

Appendix A: Exceptions and Clarifications

Type	Item	Location in RFP	Microsoft Position
Exception	<p>19. CANCELLATION: The Purchasing Division Director reserves the right to cancel this contract immediately upon written notice to the vendor if the materials or workmanship supplied do not conform to the specifications contained in the Contract. The Purchasing Division Director may also cancel any purchase or Contract upon 30 days written notice to the Vendor in accordance with West Virginia Code of State Rules § 148-1-5.2.b.</p>	General Terms & Conditions; #19	<p>Microsoft takes exception to an immediate termination or cancellation without an opportunity to cure. The right to terminate for default should be mutual. We propose the following based on industry standards:</p> <p>Customer may terminate a Statement of Services upon 30 days' notice. Either party to the Statement of Services may terminate it if the other party is in material breach or default of any obligation that is not cured within 30 calendar days notice of such breach. Microsoft may terminate a Statement of Services if Customer fails to pay any invoice that is more than 60 days outstanding. Customer agrees to pay all fees for Professional Services performed and expenses incurred prior to termination and any additional amounts that may be specified in a Statement of Services. Upon Microsoft's receipt of payment for the Professional Services, Customer's interests in the Services Deliverables will vest.</p>
Exception	<p>20. TIME: Time is of the essence regarding all matters of time and performance in this contract.</p>	General Terms & Conditions; #20	<p>Microsoft takes exception to this clause and does not include such terms in its contracts.</p>
Exception	<p>28. WARRANTY: The vendor expressly warrants that the goods and/or services covered by this Contract will: (a) conform to the specifications, drawings, samples, or other description furnished or specified by the Agency; (b) be merchantable and fit for the</p>	General Terms & Conditions; #26	<p>Microsoft takes exception and proposes the following based on industry standards:</p> <ol style="list-style-type: none"> Limited warranties and remedies – Professional Services. Microsoft warrants that it will perform Professional Services with professional care and skill. If Microsoft fails to do so, and Customer notifies Microsoft within 90 days of the date the Professional Services were performed, then Microsoft will, at its discretion,

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	purpose intended; and (c) be free from defect in material and workmanship.		<p>either re-perform the Professional Services or return the price paid for them. These remedies are Customer's sole remedies for breach of warranties in this section. Customer waives any breach of warranty claims not made during the warranty period.</p> <p>2. Exclusions. The warranties in this section do not cover problems caused by accident, abuse or use in a manner inconsistent with this Agreement, including failure to meet minimum system requirements. These warranties do not apply to free, trial, pre-release or beta Products or to components of Products that Customer is permitted to redistribute. DISCLAIMER. Except for the limited warranties above, Microsoft provides no other warranties or conditions and disclaims any other express, implied or statutory warranties, including warranties of quality, merchantability, fitness for a particular purpose, title and non-infringement.</p>
Exception	<p>35. Vendor Relationship:</p> <p>...<#1> Vendor shall be exclusively responsible for payment of employees and contractors for all wages and salaries, taxes, withholding payments, penalties, fees, fringe benefits, professional liability, insurance premiums, contributions to insurance and pension, or other deferred compensation plans, including but not limited to, Workers' Compensation and Social Security obligations, licensing fees, etc. and the filing</p>	General Terms & Conditions; #35	<p>Microsoft agrees to the inclusion of the language in paragraph <#1> of this section 35, however, Microsoft does not, as part of its standard business practices, offer the indemnification in paragraph <#2> to which we hereby take exception.</p>

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	<p>of all necessary documents, forms and returns pertinent to all of the foregoing.</p> <p><#2> Vendor shall hold harmless the State, and shall provide the State and Agency with a defense against any and all claims including, but not limited to, the foregoing payments, withholdings, contributions, taxes, Social Security taxes, and employer income tax returns.</p>		
Exception	<p>36. INDEMNIFICATION: The Vendor agrees to indemnify, defend, and hold harmless the State and the Agency, their officers, and employees from and against: (1) Any claims or losses for services rendered by any subcontractor, person, or firm performing or supplying services, materials, or supplies in connection with the performance of the Contract; (2) Any claims or losses resulting to any person or entity injured or damaged by the Vendor, its officers, employees, or subcontractors by the publication, translation, reproduction, delivery, performance, use or disposition of any data used under the Contract in a manner not authorized by the Contract, or by Federal or State statutes or regulations; and (3) Any failure of the Vendor, its</p>	General Terms & Conditions; #36	<p>Microsoft takes exception and proposes the following based on industry standards:</p> <p>The parties will defend each other against the third-party claims described in this section and will pay the amount of any resulting adverse final judgment or approved settlement, but only if the defending party is promptly notified in writing of the claim and has the right to control the defense and any settlement of it. The party being defended must provide the defending party with all requested assistance, information and authority. The defending party will reimburse the other party for reasonable out-of-pocket expenses it incurs in providing assistance. This section describes the parties' sole remedies and entire liability for such claims.</p>

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	officers, employees, or subcontractors to observe State and Federal Laws including, but not limited to, labor and wage and hour laws.		<p>1. By Microsoft. Microsoft will defend Customer against any third-party claim to the extent it alleges that any Fix or Services Deliverable made available by Microsoft for a fee and used within the scope of Section 3 of this Agreement (unmodified from the form provided by Microsoft and not combined with anything else) misappropriates a trade secret or directly infringes a patent, copyright, or trademark or other proprietary right of a third party. If Microsoft is unable to resolve a claim of infringement under commercially reasonable terms, it may, at its option, either (1) modify or replace the Fix or Services Deliverable with a functional equivalent; or (2) terminate Customer's license and refund any fees paid for such Fix(es) and Services Deliverable(s). Microsoft will not be liable for any claims or damages due to Customer's continued use of a Product, Fix or Services Deliverable after being notified to stop due to a third party claim.</p> <p>b. By Customer. To the extent permitted by applicable law, Customer will defend Microsoft against any third-party claim to the extent it alleges that Customer's use of any Fix or Services Deliverable alone or in combination with anything else, violates the law or damages a third party.</p>

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Exception	Service Level Agreements (SLAs)	Appendix A	<p>We may entertain professional services SLAs for Maintenance & Operations response times. These will be included in the Microsoft Statement of Work and/or Services Description.</p> <p>West Virginia has already agreed to Microsoft Product SLA's. Please visit Licensing Documents for more info.</p> <p>Microsoft must take exception to any other SLAs as currently written in the RFP, but remains open to further discussion to reach mutually acceptable terms.</p>
In addition to our exceptions to the Terms & Conditions listed in the RFP, Microsoft requires the follow Terms & Conditions to be included in our contract:			
Clarification	Limitations of liability		<p>Each party's maximum, aggregate liability to the other is limited to direct damages finally awarded in an amount not to exceed the amounts Customer was required to pay for the applicable Statement of Services, subject to the following.</p> <p>A) Free Professional Services and Distributable Code. For Professional Services provided free of charge and code that Customer is authorized to redistribute to third parties without a separate payment to Microsoft, Microsoft's liability is limited to direct damages finally awarded up to US\$5000.</p> <p>A) Exclusions. In no event will either party be liable for any indirect, incidental, special, punitive, or consequential damages, or for loss of use, loss of</p>

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			<p>business information, loss of revenue, or interruption of business, however caused or on any theory of liability.</p> <p>Exceptions. No limitation or exclusions will apply to liability arising out of either party's (1) confidentiality obligations (except for all liability related to Customer Data and Professional Services Data, which will remain subject to the limitations and exclusions above); (2) defense obligations; or (3) violation of the other party's intellectual property rights.</p>
Clarification	Intellectual Property Rights		<p><i>Use, ownership, rights and restrictions.</i></p> <ol style="list-style-type: none"> Products. Unless otherwise specified in a license agreement, use of any Product is governed by the Use Rights specific to each Product and version and by the terms of the applicable license agreement. Products will not be purchased under this Agreement. Fixes and Services Deliverables. <ol style="list-style-type: none"> Fixes. Each Fix is licensed under the same terms as the Product to which it applies. If the Fix is not provided for a specific Product, any use terms Microsoft provides with the Fix will apply. If no use terms are provided, Customer shall have a non-exclusive, perpetual, fully paid-up license to use and reproduce the Fix solely for its internal business purposes. Customer may not

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			<p>modify, change the file name or combine any Fix with any non-Microsoft computer code, except as expressly permitted in a licensing agreement.</p> <p>2. Pre-Existing Work. All rights in Pre-Existing Work will remain the sole property of the party providing the Pre-Existing Work. Each party may use, reproduce and modify the other party's Pre-Existing Work only as needed to perform obligations related to Professional Services.</p> <p>3. Services Deliverables. Upon payment in full, Microsoft grants Customer a non-exclusive, non-transferable, perpetual license to reproduce, use and modify the Services Deliverables solely for Customer's internal business purposes, subject to the terms and conditions in this Agreement.</p> <p>3. Affiliates' rights. Customer may only sublicense its rights in Services Deliverables and Sample Code granted hereunder to its Affiliates, but Customer's Affiliates may not sublicense these rights. Customer is responsible for ensuring its Affiliates' compliance with this Agreement.</p> <p>A) Non-Microsoft software and technology. Customer is solely responsible for any non-</p>

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			<p>Microsoft software or technology that Customer installs or uses with the Products, Fixes or Services Deliverables. Customer may not install or use non-Microsoft software or technology in any way that would subject Microsoft's intellectual property or technology to obligations beyond those included in this Agreement.</p> <p>B) Sample Code. Upon payment in full, Microsoft grants Customer a non-exclusive, perpetual, non-transferable license to use and modify any Software code provided by Microsoft for the purposes of illustration ("Sample Code") and to reproduce and distribute the object code form of the Sample Code for Customer's internal business purposes only and not to any unaffiliated third party.</p> <p>1. Restrictions on use. Customer must not (and is not licensed to) (1) reverse engineer, de-compile or disassemble any Product, Fix or Service Deliverable; (2) install or use non-Microsoft software or technology in any way that would subject Microsoft's intellectual property or technology to any other license terms; or (3) work around any technical limitations in a Product, Fix or Services Deliverable or restrictions in Product</p>

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			<p>documentation. Except as expressly permitted in this Agreement or a Statement of Services, Customer must not distribute, sublicense, rent, lease or lend any Product, Fix or Service Deliverable, in whole or in part, or use them to offer hosting services to a third party.</p> <p>2. Reservation of Rights. Products, Fixes, and Service Deliverables are protected by copyright and other intellectual property rights laws and international treaties. Microsoft reserves all rights not expressly granted in this Agreement. No rights will be granted or implied by waiver or estoppel.</p> <p>3. Supportability of Products. Support for Products is available under the terms of a licensing agreement, a separate Statement of Services or under the terms set forth at http://support.microsoft.com or a successor site.</p>
Clarification	Acceptable Use Policy		<p>End Customer must not (and is not licensed to) use the Services Deliverables:</p> <ul style="list-style-type: none"> • in a way prohibited by law, regulation, governmental order or decree; • to violate the rights of others; or • in any application or situation where use of the Service Deliverables could lead to the death or serious bodily injury of any person, or to severe physical or

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			<p>environmental damage, <i>except in accordance with the High Risk Use section below.</i></p> <p>High Risk Use</p> <p>1. WARNING: Modern technologies may be used in new and innovative ways, and End Customer must consider whether its specific use of these technologies is safe. The Services Deliverables are not designed or intended to support any use in which a service interruption, defect, error, or other failure of a Services Deliverable could result in the death or serious bodily injury of any person or in physical or environmental damage (collectively, "High Risk Use"). Accordingly, End Customer must design and implement the Services Deliverables such that, in the event of any interruption, defect, error, or other failure of the Services Deliverables, the safety of people, property, and the environment are not reduced below a level that is reasonable, appropriate, and legal, whether in general or for a specific industry. End Customer's High Risk Use of the Services Deliverables is at its own risk. End Customer agrees to defend, indemnify and hold Microsoft harmless from and against all damages, costs and attorneys' fees in connection with any claims arising from a High Risk Use associated with the Services Deliverables, including any claims based in strict liability</p>

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			<p>or that Microsoft was negligent in designing or providing the Services Deliverables to End Customer in accordance with End Customer's specifications. The foregoing indemnification obligation is in addition to any defense obligation set forth in Customer's Agreement and is not subject to any limitation of, or exclusion from, liability contained in such agreements.</p>
<p>Beyond the additional Terms & Conditions Microsoft would require in a contract, we take this opportunity to clarify a few items where our proposal deviates from what has been prescribed in the RFP.</p>			
Clarification	Use of Offshore Resourcing		<p>To deliver engagements at the greatest cost value for our customers, Microsoft utilizes offshore resources for development and testing purposes, including State and Federal government customers. Data sovereignty and security are top of mind for Microsoft and its customers, and the following steps are taken for this protection:</p> <ul style="list-style-type: none"> • Offshore resources will only have access to environments without PII present (i.e. development and test environments). • Offshore resources will not have credentials or permissions to access the production environment. • Production deployments will be handled exclusively by onshore resources.

