



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

State of West Virginia
Centralized Request for Information
Info Technology

Proc Folder: 1739093			Reason for Modification: Addendum No 3
Doc Description: One-Stop-Shop Permitting			
Proc Type: Request for Information			
Date Issued	Solicitation Closes	Solicitation No	Version
2025-08-14	2025-08-29 13:30	CRFI 0201 SEC2600000001	4

BID RECEIVING LOCATION

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

RECEIVED

2025 AUG 28 PM 3:47

VENDOR

Vendor Customer Code:

Vendor Name : FBM

Address :

Street :

City :

State :

Country :

Zip :

Principal Contact :

Vendor Contact Phone:

Extension:

FOR INFORMATION CONTACT THE BUYER

Tara Lyle
(304) 558-2544
tara.l.lyle@wv.gov

**Vendor
Signature X**

FEIN#

DATE

8/27/25

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

ADDITIONAL INFORMATION

Addendum No. 3 - to extend the bid opening date from 08/22/2025 to 08/29/2025.

Responses to vendor questions will be issued under separate addendum.

No other changes.

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	One-Stop-Shop Permitting Program				

Comm Code	Manufacturer	Specification	Model #
43232408			

Extended Description:

One-Stop-Shop Permitting Program

SCHEDULE OF EVENTS

<u>Line</u>	<u>Event</u>	<u>Event Date</u>
1	Question deadline	2025-07-24

SOLICITATION NUMBER: CRFI SEC2600000001
Addendum Number: 3

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

Applicable Addendum Category:

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

Description of Modification to Solicitation:

- 1. To extend the bid opening date from 08/22/2025 to 08/29/2025. The bid opening time remains at 1:30 pm.**
- 2. Responses to vendor questions will be issued under separate addendum.**

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

Terms and Conditions:

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

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFI SEC2600000001

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

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

ZBM

Company

[Signature]

Authorized Signature

8/27/25

Date

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

IBM
300 Summers St.
Suite 600
Charleston, WV 25301



August 29, 2025

Tara Lyle
Buyer Supervisor
Department of Administration
Purchasing Division
2019 Washington St E
Charleston, WV 25305

Dear Ms. Lyle,

Thank you for the opportunity to respond to the State of West Virginia's Request for Information regarding the development and implementation of a comprehensive one-stop shop permitting solution. We appreciate the State's commitment to streamlining processes, improving accessibility, and enhancing citizen experiences across departments.

As an experienced provider of integrated permitting solutions, our team is enthusiastic about the possibility of partnering with the State of West Virginia to deliver a platform that simplifies application, review, and approval workflows while maintaining the highest standards of compliance and security. Our approach is centered on creating a user-friendly, flexible solution that addresses the unique needs of your agencies, businesses, and constituents.

We are confident that our expertise, innovative technology, and dedication to customer service will position us as a valuable partner in modernizing and transforming the permitting process statewide. We look forward to engaging with the State to further discuss the requirements, share insights, and tailor a solution that aligns with West Virginia's goals for efficiency, transparency, and growth.

Sincerely,

A handwritten signature in blue ink, appearing to read "B. Cunningham", written over a light blue horizontal line.

Brian Cunningham
IBM Lead Client Partner
304-552-0032
Brian.Cunningham@ibm.com



IBM RESPONSE TO:

State of West Virginia,
Department of Administration

One Stop Shop Permitting

CRFI SEC260000001

Prepared by

Brian Cunningham
Lead Client Partner
brian.cunningham@ibm.com

IBM Consulting

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Executive Summary

Governor Patrick Morrisey's vision for West Virginia, as articulated in House Bill 2002, centers on transforming the state's permitting ecosystem into a catalyst for robust economic growth. The Governor recognizes that by streamlining and modernizing the permitting process, West Virginia can attract new investments, spur job creation, and foster sustained prosperity across its communities. House Bill 2002 underscores the need to eliminate duplication, increase transparency, and reduce response times—each a critical step toward making the state more competitive for business and economic development.

IBM's One-Stop-Shop Permitting Platform, powered by Salesforce, is designed to realize this vision. By providing a unified, efficient, and transparent digital system, Salesforce enables agencies to collaborate seamlessly, cut through bureaucratic red tape, and empower businesses to launch projects more rapidly. This holistic approach not only fulfills legislative requirements but also positions West Virginia as an attractive destination for economic innovation and opportunity, directly aligning with the Governor's commitment to accelerating the state's economic development.

