICA'S FASTEST GROWING PRIVATE COMPANIES



"Best Small Business" by the Blount County Chamber of Commerce, and we are certified as a "Great Place To Work®" based on feedback provided by 100% of our employees. Avèro's President also serves on the National Institute of Governmental Purchasing (NIGP) panel for cybersecurity. Avèro is a certified Minority-Owned Business Enterprise (MBE) in the state of Tennessee (#103118-04). Avèro is an equal opportunity employer and does not and will not discriminate against any person, employee, or applicant for employment on account of age, race, creed, religion, color, sex, sexual orientation, disability, national origin, marital status, or political affiliation.



References

With a deep understanding of both the cloud era and traditional technology environments, along with extensive experience working with various departments that interface with IT, Avèro has helped numerous government state organizations across the United States in IT assessments, organizational change management in technology support units, and assess, select, and implement IT solutions. To demonstrate our competence, Avèro has provided 3 such reference contacts and relevant work descriptions for clients with similar projects as the OT Assessment and Consulting Services project for WVOT that Avèro has performed within the last 7 years.



BLOUNT COUNTY, TN
IT MODERNIZATION PROJECT,
BUSINESS PROCESS MAPPING AND REDESIGN,
IMPLEMENTATION SUPPORT SERVICES (TYLER MUNIS)

Contact Name:	Mr. Justin McClure, Assistant IT Director
Contact Information:	(865) 273-5730 jmccclure@blounttn.org
Date of Services:	February 2016 - Ongoing

Since 2016, Avèro has served as the Executive Project Manager on a comprehensive multi-year ITMSP initiative with Blount County, Tennessee to update its IT infrastructure and related applications, including a replacement of the existing (then) legacy ERP system, AS400. Avèro is currently managing day-to-day support services for Post Go-Live and other IT initiatives (i.e., EAM implementation in April 2020) with the County's IT Department. Avèro has remained transparent, flexible, and responsive with the County's project team throughout the implementations of the various systems into the County's environment.

Avèro worked closely with the County to identify existing risks and user needs, review them, and develop redesigned business processes & established best practices concerning but not limited to records management, payables, receivables, budgeting, and IT services. The redesigned procedures and best practices were implemented to mitigate gaps between current-state operations and future-state efficient processes for all departments throughout the County's departments. Avèro then defined a comprehensive list of system requirements, developed a complete RFP for a new ERP software, and assisted the County throughout the phases of ERP system evaluation and selection. Our project team also served as a liaison between the County and the software vendor (Tyler Technologies) to monitor and provide advisory services throughout the ERP software implementation.

In February 2019, Avèro successfully supported the County in rolling out a new ERP FMIS, Tyler Munis. Implementing this cloud-based software system with mobile functionality helps County staff generate information faster and more economically with available features, such as the automated PO Change Orders process. The new ERP software also provides real-time information and automated reporting to enhance data transparency and integrity. Furthermore, County employees are well-furnished with software support through various training sessions



and up-to-date FAQ forums before, during, and after Go-Live implementation phases, which empowers knowledge and quality of productivity for better services. As it pertains to vendor management, during the data configuration and integration project tasks, our team ensured that all capabilities that the vendor proposed were met. All configuration and integration issues were met with swift response times.



MONROE COUNTY, NY
ERP ANALYSIS SERVICES

Contact Name:	Francheska Dixon, MSIT, IS Project Manager
Contact Information:	(585) 753-1841 francheskadixon@monroecounty.gov
Date of Services:	January 2022 - Ongoing

Avèro was contracted by Monroe County, New York to provide ERP analysis services that will result in the replacement of their existing ERP system. This multi-phased engagement will include a thorough review of their existing ERP environment across Finance, Human Resources, Procurement, Enterprise Asset Management, Reporting/Analytics, Information Security, and Interface Management to ensure all the required functionality is identified. Avèro will lead the County through future-state visioning that will focus on how the County plans to use their new ERP system, based upon industry best practices. Avèro will then assist the County with the development of an RFP for the procurement and implementation of the new ERP system.



CITY OF MARYVILLE, TN
IT ASSESSMENT AND STRATEGIC PLAN,
ERP ADVISORY SERVICES

Contact Person:	Mr. Greg McClain, City Manager
Contact Information:	(865) 273-3401 gmcclain@maryville-tn.gov
Date of Services:	February 2018 - Ongoing

Avèro currently serves as the Executive Project Manager on a multi-year strategic plan for the City of Maryville, Tennessee. Our team works closely with the City's high-level management from various departments (e.g., Human Resources, Financial, Public Utilities, Public Works, Development Services, and Fleet) to provide actionable recommendations on business process and technology improvements. Avèro helps provide ongoing support services on system evaluation, selection, and implementation activities for an ERP suite of integrated solutions.

The City's outdated financial ERP and HRMS system, GEMS, lacked workflow and automation for various critical business processes, such as work order management, fleet management, plant accounting, and asset management. Furthermore, vendor support of the current version of GEMS ended in 2018, which led the City into an ambiguous direction. Avèro performed



business process analysis across many City departments, including Financial Services, Procurement, Human Resources, Development Services, Public Works, Fleet, and Public Utilities. This analysis enabled Avèro to identify current limitations and map out the future state of critical business processes. In 2020, Avèro successfully guided the City through system requirements definition, RFP development, ERP system evaluation, and selection for various enterprise solutions (Financial, Procurement, Human Resources, Fleet, and Asset Management). Avèro assisted the City through contract negotiations with the selected vendor, Tyler Technologies and CSA, and will then provide project management support for these system implementations. Throughout the entire project, Avèro delivered weekly Project Status Reports to the City to ensure effective communication through the duration of each phase of the project.



Key Personnel

For this engagement, Avèro has put together the following team of qualified professionals possessing ample quality of knowledge and demonstrated expertise within the disciplines of technology assessments and consulting. Avèro will not engage any sub-consultants on this project. Please see brief descriptions for the members of our Proposed Project Team, as well as their resumes, included below.



Abhijit Verekar | Principal/Executive Consultant is a certified *Project Management Professional (PMP)* with 15 years of experience serving the public sector as an IT advisory professional. He has extensive experience leading IT and organizational modernization initiatives with State and Local government agencies across the United States. Over the years, he has helped his clients achieve significant efficiencies through IT strategic planning, cybersecurity, business process redesign, project management, and implementation for numerous enterprise systems being sought (e.g., ERP, Work Order/Asset Management, Permitting/Land Management, and Records/Document Management).



Andrew Hayes | Senior Consultant is a certified *Project Management Professional (PMP)* with a Master's in Business Administration (MBA) and a Master's in Organizational Development (MOD). His experience includes 15 years of successfully leading change management and IT modernization projects in the public, private, and nonprofit market sectors. He employs an appreciative approach to consulting that facilitates the identification, prioritization, and resolution of critical challenges, whether People-, Process-, or Technology-driven. He creates value by establishing collaborative, cross-functional partnerships that focus on both organizational strengths and opportunities for continuous improvement.



Ross DeFalle | Consultant is a reliable research professional with a Master of Business Administration (MBA) with a Marketing focus. With a demonstrated history of working in the Information Technology and Services industry, he provides subject matter expertise on business process redesign & mapping, requirements analysis & development, project/program management, strategic planning, and management/mentorship for a variety of public sector organizations (e.g., Law Enforcement, Public Safety, Finance, HR, Utilities, and Public Works). He has provided project management and advisory services on various enterprise systems (e.g., ERP, Land Management, and Records/Document Management) for local municipalities and public sector entities, such as the City of Maryville, Blount County, Cambridge Housing Authority, and Reno Housing Authority.



Robert Kornovich | Financial Subject Matter Expert completed his Bachelor of Arts, Project Management Certificate, and Certified Public Management Certificate from Arizona State University. He possesses over 20 years of experience providing IT strategic planning and organizational development and system implementation services to public sector clients across the country. He is a subject matter expert on ERP systems and their product offerings, specifically on how they operate behind the scenes and integrate with other enterprise systems. He is also an expert in customer service improvement and alignment of people, processes, and technology to maximize organizational resources and funding.

Please see the resumes for the members of the **Proposed Project Team** after **Figure 1** below:

Figure 1- Proposed Project Team





AVEROADVISORS.COM

RFP for OT Assessment and Consulting Services (OT23016)
CRFP 0231 OOT230000001

ABHIJIT "AV" VEREKAR

Principal/Executive Consultant

865.415.3848

AV@AVEROADVISORS.COM

PROFILE

President & CEO of Avéro Advisors with over 15 years' experience building smart organizations that empower their operations and enrich the lives of those they serve. PMP & SME providing practical IT strategic planning, cybersecurity, business process redesign, and general advisory & project management services to more than 35 government and public sector clients across the United States.

EDUCATION

- **PMP** (Certification No. [REDACTED])
Project Management Institute
- **MBA, Finance**
Cleveland State University
(Cleveland, OH)
- **Master of Commerce, Accounting & Finance**
Goa University
(Goa, India)
- **Bachelor of Commerce**
Goa University
(Goa, India)

KEY SKILLS

- ERP Implementation
- Business Process Redesign
- Requirements Definition
- Business Systems Selection
- Contract Negotiation
- Project Management

SELECT CLIENTS

- Blount County, TN
- Union County, NC
- Baltimore County, MD
- Montgomery County, MD
- City of Maryville, TN
- City of Charlottesville, VA
- City of Macedonia, OH
- City of Maricopa, AZ
- Santa Clara County Housing Authority, CA
- City of Wilsonville, OR
- State of Maryland

SELECT EXPERIENCE

Blount County, TN - ERP Implementation, Project Management & Support Services

Provided project management resources for the replacement of old ERP system; included Financials and Purchasing modules. Created and implemented a multi-year IT Modernization Strategic Plan to update the County's IT infrastructure (hardware, software, processes & policies). Collaborated with various vital departments (e.g., IT, HR, Finance) to implement modernized business processes & system solutions to improve overall efficiency and service delivery.