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Clarification	Duration of Implementation		Based on the requirements provided, and the desire to provide the most cost-effective proposal possible, the Microsoft proposal contains a single release (22 weeks total), instead of a longer, two-release schedule as outlined in the RFP. This conclusion is based on a bottom's up analysis of the requirements provided in Appendix B. Adding an additional release, or extending the delivery beyond 22 weeks would be detrimental to the cost of the project for WV DOH.
Clarification	Proposal Structure for Years 6-8 of Maintenance & Operations		The RFP requests a binding proposal, which Microsoft has provided for Contract Years 1-5. As a standard practice, however, Microsoft does not provide binding pricing proposals for periods exceeding five years due to market uncertainties, cost of living adjustments, and other factors. The pricing for the requested three optional years (years 6-8) of Maintenance & Operations (M&O) in our response should be regarded as a budgetary estimate only. Consequently, the three-year M&O estimate represents a rough order of magnitude and does not constitute a formal binding proposal from Microsoft. This estimate is based on the costs of similar solutions provided by Microsoft and its partners to other customers and is derived from forecasted year-over-year uplifts using information available at the time of this RFP response submission. Microsoft reserves the right to adjust the pricing and terms of this estimate as necessary to reflect any changes in market conditions, costs, or other relevant factors.

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Clarification	Software as a Service Addendum	Attachment B	West Virginia has already signed Microsoft's SaaS Agreement, therefore Microsoft Industry Solutions will not enter into a separate agreement.

Appendix B - Functional and Technical Requirements

Technical					
*Phase Implemented: Requirements for functionality first implemented in Phase 1 (by September 1, 2025) of the project will be marked as 1 and functionality first implemented or updated in Phase 2 (no later than July 1, 2026) will be marked as 2.					
Req. #	Requirement Description	Mandatory/Desirable	Phase Implemented per W. Va. Code §49-2-111c(b) language*	Vendor Response	Comments
General					
T.G.1	The Solution must allow authorized administrators the capability to grant and deny user access at any time.	Mandatory	1	S	Microsoft provides an admin console for its products where you can assign appropriate security roles to users. Security roles determine what users can see and do within the application based on Entra ID (formerly Azure Active Directory).
T.G.2	The Solution must allow role-based access control (RBAC) to manage user experience, features, and access and/or functionality.	Mandatory	1	S	Microsoft products integrate with Microsoft Entra ID (formerly Azure Active Directory) to implement a security model. This allows for streamlined management of user access and permissions (RBAC).
T.G.3	The Solution must be browser agnostic.	Mandatory	1	S	The following popular browsers are supported: Teams can run in any of the following web browsers running on the specified operating systems: ~Microsoft Edge (Windows 10 or later) ~Mozilla Firefox (latest publicly-released version) running on Windows 10 or later ~Google Chrome (latest publicly-released version) running on Windows 10 later, or Google Nexus tablet ~Google Chrome (latest publicly-released version) running on Mac OS X 10.8 (Mountain Lion), 10.9 (Mavericks), or 10.10 (Yosemite) or later ~Apple Safari (latest publicly-released version) running on Mac OS X 10.8 (Mountain Lion), 10.9 (Mavericks), 10.10 (Yosemite) or later, or Apple iPad
T.G.4	Recovery Time Objective (RTO) - In the event of an unplanned outage, the system shall be returned to live operation in 4 hours or less	Mandatory	1	S	Microsoft provides Service Level Agreements (SLAs) for its online services, which define the availability and performance targets for each service. While SLAs typically focus on Availability (often 99.9% or higher), RTO is a more specific metric related to how quickly the service can recover from an interruption or disaster. Microsoft (specifically within its cloud services like Microsoft 365, Azure, and Teams), Business Continuity and Disaster Recovery (BC/DR) plans are essential for ensuring that services and data can be restored within an acceptable period.
T.G.5	Recovery Point Objective (RPO) - Data will be backed up in a manner that assures the system can always be restored with no loss of data	Mandatory	1	S	Microsoft products have a financially-backed service level agreement (SLA) of 99.9% guaranteed monthly uptime. High Availability (HA) and Disaster Recovery (DR) are built in and part of the subscription. They adhere to the Microsoft business continuity and disaster recovery (BCDR) standard. The standard requires each online service to have a BCDR plan reviewed, updated, and tested at least annually. The Microsoft Cloud BCDR Plan Validation Report is available to customers on our Service Trust Portal at: https://servicetrust.microsoft.com Recovery Point Objective (RPO) is based on Azure SQL active-geo replication, which has a Recovery Point Estimate (RPE) of less than five seconds. However, customers might experience up to 15 minutes of data loss, depending on the nature and timing of the outage. Recovery Time Objective (RTO) varies depending on the nature of the outage, and could take up to four to 10 hours.

T.G.6	The Solution must identify and flag duplicate entries of information.	Mandatory	2	S	Duplicate detection lets organizations set duplicate detection policies and create duplicate detection rules for business and custom entities. These rules can be applied across different record types in Dynamics 365. Based on the duplicate detection rules set by the administrator, the system alerts the user about potential duplicates when the user tries to create new records or update existing records. To maintain data quality, you can schedule a duplicate detection job to check for duplicates for all records that match a certain criteria. You can clean the data by deleting, deactivating, or merging the duplicates reported by a duplicate detection job.
T.G.7	The Solution should require permission access using a single sign-on (SSO).	Desirable	1	S	SSO achieved using Entra ID (formerly Azure Active Directory)
T.G.8	The Solution should enable authorized users to access and enter information through a mobile device.	Desirable	1	S	Teams has a native mobile app available for users via the Apple App Store and Google Play.
T.G.9	The Solution should allow RBAC to schedule mass or batch changes at an established time frame.	Desirable	2	S	Microsoft Power Automate allows you to automate tasks across Microsoft services. You can create flows that trigger periodic batch updates for Teams based on various triggers (e.g., time-based triggers, event-based triggers). Also the Microsoft Graph API provides programmatic access to data across Microsoft 365 services, including Teams. You can use Graph API to automate batch updates for Teams, users, or other Teams-related entities (e.g., creating channels, adding/removing users, updating permissions).
T.G.10	The Vendor should resolve data input errors reported by users within two (2) business days from when the report was received.	Desirable	2	S	Proposal includes maintenance and operations workstream to support requests like these.
Security					
T.S.1	<p>The Vendor and the Solution must meet all applicable State and Federal privacy, confidentiality, and security requirements. Per 45 CFR 1355.52 (d) (iii), the CCWIS data must "be exchanged and maintained in accordance with confidentiality requirements in Section 471 (a) (8) of the Act, and 45 CFR 205.50, and 42 U.S.C. 5106a (b) (2) (B) (viii) through (x) of the Child Abuse Prevention and Treatment Act, if applicable, and other applicable federal and state or tribal laws". The Contractor must ensure that all data in its possession meets the standards outlined in 45 CFR 1355.52 (d) (iii) and complies with the following list of Federal standards:</p> <ul style="list-style-type: none"> a. Federal Information Security Risk Assessment (ISRA) Procedures b. CMS System Security Plan c. 42 CFR Parts 412, 413, 422, 433 d. 45 CFR Part 160 Administration e. 45 CFR Part 162 Privacy f. 45 CFR Part 164 Security g. Records Usage, Duplication, Retention, Re-disclosure, and Timely Destruction Procedures/Restrictions 5 U.S.C. 552a (o)(1)(F), (H), and (I) h. Internal Revenue Service (IRS) Publication 1075 compliance i. Privacy Act of 1974 at 5 U.S.C. 552a j. Federal Information Security Management Act (FISMA) k. SSA Information System Security Guidelines for federal, State, and local agencies l. Title XIX Confidentiality Rules m. CMS Standards and Conditions at 42 CFR 433.112 n. ACF CCWIS Design Requirements established in §1355.53 o. MARS-E (At a minimum MARS-E 2.0) p. Confidentiality requirements under Section 471(a)(8) of the Social Security Act q. Confidentiality/access requirements under Section 106(b)(2)(a)(v) of the Child Abuse Prevention and Treatment Act 	Mandatory	1	S	<p>Microsoft is committed to the highest levels of trust, transparency, standards conformance, and regulatory compliance. We have built our broad suite of cloud products and services from the ground up to address the most rigorous security and privacy demands of our customers. Microsoft complies with data protection and privacy laws applicable to cloud services, and third parties verify our compliance with world-class industry standards.</p> <p>We offer a comprehensive framework to help you comply with your specific requirements. Dynamics 365 meets many international and industry-specific compliance standards. Microsoft cloud services have the largest compliance portfolio in the industry, including some of the most rigorous assessments in the world. These assessments range across global technical standards, industry-specific requirements, and region-specific requirements and regulations.</p> <p>Microsoft employs a risk-management model of shared responsibility with the customer. We are responsible for the platform, including services offered, and we seek to provide a cloud service that can meet the security, privacy, and compliance needs of your organization. As a customer, you are responsible for the environment once we have provisioned the service. You must identify which controls apply to your business and understand how to implement and configure them to manage security and compliance for your nation, region, and industry.</p> <p>a. Federal Information Security Risk Assessment (ISRA) Procedures - Microsoft has accredited certification assessments for NIST 800-161, NIST 800-171, NIST 800-53, NIST 800-63, and NIST CSF.</p>
T.S.2	The Solution should allow a default access level for assigned users of a multi-disciplinary team (MDT) prior to the MDT meeting.	Desirable	2	S	Security roles and Entra ID groups will be configured for default access levels. This allows MDT users to be added to those teams and granted their default access levels.



West Virginia Department of Human Services Proposal for Child Welfare Mobile Application Communication Software

CRFP-0511-BSS2500000001

February 06, 2025



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Submitted to:
Crystal G Hustead
WV DHS
2019 Washington Street, East
Charleston, WV 25305



February 6, 2025
Crystal G Hustead
2019 Washington Street,
East Charleston, WV 25305

Dear West Virginia Department of Human Services Team:

Microsoft is pleased to have the opportunity to provide a response to the request for proposal for West Virginia Department of Human Services (WV DHS) Child Welfare Mobile Application Communication Software.