Revolutionizing Permitting: Seamless, Digital, and Efficient

Salesforce offers a comprehensive suite of features tailored for license and permitting management, designed to digitize and streamline the entire lifecycle of licensing processes for government agencies. With Salesforce, agencies can configure online application portals where citizens and businesses submit license or permit requests, upload supporting documentation, and make secure payments—all from a single, user-friendly interface. Automated workflows route applications efficiently for review and approval, while built-in communication tools keep applicants informed at every stage.

Advanced case management capabilities allow staff to track, process, and resolve complex licensing matters, handle renewals, manage inspections, and address compliance issues with full audit trails. Integration options connect Salesforce with payment gateways, GIS systems, and legacy databases, enabling a seamless flow of information across departments. Real-time dashboards and reporting provide instant visibility into workloads, timelines, and regulatory compliance, empowering agencies to optimize operations and deliver superior service to applicants and the community.

Proven Digital Solutions Driving Economic Growth

Successes from other state and local governments across the country using Salesforce platforms for licensing and permitting further underscore the transformative potential of this approach. By learning from these proven successes, West Virginia can leapfrog traditional barriers, delivering a modern, business-friendly environment that attracts investment, fosters accountability, and supports sustained economic growth:

- **Arizona Registrar of Contractors (AZROC):** Saved 8,000 hours in annual data entry, reduced application deficiencies by 59%, customer inquiries by 18%, and cut costs by \$125,000 per year.
- **State of Minnesota:** Simplified public access to nearly 600 types of licenses across five agencies, replacing paper forms and manual work with a centralized digital portal.
- **Wyoming Office of State Lands & Investments:** Improved data accuracy, consolidated legacy systems, enabled management of 40,000+ land parcels, and increased staff efficiency with a unified digital platform.

- The **Massachusetts Department of Early Education and Care** streamlined license and inspection processes for over 11,000 providers using Salesforce, enabling online applications, real-time mobile inspections, and centralized communication, with 50 new applicants monthly benefiting from improved efficiency and automated workflows.
- The **U.S. Department of Agriculture (USDA)**, a \$150B+ agency with 100,000 employees and 17 agencies, has leveraged Salesforce to standardize and streamline its licensing, permitting, and collaboration processes across 12 integrated systems, resulting in consistent user experiences and improved data accessibility through reports and dashboards.

IBM and Salesforce: Powering West Virginia's Permitting Transformation

IBM stands out as the ideal team to implement West Virginia's one-stop-shop platform, underpinned by its status as a Salesforce Global Strategic Partner—one of Salesforce's top 30 partners worldwide. With more than 25 years of close collaboration with Salesforce and a proven track record of over 10,000 successful Salesforce implementations, IBM combines deep technical knowledge with unmatched global reach. Our team is made up of skilled professionals who hold more than 22,700 certifications—including Salesforce Public Sector Solutions—and operate out of eighteen global Technology Centers. This breadth of expertise allows IBM to deliver secure, scalable, and innovative Salesforce solutions tailored specifically to public sector needs. Backed by our multidisciplinary teams of Salesforce architects, process analysts, and change management specialists, IBM is equipped to ensure rapid deployment, proactive risk mitigation, and ongoing optimization. By leveraging this robust experience and comprehensive resources, West Virginia can confidently transition to a modern permitting ecosystem that fully realizes the Governor's vision for efficiency, transparency, and economic growth.

Contact Information: *In response to RFI requirement 3.2.3*

International Business Machines Corporation (IBM)	
Brian Cunningham, Lead Client Partner 304-552-0032 Brian.Cunningham@ibm.com	Charles McCarthy, Senior Sales Director 978-460-2054 c.mccarthy@ibm.com

One-Stop Shop Permitting Program Solution and Approach

IBM and Salesforce are uniquely positioned to deliver West Virginia's One-Stop-Shop Permitting vision, aligning seamlessly with Governor Patrick Morrisey's economic development strategy and commitment to efficient, transparent government. By harnessing Salesforce's unified platform along with IBM's comprehensive suite of offerings that combine the power of AI strategy with Salesforce Cloud expertise, West Virginia will empower its agencies, support business and infrastructure growth, and deliver exceptional digital experiences for all citizens.