City of Maryville, TN - Business Process Analysis, ERP Planning & Support Services

Performed a thorough assessment of "AS-IS" business processes, services, policies, technologies & skillssets and developed strategies to optimize the City's operations and service delivery. Guided City executives and departmental heads (e.g., HR, Finance, IT, Utilities) in planning and implementing an optimal ERP suite of various integrated solutions (financial, asset, permitting & fleet management) for productivity & services enhancements.

Knoxville's Community Development Corporation (KCDC), TN - IT Review & ERP Services

Analyzed the current state of IT programs, processes, systems & staffing through various analyses (e.g., business process analysis, SWOT analysis) to identify deficiencies & threats to KCDC's organizational efficiency. Developed strategic recommendations for improvement and documented a comprehensive IT Strategic Plan guiding KCDC's IT investment decisions over the next 5 years. Assist KCDC in evaluating software vendors for an optimal ERP system to replace its legacy Emphasys Elite software.

City of Charlottesville, VA - Business Process Mapping, System Advisory & Support Services

Analyzed "AS-IS" and developed "TO-BE" business process maps for various critical departments (Neighborhood Development Services, Public Works, Park & Recreation) to improve efficiency. Assisted the City in requirements definition, RFP development, and system selection & implementation for optimal ERP solutions.

Santa Clara County Housing Authority (SCCHA), CA - IT Project Management Services

Provided IT Project Management services for various concurrent Emphasys Elite-related projects and guided SCCHA in planning & implementing cost-effective & efficient solutions. Monitored as the primary liaison between SCCHA & Emphasys software vendor to ensure that all project deliverables align with the agency's vision.

Dept. of Human Resources (DHR), State of Maryland - Case Management Software Development

Led a team of software developers, system testers & business analysts to assess the current state of DHR's legacy case management system, CARES. Identified key findings and applied SDLC approach to develop & implement a custom web-based, front-end UI, xPression, for optimization in HR-related processes & services (e.g., onboarding, benefits administration).





AVEROADVISORS.COM

RFP for OT Assessment and Consulting Services (OT23016)
CRFP 0231 OOT230000001

ANDREW HAYES

Senior Consultant

330.587.8691

AHAYES@AVEROADVISORS.COM

PROFILE

Senior Project Manager of Avero Advisors with 15 years of experience leading change management and IT modernization projects in the public, private, and nonprofit market sectors. Expertise in establishing collaborative, cross-functional partnerships focused on both organizational strengths and opportunities for continuous improvement, whether People-, Process-, or Technology-driven.

EDUCATION

- **PMP** (Certification No. [REDACTED])
Project Management Institute
- **MBA, Business Administration**
Case Western Reserve University
(Cleveland, OH)
- **Master of Organizational Development**
Case Western Reserve University
(Cleveland, OH)
- **Bachelor of Science, Business Administration**
University of Akron
(Akron, OH)

KEY SKILLS

- ERP Implementation
- Business Process Redesign
- Requirements Definition
- Business Systems Selection
- Contract Negotiation
- Project Management

SELECT CLIENTS

- Maricopa Association of Governments, AZ
- Blount County, TN
- Union County, NC
- City of Maryville, TN
- City of Charlottesville, VA
- City of Macedonia, OH
- City of Maricopa, AZ
- City of Alcoa, TN
- City of Cleveland, OH
- City of Green, OH
- State of Maryland

SELECT EXPERIENCE

Maricopa Association of Governments (MAG) – ERP Implementation Services

Reviewed existing workflows and processes, functional components, related applications, integrations, and touchpoints of the existing ERP platform. Developed a series of Business Process Modeling & Notation (BPMN) for optimized future-state (“TO-BE”) workflows for business processes across MAG departments. Will subsequently provide project management services for the implementation of an ERP software system.

City of Maryville, TN – Business Process Analysis, ERP Planning & Support Services

Performed a thorough assessment of “AS-IS” business processes, services, policies, technologies & skillsets and developed strategies to optimize the City’s operations and service delivery. Guided City executives and departmental heads (e.g., HR, Finance, IT, Utilities) in planning and implementing an optimal ERP suite of various integrated solutions (financial, asset, permitting & fleet management) for productivity & services enhancements.

Blount County, TN – ERP Implementation, Project Management & Support Services

Provided project management resources for the replacement of old ERP system; included Financials and Purchasing modules. Created and implemented a multi-year IT Modernization Strategic Plan to update the County’s IT infrastructure (hardware, software, processes & policies). Collaborated with various vital departments (e.g., IT, HR, Finance) to implement modernized business processes & system solutions to improve overall efficiency and service delivery.

City of Charlottesville, VA – Business Process Mapping, System Advisory & Support Services

Analyzed “AS-IS” and developed “TO-BE” business process maps for various critical departments (Neighborhood Development Services, Public Works, Park & Recreation) to improve efficiency. Assisted the City in requirements definition, RFP development, and system selection & implementation for optimal ERP solutions.

City of Alcoa, TN – Information Technology Strategic Plan

Evaluated the current state of technology environment (e.g., infrastructure, systems, processes, resources, staffing, funding, service delivery) for multiple crucial City departments (i.e., Financial Services, HR, CIS, Manager’s Office). Identified disparities between “AS-IS” & “TO-BE” states and developed a comprehensive IT Strategic Plan to mitigate inherent gaps and guide Alcoa’s IT decisions over the next 5 years.

Union County, NC – IT Infrastructure Evaluation & Staffing Analysis

Assessed the current state of IT infrastructure & staffing for approximately 24 departments (e.g., Finance, IT, HR, Procurement), including, but not limited to, IT infrastructure analysis (software & hardware), IT staffing review, and SWOT analysis. Identified opportunities for improvement and documented a comprehensive IT Strategic Plan & Roadmap to guide the City’s decision-making in the next 5-7 years.





AVEROADVISORS.COM

RFP for OT Assessment and Consulting Services (OT23016)
CRFP 0231 OOT230000001

ROSS DEFALLE Consultant

865.415.3848

RDEFALLE@AVEROADVISORS.COM

PROFILE

Project Manager of Avero Advisors with experience in the service industry, as well as business administration and marketing research. Expertise in providing practical IT strategic planning, business process redesign, system advisory, and project management/ mentorship services for various public sector organizations.

EDUCATION

- **MBA, Marketing**
Arizona State University (Tempe, AZ)
- **Bachelor of Arts, Economics**
Lenoir-Rhyne University (Hickory, NC)

KEY SKILLS

- Strategic Planning
- Business Process Redesign
- Requirements Definition
- RFP Development
- Business Systems Evaluation
- Project Management

SELECT CLIENTS

- Pittsylvania County, VA
- Blount County, TN
- Union County, NC
- Legal Aid of Nebraska
- City of Maryville, TN
- City of Charlottesville, VA
- City of Maricopa, AZ
- City of Alcoa, TN
- Reno Housing Authority, NV
- Knoxville's Community Development Corporation, TN
- Santa Clara County Housing Authority, CA

SELECT EXPERIENCE

City of Maryville, TN - Business Process Analysis, ERP Planning and Support Services

Performed a thorough assessment of "AS-IS" business processes, services, policies, technologies, and skillsets and developed strategies to optimize the City's operations and service delivery. Guided City executives and departmental heads (e.g., HR, Finance, IT, Utilities) in planning and implementing an optimal ERP suite of various integrated solutions (financial, asset, permitting, and fleet management) for productivity and services enhancements.

Knoxville's Community Development Corporation (KCDC), TN - IT Review and ERP Services

Analyzed the current state of IT programs, processes, systems, and staffing to identify deficiencies and threats to KCDC's organizational efficiency. Developed strategic recommendations for improvement and documented a comprehensive ITSP guiding KCDC's IT investment decisions over the next 5 years. Assisted KCDC in evaluating software vendors for an optimal ERP system to replace its legacy Emphasys Elite software.

City of Charlottesville, VA - Business Process Mapping, System Advisory and Support Services

Analyzed "AS-IS" and developed "TO-BE" business process maps for various critical departments (Neighborhood Development Services, Public Works, Park and Recreation) to improve efficiency. Assisted the City in requirements definition, RFP development, and system selection and implementation for optimal permitting and asset management solutions.

Reno Housing Authority (RHA), NV - Professional Document Management Consulting Services

Assessed the current state of RHA's paper-based document management operations and identified opportunities for improvement through IT and business process modernization. Defined system requirements and assisted in RFP development, system evaluation, selection, and implementation for a future Document Management solution.

Pittsylvania County, VA - Information Technology Strategic Plan

Assessed the current state of IT infrastructure (hardware, software, network and process) for approximately 17 departments (e.g., IT, Community Development, Finance, HR, Public Safety, and Public Works) within the County. Identified and developed a comprehensive ITSP and Roadmap to guide the County's IT decision-making efforts through the next 3-5 years.

Union County, NC - IT Infrastructure Evaluation and Staffing Analysis

Assessed the current state of IT infrastructure and staffing for approximately 24 departments (e.g., Finance, IT, HR, Procurement), including but not limited to IT infrastructure analysis (software and hardware), IT staffing review, and SWOT analysis. Identified opportunities for improvement and documented a comprehensive ITSP and Roadmap to guide the City's decision-making in the next 5-7 years.