By launching the initiative to develop Child Welfare Mobile Application Communication Software, the State of West Virginia is seeking to jointly develop, test, adjust, plan the go-to-market, successfully implement and run the Child Welfare Mobile Application Software. As such, Microsoft's response is offering a comprehensive solution and delivery approach to the State of West Virginia in support of your Digital Transformation goals.

Our team is committed to your short-term goals and long-term success. The following represents just a few reasons why Microsoft is the right partner in your Digital Transformation journey via our Youth Teams App (YTA) solution:

- **Enhanced Case Management:** The app allows caseworkers to efficiently manage case information, schedule meetings, and collaborate with team members through a unified interface. This streamlines communication and improves productivity
- **Remote Accessibility:** Developed during the COVID-19 pandemic when remote visits were essential, the app facilitates remote casework, enabling caseworkers to connect with at-risk youth and families even when in-person meetings are not possible
- **Integration with Existing Tools:** The YTA seamlessly integrates with tools like Outlook for meeting creation and Power Apps for data management, providing a comprehensive solution that enhances the overall efficiency of case management

Please do not hesitate to contact me at (717) 368-3728 with any questions regarding our offer. On behalf of Microsoft, we look forward to discussing next steps with you on this important technology initiative, and value this opportunity to extend our partnership.

Sincerely,

Vladimir Valencia
Consulting Services, Director
(717) 368-3728



Omnibus Statement

This proposal to the West Virginia DHS is in response to its Request for Proposal (RFP) dated on January 7, 2025. This proposal is valid for 90 days. This proposal is not meant to constitute a formal offer, acceptance, or contract, although this proposal is furnished with the expectation that we would provide the services specified herein. In the event that Microsoft is selected to provide the products or services contemplated by this proposal, Microsoft will negotiate in good faith with you to finalize, as applicable, an enrollment for products, a statement of work, a work order for consulting services, a service description for product support services, and/or a master agreement to govern the relationship. Microsoft's proposal is predicated solely and exclusively upon the information contained in Microsoft's proposal response, and no other terms and conditions apply except as otherwise negotiated between the parties.



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1 Executive Summary

Upon careful review of this RFP, our proposal reflects our understanding of the scope and complexity associated with the Child Welfare Mobile Application Communication Software. Please note that our project has identified certain risks which have influenced our pricing. However, we believe that through further discussions, we can mitigate these risks and subsequently adjust our pricing. We look forward to continuing our discussions to better address your needs.

The goal of this project is to improve communication and collaboration among the interested parties involved in the welfare of children to help enhance the State's foster care system.

Benefits to WV DHS

Your Trusted Innovation Partner. WV DHS will be empowered to put innovation into practice using Microsoft Industry Solutions to deliver strategic business outcomes, maximize the value of cloud technology, and drive success through continual support.

WV DHS can access our built-in knowledge of all Microsoft platforms for defining, developing, delivering, and supporting Child Welfare Mobile Application Communication Software.

Most Complete and Integrated Solutions and Experiences. Microsoft offers the most connected, comprehensive set of cloud solutions with Microsoft Azure, Microsoft 365, and Microsoft Power Platform. Our integrated portfolio of cloud services works across devices and is supported by one of world's largest developer and partner ecosystems that lowers your cost and complexity for integration of services, products, and IT provider management and support.

WV DHS 's Team. Your Microsoft Services consultants, architects, engineers, project managers, cybersecurity specialists, digital advisors, and other global and technical support help WV DHS get the most from your technology investments. Through your Microsoft Services team WV DHS will benefit from direct access to Microsoft's software and hardware development, manufacturing experience, and the developers who build Microsoft products and devices.

WV DHS can achieve better communication and collaboration and can reduce risk by implementing Child Welfare Mobile Application Communication Software with Microsoft. This proposal demonstrates how WV DHS's requirements and goals will be reached by partnering with Microsoft Services.

In alignment with WV DHS's vision and based on RFP, we understand that WV DHS's key requirements stand out as follows:

- Authorized users to use the Solution to access information and documents and communicate through a secure connection.
- The Solution should help prevent user error with document uploading to any case.
- Authorized users to utilize calendar functionality that allows users to schedule visitation sessions for children and parents, SNS appointments, meetings with GALs, court dates, and MDT meetings.
- All authorized users to be able to make non-medical related requests, including but not limited to vacation requests or haircut requests.
- The Agency to utilize Solution-generated reports to understand the responsiveness of team members to questions or requests and the average time it takes for authorized Agency users to update the information

Future benefits. Microsoft Power Platform Copilot offers a range of benefits across various business functions:

1. **Enhanced Productivity:** Copilot helps automate repetitive tasks, such as data entry and email generation, allowing employees to focus on more strategic activities
2. **Automated Responses:** Copilot can draft responses to common customer queries, ensuring quick and consistent communication. This reduces response times and frees up your team to handle more complex issues.
3. **Contextual Assistance:** It provides agents with relevant information and suggestions based on the customer's history and current query, enabling more personalized and effective support.
4. **Knowledge Base Integration:** Copilot can pull information from your knowledge base to provide accurate answers, reducing the need for agents to search for information manually.
5. **Sentiment Analysis:** By analyzing the tone and sentiment of customer messages, Copilot can help agents prioritize and tailor their responses to better address customer emotions and concerns.
6. **Task Automation:** Routine tasks such as ticket creation, follow-ups, and status updates can be automated, allowing agents to focus on resolving issues rather than administrative work.

7. Training and Onboarding: New agents can benefit from Copilot's guidance and suggestions, helping them learn the ropes faster and providing consistent support quality.

2 Why Microsoft

Microsoft Services can offer a single point of delivery and support through the entire IT lifecycle, from envisioning through day-to-day operations. Our consultants and engineers have the necessary technical, architectural, and project management skills to help mitigate risk associated with business, technical, and organizational constraints.

We often accelerate the rate of implementation by leveraging prior project success and experience from similar engagements. Our services team can provide technical, architectural, and overall project leadership expertise throughout the effort.

Our integrated team model can help transfer Microsoft knowledge back to WV DHS project team members. Microsoft consultants assume the role of mentors and will structure this project with a goal to help transfer skills and knowledge to your staff.

3 Proposed Solution

3.1 Scope

Microsoft is proposing to have a standalone Power Apps solution, deployed as an app within Microsoft Teams that would provide case workers with an edge in everyday communications which are part of the case management activities. The proposed solution contains the following scope:

- A Power App which will be published as a Teams based application for seamless user interface for case workers.
- The invitation process will be based on email to the children, families, and support groups to join via a link.
- Case workers will be able to see their calendar filtered by the meetings displayed exclusively for the child they are working with.
- Items such as evaluations and various records will be pulled from the current SACWIS system as needed.
- The native and secure communications features of Teams like chats, channels, voice, and video calls will be leveraged as solution features which will be used by the case workers.

- Azure Communications Services will be leveraged for SMS text messaging, available to users directly within the proposed solution.
- Digital signature functionality will be enabled.
- All communications interactions will be pushed to the current SACWIS system.

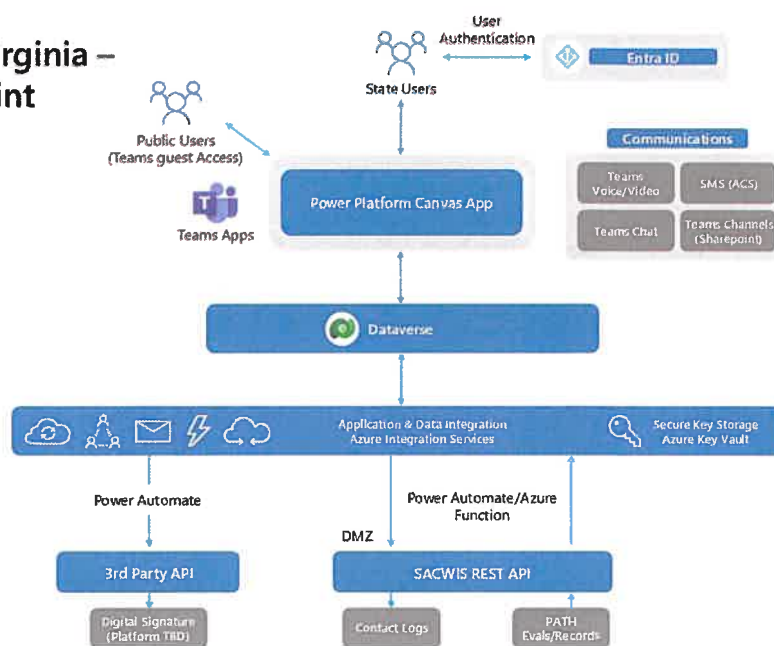
Key Benefits:

- User-Friendly Interface: The Teams-based interface provides an intuitive and familiar environment for case workers.
- Enhanced Collaboration: Leveraging Teams features improves communication and teamwork.
- Efficient Data Access: Direct integration with SACWIS ensures timely access to critical case data.
- Improved Engagement: The SMS and email invitation system enhances family and support group participation.
- Security and Compliance: Adherence to data protection standards and secure communication methods.

3.2 Approach

The proposed solution will be hosted within the State of West Virginia's Microsoft 365 (Azure) tenant in the GCC (Government Community Cloud).

State of West Virginia – Solution Blueprint



Microsoft will provide Services in support of the following solution components. Complexity definitions are located in section 6.6.

Area	Description	Assumptions
Application Development	Configure a Power Apps (Canvas App) and deploy within Teams.	Configure up to 25 entities (10 simple, 10 medium, and 5 complex) and associated forms and views. Minor Teams UX theming included (color, light/dark mode updates).
Invitation process	Case workers will have the ability to invite children, families and supports groups to enroll in the Youth Teams Application.	The invitations will be in the form of a link sent via email. Adequate graph API permissions will be granted by IT to ensure we check for existing users.
Dashboards/Reports	Case workers would be able to see a dashboard with the list of children, to whose cases they are assigned, along with other pre-built and ad-hoc reports.	The list of support group members and upcoming meetings will be filtered based on the child selected. Adequate graph API permissions will be granted by IT to ensure we have access to calendars events. Up to 4 Power BI reports/dashboards (1 simple and 3 medium)
Calendar Integration	Meetings scheduled via the Outlook calendar will be shown in the calendar view and can be filtered based on the child selected.	Adequate graph API permissions will be granted by IT to ensure we have access to calendars events.
Setup meetings	Case workers will have the ability to setup Teams meetings from within the Youth Teams Application.	
Email notifications	The support group for each child will receive an email notification reminding them of upcoming meetings	The meeting invite will be sent from a generic mailbox.