One-Stop Shop Permitting Solution Overview

House Bill 2002 identified several critical challenges within West Virginia's permitting process:

- **Redundant Processes:** Applicants often face repetitive data entry, unclear requirements, and duplicative reviews across agencies.
- **Lack of Transparency:** Applicants and stakeholders have limited visibility into permit status, requirements, and timelines, leading to frustration and delayed projects.
- **Inefficient Coordination:** Agencies operate in silos, creating bottlenecks and making it difficult for leadership to track progress or resolve issues proactively.
- **Administrative Burden:** Manual workflows increase staff workload and the risk of human error, further delaying approvals and economic activity.

IBM's One-Stop-Shop solution, powered by Salesforce is expressly architected to overcome these pain points.

- **Unified Digital Application Intake:** Our platform consolidates permit, license, and regulatory applications into a single digital portal, ensuring applicants submit information only once and agencies access a centralized record—directly eliminating the redundancy cited in HB 2002.
- **End-to-End Workflow Automation:** By automating review, routing, and approval processes, Salesforce reduces manual steps, improves data accuracy, and shortens overall permitting timelines, in full alignment with the bill's mandate to accelerate response times.
- **Real-Time Transparency:** Applicants, businesses, and agency leaders benefit from self-service dashboards, real-time status tracking, and proactive notifications—building trust and clarity at every stage, as called for by HB 2002.
- **Inter-Agency Collaboration Tools:** Salesforce's cloud-based architecture enables seamless communication between agencies, automatic handoffs, and centralized document management, breaking down the silos that have historically hindered coordination.
- **Scalability and Modernization:** As West Virginia's permitting landscape evolves or expands, Salesforce's flexible platform allows for rapid onboarding of new agencies or permit types, ensuring lasting modernization beyond HB 2002's initial requirements.

Solution Components

The proposed One-Stop-Shop Permitting Platform is built on Salesforce's secure, cloud-native architecture, designed specifically to support public sector regulatory processes. The solution is modular, configurable, and scalable—enabling the State of West Virginia to meet the

Figure 1 Salesforce Public Sector Solution Architecture

The platform includes the following technology layers:

Layer	Salesforce Component	Description
User Experience	Experience Cloud	Delivers a centralized, self-service portal for applicants, businesses, and licensees to apply, upload documents, pay fees, and track application status
	Salesforce Mobile App	Enables inspectors and field personnel to perform tasks on the go, including site inspections, real-time data capture, and photo uploads
	OmniStudio	Provides guided, dynamic forms tailored to different permit types, reducing data entry errors and improving applicant experience
	Custom Dashboards & Reports	Give agency users and leadership real-time visibility into application volumes, processing timelines, and SLA compliance
Business Logic	Salesforce Public Sector Solutions (PSS)	Offers a purpose-built data model for permitting and licensing, with embedded milestone tracking and compliance workflows
	Flow Builder and Orchestration	Support end-to-end automation of application intake, inter-agency routing, approvals, escalations, and notifications
	OmniStudio Integration Procedures	Allow configuration of complex rules (e.g., eligibility, fee calculation) without code
	Apex (used minimally)	Supports advanced scenarios where configuration is insufficient, such as tiered fee models or statutory exceptions
Integration	Mulesoft AnyPoint Platform	Serves as the integration backbone, enabling secure, scalable connections with existing permitting portals, GIS systems, financial systems, and inspection platforms.
	Named Credentials	Enable lightweight integration with external REST/SOAP services for simple data lookups or document sync
	External Services and Platform Events	Support asynchronous communication and real-time updates across agency systems
Data and Compliance	Salesforce Shield (optional)	Offers platform encryption, field-level audit trails, and event monitoring to

Layer	Salesforce Component	Description
		support compliance with data retention, cybersecurity, and audit requirements
	GovCloud or Commercial Cloud	Options provide hosting flexibility aligned with FedRAMP and BIT standards
	DataLoader and MuleSoft ETL	Tools enable initial data migration from legacy systems and batch synchronization where APIs are unavailable
Security and Access	Salesforce Identity with Multi-Factor Authentication (MFA)	Supports secure Single Sign-On (SSO) integration with Azure AD / Entra ID, as well as any SAML 2.0 or OIDC-compliant identity provider.
	Role Hierarchies and Permission Sets	Enforce strict access controls by user type, ensuring data privacy and regulatory compliance
	Login Flows and Session Controls	Apply contextual access policies, timeouts, and audit logging for sensitive operations

Permit Powerhouse: Streamlining Approvals with One Unified Platform

The platform will be engineered to deliver a comprehensive, end-to-end permitting solution, combining core modules such as **Public Sector Solutions (PSS)**, **Experience Cloud**, **Service Cloud**, and **MuleSoft** integration. The result is a unified and robust system that not only streamlines the permitting process but also adapts to the evolving needs of West Virginia's agencies, businesses, and citizens.