AVEROADVISORS.COM

RFP for OT Assessment and Consulting Services (OT23016)
CRFP 0231 OOT230000001

ROBERT KORNOVICH

Financial Subject Matter Expert

865.415.3848

RKORNOVICH@AVEROADVISORS.COM

PROFILE

Chief Projects Officer of Avèro Advisors with 20 years' experience providing IT strategic planning, organizational development, and system implementation services for public sector clients. Skilled SME on ERP systems and their products. An expert in customer service improvement and aligning people, processes, and technology to maximize resources and funding of organizations.

EDUCATION

- **Bachelor of Arts**
Arizona State University (Tempe, AZ)
- **Project Management Certification**
Arizona State University (Tempe, AZ)
- **Certified Public Manager**
Arizona State University (Tempe, AZ)

KEY SKILLS

- Project Management
- Strategic Planning
- Customer Service Experience Management
- Business Process Analysis
- Effective Leadership
- Building Project Roadmap and Comprehensive Vision
- Requirements Definition
- System Evaluation
- Member of:
 - ICMA (International City/County Management Association)
 - IACP (International Association of Chiefs of Police)

SELECT CLIENTS

- Pittsylvania County, VA
- Union County, NC
- Legal Aid of Nebraska
- Knoxville's Community Development Corporation, TN
- Santa Clara County Housing Authority, CA
- City of Lethbridge, Canada
- Reno Housing Authority, NV

SELECT EXPERIENCE

Town of Paradise Valley, AZ - *Technology Operations Management*

Evaluated systems and workflows, incorporated relevant technology advancements, and addressed organizational technology needs and process improvements. Developed Business Intelligence and ERP platforms to serve organizational needs and facilitate timely, informed decisions that provide maximum ROI for technology platforms. Managed an approximately \$3.5 million public safety technology upgrade that brought the Town to the leading edge of national law enforcement standards while developing and implementing unique solutions that were otherwise unavailable to the industry at the time. Identified, planned, implemented, and managed long-term technology goals and the Town's strategic vision.

Santa Clara County Housing Authority (SCCHA), CA - *IT Project Management Services*

Oversaw various concurrent Emphasys Elite-related projects and provided management, evaluation, and improvement for SCCHA's mission-critical voucher and housing administration platform. Led the infrastructure overhaul to address current and future business continuity goals, including providing flexible and resilient hosting platforms for growing technology needs. Developed optimized business processes and staff collaboration and change management strategies to maximize ROI for SCCHA's technology services. Guided SCCHA in planning and implementing cost-effective and efficient solutions. Served as the primary liaison between SCCHA's Emphasys software vendor to ensure that all project deliverables aligned with its vision.

Pittsylvania County, VA - *Information Technology Strategic Plan*

Gathered technical data from interactive sessions with Pittsylvania County's IT Department and analyzed the current IT environment (hardware, software, systems, server, network security). Developed IT strategic recommendations to mitigate existing (and potential) gaps and support the County's business needs in its IT efforts to provide a better quality of service to its citizens in the next 3-5 years.

Union County, VA - *IT Infrastructure Evaluation and Staffing Analysis*

Gathered technical data from interactive sessions with Union County's IT Department and analyzed the existing technology environment (hardware, software, systems). Developed IT strategic recommendations to mitigate existing gaps and support the County's business needs in its IT efforts to provide a better quality of service to its citizens.

City of Lethbridge, Alberta, Canada - *Records Management System Needs Assessment*

Conducted interactive sessions with the City's Fire and Emergency Services teams and performed a thorough gap analysis on the existing FDM RMS. Identified system needs and developed a comprehensive list of requirements for the future procurement and implementation of an RMS.





Project Approach & Methodology

Avèro Advisors realizes the significance of WVOT's role in providing reliable, and cost-effective technology services to 25,000 computers and 23,000 network users, all under the leadership of the Chief Information Officer (CIO). With approximately 200 full-time and temporary employees, the WVOT aims to accomplish the invaluable strategic goals of Digital Government, Technology Optimization & Value, Enterprise Services, and Cybersecurity. As the Office that supplies technology services to over 150 various departments, divisions, commissions, authorities, offices, etc. for the State of West Virginia, the WVOT has an integral role in the success of State staff, citizens, and businesses.

Avèro has done assessments, consulting, and strategic planning for government agencies nationwide that are choosing to use our recommendations to guide their IT decision-making for years to come. Our unparalleled dedication to clients is one of the many attributes that separates our firm from others - we are committed to making **our clients'** priorities **our** priorities. Dedication, pursuit of excellence, and transparency are values we live by, which is why we are confident we are the right firm to join the WVOT on its journey to modernize its existing services and create new strategic technology governance and management capabilities & services.

We understand that the WVOT seeks a qualified & experienced consultant to not only assess the current state of the WVOT but also to consult with the WVOT's leadership to continue and improve the modernization efforts of the Office. Our aim is to build and mature WVOT's capabilities to provide strategic technology management services and provide visibility of the Executive Branch's technology investment portfolio while empowering data-driven & standards-based decisions about future technology investments & strategic goals. Avèro will use a three-dimensional approach, **People, Process, and Technology (PPT)**, to develop a high-level understanding of the Office's current IT environment. This approach will enable our team to recognize how existing technology & staff resources support business activities, identify critical processes that are executed using available technology platforms, and understand how current processes inform decisions, which will enable the Office's overall operational efficiency and effectiveness. Our PPT approach encompasses the areas shown below:

People	Process	Technology
Organizational Structure	Governance	Infrastructure
Staffing & Competencies	Enterprise Architecture	Applications
Leadership	Business Process Analysis	Network & Security
Communication	Strategy & Management	Disaster Recovery
Sourcing	Program/Project Management	Data & Information

Avèro makes every commitment to maintaining a superior service level for every project with the clients we serve and champion for. Our firm strives to remain an independent 3rd party consulting firm with no affiliations to software or hardware vendors whatsoever, which ensures that our strategic recommendations will be objectively tailored exclusively to the specific desires of the WVOT. Furthermore, Avèro strives to maintain constant communication with clients by employing multiple methods to ensure that there are no surprises at any point during the



project. An overview of Avèro's **Proposed Project Methodology** for the OT Assessment and Consulting Services project is shown in **Figure 2** below:

Figure 2 - Proposed Project Methodology



In response to CDC guidelines related to COVID-19, all project tasks within our proposed methodology may be performed remotely or onsite. We welcome feedback from the WVOT to ensure compliance with the project's requirements and the Office's business needs. Avèro remains flexible and committed to providing practical solutions that align with the WVOT's goals in a timely and cost-effective manner.

Phase 1

1. CONDUCT PROJECT PLANNING & KICK-OFF

- Avèro will facilitate a kick-off meeting with the WVOT's project sponsors, including the CIO and other key stakeholders, to assimilate project goals and formalize expectations. During the meeting, we will accomplish the following tasks:
- Introduce our Project Team and identify the roles of each consultant on this engagement
- Present a detailed Project Plan, including project tasks, goals, timeframes, deliverables, and milestones
- Identify the list of relevant WVOT participants and determine the desired collaboration between stakeholders within the various parts of the WVOT
- Collaborate with the WVOT's project sponsors to identify roles & responsibilities for reviewing and validating project deliverables
- Answer any questions and incorporate feedback from attendees



Finalize the Project Plan with feedback and approval of the WVOT

✓ Deliverable 1: Project Plan

Figure 3 is a sample Project Work Plan utilized by Avèro on an IT Infrastructure Evaluation & Staffing Analysis project that took place in early 2020.

Figure 3 – Project Work Plan

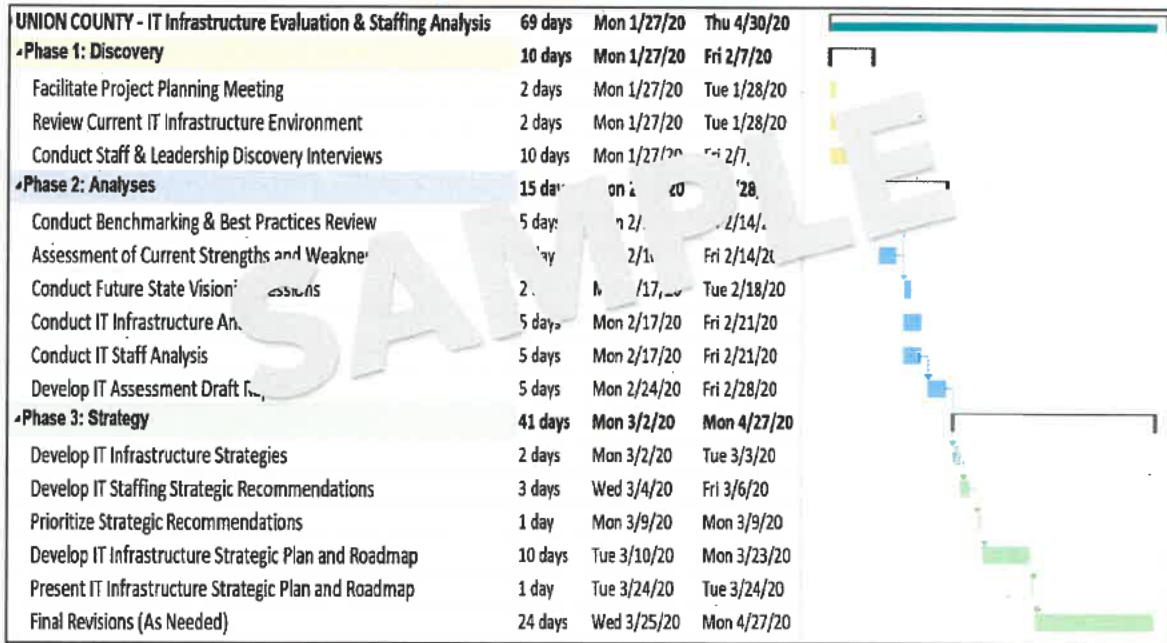


Figure 4 is a sample Project Status Report utilized by Avèro on an ITSP project that took place from August 2020 - October 2020. The report summarizes what activities were completed during the previous reporting period, the development of any deliverables during that reporting period, activities scheduled for the upcoming reporting period, and any planned deliverables for the upcoming reporting period. A similar format will be utilized for effective communications during the project for the Knoxville Police Department.