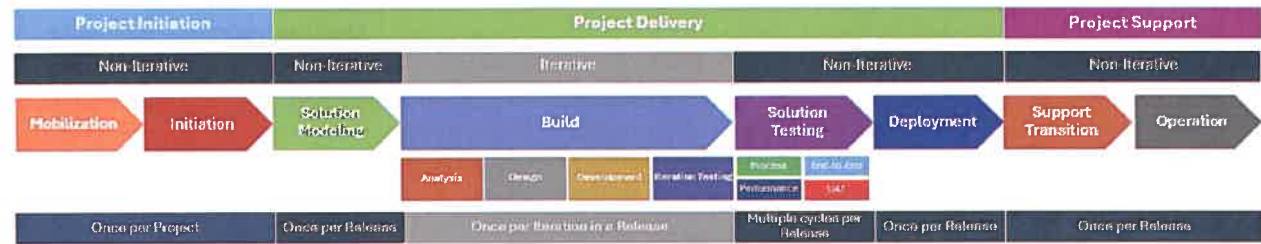
Area	Description	Assumptions
Collaboration	Native Teams functionality like chat, channels, voice, and video calling will be available for managing communications and conversations as part of case management activities.	
Integration	<p>From Dataverse to SACWIS: Communications logs (all channels) to current SACWIS system (PATH).</p> <p>From SACWIS (PATH) to Dataverse: On-demand information, e.g evaluations, medical records, demographic information.</p> <p>Digital Signature.</p>	<p>API-based integration. Adequate access will be provided to the Microsoft team members.</p> <p>This may require updates to the API by the customer.</p> <p>Up to 11 queries from PATH will be developed ('inbound' integration), and up to 4 'outbound' integrations to PATH will be developed (14 medium and 1 complex integration).</p> <p>Digital signature will utilize Adobe Acrobat Sign or DocuSign connector (license to be purchased by the State of WV).</p>
Security	<p>Configure Power Apps security roles to govern role-based access control to the solution.</p> <p>Conduct threat modeling and security assessment of the solution and provide remediation guidance for the following solution components:</p> <ul style="list-style-type: none"> - APIs - Key Vaults - Application Identities - Azure resources within the landing zone for the solution - Solution Application Code - Entra ID (Teams Guest Access & Internal User Identities in scope for the solution) 	<p>Up to 5 custom security roles will be configured.</p> <p>Customer will provide an Azure Landing zone for the solution and will be responsible for security of the applications and infrastructure outside of the landing zone for the solution.</p> <p>Any deviation from the security work specified in this proposal will require a change request.</p>

Area	Description	Assumptions
Communication channels	Configure communications channels within the solution: <ul style="list-style-type: none"> - Email - Teams Voice - Teams Chat - SMS text messaging - Document upload 	Email will utilize out-of-box Exchange integration using State of West Virginia's existing Exchange Online instance. Teams Voice, Chat, and document upload will leverage out-of-box Teams functionality. SMS texting will leverage Azure Communication Services with the State of WV Microsoft 365 tenant.

3.3 Timeline & Methodology

This project will utilize the Microsoft Sure Step 365 methodology for this implementation that is built upon a phased approach detailed out below.

Sure Step 365 Methodology



Mobilization and Initiation Phase

Initiation phase occurs between the Mobilization phase and Solution Modeling phase. This phase focuses on preparing the project team for actual project delivery work. Mobilization phase activities must be completed prior to Initiation kick off. The goal of the Initiation phase is to ensure the team (customer, Microsoft, and partner) are aligned with the solution approach, methodology, tools, schedule, and governance aspects of the project.

Mobilization and Initiation

The Mobilization and Initiation phase includes critical prerequisites that must be completed before implementation of the project solution starts. This phase occurs once.

The key goals are:

- Alignment of the solution approach, scope, methodology, tools, schedule, organizational change management, and governance aspects of the project among WV Department of Human Services and Microsoft team.
- Sponsors / SMEs / Team Members are identified and aware of the project vision and understand the desired outcomes of each phase

Key Activities or Desired Outcomes

The key activities of Mobilization and Initiation phase are:

Mobilization Phase

- Assemble the Project Team: Identifying and assigning key stakeholders, project managers, consultants, and other resources.
- Define Roles and Responsibilities: Finalizing who will be responsible for which tasks, ensuring all team members understand their role.
- Resource Allocation: Securing and assigning necessary resources, such as software, hardware, and infrastructure.
- Project Governance Setup: Reviewing proposed governance structure in the SOW and jointly agree to any adjustments / refinements to be made. Once there is joint agreement, establishing governance structures, such as steering committees and escalation paths.
- Communications plan established to include, but not limited to: Status reporting, steering committee meetings, operations committee meetings and other necessary communications to ensure seamless delivery.
- Infrastructure and Environment Setup: Ensuring the technical environment is ready for development and testing (e.g., servers, cloud resources, etc.).

Initiation Phase

- Project Kick-Off: Officially starting the project with all stakeholders, including team introductions and outlining objectives.
- Business Case Definition: Defining and refining the business case, including project goals, benefits, and expected outcomes.
- Risk and Issue Management: Establishing processes to identify, log, and manage risks and issues.
- Stakeholder Engagement: Identifying key stakeholders and determining their level of involvement throughout the project.
- High-level Project Plan: Developing an initial high-level timeline and project plan.

Solution Modeling & Build

Solution Modeling is the phase between Initiation and Build. The goal of the Solution Modeling phase is to walk the customer through the baseline system with standard out of the box

functionality (with no customizations, only configurations) based on the project scope and to drive a configuration first approach.

The Build phase occurs at the completion of solution modeling and build planning focused on an iterative or sprint based approach length typically in occurring in 2-3 week cycles but subject to adjustment, incorporating key tasks below:

- Analysis
- Design
- Development
- Iteration Testing

Solution Modeling and Build

Goals:

Solution Modeling

This phase will consist of multiple workshops over the 4 week phase period to validate or establish the list of in-scope business processes required for the engagement to include, but not limited to:

- Updated solution design document
- Project scope sign off
- Updated project plan and schedule

Build

- Updated project plan and schedule
- Configuration complete
- Gaps developed, unit tested, and functional tested
- Test cases ready
- Solution test plan ready

Key Activities or Desired Outcomes

The key activities for Solution Modeling:

- Solution modeling kickoff
- Requirements validation
- Build phase planning and refinement
- 4 weeks of workshops to incorporate as required to potentially include: Data model and development, power apps, integrations, Invitation process, dashboards/reports, calendar integration, meeting set up, email notifications & collaboration, security, and communication channels
 - Number of workshops and durations to be decided by the project team after the project has kicked off

The Key Activities for Build:

- Build kickoff
- Configuration and Development
- Unit testing
- Sprint demo's to showcase in scope items completed for each sprint
- Test cases and solution test plan complete

In scope items to be configured and developed in each sprint proposed to follow the below, but subject to change pending project team alignment during initiation and solution modeling:

Week 9: Data model development, Power Apps configuration

Week 10: Power Apps configuration

Week 11: Power Apps configuration, Integration development

Week 12: Power Apps configuration, Integration development, Security role configuration

Week 13: Integration development, Security role configuration

Week 14: Integration development, Teams configuration, Teams UX Update

Week 15: Integration development, Report development, Teams configuration, Teams UX update

Week 16: Integration development, Report Development

Solution Testing

The **Solution Testing** phase aims to validate solution quality, process compliance, and performance. This phase includes system integration testing (SIT), end-to-end (E2E) testing, user acceptance testing (UAT), security assessments, performance testing and establishing standard operating procedures (SOP) and training materials for end user adoption.

Solution Testing

Goals:

The primary goal of the Solution testing phase is to validate solution quality, process compliance, and tested process performance. The goals of Solution Testing phase are:

- Validate that the solution has been configured and customized to meet the overall WV Department of Human Services requirements.
- Validate production-ready data.
- This Phase occurs once.

Key Activities or Desired Outcomes

- Perform System Integration Test (SIT)/E2E and User Acceptance Test (UAT).
- Addressing issues / bugs and prioritized changes to configuration / custom code as capacity allows.
- Test documentation and sign-off
- Validated Solution Functionality
- Issue Identification and Remediation
- End-to-End Process Validation

- User Acceptance Testing (UAT) Completed
- Performance and Scalability Testing Completed
- Security and Compliance Testing Completed
- Test documentation and sign-off
- Go-Live Decision

Prepare, Deploy & Transition

In the **Prepare, Deploy & Transition phase**, the team will complete **Production Deployment** to deploy the solution to production. These phases include go-live readiness, cutover plan execution, production data migration, transitional application support, and knowledge transfer to long-term care teams.

Prepare & Deploy & Transition Phase

Goals:

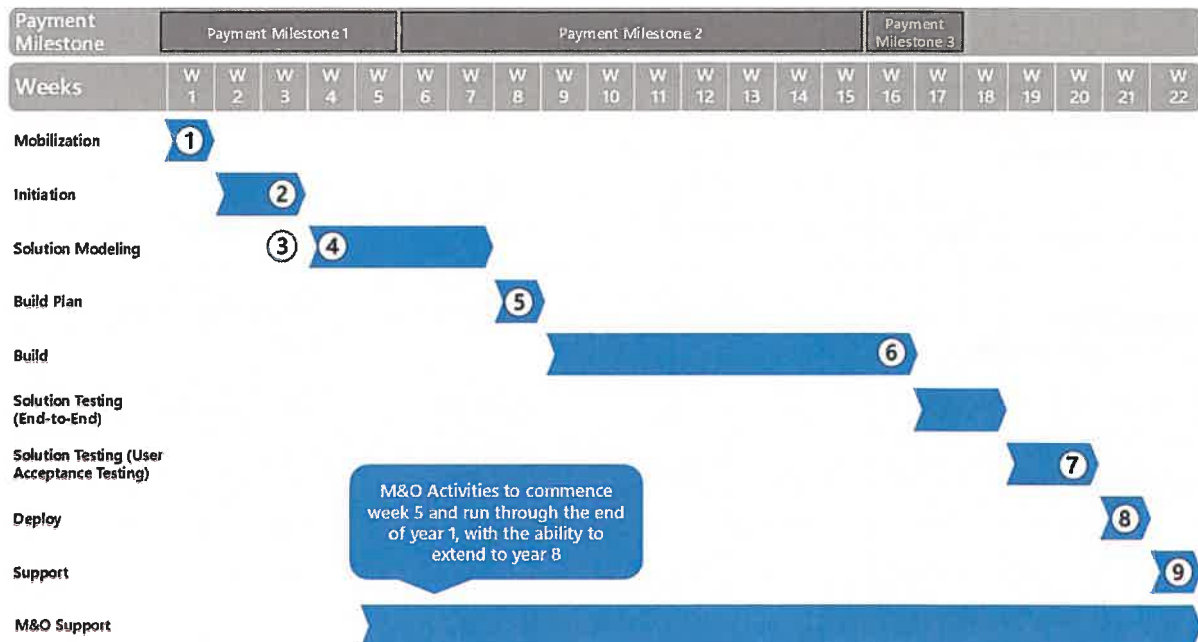
The Production Deployment and Support Transition phase focuses on deploying the solution to the production environment and any remaining support and knowledge transfer M&O team as well as the identified WV DHS staff. In this phase, the application is released in production environment(s). The goals of Production Deployment phase are:

- Go-live readiness
- Cutover plan execution.
- Application is released in production environment.
- Completion of production data migration.

Key Activities or Desired Outcomes

- Final Solution Configuration
- Data Migration
- Production Environment Setup
- Go/No-Go Decision
- Final Cutover Planning
- Solution Deployment into Production
- Post-Deployment Validation

The timeline below represents the proposed approach based upon Microsoft's Sure Step 365 methodology.



Key Project Milestones:

1. Project Kick Off (D001)
2. Finalized Project Management Plan (D002)
3. Agree on changes to TWIST API, Application and Graph API Permission Complete (D013)
4. Installation and Environment Set Up Complete (D006)
5. Solution Modeling Sign Off and Sprint Plan Completion
6. Completion of Configuration & Customization (D007)
7. Go-Live Readiness Assessment (D012)
8. Go-Live Event (D014)
9. Post Go-Live Support Transition

3.4 Software Products and Technologies

Product and technology item	Version	Responsibility	Ready by
Microsoft PowerApps Premium	Latest available	Customer	Prior to the project start date.
E5 (including Office and Teams)	Latest available	Customer	Prior to the project start date.

Product and technology item	Version	Responsibility	Ready by
Azure subscription (Azure Communication Services, Integration Services)	Required for any environmental deployments on the Azure platform.	Customer	Prior to project start date.
Microsoft Azure DevOps	Latest available	Customer	Prior to project start date.
Microsoft 365 Documentation tools	Latest available	Customer	Prior to project start date.
Microsoft Azure DevOps: Licenses for testing	Latest available	Customer	Prior to project start date.
Digital Signature	Adobe Acrobat Sign or Docusign	Customer	Prior to project start date.