Centralized Application Management

By consolidating disparate application processes into a unified, digital platform, the solution transforms the permitting journey for both applicants and government agencies. Applicants no longer need to navigate a maze of department-specific websites or submit identical information multiple times; instead, they engage with a streamlined portal that adapts to their unique needs, whether they are applying for a simple license renewal or managing a complex, multi-agency project. This intuitive portal not only centralizes submissions but also provides real-time guidance, document storage, and the ability to manage several permit types concurrently.

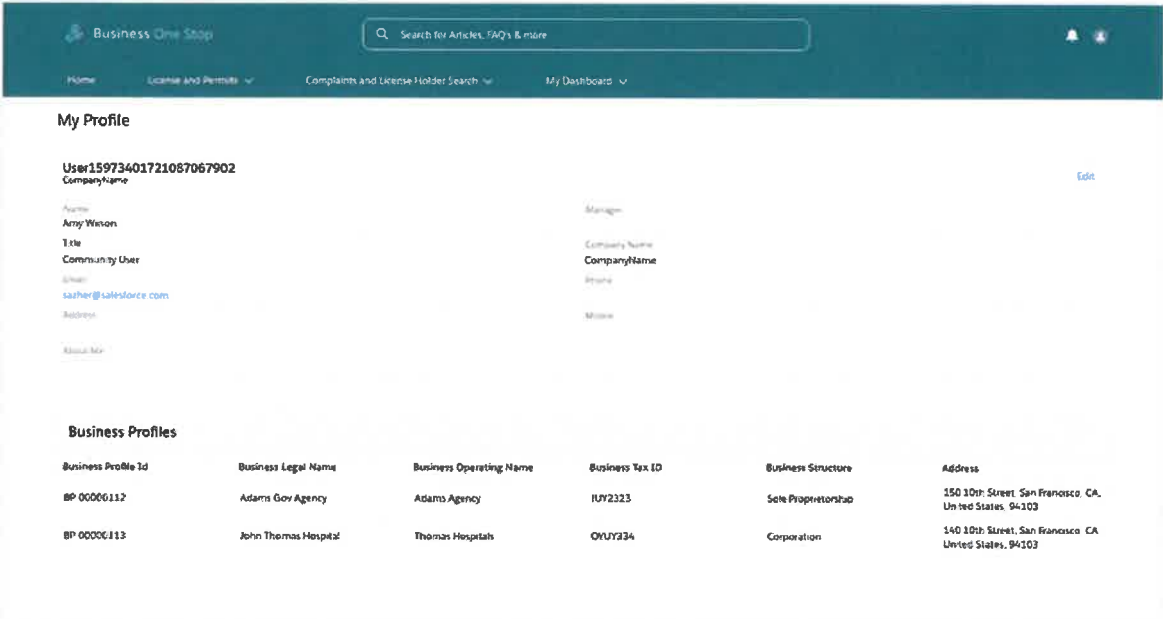


Figure 2 Registered users have access to everything they need in regards to licensing, permits, and inspections

For agency personnel, the centralized workspace offers role-based access, ensuring that each team member sees only the information relevant to their responsibilities. Applications are automatically organized, categorized, and prioritized, eliminating manual tracking and reducing the risk of overlooked tasks. Integrated analytics and reporting tools empower agencies to monitor performance, identify bottlenecks, and ensure compliance with statutory requirements like those defined in HB 2002.

The screenshot displays a web application interface for 'Business License Applications'. At the top, there are filters for 'Public Sector: Lice...' and 'Business License Applicat...'. Below this, a header indicates '29 items • Sorted by Application ID • Updated 8 minutes ago'. The main content area is divided into two tabs: 'BLATYPE1 (20)' and 'UNCATEGORIZED (29)'. A table below these tabs shows the workflow stages: Submitted (15), Application Ac... (3), Inspection Pha... (2), Violations Obs... (3), Inspection Co... (3), In Review (1), and Approved. The table lists individual applications with details such as Application ID, Name, Description, and Date/Time.