Figure 4 – Project Status Report

PROJECT STATUS REPORT	
Current Reporting Period	Upcoming Reporting Period
August 17 – August 21	August 24 – August 28
Project Activities Completed	Planned Project Activities
<p>During the current reporting period, Avèro Advisors conducted current state discovery sessions with departmental directors and key personnel from the following County departments:</p> <ul style="list-style-type: none"> • Accounts Payable • Information Technology • Payroll • Purchasing • County Executive Assistant • Community Development • Commissioner of the Revenue • Treasurer's Office • Economic Development • Building Grounds • Land • Sheriff <p>Along with these tasks, Avèro also developed the Current State Assessment Report and high-level Strategic Roadmap to mitigate existing gaps within the County technology environment. Avèro also ran a report in PDQ Inventory to identify all County applications and devices on the network. By the end of this reporting period, Avèro reviewed current findings and updated project status with the County Administrator, Project Manager, and members of the Executive Team (8/20).</p>	<p>During the upcoming reporting period, Avèro Advisors will complete the current state discovery sessions with the remaining County departmental stakeholders (e.g., Staff, DSS). Avèro's technical team will review PDQ Inventory reports for both applications and devices on the network. With the assistance of our technical team, Avèro will finalize development of the Current State Assessment Draft Report. Avèro also continues development of the high-level IT Strategic Roadmap draft that will guide the County's IT efforts in the next three (3) to five (5) years. Additionally, Avèro is in the process of developing the level of effort, including both labor and cost, for the implementation of IT Modernization Strategies already identified and presented to the Executive Team. Summaries of such strategies will appear in their entirety in the forthcoming deliverable, the IT Strategic Plan Draft Report.</p>
Deliverables Developed	Planned Deliverables
<ul style="list-style-type: none"> • D2 – Current State Assessment (DRAFT) – IN-PROCESS • D3 – IT Strategic Roadmap (DRAFT) – IN-PROCESS 	<ul style="list-style-type: none"> • D2 – Current State Assessment Draft Report (COMPLETE) • D3 – IT Strategic Roadmap Draft (IN-PROCESS) • D4 – IT Strategic Plan Draft Report

2. HOLD EXECUTIVE VISIONING SESSION

Avèro will organize a meeting with the CIO and other critical stakeholders to discuss their ideas for internal efficiencies driven by technology and enhanced service delivery to West Virginia staff and residents. During this session, we will apply our knowledge of industry best practices, as well as our in-house knowledge base, to guide the discussion towards identifying and documenting a high-level vision that will inform the WVOT's long-term IT strategy. This project activity will serve as the project's foundation.

3. REVIEW EXISTING WVOT ENVIRONMENT

Avèro will review the current environment within the WVOT, including available documentation, processes & procedures, business requirements, related software applications, integrations, and touchpoints. Our team will also analyze current-state data sources, such as systems, applications, outside spreadsheets, and information transferred in paper format within the IT environment. This activity will enable our Project Team to define a Business Process Inventory for subsequent project activities.

Included in Avèro's review of the WVOT environment, our team will develop a Preliminary IT Report highlighting (at least) the following: key financial summary outlining estimated technology spend (both holistically and by department), financial estimates of technology debt, and an inventory of approved & under consideration technology investments for the FY23 budget cycle and the FY24 budget cycle. Avèro will present the Preliminary IT Financial Report to key project stakeholders, including the CIO, and once approved, it will be signed off on by the CIO and any other required leaders of the WVOT.



Deliverable 2: Preliminary IT Financial Report

Also included in Avèro's review of the WVOT environment, our team will develop a Service Rates Catalog, with an assessment of and revisions to the Service Rates Catalog, with the aim of aligning the Catalog toward a Technology Business Management (TBM) cost-recovery model. Our assessment will include a rationalization and analysis of all existing and proposed service rates. Avèro will present the Service Rates Catalog to key project stakeholders, including the CIO, and once approved, it will be signed off on by the CIO and any other required leaders of the WVOT.



Deliverable 3: Service Rates Catalog

Additionally, included in Avèro's review of the WVOT environment will be an ITIPS Analysis. Our Project Team will complete data collection & validation, inventory, and the risk & financial analysis of the top 100 business applications through the existing State's I-TIPS. Analysis and reporting will, at a minimum, include contractual and service breakdowns, applications by category, key technical information, and business criticality. Avèro will present the I-TIPS Analysis to key project stakeholders, including the CIO, and once approved, it will be signed off on by the CIO and any other required leaders of the WVOT.



Deliverable 4: I-TIPS Analysis

Figure 5 is a sample **Business Process Inventory** specifically used by Avèro for Knoxville's Community Development Corporation, Tennessee for the IT Review and ERP Services Project. The inventory prioritizes various departmental processes of the Corporation and notes the process owner and status of each relevant process.



Figure 5 – Business Process Inventory

Priority	Department	Process	Process Owner	Status	Notes
1	Accounting	AP - Adding a Vendor	Jim	Validated	
	Accounting	AP - Invoicing - Approval	Jim	Validated	
	Accounting	AP - Invoicing - Payment	Jim	Validated	
	Accounting	AP - Pay Request Approval	Jim	Validated	
	Accounting	AP - Bill Backs for Tax Credits	Jim	Validated	
	Accounting	AP - KUB Auto Draft - Charges	Jim	Validated	
	Accounting	AP - KUB Auto Draft - Recording Payment	Jim	Validated	
	Accounting	AR - Check or Money Order Payments - RDC	Jim	Validated	
	Accounting	AR - Check or Money Order Payments - Site	Jim	Validated	
	Accounting	AR - NSF - Bank	Jim	Validated	
	Accounting	AR - Utility Reimbursement Payments	Jim	Validated	
	Accounting	AR - TAR (Tenant Accounts Receivable) - PBRA	Jim	Validated	
	Accounting	AR - Debt Collection	Jim	Validated	
	Accounting	General Ledger (GL) - Manual Journal Entry	Jim	Validated	
	Accounting	General Ledger (GL) - Manual Journal Entry	Jim	Validated	
2	Housing Ops	Blended Recertification (50059)	Kara	Validated	
	Housing Ops	Blended Recertification	Kara	Validated	
	Housing Ops	Inspections (Reservations)	Kara	In-Process	
	Housing Ops	UPCS/Inspect	Kara	Validated	
	Housing Ops	Res. Allocation	Kara	Validated	
	Housing Ops	G. Utility Allowance	Kara	Validated	
	Housing Ops	Gross Rents (without Utility Allowance)	Kara	Validated	
	Housing Ops	Tenant Termination of Assistance (50099)	Kara	Validated	
	Housing Ops	Termination of Tenancy	Kara	Validated	
	Housing Ops	Tax Credit/Blended Recertification	Kara	Validated	
3	Regulatory & Compliance	Admissions - Waitlist & Application	Kara	Validated	
	Regulatory & Compliance	Reasonable Accommodations in Housing Process	Kara	Validated	
	Regulatory & Compliance	Reasonable Accommodations in Transfer Request	Kara	Validated	
	Regulatory & Compliance	Reasonable Accommodations in Appeal Process	Kara	Validated	
	Regulatory & Compliance	TRACS Submissions & Management	Kara	Validated	
	Regulatory & Compliance	TRACS Certifications - Level 1 Error	Kara	Validated	
	Regulatory & Compliance	TRACS Certifications - Level 2 Error	Kara	Validated	
	Regulatory & Compliance	TRACS Certifications - Level 3 Error	Kara	Validated	
	Regulatory & Compliance	TRACS Certifications - Level 4 Error	Kara	Validated	
	Regulatory & Compliance	Eviction through Court & Set Out	Kara	Validated	
Regulatory & Compliance	Non-Grivable Eviction	Kara	Validated		

4. CONDUCT CURRENT-STATE DISCOVERY SESSIONS

Avèro will focus on assessing the following capabilities, which currently are at a low-to-non-existent level, according to the WVOT:

- Technology Investment Management
- Enterprise IT Spend
- Technology Spend Analysis
- Project Assurance
- Information Technology & Investment Portfolio System (I-TIPS)

Avèro will conduct Current-State Discovery Sessions to develop our analysis of the WVOT's existing environment. These sessions can be done remotely or onsite and will last 30 minutes to 1 hour. They will be conducted in individual and group settings with identified stakeholders across the WVOT in order to gain a full understanding of the current-state environment within the WVOT. Avèro will gather crucial stakeholder feedback on the WVOT's staff's daily functions, challenges faced, current acknowledged threats or vulnerabilities related to technology, and any improvements they believe would enhance productivity through the modernization of IT operations. These interactive sessions will allow us to identify current hardware and software in place, document the concerns of key WVOT stakeholders, and gather data to analyze the current state of the IT & organizational structure, staffing levels, staff IT skills, and use of contracted services. Besides having Current-State Discovery Sessions, our team will also run a diagnostic tool (PDQ) with support from WVOT staff to collect specific data on the WVOT's hardware, software, and network for in-depth analysis. This activity will help identify gaps, improvements, efficiencies, optimized processes, refined IT organizational structure & online collaboration tools, enhanced security resiliency, and streamlined operations for the future state.