3.5 Environments

The environments listed in the following section will be needed to deliver this project. Installation responsibility pertains to the installation and setup of Microsoft Power Apps.

Additionally, it is the Customer's responsibility to verify that the environments have been procured and set up in time to meet the schedule set forth in the project plan. Any delays to the project schedule caused by delays in availability of hardware or software are subject to the change management process described in this SOW. Microsoft will give one week notice to the Customer prior to any infrastructure requests for each of the environments listed in the following table.

Microsoft will work with the Customer's IT staff to complete the sizing exercise during the Solution modeling phase. The sizing recommendation for the environments will be based on the development environment configuration and quantity. This will be reviewed and accepted by both the Customer and Microsoft.

The following environments will be required to deliver the project.

Environment	Primary installation responsibility	Shadow responsibility	Environment purpose	Ready by
Contoso (aka Sandbox)	Microsoft	Customer	Base system reference	Start date of the project

Environment	Primary installation responsibility	Shadow responsibility	Environment purpose	Ready by
Build environment	Microsoft	Customer	Compilation and generation of custom builds	One week before start of Build phase
Test	Customer	Microsoft	Customer functional testing	Two weeks before start of System Integration Testing (SIT)
Training (Customer can use this for internal staff training)	Customer	Microsoft	User training	As deemed appropriate by the customer. This environment will not be used by Microsoft except to deploy the latest solution.
UAT	Customer	Microsoft	User Acceptance Testing (UAT) Support	Two weeks before start of UAT
Production	Customer	Microsoft	Production environment	Two weeks before start of UAT

3.6 Testing

The following testing is included in the scope of the project.

Test type (environment)	Description	Responsibility			
		Testing	Provides test data	Provides test cases	Provides guidance and support
Unit testing (Development)	Done to determine whether a unit of code functions according to the technical requirements of the solution.	Microsoft	Microsoft	Microsoft	Customer

Test type (environment)	Description	Responsibility			
		Testing	Provides test data	Provides test cases	Provides guidance and support
Functional testing	Focuses on functionality meeting the design.	Microsoft	Customer	Customer	Customer
Process testing	Done to validate the test script for each business process required for the solution. Process testing does not test end-to-end scenarios.	Customer	Customer	Customer	Microsoft
System Integration Testing	Done to determine whether functionality meets design specifications. This is achieved by running tests, with a focus on component development and integration with third-party systems. Test cases are based on the functional specifications document and business requirements.	Microsoft	Customer	Customer	Customer
User acceptance testing	A Customer-led activity done to test key, real-world scenarios (business requirements). Test cases are based on the functional specifications document.	Customer	Customer	Customer	Microsoft

3.7 Training and Knowledge Transfer

Microsoft will provide comprehensive end user guides and training videos for WV DHS end users to be able to adopt the new collaboration solution developed by Microsoft.

Training Strategy and Plan

The training will address the needs of key user roles, focusing on equipping them with the skills and knowledge needed to maximize the solution's benefits.

Training Materials

Microsoft will develop end-user materials to include a total of 2 user guides- external, 1 user guide-internal, and 6 role training videos, utilizing the following:

- Source process and technical materials, standard operating procedures, and other relevant content.
- A feedback loop with WV DHS Functional leaders to develop training materials through an iterative development process, keeping in mind program objectives.
- Use professional-grade tools to ensure videos are visually engaging, accessible, and easy to follow.
- Validation of training videos with representatives from each user group to ensure clarity and relevance.

The following training materials are in scope and will be delivered to Microsoft for WV DHS:

Written Materials:

The training team will develop role-specific written training materials tailored to the following user groups:

Caseworkers and Field Operatives:

- Workflow guides for case management processes, data entry, and reporting as it pertains to the new solution.
- Checklists for field activities, integrated with omni channel usage guidance.

External Stakeholders (e.g., foster families, Socially Necessary Services providers):

- Simplified guides focused on portal usage, document submissions, and communication workflows.
- The initial FAQs addressing common scenarios external user might face.

Role-Specific Training Videos:

Caseworkers and Field Operatives: Scenario-based guides showcasing how to handle a case from intake to closure as it pertains to the new solution.

External Stakeholders: Short, intuitive videos on how to interact with the portal for updates and communications.

- Environments needed for training materials development:

Environment	Responsibility (Setup)	Ready by
End-to-end (E2E)/user acceptance testing (UAT) /system integration testing (SIT)	Microsoft	Week 10 of Project timeline
Test/training	Microsoft	Commencement of Iteration Testing (Week 16/17)

Microsoft will also provide informal knowledge transfer throughout the project. Informal knowledge transfer is defined as Customer staff working alongside Microsoft staff.

3.8 Maintenance and Operations

Comprehensive Transition Planning

Our approach to transitioning systems from development to M&O ensures continuity and minimizes disruptions. We leverage structured planning and collaborative processes to achieve a seamless handover.

- **Knowledge Transfer** - Conducting structured sessions with the development team to capture system architecture, integrations, and workflows.
- **Detailed Documentation** - Developing comprehensive guides, user manuals, and process flowcharts.
- **Stakeholder Collaboration** - Facilitating regular meetings with agency personnel to align expectations and deliverables.

Proactive Maintenance

Proactive maintenance is critical to ensuring the reliability and performance of the system. Our methodology includes automated tools and preventive strategies to mitigate risks before they affect operations.

- **Automated Monitoring** - Utilizing tools like Azure Monitor for real-time system health tracking.
- **Regular Updates** - Scheduling updates to keep system components current and secure.
- **Risk Mitigation** - Identifying and addressing potential issues early to prevent system downtime.

Responsive Operations Support

Our operations support model prioritizes fast and effective resolutions to user issues, ensuring minimal disruptions to service delivery. Regular business hours Monday-Friday 8am-5pm EST to be adhered to.

- **Tier-2 Escalation Support Desk** - Our Tier-2 Escalation Support Desk provides business hours assistance from qualified experts.
- **Escalation Management** - Our escalation process provides a clear pathways for resolving critical incidents quickly and efficiently. Escalation process to be defined with the customer team during phase 3- testing and operational readiness.

Break-Fix Methodology

We ensure prompt resolution of technical issues through a structured break-fix approach, minimizing system disruptions and downtime.

- **Rapid Incident Response** - Prioritizing and addressing incidents based on severity.
- **Root Cause Analysis** - Investigating and resolving underlying causes to prevent recurrence.
- **Collaborative Diagnostics** - Working closely with agency teams to resolve recurring or complex issues.

Issue Classification and Response Times

We classify incidents based on severity to ensure timely resolution and minimal disruption:

Severity Level	Description	Initial Response Time
Critical	System-wide failure, legal compliance risk, or data loss with no workaround.	1 hour
High	Partial system failure affecting major functions but with a workaround.	2 hours
Medium	Functionality impairment with a viable workaround.	4 hours
Low	Minor issues with no operational impact.	24 hours

Rolling Out Updates

Our update deployment process is designed to minimize risk and ensure system stability through a controlled and systematic approach.

- **Scheduled Deployments** - Coordinating updates during low-usage periods to reduce user impact.
- **Change Management** - Implementing a formal process for reviewing and approving updates.
- **Sandbox Testing** - Testing updates in non-production (lower) environments to identify and address issues.
- **Incremental Rollouts** - Deploying updates in stages to monitor performance and resolve potential issues.
- **User Communication** - Providing advance notifications and detailed release notes to users.

Maximizing Uptime

Ensuring maximum system uptime is a cornerstone of our M&O methodology. We employ redundancy, monitoring, and optimization strategies to achieve this goal.

- **Real-Time Monitoring** - Use advanced tools to detect and address issues proactively.

- **Disaster Recovery** - Maintain a robust Business Continuity and Disaster Recovery (BCDR) plan with regular backups and restore exercises.
- **Performance Optimization** - Continuously analyze and optimize system performance to eliminate bottlenecks.

System and Support Process Optimization

Continuous improvement ensures that the system evolves to meet user needs and operational demands.

- **User Feedback Integration** - Regularly collect and incorporate stakeholder feedback.
- **Performance Analytics** - Collect and analyze customer ticket data to identify trends, recurring issues, and opportunities for improvement, enabling system optimization and enhanced user experience.
- **Workflow Automation** - Expand the use of Power Automate to streamline manual processes and increase efficiency.

Phase 1: Preparation and Onboarding (Weeks 1-4)

- **Key Activities:**
 - Conduct project kickoff and alignment meetings with stakeholders.
 - Develop a detailed project plan, outlining milestones and deliverables.
 - Assemble and onboard the Avid Systems support team.
 - Initial knowledge transfer sessions with the development team.
- **Duration:** 4 weeks

Phase 2: Knowledge Transfer and Documentation (Weeks 5-9)

- **Key Activities:**
 - In-depth system reviews, including architecture, integrations, and workflows.
 - Conduct comprehensive documentation review sessions, including user guides, process maps, and operational workflows.
 - Identify and document any known risks or technical issues.
- **Duration:** 5 weeks

Phase 3: Testing and Operational Readiness (Weeks 10-14)

- **Key Activities:**
 - Develop and implement processes for ticket handover from internal DHS support teams to the M&O team.
 - Develop and implement SLAs, including response and resolution time metrics.
 - Establish regular meeting cadence with West Virginia DHS and IT teams.
 - Work with the West Virginia DHS and IT teams to setup the necessary accounts for the M&O team.

- Establish and validate monitoring tools, such as Azure Monitor and Power Platform analytics.
- Conduct mock support scenarios to test escalation pathways and team readiness.
- **Duration:** 4 weeks

Phase 4: Transition and Support Ramp-Up (Weeks 15-18)

- **Key Activities:**
 - Incremental handover of responsibilities from the development team.
 - Finalize operational workflows and support escalation plans.
 - Conduct post-transition audits to confirm readiness for M&O.
- **Duration:** 4 weeks

Ongoing Support (Week 18 Onward)

- **Key Activities:**
 - Fully assume M&O responsibilities, which includes the following:
 - Ongoing monitoring of system performance, including uptime, latency, and data integration across platforms.
 - Ensuring that the system operates within predefined service levels, and monitoring system health proactively to detect and resolve issues before they affect users.
 - Addressing and resolving incidents in accordance with SLAs, with a primary focus on minimizing downtime.
 - Following a structured incident response process that prioritizes critical issues and ensures timely resolution.
 - Regular updates and patches for the Power Platform environment, ensuring that the system remains secure, compliant, and aligned with industry standards.
 - Providing escalation support during regular business hours and after-hours support for critical incidents.
 - Maintaining compliance with relevant standards, including those outlined in the proposal, particularly concerning sensitive data.
 - Generating and submitting periodic reports detailing system performance, support issues, and compliance with SLAs.
 - Maintaining comprehensive documentation for ongoing system maintenance, configuration changes, and incident management.
 - Regularly update the system to ensure compliance and performance optimization.
 - Conduct quarterly reviews to assess performance and identify improvement areas.
 - Regularly update the system to ensure compliance and performance optimization.
 - Conduct quarterly reviews to assess performance and identify improvement areas.

3.9 Areas out of scope

Any area not explicitly included in this proposal is out of scope for Microsoft during this project. Areas out of scope for this project are listed in the following table.