Submitted (15)	Application Ac... (3)	Inspection Pha... (2)	Violations Obs... (3)	Inspection Co... (3)	In Review (1)	Approved
BLA-000000008 Patient House Hazardous material saf 8/6/2020, 1:03 PM	BLA-000000002 Foodies Hazardous material safety 5/3/2020, 12:30 AM	BLA-000000029 SIMPLY UNIQUE NAILS Comprehensive Cosmetol 8/17/2020, 4:00 PM	BLA-000000024 Triaged Hazardous material safety 8/14/2020, 7:07 PM	BLA-000000028 Global Media Hazardous mater: safety 8/14/2020, 11:27 PM	BLA-000000021 Nurses Hazardous material safety 8/14/2020, 12:30 AM	
BLA-000000009 Triaged Hazardous material saf 8/6/2020, 1:05 PM	BLA-000000034 John Thomas Hospital CT Scanner Permit 8/20/2020, 11:26 AM	BLA-000000037 John Thomas Hospital CT Scanner Permit 8/20/2020, 7:09 PM	BLA-000000027 ANNA FOR HAIR Hazardous material safety 8/14/2020, 11:11 PM	BLA-000000032 ANNA FOR HAIR CT Scanner Permit 8/18/2020, 4:53 PM		
BLA-000000010 Triaged Hazardous material saf 8/11/2020, 11:26 PM	BLA-000000035 Triaged CT Scanner Permit 8/20/2020, 6:48 PM		BLA-000000038 Patient House CT Scanner Permit 8/20/2020, 7:09 PM	BLA-000000039 John Thomas Hospital CT Scanner Permit 8/20/2020, 7:52 PM		
BLA-000000011 Triaged Hazardous material saf 8/11/2020, 11:29 PM						
BLA-000000012						

Figure 3 Staff have a single unified view which helps pinpoint bottlenecks and where to apply resources

Furthermore, this centralized system fosters greater accountability and transparency. Every touchpoint—whether an application is submitted, reviewed, or approved—is logged and auditable. Applicants receive automated updates at every stage, significantly reducing status inquiries and enabling staff to focus on higher-value activities. As the platform evolves, it can quickly scale to accommodate new regulations, permit types, or agency partners, ensuring adaptability as the needs of West Virginia’s public sector continue to grow and change.

Ultimately, by bridging gaps between agencies and simplifying the user experience for citizens and businesses, the solution not only reduces administrative burden but also catalyzes economic activity, positioning government services as efficient, responsive partners in community development.

Automated Routing and Approvals

Advanced workflow automation lies at the heart of the platform’s efficiency, orchestrating every step of the permitting process with precision and adaptability. The system intelligently routes applications based on a variety of parameters—such as permit type, project complexity, jurisdictional boundaries, and required departmental reviews—ensuring that each submission reaches the right team without manual intervention.

The platform’s robust rules engine enables agencies to codify business logic and compliance requirements directly into workflows. For example, if an application meets certain risk thresholds or involves sensitive land use, the system can automatically trigger escalations to senior reviewers or route the file for additional environmental or legal scrutiny. If supporting documentation is incomplete, automated notifications are sent to applicants requesting clarification or supplementary materials, reducing delays caused by missing information.

Approvals are streamlined through configurable pathways: straightforward applications may receive instant approval after automatic checks, while more complex cases follow multi-stage review processes involving sequential or parallel input from different departments. Each decision point—whether an approval, rejection, or request for more information—is securely logged, timestamped, and attributed to the responsible user to provide a complete audit trail.

Built-in analytics monitor workflow efficiency, flagging bottlenecks or overdue items and enabling proactive intervention. Agencies can set service-level agreements within the system, which automatically escalates stalled applications to supervisors to maintain statutory compliance and prevent backlogs.

This comprehensive approach not only ensures consistent, transparent processing but also fosters confidence among applicants and agency staff, as every action is visible, traceable, and accountable from submission to final approval.

Seamless Integrations

With MuleSoft and Salesforce's native APIs, the platform integrates effortlessly with existing state systems—such as GIS, tax, inspection, and payment solutions. This ensures real-time data exchange, up-to-date application statuses, and eliminates the burden of manual data entry for agency staff.