5. CONDUCT CYBERSECURITY RISK ASSESSMENT

Avèro will conduct a high-level Cybersecurity Risk Assessment on the WVOT's existing technology and infrastructure. Our team will identify enterprise risks, prioritize them, and highlight opportunities to mitigate known & unknown risks going forward proactively. Avèro will take the WVOT through a 22-point National Institute of Standards and Technology (NIST)-based security assessment that will identify security deficiencies throughout the organization that could allow a breach of sensitive and confidential data. We will perform a thorough review of security policies, procedures, system architecture, network architecture, physical access, and various security systems. We will also utilize industry-leading network and infrastructure diagnostic tools, such as PDQ Deploy and PDQ Inventory, to obtain critical information about the WVOT's infrastructure. The 22-point NIST-based assessment will include the following risk areas at a minimum:

- | | |
|---|---|
| ▪ Incident Response Plan | ▪ DLP for Personally Identifiable Information |
| ▪ Disaster Recovery Plan | ▪ Utilize All Owned Security Features |
| ▪ Business Continuity Plan | ▪ Verification Methods Used & Documented |
| ▪ Documented Policies & Procedures | ▪ Controlled Use of Custom Programming |
| ▪ Cybersecurity Education | ▪ Level Set Expectations for Sensitive Data |
| ▪ Data Protection | ▪ ITIL Foundations |
| ▪ Policies Governing Employee Data Access | ▪ Physical Security |
| ▪ Vulnerability Scanning | ▪ Cybersecurity Officer of Designee |
| ▪ Active Network Monitoring | ▪ Segmented & Secured Wi-Fi |
| ▪ Multi-Factor Authentication | ▪ SaaS Vendor Requirements |
| ▪ Automate Threat Detection & Response | |
| ▪ Encryption | |

6. PERFORM CURRENT-STATE BUSINESS PROCESS ANALYSIS

Avèro will develop Business Process Modeling & Notation (BPMN) diagrams detailing a roadmap of existing business processes gathered during the Current-State Discovery Sessions and key findings from previous project-based analyses. Avèro will assess end-to-end processes to identify strengths & weaknesses in the current business process standards. This current-state process mapping activity will help uncover hidden flaws of the existing technology and outline a roadmap of what the WVOT envisions to enhance its operational efficiency and mitigate existing limitations with the future of its technology. In this step, Avèro will:

- Map daily activities to business processes across the WVOT's business systems
- Diagram and document workflows
- Identify inefficiencies, such as bottlenecks or duplications
- Identify missing key business activities and essential controls
- Determine undefined or poorly defined process ownership responsibilities
- Identify insufficient or ineffective performance indicators
- Identify structural inefficiencies
- Define inefficient access to data and determine the condition of existing data



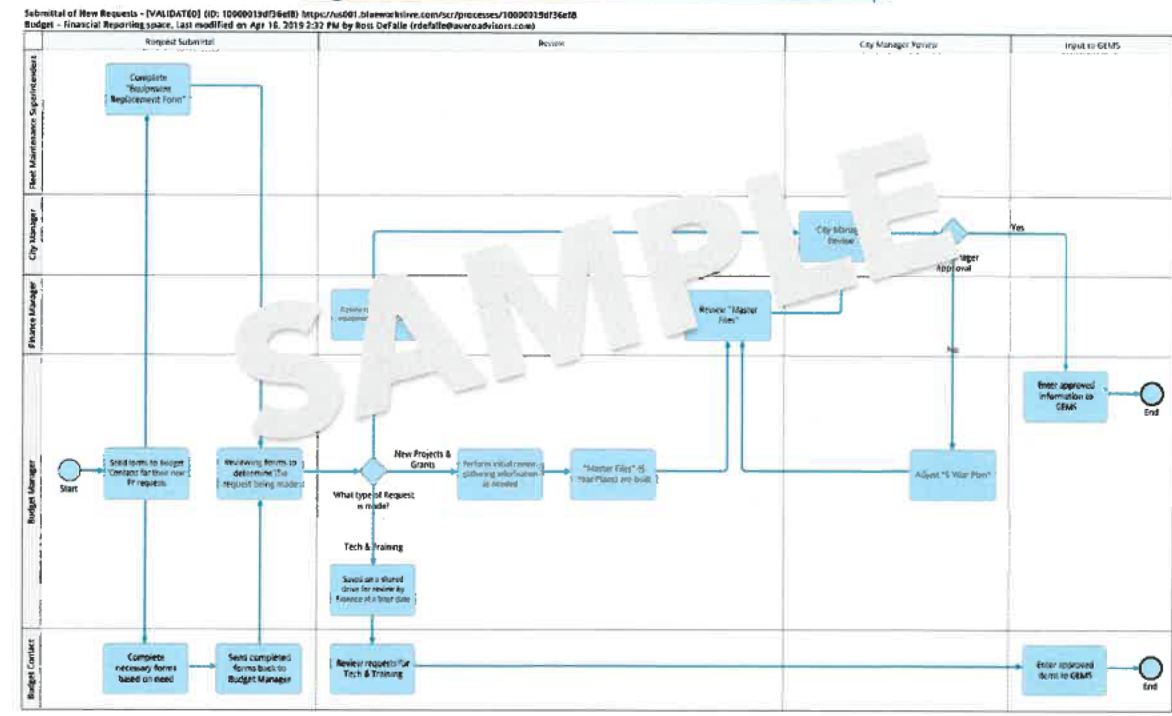
- Determine IT spending and how it impacts (or does not impact) the WVOT

Avèro will validate the current-state workflow diagrams with the Department’s CIO and other critical stakeholders before moving forward.

Figure 6 is a sample **Current-State Business Process Map**, which was developed using the BPMN 2.0 format by Avèro on behalf of the City of Maryville, Tennessee for the ERP project. Discovery sessions were conducted during the current state to capture and analyze the existing operating environment across various functional areas. Business process analysis was conducted on all key business processes across the following functions:

- **Financial Management** (General Government) - Accounts Payable, Accounts Receivable, Budget, Cash Receipts, Fixed Assets, General Ledger, Human Resources, Payroll, Procurement
- **Land Management** - Code Enforcement/Inspections, Planning and Zoning, Permitting
- **Asset Management** (Public Utilities) - Fixed Assets, Work Order, Inventory
- **Fleet** - Work Order, Inventory, Preventative Maintenance

Figure 6 – Current-State Business Process Map



7. CONDUCT FUTURE-STATE VISIONING SESSIONS

Avèro will focus on envisioning the following support activities because organizational change management is a critical component of the project, given the relationship between the business functions and IT. The WVOT desires us to provide the following relationship management and communications support capabilities to drive organizational change at both the executive & operational levels and advise the WVOT on how to sustain these changes:



Executive Leadership Support
Operational Leadership Support & Development
Workshops

- Avèro will conduct Future-State Visioning Sessions to develop our analysis of the WVOT's desired environment. These sessions can be done remotely or onsite and will last 30 minutes to 1 hour. They will be conducted in individual and group settings with identified stakeholders across the WVOT in order to gain a full understanding of the ideal technology environment within the WVOT. These interactive sessions will allow us to document critical ideas and "wish list" improvements that key WVOT stakeholders have regarding the optimization of their environment. Feedback gleaned from these sessions will be incorporated and utilized by Avèro to develop modernization strategies during subsequent project activities.