Area	Description
Product licenses	Product licenses (Microsoft or non-Microsoft) and cloud service subscriptions are not included, unless otherwise noted in the <i>Software products and technologies</i> section of this SOW. However, we will provide you guidance regarding what's needed, working with the Microsoft West Virginia account team.
Hardware	Microsoft will not provide hardware for this project.
Infrastructure setup	Infrastructure setup (required hardware and software), including setup of a high availability, disaster recovery, or load-balanced environment, is not in the scope of this SOW.
Legacy systems	Microsoft will not be responsible for supporting legacy client systems.
Requirements gathering	Microsoft will analyze the requirements documented for processes identified as in scope; gathering requirements is not in scope under this SOW.
Documentation	Preparation of documentation regarding existing processes, previous standards, policies, or existing guidelines is outside the scope of this SOW.
Upgrades, updates, patches, and fixes	<p>Upgrades, updates, patches, and fixes are not included in this scope of work, specifically:</p> <ul style="list-style-type: none"> • Operating system versions, updated service packs, or hotfixes. • Other server or client framework component versions. • Custom coding to avoid the application of hotfixes is out of scope. (If a fix or patch is identified as required after the start of the project, an assessment will be made by the project management team from Microsoft and the Customer as to the need for such a fix. If the fix is deemed needed by both parties in order to implement the functionality required by the Customer, the change will go through the change management process.) <p>Note: If a fix or patch is needed because of defects in the Microsoft software, the Customer will use its Microsoft Premier</p>

Area	Description
	or Unified support contract or third-party support provider to apply the fix or patch.
Global solution needs	Language implementations that are not part of the core product will not be applied as part of this SOW.
Process re-engineering	Designing functional business components and business processes of the solution is not included.
Organizational change management	Designing—or redesigning—the Customer's functional organization is not included.
Localization	Any localization requirements.
Customer line of business (LOB) Systems	Any work on existing State of WV line-of-business systems
Accessibility Testing	Customer is responsible for performing any Accessibility testing and provide access to tools, and test cases required prior to the start of the Solution Testing phase for such testing to the Microsoft team.
Performance Testing	Performance testing is out of scope for this proposal
Data Migration	Data migration activities are out-of-scope for Microsoft.

4 Qualifications and Experience

4.1 Business

Vendor should briefly describe the company's core business, background, and experience in providing IT solutions to government health and human services agencies.

Microsoft has a strong foundation in providing IT solutions to government health and human services agencies. Here is an overview of their core business, background, and experience in this area:

Microsoft offers a comprehensive set of cloud solutions, including Microsoft Azure, Microsoft 365, and Microsoft Power Platform, which are integrated to provide connected and efficient services. They have extensive experience in defining, developing, delivering, and supporting applications for government agencies, such as the Child Welfare Mobile Application Communication Software. Microsoft Services consultants, architects, engineers, project managers, cybersecurity specialists, and digital advisors work closely with government clients to maximize their technology investments.

4.2 Corporate Identity

Vendor should provide the identity of any parent corporation, including address, phone and fax numbers, federal employer identification number (FEIN) or tax ID number, company website, and contact email. Provide the identity of any subsidiaries, as applicable.

Microsoft Corporation (Nasdaq "MSFT") was founded in 1975 and it was incorporated in the State of Washington. Our mission is to empower every person and every organization on the planet to achieve more. We enable digital transformation for the era of an intelligent cloud and an intelligent edge. Our revenue comes from the developing, manufacturing, licensing, and support of software products and services for different types of computing devices worldwide.

Table 1: This table provides a summary overview of our organization.

Microsoft Profile	Brief Description
Name	Microsoft Corporation
Established date	1975
Incorporation date	June 25, 1981
Years in business	Microsoft has been in business for 49 years.
Headquarters	Microsoft Corporation One Microsoft Way Redmond, WA 98052-7329 www.microsoft.com
Contact details	Phone: (425) 882-8080 1-800-642-7676 (U.S. Only)

Microsoft Profile	Brief Description
Mission statement and corporate values	Our Mission is to empower every person and every organization on the planet to achieve more. Microsoft's corporate values are to align to our mission, support our culture, and serve as a declaration of how we treat each other, our customers, and our partners.
Leadership details	Under the leadership of CEO Satya Nadella, Microsoft has continued to grow at a tremendous pace. Please refer to the link below for our global organization management structure including photos, biographies, and speech transcripts of Microsoft executives and board of directors members: https://news.microsoft.com/leadership/
Stakeholder details	Microsoft Corporation is a publicly owned company traded as "MSFT" on the NASDAQ. Microsoft went public on March 13, 1986.
Nasdaq symbol	MSFT
Financials	Please refer to https://www.microsoft.com/en-us/investor for additional information.
Credit rating	Microsoft corporate credit rating is AAA and Aaa by Standard & Poor's Rating Services and Moody's Investors Service Inc., respectively. The commercial paper is rated A-1+ by Standard & Poor's and P-1 by Moody's.
Independent auditor	Microsoft's independent auditor is Deloitte & Touche.
Bankruptcy	Microsoft has a strong financial background and has never filed for bankruptcy.
Employees	Facts About Microsoft <ul style="list-style-type: none"> Click the link above to access current employee counts.
Subsidiaries	Microsoft is a global company with more than 120 subsidiaries around the world. Microsoft commits to working with businesses, communities, and governments worldwide to help advance social and economic well-being and enable people around the world to realize their full potential.

Microsoft Profile	Brief Description
	For a full list please visit https://news.microsoft.com/facts-about-microsoft/
Acquisitions	In the past three decades, Microsoft has been involved in several acquisitions across the world. Please refer to Acquisition History
Insurance	Microsoft's insurance program is extensive. We are self-insured in many areas and use alternative financing arrangements in others. Certificates of Insurance and Evidence of Insurability documents are available upon request.
CAGE code (Commercial and government entity)	60128
CUSIP (Committee on Uniform Securities Identification Procedures)	594918104
SAM (U.S. Federal) The System for Award Management (SAM) (https://www.sam.gov) is a government run site that serves as a central registration point for government contractors.	FMVPEWNJGLM1 Any company that would like to do business with the federal government, or needs to report subcontract information, must register on SAM.gov. It is also a requirement for companies that want to obtain a General Services Administration (GSA) Schedule Contract. Associated keywords for Federal: UEI and Unique Entity ID (UEI)
D&B number (Dun & Bradstreet aka DUNS Number)	08-146-6849
Federal Tax ID Number (IRS) (aka PIN/EIN Number)	91-1144442
NAICS code (North American Industry Classification System)	518210 (Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services) 511210 (Software Publishers) 541511 (Custom Computer Programming Services)
SIC code (Standard Industry Code)	Microsoft's Primary SIC is 7373
Microsoft's UBI (United Business Identifier) number for the State of Washington Department of Revenue	C 600 413 485

Microsoft Profile	Brief Description
Other incorporation dates	Microsoft Corporation incorporated on June 25, 1981 in the State of Washington; Reincorporated in the state of Delaware on September 19, 1986; Reincorporated in the state of Washington on November 1, 1993
Sole proprietorship Tax ID, if applicable.	Sole proprietorship Tax ID is not applicable. Federal Tax ID: 91-1144442
Microsoft’s Central Index Key (CIK) number with the SEC	789019

4.3 Organization and Structure

Vendor should provide an overview of its organizational operating structure and describe the operational and functional relationships of the business units of its organization as they relate to Vendor's proposal and the Agency's stated needs and requirements. Organizational charts are helpful supplements to the descriptions.

Microsoft Corporation is a global technology company that develops, manufactures, licenses, supports, and sells software, hardware, cloud computing, and consumer electronics. It is one of the largest and most influential companies in the world, with a market capitalization of over \$3 Trillion as of 2024. Microsoft is best known for its Windows operating system, Office productivity suite, Xbox gaming console, Surface devices, Azure cloud platform, and more recently with the heralding of AI and Copilot. It also owns and operates online services, such as Bing, LinkedIn, Skype, OneDrive, Outlook, and Teams.

Microsoft was founded in 1975 by Bill Gates and Paul Allen, who started by developing and selling BASIC interpreters for the Altair 8800 microcomputer. The company rose to prominence in the 1980s and 1990s with the success of its MS-DOS and Windows operating systems, which became the dominant platforms for personal computers. Microsoft also expanded into other areas, such as software development tools, databases, servers, and internet browsers. In the 2000s, Microsoft faced increasing competition from rivals such as Apple, Google, and Amazon, as well as antitrust lawsuits and regulatory scrutiny in various markets. The company underwent several

reorganizations and strategic shifts, focusing more on cloud computing, artificial intelligence, and mobile devices.

Microsoft has a diversified business model, with revenue streams from various segments and geographies. In FY23, Microsoft reported the following:

- Revenue: \$211.9 billion for the fiscal year ended June 30, 2023, which is an increase from the previous year.
- Operating Income: \$88.5 billion GAAP and increased 6%, and \$89.7 billion non-GAAP and increased 8% (up 14% in constant currency).
- Net Income: \$72.4 billion GAAP and decreased slightly, and \$73.3 billion non-GAAP and increased 6% (up 11% in constant currency).

These figures reflect the company's performance across its various segments, including Productivity and Business Processes, Intelligent Cloud, and More Personal Computing. Microsoft's focus on cloud computing, artificial intelligence, and other strategic areas has contributed to this financial growth.

Microsoft's vision is to empower every person and every organization on the planet to achieve more. The company's mission is to enable people and businesses throughout the world to realize their full potential. The company's values are innovation, diversity and inclusion, corporate social responsibility, and customer satisfaction. The company's culture is based on a growth mindset, which encourages learning, curiosity, and experimentation. The company's strategy is to create best-in-class platforms and productivity services for a mobile-first, cloud-first world. The

company's goals are to reinvent productivity and business processes, build an intelligent cloud platform, and create more personal computing experiences.

Microsoft Industry Solutions Delivery (ISD)

Microsoft Industry Solutions (formerly Microsoft Consulting Services) began in 1990 and currently consists of consultants, including enterprise architects, engineers, project managers, cybersecurity specialists, and other technical specialists and business development professionals. These individuals live and work across 191 countries, supporting 46 different languages, and engaging in customer and partner interactions through on-premises, phone, web, community, and automated tools.

Microsoft ISD includes a diverse group of technical architects, engineers, consultants, and support professionals dedicated to delivering on Microsoft's mission of empowering businesses on the planet to do more and achieve more in a mobile-first, cloud-first world.

ISD brings mobile application practice-based technical consulting services including:

- Project management and governance
- Functional consulting
- Full lifecycle implementation and migration services
- Post-deployment support

The value we provide is centered on our deep knowledge of the Microsoft platform and related technologies, and our ability to assist our customers with:

- Adopting and deploying Microsoft technologies.
- Innovating and competing using the latest technological advancements.
- Mitigating risk through strong adherence to project lifecycle management and governance.
- Accelerating the rate of implementation by applying prior project success and experience gained through similar engagements.

Our world class ISD staff has direct access to Microsoft software developers and security specialists who build Microsoft products and devices. This access affords WV DHS invaluable insights into the technologies and architectures of our solutions through our professional services team. Furthermore, this kind of knowledge transfer allows us to facilitate and complete your company's IT deployment projects smoothly, efficiently, and successfully—according to your specifications, expectations, and satisfaction, and per mutually agreed upon timelines and budgets.

In addition to our own in-house products, professional services and ongoing technical support organizations Microsoft has a vast ecosystem of partners and Independent Software Vendors (ISVs) and global consulting agencies who can also bring value to our solutions through scale and expertise in focused areas.

4.4 Locations

Vendor should describe the geographical locations of their firm at the national, regional, and local levels, as applicable. Identify all locations that will be used to support a resultant contract and the operations managed from these locations. Clearly identify any overseas locations which may be used to support the resultant contract. No State data may be stored on servers or systems outside of the United States of America (U.S.), including U.S. Territories.