Through these integrations, agencies can automatically validate applicant information against authoritative state databases, verify parcel data through GIS mapping, and synchronize permit fees with financial systems for accurate invoicing and payment processing. Inspection schedules, compliance records, and enforcement actions are seamlessly shared between departments, reducing duplication and ensuring a unified case history for every permit.

Moreover, the system's open architecture allows for easy expansion as new technologies or regulatory requirements emerge, supporting the connection of future data sources or partner agencies. This connectivity not only improves data accuracy and operational efficiency but also provides a holistic view of permit activity across the state, empowering leaders to make data-driven decisions and support strategic community development initiatives.

Customizable User Experiences

Role-based portals and dashboards deliver tailored access and functionality for every stakeholder—applicants, agency reviewers, inspectors, and executive leadership. For agency workers across West Virginia, these tools translate directly into increased productivity and clarity in day-to-day operations. Applicants benefit from intuitive, step-by-step application wizards, automated status notifications, and secure document uploads, which reduce the need for manual follow-ups and streamline submission processes.

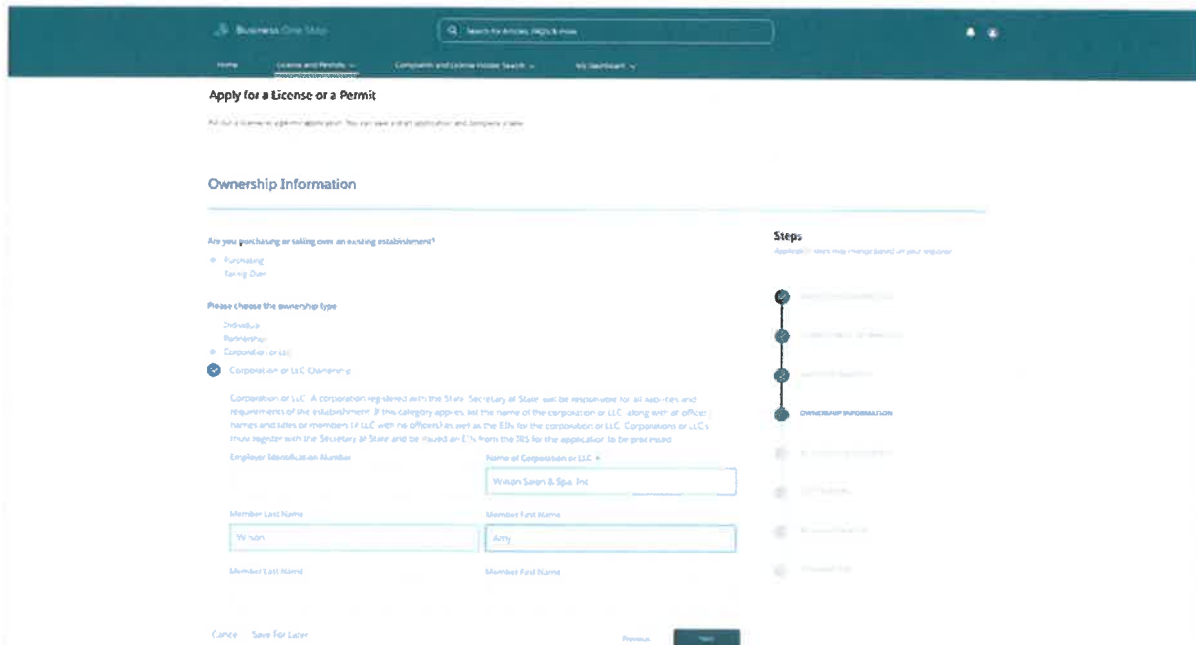


Figure 4 Dynamic application process guides constituents and provides more accurate intake with fewer mistakes and call-backs

For agency staff in West Virginia’s diverse departments—whether working in permitting, inspections, or environmental compliance—personalized queues and dynamic task lists ensure that each worker can easily prioritize urgent items and manage caseloads efficiently. Real-time analytics dashboards present actionable insights, such as trends in permit volume, areas of recurring compliance issues, and service-level performance, equipping supervisors and frontline staff alike to make informed decisions.

Furthermore, integration with state-specific systems means that agency workers no longer have to grapple with siloed data or redundant entry. Information flows seamlessly between the platform and existing West Virginia databases, so personnel can retrieve parcel records, verify applicant credentials, or cross-check compliance documents without having to switch tools or request information from other agencies. This interconnectedness not only saves time but also helps agency workers in West Virginia provide faster, more transparent service to citizens and the business community.