8. PERFORM FUTURE-STATE BUSINESS PROCESS ANALYSIS

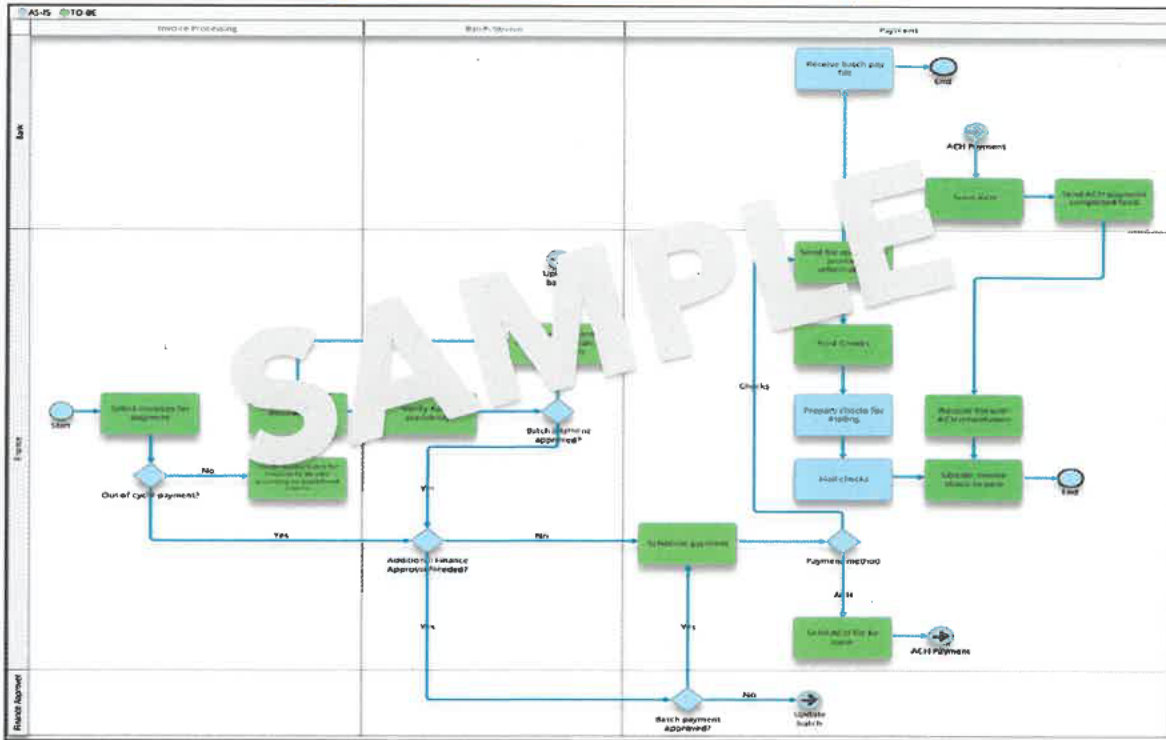
Avèro will develop optimized future-state workflow diagrams in BPMN format for business processes across the WVOT that will reflect the "wish list" improvements gathered during the Future-State Visioning Sessions and key findings from previous project-based analyses. Our team will also focus on eliminating bottlenecks, duplicated efforts, manual activities, in-house workarounds, and potential legal and compliance risks within the IT environment. We will apply our technical knowledge and skills to ensure that the optimized business processes harness the functional capacity of workflow automation offered by modern technology. Furthermore, Avèro will map crucial integration points spanning processes and departments to accurately depict data integration between systems. Avèro will validate the future-state workflow diagrams with the WVOT's CIO and other critical stakeholders before moving forward.

Figure 7 is a sample **Future-State Business Process Map**, which was developed using the BPMN 2.0 format by Avèro on behalf of the City of Maryville, Tennessee for the ERP project. Orange boxes indicate tasks the system will automate, green boxes indicate tasks staff members will conduct within the system, and blue boxes indicate tasks done outside of the system. Avèro then facilitated visioning sessions with City stakeholders to capture their vision for the future, based upon a working knowledge of industry best practices and the functional capacity of IT modernization offered by a suite of integrated solutions within the ERP software system. Avèro then developed optimized future-state workflows, across those same functional areas, related to the scope of the ERP project, which included replacement of the following:

- **Financial Management** (General Government) – Accounts Payable, Accounts Receivable, Budget, Cash Receipts, Fixed Assets, General Ledger, Human Resources, Payroll, Procurement
- **Land Management** – Code Enforcement/Inspections, Planning and Zoning, Permitting
- **Asset Management** (Public Utilities) – Fixed Assets, Work Order, Inventory
- **Fleet** – Work Order, Inventory, Preventative Maintenance



Figure 7 - Future-State Business Process Map



9. DEVELOP MODERNIZATION STRATEGIES

Avèro will develop Modernization Strategies based on our years of experience with clients similar to the WVOT, as well as industry best practices, to strategically resolve the gaps previously identified. Avèro will conduct an interactive review session with the WVOT's project sponsors to finalize the prioritization of the proposed strategies based on the WVOT's priorities, business needs, and goals. Avèro will also collaborate with them to rank the Modernization Strategies based on the anticipated degree of impact, associated cost, and implementation timeline. Avèro will ensure that the proposed strategies are specific, measurable, actionable, realistic, and timely (SMART). Each strategy will be discussed and validated by the WVOT's project sponsors to ensure strategic and cultural alignment. The strategies will target the following areas within the WVOT's environment:

- Hardware, software, and network capabilities
- Security protocols and systems, plus threat prevention & mitigation actions for security resiliency
- Current & future IT projects
- Inventory management
- Disaster Recovery Plan
- Technologies, staffing, resources, funding, training, and service delivery model
- Vendor contracts, including service level agreements, software licenses, and software agreements
- Automated & manual systems



- Existing & available outsourcing opportunities
- Technology spending capabilities & financial management
- Approaches to incorporate current & emerging technology requirements, best practices, trends, and necessary upgrades

10. DEVELOP STRATEGIC TECHNOLOGY ROADMAP

Avèro will move forward with the finalization of the Modernization Strategies once the WVOT's key stakeholders, including the CIO, have confirmed them. The WVOT's confirmation will let us proceed with the development of a Strategic Technology Roadmap, which will lay out the priority level of each Modernization Strategy and the planned amount of time to implement each strategy.



The Strategic Technology Roadmap will include prioritized strategies in the form of a Gantt chart, as shown in [Figure 8](#) below.

Figure 8¹ - Legend



The following sample is a Technology Roadmap of an IT Modernization Program, which Avèro developed for Union County, North Carolina.



Figure 8² - Technology Roadmap

Union County - IT Strategic Roadmap (2020 - 2024)		2020		2021		2022		2023		2024	
		Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Urgent (1 - 3 months)											
1	Establish & Deploy Remote Workforce Protocols										
2	Upgrade Windows 7 Desktops to Windows 10										
3	Upgrade 2008 Servers to 2016										
4	Introduce Adware/Malware Removal Tools										
Immediate (3 - 12 months)											
5	Create Backup Schedule										
6	Test Ability to Restore Enterprise Software Systems										
7	Restructure IT Department										
8	Conduct Enterprise Software System Audits										
8.1	Human Resource Information System (NEOSOV)										
8.2	Transportation Scheduling System (Route-Match)										
8.3	Community Development/Electronic Review (I										
8.4	Financial Management System (Tyl										
8.5	Case/Content Management System (with Com										
9	Complete Open3c										
10	Evaluate IT Asset Management Site Sweeps										
11	Evaluate IT HelpDesk (Interlaw)										
12	Evaluate IT Management/Boarding Tool										
13	Continue the expansion of Laserfiche & DocuSign										
Short-Term (1 - 2 years)											
14	Conduct Cyber Security Risk Audit										
15	Rollout Security Awareness Tool										
16	Document all IT Operational Processes										
17	Develop IT Policies and Procedures										
18	Introduce IT Governance (Planning, Procurement, Project Management)										
19	Implement Cloud-Based Office 365 Suite										
20	Implement Single Sign-On Tool (SSO)										
21	Conduct Countywide Training on Key Enterprise Software Systems										
22	Conduct IT planning for new 911 Center & UCSD Jail										
23	Optimize the Union County Website										
Long-Term (2 - 5 years)											
24	Introduce a Countywide Collaboration/Communication Tool										
25	Introduce Self-Service Processes and Tools										
26	Implement Hosted-VOIP Phone System										
27	Conduct Fiber-Optic Network Planning										
28	Migrate Key Enterprise Software Systems to the Cloud										

11. DEVELOP ANNUAL IT REPORT

Avèro will develop an Annual IT Report based on the prioritized strategies in the Strategic Technology Roadmap. The Report will guide the WVOT as it plans, procures, implements, and manages current and future investments and resources over the next 5 years. The proposed recommendations will strategically identify opportunities to improve service offerings, build operational efficiencies through integrated enterprise technology, enhance cybersecurity, optimize workflows, reduce costs, and improve technology to align with the WVOT’s objectives. Avèro will subsequently finalize and deliver the Annual IT Report to the WVOT.

Avèro will incorporate any feedback provided by the WVOT’s project sponsors to develop an implementation plan for each validated strategy within the Annual IT Report. The Report will function as the cornerstone of the WVOT’s efforts to improve the balance between demand for new technology and available resources, including structure, staffing, capital, and operating funds, as well as addressing questions of governance, security, leveraging cloud technologies, cybersecurity, business continuity planning, and service offerings. We will conduct a final review session with the WVOT’s project sponsors, including the CIO and other critical stakeholders, to validate the proposed Annual IT Report. As the WVOT deems necessary, we will modify the



Report before officially presenting it with an executive summary. Avèro will subsequently hold a formal presentation detailing the findings in the report to the WVOT.

 **Deliverable 6: Annual Information Technology (IT) Report**

Figure 9 is an ITSP, including action steps, resources, timelines, and anticipated costs for each recommendation's successful implementation. The sample below describes each line item included in the sample ITSP. Please note that any prices provided are general estimates and should be clarified as the procurement process continues.

Figure 9 – ITSP

Recommendation	Replace SAMPLE SYSTEM with a New Financial ERP System
Gaps Addressed	<ul style="list-style-type: none"> SAMPLE, the City's financial ERP system, has not been updated since 1995. The City's options are to convert to SAMPI F's "NextGen" system, stick with the current version of SAMPI F, or procure another solution.
Action Steps	<ul style="list-style-type: none"> Assign Project Sponsor and Project Manager Develop an inventory of current processes impacted by the ERP system Perform workflow analysis to determine functional requirements Develop Requirement Traceability Matrix for requirement definition Conduct market for available ERP systems Procure and Implement the selected ERP system Follow the vendor's implementation plan Configure appropriate workflows for Financial Management Facilitate end-user training ("Train the Trainer") Go-Live and Post Go-Live Support
Resources	<ul style="list-style-type: none"> IT Staff External Consultant Department-level Project Champions IT Steering Committee
Stakeholders	<ul style="list-style-type: none"> IT Staff All-City staff (especially Finance/HR/Public Works Utilities)
Prerequisites	<ul style="list-style-type: none"> None
Estimated Cost	<ul style="list-style-type: none"> \$XXX - \$XXX plus annual maintenance fees (~\$X,XXX)
Impact/Comments	<ul style="list-style-type: none"> Enterprise Resource Planning (ERP) system will be used as a single repository for all information regarding business operations. The ERP system will provide seamless access to data to relevant users in real-time. The new ERP system will automate standard business processes such as accounts receivable, accounts payable, budgeting, etc., to improve efficiency and will integrate with other enterprise systems across departments (HR, Payroll, Inventory, Asset Management, etc.)