Microsoft's presence is truly global. We operate in over 200 countries and are committed to working with businesses, communities, and governments to help advance social and economic well-being.

Microsoft's Multi-Geo capabilities allow customers to manage data-at-rest locations at a granular level for their users, SharePoint sites, Microsoft 365 Groups, and Microsoft Teams. This ensures that data residency requirements are met while retaining single-tenant administration and full-fidelity collaboration experiences. The Multi-Geo architecture consists of a central location (where the Microsoft 365 subscription was originally provisioned) and one or more satellite locations.

Microsoft has data centers in various regions, including the United States, Europe, Asia, and other parts of the world. For example, in the United States, there are data centers in locations such as Los Angeles, Dallas, Miami, and San Jose. These data centers support various operations and ensure high availability and disaster recovery capabilities.

To view datacenter locations, please visit: <https://azure.microsoft.com/en-us/explore/global-infrastructure/geographies/#overview>

4.5 References

The Vendor should provide three (3) references from system implementation projects or systems in operation within the last five (5) years that demonstrate the Vendor's ability to achieve the goals and objectives in Section 4.2 and meet the requirements in the RFP.

Reference 1

- Customer name and title: Marina Havan, Chief Information Office, DC Child and Family Services Agency.
- Solution: Comprehensive Child Welfare Information System
- Contact: Marina.Havan@dc.gov

Reference 2

- Customer name and Title: Steven Hintze, Chief Data and Product Officer, Arizona DCS
- Solution: Comprehensive Child Welfare Information System
- Contact: Steven.Hintze@azdcs.gov

Reference 3

- Customer name and title: Jim Daugherty, Chief Information Officer, Illinois DCFS
- Solution: Provider Portal (Product & ISD services) AND Youth Teams App Mobile Application (Product only)
- Contact: James.Daugherty@Illinois.gov

4.6 Mandatory Qualification/Experience Requirements

Vendor must demonstrate that they have successfully implemented and operated a Child Welfare client communications system for a government agency in the U.S. in compliance with all federal and state regulations within the five (5) years prior to this bid opening. Vendors may use one (1) or more of the references provided in response to Section 4.3.1.5 to satisfy this requirement.

Microsoft brings a highly configurable platform foundation with advanced capabilities, delivered by a team with both system integration and child welfare experience. Microsoft Industry Solutions (ISD) is a global consulting and support organization guiding enterprises and public sector entities along their digital transformation journey. As an arm of Microsoft, ISD brings unrivaled experience with Microsoft products and services, with direct access to engineering teams working on the latest innovations. With customer centricity, industry experience and technical depth, ISD brings together a highly specialized team with a deep understanding of Public Health and Human Services, and Child welfare. Microsoft provides resources with extensive experience in the implementation of CCWIS solutions to support the overall project, including project governance and system design, configuration, deployment, and support.

We bring a proven, hybrid Agile methodology that emphasizes collaboration with WV to provide a seamless implementation and comprehensive system. We will help WV achieve better outcomes for children and families as quickly as possible. Our team is backed by the largest software company in the world and the consulting expertise of more than 16,200 enterprise services employees.

Microsoft SACWIS and CCWIS experience:

- In Arizona, Microsoft delivered a modern, cloud-based CCWIS solution that supports the state's vision of improving outcomes for children and families. The solution leverages Microsoft Power Platform, Azure, and Office 365 to provide a user-friendly, mobile-enabled, and data-driven system that integrates with other state systems and external partners. The system has unlocked capabilities and access to data that were simply unavailable to the agency in the past, providing a complete transformation. With tight integration to Microsoft 365 products, it speeds user adoption and reduces the training cost for employees to adopt the system because many users are familiar with the market leading tools that make up the solution.
- In DC, Microsoft is implementing a CCWIS solution that will replace the legacy SACWIS system and enable the state to meet the federal CCWIS requirements. The solution is built on Microsoft Power Platform, Power Platform, Azure, and Office 365, and will provide a comprehensive, flexible, and secure system that supports the state's business processes and data needs. The modular CCWIS solution allows for easy expansion and updates as needs and regulatory requirements change. In addition, we are presently working with DC to determine where we can leverage AI capabilities to support their case workers and enhance their existing workflows.
- In Idaho, Microsoft is providing CCWIS solution components, which were implemented by one of our global partners. This demonstrates flexibility demonstrates the solution and will modernize the state's child welfare system and enhance the quality and timeliness of services. The solution is based on Microsoft Power Platform, Azure, and Office 365, and will offer a user-centric, mobile-ready, and analytics-enabled system that integrates with other state systems and external partners.

These initiatives have notably contributed to enhancing operational efficiency for the states' CCWIS implementation, using market leading tools, reduced the need for training, enabled faster employee adoption and are themselves continually updated as part of the Microsoft cloud platform. These examples demonstrate Microsoft's commitment to supporting child welfare programs with innovative technology solutions and expert consultancy.

5 Project Governance Approach

5.1 Communication Plan

A formal process will be employed to facilitate communication during the project. There will be two key vehicles for providing this communication: a weekly status report and a weekly status meeting.

The Microsoft Project Manager, working in conjunction with the Customer Project Manager, will compile status reports for distribution to both Customer and Microsoft management.

Meetings will be held to review overall status, the project schedule and open issues noted in the status report.

Additionally, a Steering Committee Status Report will be prepared, and a meeting will be conducted monthly.

5.2 Issue Management Plan

A formal process will be employed to track and resolve project issues. The following general procedure will be used to identify and manage project issues:

- Identify
- Document
- Assign responsibility
- Monitor and report progress
- Communicate issue resolution

In addition, a mutually agreed upon issue escalation process will be defined at the outset of the project.

5.3 Change Control Plan

During the proposed project, items might arise that are outside the scope of work contemplated by either party. To address such items so they are given proper consideration, to increase the probability that project scope is carefully managed, and costs are contained, we will employ a formal change control process. The proposed change control process that we will employ is as follows:

- Identify and document
- Assess and prioritize
- Estimate required effort
- Monitor and report progress
- Approve / disapprove

- Communicate change resolution

6 Assumptions

6.1 Customer Responsibilities

The Customer will also be required to:

- **Provide information:** This includes accurate, timely (within three business days or as mutually agreed upon), and complete information required for the engagement.
- **Provide access to people and resources:** This includes access to knowledgeable Customer personnel, including business user representatives, and access to funding if additional budget is needed to deliver the project scope.
 - WV DOH will provide access to subject matter experts to answer questions and provide clarifications about user stories and requirements through the entirety of the project
 - WV DOH will provide testers for functional/process testing during the Build phase (Weeks 9-16), and End-to-End and User Acceptance Testing (weeks 17-20)
- **Provide access to systems:** This includes access to all necessary Customer work locations, networks, systems, and applications (remote and on site).
- **Provide a work environment:** This consists of suitable workspaces, including desks, chairs, and internet access.
- **Manage non-Microsoft resources:** The Customer will assume responsibility for the management of all Customer personnel and vendors who are not managed by Microsoft.
- **Manage external dependencies:** The Customer will facilitate any interactions with related projects or programs to manage external project dependencies.
- Any changes needed to the PATH API or application will need to be identified by the end of Solution Modeling phase. The changes will need to be completed by the 3rd week of development (end of Week 6).

- Graph API permissions must be agreed upon by Business and IT stakeholders by the end of Solution Modeling phase and permissions must be provided by the 3rd week of development (end of Week 6).
- User Experience and User Interface must be finalized by the end of Week 7 after the start of the project.
- **Definition of "Done":** The project team will consider the definition of done as the successful completion and sign-off of User Acceptance Testing (UAT) in accordance with the third milestone payment. At this juncture, the services transition of development to M&O will complete.
- **Data Migration:** While data migration is out-of-scope for Microsoft, it is noted that certain data migration activities may be necessary to seed data into the system. If required, WV DHS data migration tasks must fall within the project schedule listed in this proposal. This includes:
 - Provide a source system data dictionary (Word or Excel file) to allow the Microsoft team to review the necessary fields to be created in the proposed solution by week 2 of the engagement.
 - Providing sample data migration data in the Process Test environment by week 8 of the engagement.
 - Providing a test data migration run (with PII obfuscated) by week 14 of the engagement to support end-to-end testing (Test environment) and UAT testing (UAT environment).
 - Provide a production data migration run to support deployment during week 21 of the engagement.
 - WV DHS may elect to load data into the solution using the out-of-box Power Platform import tool. Microsoft will provide an overview on how to use this tool.
 - Delays in the project timeline due to data migration delays will require a change request to extend the project.
- **Integration:**
 - Provide documentation regarding the PATH API (interface agreement) by week 2 of the engagement

- Deploy any necessary changes to the PATH API test environment by week 12 of the engagement.

6.2 Project Assumptions

The project scope, Services, fees, timeline, and detailed solution are based on the information provided by the Customer to date. During the project, the information and assumptions in this SOW will be validated, and if a material difference is present, this could result in Microsoft initiating a change request to cover additional work or extend the project duration. In addition, the following assumptions have been made.

- Workday: The standard workday for the Microsoft project team is between 8 AM and 5 PM, Monday through Friday.
- Standard holidays: Observance of consultants' country-of-residence holidays is assumed and has been factored into the project timeline.
- Remote work:
 - The Microsoft project team will perform Services remotely.
 - If the Microsoft project team is required to be present at the Customer location on a weekly basis, resources will typically be on site for three nights and four days, arriving on a Monday and leaving on a Thursday.
 - All onsite Services provided in this engagement will be subject to reimbursable travel expenses charged at actual cost.
 - The place of performance under the SOW may be at a Microsoft facility, a Customer's facility, a US government facility, or various remote and off-site locations (including Microsoft employee home offices).
- Language: All project communications and documentation will be in English. Local language support and translations will be provided by the Customer.
- Staffing:
 - If necessary, Microsoft will make staffing changes. These may include, but are not limited to, resources and engagement roles.

- Microsoft reserves the right to utilize whichever labor categories, which could include certain vetted and approved subcontractors, in whatever quantities, in our sole discretion, are appropriate to perform the professional services outlined in this SOW.
 - If any Security clearances are required, those need to be identified by the customer before contract signature and outlined in the Statement of Work. If Security clearance becomes required after contract signature, it may cause engagement delays or delays in staffing and engagement start.
 - Resource mobilization for staffing the engagement will be, on average, 4 weeks from contract WO execution date. Factors that could shorten or lengthen that time frame include: resource availability, how lengthy the customer onboarding process may be, what types of skills are required, etc.
 - Microsoft employees may be based within the US or outside of the US unless the customer has specific requirements for where the engagement team members need to be based. If the customer has requirements on where Microsoft resources can be located, those need to be identified by the customer before contract signature and outlined in the Statement of Work.
 - Any Customer required onboarding or compliance training and/or activities is not included in the estimation. If any are required, the time required by each engagement team member to complete them will need to be estimated in the contract as billable activities or the change management process outlined in the Change Management Process section of this document will be triggered.". Examples include: Security training, Internal orientation, Financial compliance training, Healthcare compliance training, Background checks, fingerprinting, badging, and authentication
 - Known standards: Time will be required to learn the Customer tooling if there are deviations from Microsoft standards. This time has not been included in engagement estimates and may require additional resources/time allocation as per the change management process (see the Change Management Process section of this document). Microsoft will use standard Azure DevOps process templates, as well as other IP designed to speed up delivery, including, but not limited to, standard work items, pipelines, and document templates.
- Other assumptions:

- Microsoft will make available to the Customer all data and insights gathered during the engagement. Microsoft will purge said data and insights upon explicit Customer request or at the end of the engagement.
- Holidays, vacations, and training time have not been factored into this SOW.
- All work is assumed to be delivered without breaks in the schedule. Any breaks in the engagement calendar must be scheduled four weeks in advance; failure to do so will result in uninterrupted time being billed.
- The Customer will meet the necessary requirements to help make sure the solution design meets regulatory requirements.
- During the course of the engagement under this SOW, if the requested business objective includes Microsoft developing or deploying an AI System for or with Customer which may be considered a sensitive use, Microsoft will conduct an internal responsible AI review, to include assessment of and requirements for the potential sensitive use. The outcome of the review will be discussed with the Customer and Microsoft will act in compliance with its responsible AI principles, including making any required modifications. For more information about Microsoft's responsible AI principles please refer to <https://aka.ms/RAI>.
- When the Customer determines that Microsoft or its agents will have access to personal identifiable information, the Customer is obligated to inform Microsoft within 5 days that further access to that information requires the use of equipment owned or supplied by the Customer.
- All work is to be contiguously scheduled. Any breaks in the engagement calendar must be scheduled four weeks in advance or will be billed without interruption.
- Any delay in delivering Customer-required items could impact the delivery schedule.
- In addition to engagement team members, the Customer shall allow Microsoft internal systems to access the mutually accessible delivery platforms/tools used for this engagement.
- Microsoft will read, store, and share necessary delivery insights on the work artifacts and products generated as part of this engagement (for example, test

cases, code base, and pipelines) that are hosted on the mutually accessible delivery platforms like Azure DevOps, and GitHub.