By empowering agency employees with these robust, user-friendly digital resources, the platform transforms formerly fragmented, paper-heavy processes into a cohesive, efficient ecosystem—one that supports the unique needs and regulatory landscape of West Virginia.

End-to-End Communication & Collaboration

In-platform messaging, automated reminders, and inter-agency workgroups break down communication barriers. Stakeholders can submit and track inquiries, attach supporting documents, and collaborate on compliance reviews—all within the secure Salesforce environment.

Real-Time Tracking & Transparency

Applicants and agency leadership access real-time dashboards that provide a transparent view into the entire permitting process, highlighting application status, outstanding tasks, workflow bottlenecks, and compliance with HB 2002 benchmarks. These dashboards are updated continuously, giving all stakeholders—internal teams, decision-makers, and the public—a single source of truth that reduces unnecessary status inquiries and ensures everyone is working from the most current information available.

Crucially, the system's comprehensive audit trails automatically log every action taken within the platform—whether it's a permit approval, document upload, or communication between departments. This robust recordkeeping not only supports smooth internal audits but also makes it possible to reconstruct the exact sequence of events for any permit, fostering organizational accountability and ensuring regulatory compliance. In case of public inquiries or legislative review, agency staff can quickly retrieve complete histories, providing clear, indisputable evidence of responsible stewardship.

Public reporting features further advance the state's commitment to transparency by allowing non-sensitive permit data, processing times, and compliance outcomes to be published on citizen-facing portals. Residents, businesses, and watchdog organizations can independently monitor agency performance, track trends in permitting and enforcement, and hold public institutions accountable for meeting service-level expectations. This open flow of information is central to building trust between government and the communities it serves.

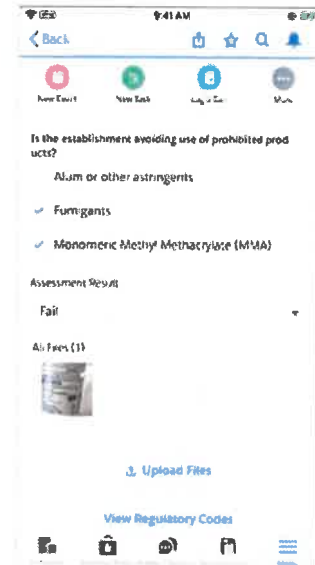
Altogether, these transparency tools directly support Governor Morrisey's agenda by rooting West Virginia's licensing and permitting operations in openness, efficiency, and accountability. By empowering both the public and agency leadership with real-time access to critical information, West Virginia sets a statewide standard for ethical governance and demonstrates a proactive approach to public engagement and oversight.

Document & Records Management

All documents, plans, correspondence, and approvals are centrally stored, versioned, and easily retrievable—ensuring compliance with public records laws and facilitating smooth audits.

Mobile Accessibility

The platform is fully mobile-ready, leveraging Salesforce's advanced mobile capabilities to support seamless access and productivity on the go. Field inspectors, agency staff, and applicants can securely log in from smartphones or tablets, enabling real-time updates and collaborative work from virtually any location. The intuitive mobile interface allows users to capture and upload site photos, annotate documents, complete digital checklists, and submit inspection reports directly from the field. Push notifications alert users to critical updates, upcoming deadlines, or required actions, ensuring nothing is overlooked. GPS integration enables geo-tagging of inspection locations for enhanced record accuracy, while offline access allows work to continue even in areas with limited connectivity—automatically syncing data once a connection is restored. This robust mobile functionality not only accelerates decision-making and reduces administrative overhead but also empowers all stakeholders to stay engaged and informed, regardless of where their duties take them.



Seamless, Secure, and Scalable Solutions for West Virginia

Salesforce's modular, cloud-first architecture is engineered for resilience, scalability, and rapid time-to-value—directly benefiting West Virginia's licensing and permitting operations in the following ways:

Configuration over Code

[response below aligns to RFI requirements 3.2.4 Describe how your solution would address adding additional permits and licenses for the participating agencies, when necessary, as well as adding additional agencies and their permitting requirements that may come online after the fact]

Most business logic and workflows are delivered via Salesforce's robust declarative tools—such as Flow, Process Builder, and custom objects—enabling agencies to rapidly design, deploy, and update processes with minimal reliance on custom development. This low-code approach ensures that new permit types, license categories, and regulatory requirements can be introduced swiftly, often entirely by agency administrators or business analysts. When a new permit or license becomes necessary—whether due to legislative change, emerging industry needs, or evolving agency mandates—staff can configure new forms, approval workflows, data validation rules, and notification triggers directly within the platform's intuitive interface. This agility eliminates lengthy development cycles and permits agencies to adapt in near real-time.