Optional Phase 2

1. PROVIDE IT GOVERNANCE IMPLEMENTATION

Based on the final agreed Strategic Technology Roadmap, Avèro will provide proposed new and updated policies and & aligned to the IT Governance. Avèro will submit the policies & procedures to the identified key stakeholders, gather feedback from them, and make changes before presenting the finalized policies & procedures. These will be signed off on by the CIO and any other required leaders of the WVOT.



Deliverable 1: IT Governance Implementation

2. PROVIDE I-TIPS

Avèro will then provide a complete Total Cost Of Ownership (TCO) and rationalization analysis of, at minimum, the IT business applications inventoried during Phase 1 of the project. Analysis and reporting must, at minimum, include financial breakdowns in alignment with TBM and comprehensive reports with rationalization findings. Avèro will present the I-TIPS to key project stakeholders, including the CIO, and once approved, it will be signed off on by the CIO and any other required leaders of the WVOT.



Deliverable 2: I-TIPS

3. PROVIDE STATE TECHNOLOGY STRATEGIC PLAN

Finally, Avèro will provide a complete State Technology Strategic Plan, which will be similar to the Strategic Technology Roadmap and Annual IT Report that it provided in Phase 1. The Plan will be a very thorough, comprehensive document with aligned, department-level strategic roadmaps identifying business outcomes and intended benefits. Avèro will submit the Plan to the identified key stakeholders, gather feedback from them, and make changes before presenting the finalized Plan. The final State Technology Strategic Plan will be signed off on by all required leaders of the State of West Virginia.

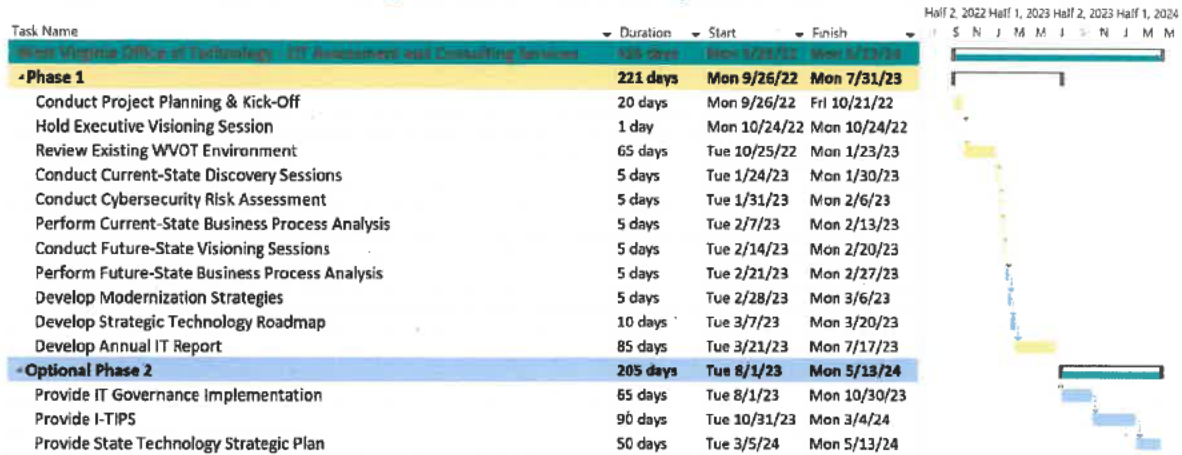


Deliverable 3: State Technology Strategic Plan



Based on our experience providing advisory services to other government and public sector clients with projects like the OT Assessment and Consulting Services project for the WVOT, Avèro Advisors estimates a timeline of approximately 12 months from notice to proceed for Phase 1. An additional 12 months is the estimated timeline required for the completion of Optional Phase 2. The **Estimated Project Timeline** for this engagement, as shown below in **Figure 10**, illustrates the phased timeline with specific phases for all project activities.

Figure 10 – Estimated Project Timeline



Avèro understands the proposed schedule and level of effort may change based on the WVOT's availability and further discussions with the project sponsors. Avèro will work with the WVOT to accommodate any suggestions related to the modification of the project schedule.



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

State of West Virginia
 Centralized Request for Proposals
 Consulting

Proc Folder: 1089655			Reason for Modification:
Doc Description: RFP for OT Assessment and Consulting Services (OT23016)			
Proc Type: Central Master Agreement			
Date Issued	Solicitation Closes	Solicitation No	Version
2022-08-22	2022-09-15 13:30	CRFP 0231 OOT230000001	1

BID RECEIVING LOCATION

BID CLERK
 DEPARTMENT OF ADMINISTRATION
 PURCHASING DIVISION
 2019 WASHINGTON ST E
 CHARLESTON WV 25305
 US

VENDOR

Vendor Customer Code: N/A
Vendor Name: Avero Advisors
Address: ↴
Street: 512 W. Broadway Ave.
City: Maryville
State: TN **Country:** USA **Zip:** 37801
Principal Contact: Abhijit Venekar
Vendor Contact Phone: 865-415-3848 **Extension:** N/A

FOR INFORMATION CONTACT THE BUYER
 Jessica L Hovanec
 304-558-2314
 jessica.l.hovanec@wv.gov

Vendor Signature X *Abhijit Venekar* **FEIN#** 81-3959556 **DATE** 9/15/22

All offers subject to all terms and conditions contained in this solicitation



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

State of West Virginia
 Centralized Request for Proposals
 Consulting

Proc Folder: 1089655			Reason for Modification:
Doc Description: RFP for OT Assessment and Consulting Services (OT23016)			
Proc Type: Central Master Agreement			
Date Issued	Solicitation Closes	Solicitation No	Version
2022-08-22	2022-09-15 13:30	CRFP 0231 OOT230000001	1

BID RECEIVING LOCATION

BID CLERK
 DEPARTMENT OF ADMINISTRATION
 PURCHASING DIVISION
 2019 WASHINGTON ST E
 CHARLESTON WV 25305
 US

VENDOR

Vendor Customer Code: N/A
Vendor Name: Avero Advisors
Address: 512 W. Broadway Ave.
Street:
City: Maryville
State: TN **Country:** USA **Zip:** 37801
Principal Contact: Abhijit Venekar
Vendor Contact Phone: 865-415-3848 **Extension:** N/A

FOR INFORMATION CONTACT THE BUYER
 Jessica L Hovanec
 304-558-2314
 jessica.l.hovanec@wv.gov

Vendor Signature X **FEIN#** 81-3959556 **DATE** 9/15/22

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION

The West Virginia Purchasing Division is issuing this solicitation as a request for proposal (RFP) on behalf of the West Virginia Office of Technology (WVOT) for Consulting Services to establish strategic technology management services within the WVOT per the specifications and terms and conditions as attached hereto.

ONLINE SUBMISSIONS FOR THIS REQUEST FOR PROPOSAL (RFP) ARE PROHIBITED

***ADDITIONALLY, the Vendor should clearly separate the cost proposal from the technical proposal in a separately sealed envelope.

INVOICE TO	SHIP TO
DEPARTMENT OF ADMINISTRATION OFFICE OF TECHNOLOGY 1900 KANAWHA BLVD E, BLDG 5 10TH FLOOR CHARLESTON WV 25305 US	WV OFFICE OF TECHNOLOGY BLDG 5, 10TH FLOOR 1900 KANAWHA BLVD E CHARLESTON WV 25305 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	See Pricing Page - Attachment A	1.00000	EA		

Comm Code	Manufacturer	Specification	Model #
80101507			

Extended Description:
See Pricing Page - Attachment A

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Technical Questions due by September 1, 2022 at 10:00 AM ET	2022-09-01

	Document Phase	Document Description	Page 3
OÖT2300000001	Final	RFP for OT Assessment and Consulting Services (OT23016)	

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions



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

State of West Virginia
 Centralized Request for Proposals
 Consulting

Proc Folder: 1089655			Reason for Modification: Addendum #1 to attach vendor questions and answers.
Doc Description: RFP for OT Assessment and Consulting Services (OT23016)			
Proc Type: Central Master Agreement			
Date Issued	Solicitation Closes	Solicitation No	Version
2022-09-08	2022-09-15 13:30	CRFP 0231 OOT2300000001	2

BID RECEIVING LOCATION

BID CLERK
 DEPARTMENT OF ADMINISTRATION
 PURCHASING DIVISION
 2019 WASHINGTON ST E
 CHARLESTON WV 25305
 US

VENDOR

Vendor Customer Code:

Vendor Name : Avero Advisors LLC(dba Avero Advisors)
Address : 512 West Broadway Avenue, Maryville, TN 37801
Street :
City : Maryville
State : TN **Country :** United States of America **Zip :** 37801
Principal Contact : Abhijit Verekar Founder & CEO
Vendor Contact Phone: 865-415-3848 **Extension:** N/A

FOR INFORMATION CONTACT THE BUYER
 Jessica L Hovanec
 304-558-2314
 jessica.l.hovanec@wv.gov

Vendor Signature X *Abhijit Verekar* **FEIN#** 81-3959556 **DATE** 9/15/22

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION

Addendum #1 to attach Vendor Questions and Answers.