- The gathered data and the generated insights will be made available to the Customer during the duration of the engagement and will be purged based on explicit Customer request or the end of the engagement.

6.3 Infrastructure Assumptions

- Existing systems or programs upon which the project deliverables depend are stable and will not change during the term of this project.
- The Microsoft Power Apps development environment and any required Azure environment will be provisioned and made accessible to Microsoft before the start of the Build-Development activity set.
- Timely availability of the hardware, software, and physical space for the solution environments is essential. Failure to complete site readiness activities that are required for Microsoft to deliver its Services according to the agreed-upon project schedule may result in project delays requiring change orders to this SOW and additional project costs.
- WV DOC has already set up and activated Active Directory Domain Service (AD DS), established access to the required infrastructure that will be used by this solution, and completed the configuration of correct security zones and firewall control, and all proposed WV DOC users have identities in Entra ID (formerly Azure Active Directory).
- The solution will be deployed in a single data center.
- State of West Virginia is responsible for the activation of the Azure online subscription and deployment of necessary configurations to enable the in-scope platform items. Microsoft will work directly with customer resources to identify the necessary components.

6.4 General Technical Assumptions

- No part of the solution will be supported on operating systems other than Windows 10 or later.
 - WV DHS is responsible for providing supported systems for internal users to access the proposed solutions. Supported desktop operating systems, mobile operating systems, and browsers are maintained here: <https://learn.microsoft.com/en-us/power-apps/limits-and-config>The following table lists the minimum and

recommended hardware requirements for the Microsoft Power Apps web application.

Component	Minimum	Recommended
Processor	1.9 gigahertz (GHz) x86- or x64-bit dual core processor with SSE2 instruction set	3.3 gigahertz (GHz) or faster 64-bit dual core processor with SSE2 instruction set
Memory	2-GB RAM	4-GB RAM or more
Display	Super VGA with a resolution of 1024 x 768	Super VGA with a resolution of 1024 x 768

- Running Microsoft Power Apps on a computer that has less than the recommended requirements may result in inadequate performance. Additionally, satisfactory performance may be experienced running systems that use a different hardware configuration than those published here—for example, a system with a modern quad-core processor, lower clock speed, and more RAM.
- Network requirements
 - Microsoft Power Apps is designed to work best over networks that have the following elements:
 - Bandwidth greater than 50 KBps (400 kbps)
 - Latency under 150 ms
 - Notice that these values are recommendations and don't guarantee satisfactory performance.

For custom code, testing will be done on one Operating System and Teams application that is agreed to mutually by Microsoft and the State of West Virginia.

- State of West Virginia will provide 24-hour-a-day, 7-day-a-week access to its development and testing environments to both onsite and offshore consultants in order to carry out work on the project.
- Offshore resources will not be accessing any data in the customer environment. As there is only data import involved in this project, there is no additional mitigation strategy needed.
- Any bugs arising in any third-party tools are the responsibility of the respective vendors. These bugs will not be fixed by Microsoft.

6.5 Scope or Solution Assumptions

Assumption area	Description
Compliance	HIPAA Compliance will be dealt with when implementing this program for the larger child welfare system and will not be a blocker for Phase 1.
User Experience	UX/ UI work will be limited to Teams look and feel.
Integration	PATH API will be available for Microsoft to interface with. Any changes needed to the API will be made by the State of WV within the timeframe of the project. Due to the short timeframe of the project, any delays in this process will have an impact on the timelines and cost. Change management processes will kick in to account for any delays.
Telephony	The proposed solution is not a replacement for the current telephony solution, and will not accept or place calls to the current telephony system.
Reporting	Any Power BI reports developed will query the Dataverse database included in the proposed solution, and no additional data sources (including PATH)
Scope Clarity	Microsoft reserves the right to re-estimate and reprice the delivery after the solution modeling phase to address any changes in scope complexity or other discoveries.

6.6 Complexity Definitions

	Workload	Assumptions
1	Power Apps configuration	<p>Simple Entity/Page:</p> <ol style="list-style-type: none"> 1. System/OOB (out-of-box)/Custom Entity 2. Up to 5 Custom Fields 3. 1 Main Form, 1 Quick View Form 4. OOB View Only 5. Configure Entity Properties <p>Medium Entity/Page</p> <ol style="list-style-type: none"> 1. System/OOB/Custom Entity 2. Up to 50 Fields (System and Custom) 3. 2 Main Form, 2 Quick View Form

	Workload	Assumptions
		<ul style="list-style-type: none"> 4. OOB View and 2 Custom view 5. Configure Entity Properties <p>Complex Entity/Page</p> <ul style="list-style-type: none"> 1. System/OOB/Custom Entity 2. Up to 100 Fields (System and Custom) 3. 3 Main Form, 3 Quick View Form 4. OOB View and 4 Custom view 5. Configure Entity Property
2	Custom code (e.g. plugins/Azure function/javascript)	<p>Simple Plugin/Function:</p> <ul style="list-style-type: none"> 1. up to 20 Lines of Code (LOC) 2. No HTTP Object, Rest API, Web API Call 3. Condition Check : max 2 IF...Else (including nested IF) <p>Medium Plugin/Function</p> <ul style="list-style-type: none"> 1. up to 40 LOC 2. No HTTP Object, Rest API, Web API Call 3. Condition Check : max 6 IF...Else (including nested IF) <p>Complex Plugin/Function</p> <ul style="list-style-type: none"> 1. up to 80 LOC 2. Max 1 HTTP Object/ Rest API / Web API Call 3. Condition Check : max 8 IF...Else (including nested IF)
3	Configure workflow/Power Automate flow	<p>Simple:</p> <ul style="list-style-type: none"> 1. Workflow with 1 to 5 Steps <p>Medium:</p> <ul style="list-style-type: none"> 1. Workflow with 6 to 20 Steps <p>Complex:</p> <ul style="list-style-type: none"> 1. Workflow with 21 to 40 Steps
4	Integration Points	Each integration feature counts as one integration point. For example if the solution is required to query 11 different record types from PATH this counts as 11 integration points.

	Workload	Assumptions
		<p>Simple:</p> <ol style="list-style-type: none"> 1. Batch or real-time integration (oData connection/Web API call, SFTP file creation, Azure Service bus message creation) with up to 10 fields <p>Medium:</p> <ol style="list-style-type: none"> 1. Batch or real-time integration (oData connection/Web API call, SFTP file creation, Azure Service bus message creation) with up to 20 fields <p>Complex:</p> <ol style="list-style-type: none"> 1. Batch or real-time integration (oData connection/Web API call, SFTP file creation, Azure Service bus message creation) with up to 40 fields.
5	Reports (Power BI)	<p>Simple :</p> <ol style="list-style-type: none"> 1. Based on 1 Entity 2. Create 1 table and/or 1 chart 3. Simple Parameters and/or Max 1 Lookup/Drop down parameter <p>Medium:</p> <ol style="list-style-type: none"> 1. Based on 2 Entities (but not more than total 2) 2. 2 table and/or 2 chart 3. Simple Parameters and/or Max 2 Lookup/Drop down parameters <p>Complex:</p> <ol style="list-style-type: none"> 1. Based on 4 Entities (but not more than 4) 2. 4 table and/or 4 chart 3. Simple Parameters and/or Max 4 Lookup/Drop down parameters

7 Appendix

7.1 Appendix A – Exceptions and Clarifications

7.2 Appendix B – Functional and Technical Requirements

7.3 Appendix C- Designated Contact Form

7.4 Appendix D – Cost Proposal Form

Microsoft Disclaimer

This proposal is for discussion and information purposes only. The contents of this proposal (a) may change at any time until a final agreement is executed by the relevant Microsoft entity and WV DHS Government and (b) are considered confidential and trade secret information of Microsoft and may not be disclosed to any third party. Microsoft reserves all rights in and to the contents of this proposal, including all intellectual property rights, and no rights are granted to you, including by implication, estoppel, statute, or otherwise. MICROSOFT MAKES NO WARRANTIES, EXPRESS, IMPLIED, STATUTORY OR OTHERWISE, AS TO THE INFORMATION IN THIS PROPOSAL, INCLUDING ANY INFORMATION ABOUT MICROSOFT OR THIRD-PARTY PRODUCTS AND SERVICES, AND MICROSOFT WILL NOT BE LIABLE FOR ANY DAMAGES RESULTING FROM THE USE OR PROVISION OF ANY INFORMATION CONTAINED HEREIN. UNLESS EXPLICITLY STATED, ANY PRICING SET FORTH HEREIN IS EXCLUSIVE OF ANY AND ALL TAXES WHICH MAY APPLY TO THE PARTIES.

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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.

(Printed Name and Title) Robin Hagar, Delivery Management Executive
(Address) 12012 Sunset Hill Road – 5th Floor Reston, VA 20190
(Phone Number) / (Fax Number) (508) 243-2302
(email address) robinhagar@microsoft.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 this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; 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.

Microsoft Corporation

(Company) Robin Hagar
Robin Hagar (Feb 4, 2025 09:00 EST)

(Signature of Authorized Representative) Feb 4, 2025
Robin Hagar, Delivery Management Executive

(Printed Name and Title of Authorized Representative) (Date)
(508) 243-2302

(Phone Number) (Fax Number)
robinhagar@microsoft.com

(Email Address)

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP BSS2500000001

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 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.

Microsoft Corporation

Company

Robin Hagar
Robin Hagar (Feb 4, 2025 09:00 EST)

Authorized Signature

Feb 4, 2025

Date

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






Designated Contact Form

Final Audit Report

2025-02-04

Created:	2025-02-04
By:	Vladimir Valencia (Vladimir.Valencia@microsoft.com)
Status:	Signed
Transaction ID:	CBJCHBCAABAA3WiTyUnozG7YB80_hNO0najvCPZeLpNI

"Designated Contact Form" History

-  Document created by Vladimir Valencia (Vladimir.Valencia@microsoft.com)
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-  Document emailed to Robin Hagar (robinhagar@microsoft.com) for signature
2025-02-04 - 1:55:32 PM GMT
-  Email viewed by Robin Hagar (robinhagar@microsoft.com)
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