The West Virginia Purchasing Division is issuing this solicitation as a request for proposal (RFP) on behalf of the West Virginia Office of Technology (WVOT) for Consulting Services to establish strategic technology management services within the WVOT per the specifications and terms and conditions as attached hereto.

ONLINE SUBMISSIONS FOR THIS REQUEST FOR PROPOSAL (RFP) ARE PROHIBITED

***ADDITIONALLY, the Vendor should clearly separate the cost proposal from the technical proposal in a separately sealed envelope.

INVOICE TO	SHIP TO
DEPARTMENT OF ADMINISTRATION OFFICE OF TECHNOLOGY 1900 KANAWHA BLVD E, BLDG 5 10TH FLOOR CHARLESTON WV 25305 US	WV OFFICE OF TECHNOLOGY BLDG 5, 10TH FLOOR 1900 KANAWHA BLVD E CHARLESTON WV 25305 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	See Pricing Page - Attachment A	1.00000	EA		

Comm Code	Manufacturer	Specification	Model #
80101507			

Extended Description:
See Pricing Page - Attachment A

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Technical Questions due by September 1, 2022 at 10:00 AM ET	2022-09-01

REQUEST FOR PROPOSAL

- 6.8. Availability of Information:** Proposal submissions become public and are available for review immediately after opening pursuant to West Virginia Code §5A-3-11(h). All other information associated with the RFP, including but not limited to, technical scores and reasons for disqualification, will not be available until after the contract has been awarded pursuant to West Virginia Code of State Rules §148-1-6.3.d.

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, to the best of my knowledge, the bidder has properly registered with any State agency that may require registration.

Avero Advisors

(Company)

Abhijit Vernekar Abhijit Vernekar President & CEO

(Representative Name, Title)

865-415-3848 Fax=N/A

(Contact Phone/Fax Number)

9/15/22

(Date)

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

(Name, Title) Abhisit Verekar
(Printed Name and Title) Abhisit Verekar, President & CEO
(Address) 512 W. Broadway Ave Maryville, TN 37801
(Phone Number) / (Fax Number) 440-991-6628
(email address) av@averoadvisors.com

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that: I have reviewed this Solicitation/Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

Avero Advisors
(Company)
Abhisit Verekar President & CEO Abhisit Verekar
(Authorized Signature) (Representative Name, Title)
Abhisit Verekar 9/15/22
(Printed Name and Title of Authorized Representative) (Date)
865-415-3848 N/A
(Phone Number) (Fax Number)
av@averoadvisors.com
(Email Address)

SOLICITATION NUMBER: CRFP OOT2300000001
Addendum Number: 1

The purpose of this addendum is to modify the solicitation identified as CRFP OOT2300000001 ("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:

- 1) To attach the vendor questions and answers**

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.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP OOT2300000001

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Avero Advisors LLC(dba Avero Advisors)

Company



Authorized Signature
September 15, 2022

Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.

CRFP OOT2300000001 Addendum #1
Vendor Questions and Answers

Q1) Is there any budget allocated for this contract? If yes, can you please let us know the same?

A1) The State does not share budgetary information. The RFP process seeks proposals designed to provide best value to the State with cost being an evaluated element of the proposal.

Q2) Is Subcontracting allowed for this opportunity, if so, are there any specific participation goals to be met?

A2) The contract will be awarded to a single Vendor. The contracted Vendor will be responsible for coordinating all efforts required, and may choose to utilize subcontractors, but the State will have no working or contractual relationship with subcontractors.

Q3) Is there an incumbent on the contract? If yes, could you please let us know the incumbent name and spending done on contract so far?

A3) No incumbent.

Q4) What is the total number of resources who are currently working on this project? Please let us know their position name and hourly rate?

A4) See answer 3.

Q5) Considering the current COVID-19 pandemic situation, if the proposed candidates are not available at the time of award, will the agency allow us to provide replacement personnel with similar or more skill sets?

A5) Replacements can be provided, but will require approval by the State, and must meet all requirements outlined.

Q6) Is there any limitation on providing resumes of the personnel, i.e., if the requirement is for two candidates; do we need to submit only two resumes or can we propose resumes of more than two candidates for agency's consideration?

A6) For each role, Vendors should provide a resume for the candidate it is proposing who meets all requirements.

Q7) Are hourly rate ranges acceptable for proposed personnel including key?

A7) No, Vendor must provide a firm (maximum) rate with its bid. Should a Vendor choose to charge less than the bid amount, that is acceptable, but can never charge more than the bid amount.

Q8) Is it entirely onsite work or can it be done remotely to some extent / Does the services need to be delivered onsite or is there a possibility for remote operations and performance.

A8) Please see RFP Section 4.2

Q9) We note that on Page 2 of the Solicitation Document, under Additional Information, the form indicates that online submissions for this proposal are prohibited. We also note in item 6 BID SUBMISSION that it says vendors can submit bids electronically through vwOASIS. However, two paragraphs below it states that a response to this Proposal is not permitted in wvOASIS. Please clarify if bids can be electronically submitted into wvOASIS.

A9) RFP responses CANNOT be submitted electronically.

- Q10)** Section 4.2. we note that “the State is open to operate in a hybrid manner”. While traditionally (i.e., pre-COVID) we did work almost exclusively onsite and can travel as needed, we also recognize that remote work has become more of the norm. For planning purposes, does the State have a view of how much onsite work may be required? Please confirm if you expect travel expenses to be included in the pricing? Will travel cost be evaluated?
- A10)** The WV Office of Technology operates as a hybrid work environment, therefore, the majority of the interactions with the agency can be remote. Some key change management activities, such as interactions with State leadership and stakeholder workshops should be evaluated for in person interactions. Pricing must be inclusive of all costs.
- Q11)** In ITEM 16, SMALL, WOMEN-OWNED , OR MINORITY-OWNED BUSINESSES, in the reference to West Virginia Code §5A-3-37(a)(7), the (a)7 does not appear online when searching via Google or the WV Code. Has the code or reference changed, and/or can you provide a link to this code §5A-3-37(a)(7)?
- A11)** The new reference is W. Va. Code 5A-3-37(c)(2)(G).
It states as follows:
"Notwithstanding any provisions of § 5A-3-37(c)(2)(A), § 5A-3-37(c)(2)(B), § 5A-3-37(c)(2)(C), § 5A-3-37(c)(2)(D), § 5A-3-37(c)(2)(E), or § 5A-3-37(c)(2)(F) of this code to the contrary, if any nonresident vendor that is bidding on the purchase of motor vehicles or construction and maintenance equipment and machinery used in highway and other infrastructure projects by the director or by a state department is also certified as a small-, women-, or minority-owned business pursuant to § 5A-3-59, the nonresident vendor shall be provided the same preference made available to any resident vendor under the provisions of this subdivision."
- <https://www.state.wv.us/admin/purchase/minority.html>
- Q12)** ITEM 16, SMALL, WOMEN-OWNED , OR MINORITY-OWNED BUSINESSES indicates preference for such businesses. Can you explain how the state will apply this preference in its evaluation? Also, what documentation or certification must be submitted with the bid for a qualifying non-resident business?
- A12)** SWAM Preference: A non-resident vendor certified as a small, women-owned, or minority-owned (SWAM) business, pursuant to W. Va. Code § 5A-3-59, must be provided the same preference made available to any resident vendor when requested. The SWAM rules found in W. Va. § 148 C.S.R. 22-9 further explain that a non-resident SWAM business will receive the highest preference made available to a resident vendor in the solicitation for which the SWAM business has submitted a bid. In order to obtain this preference, however, a non-resident SWAM business must identify itself as such in writing with the bid and must be properly certified under the rules governing certification pursuant in W. Va. § 148 C.S.R. 22-1 et seq. The Vendor Preference Request form can be accessed online at www.state.wv.us/admin/purchase/forms.html.
- Q13)** Please clarify how the State plans to score Comparative Analysis Amongst Vendors in Section 6.2 Evaluation Criteria.
- A13)** The WVOT will compare the Vendors’ submissions against one another to obtain the ‘best in class’ solution. Vendors should highlight how its response exceeds the requested levels, how its approach is a better methodology than what others may propose, or how it can value-add things to the project the WVOT may not have considered.
- Q14)** Will the necessary internal WVOT resources be available as needed during the project?
- A14)** Yes

Q15) Is the WVOT currently using any type of Service Management solution (ServiceNow, HP Service Manager, etc.)?

A15) WVOT leverages Ivanti as the ITSM and is implementing Nicus as the ITFM solution.

Q16) Is the WVOT currently using an Enterprise Architecture Framework? The Open

A16) Group Architecture Framework (TOGAF).

Q17) Is the WVOT currently using a Cybersecurity Framework?

A17) The NIST Cybersecurity Framework.

Q18) Does the WVOT have a formal Change Management process in place?

A18) Yes

Q19) Are the 4.2.2.3 Additional/Optional Services resources available as needed for both Phase 1 and Phase 2?

A19) The State may choose to leverage those in either Phase for unexpected work not defined within the Phases.

Q20) Are the Hours listed in 4.2.2.3 Additional/Optional Services, a not to exceeded time estimate?

A20) No, they are an estimate by the State for cost evaluation purposes.

Q21) Will all questions submitted be shared will all potential vendors?

A21) Yes