Furthermore, the solution's modular architecture supports the seamless onboarding of additional agencies and their unique permitting requirements. Each agency can be provisioned with its own secure workspace, complete with tailored workflows, user roles, dashboards, and reporting. Cross-agency permit types or collaborative processes may be streamlined through shared objects and unified data models, while agency-specific needs—such as unique application fields, review steps, or compliance checks—are easily accommodated through configuration.

As new agencies come online, the platform's standardized templates and reusable components ensure consistency in user experience and back-office administration, while also reducing the

time and complexity of onboarding. Built-in tools for data migration and integration facilitate the consolidation of legacy permitting systems, maintaining continuity of records and minimizing disruption.

This flexibility is further enhanced by Salesforce's AppExchange ecosystem, which enables agencies to add specialized modules or vetted third-party solutions for unique regulatory or operational needs without compromising security or interoperability. As a result, West Virginia is empowered to respond dynamically to future permitting and licensing demands—confident that any new permit, license, or agency requirement can be incorporated smoothly, securely, and efficiently, all within the unified statewide platform.

API-First Integration

[response below aligns to RFI requirements 3.2.5 How would you address permitting portals currently in use by state agencies?]

MuleSoft, as Salesforce's flagship integration platform, dramatically expands the capabilities of West Virginia's licensing and permitting solution by enabling secure, reliable, and scalable connectivity with the diverse permitting portals and legacy systems currently in use by state agencies. Through its library of pre-built connectors and flexible API management, MuleSoft facilitates real-time, bi-directional data exchange between Salesforce and virtually any external application—including legacy permitting software, case management tools, document repositories, and financial systems.

For agencies operating their own permitting portals, MuleSoft provides seamless integration pathways that minimize disruption and preserve business continuity during modernization. Existing records, historical application data, and ongoing casework are synchronized into the unified Salesforce environment, ensuring that no critical information is lost in transition. This also allows agencies to maintain parallel operations or phased migrations, reducing risk for high-stakes regulatory services.

With MuleSoft, state agencies can consolidate siloed data, streamline workflows, and automate cross-system processes such as background checks, fee collection, and compliance validation. It becomes possible to trigger automatic status updates, document retrieval, and applicant notifications across connected systems, creating a consistently smooth experience for both agency staff and the public. MuleSoft's robust security, monitoring, and error-handling capabilities ensure all integrations adhere to the strictest compliance standards—protecting sensitive data as it moves between platforms.

By leveraging MuleSoft, West Virginia's statewide licensing platform is not only future-ready but also responsive to the current technological landscape. Agencies can honor their investments in existing permitting portals while benefiting from Salesforce's advanced features, unified analytics, and mobile-ready user experience, all without costly, time-consuming system replacements. This approach accelerates the state's modernization efforts, reduces technical risk, and positions agencies to evolve as new regulatory or operational needs arise.

Role-Based Access and Security Framework

[response below aligns to RFI requirements 3.2.6 Describe how you handle security and privacy/cyber security as well as backups and disaster recovery within your solution?]

Our solution employs a robust, multi-layered security architecture designed to ensure the confidentiality, integrity, and availability of sensitive licensing and permitting data at every level.

Granular, role-based access control (RBAC) is enforced throughout the platform, so that public applicants, agency staff, administrators, and auditors are each assigned permissions aligned with their duties. Built-in least-privilege principles restrict users to only the features and records necessary for their roles, minimizing risk of data exposure or unauthorized changes. All access events and administrative actions are logged and monitored in real time, supporting comprehensive auditing and rapid detection of anomalous behavior.

In addition to RBAC, the platform supports Single Sign-On (SSO) integration with agency identity providers, leveraging protocols like SAML and OAuth for centralized authentication and streamlined user management. Multi-factor authentication (MFA) is enforced for all privileged accounts and can be required across user groups, further reducing the risk of credential compromise. Data is encrypted both in transit (using TLS 1.2+/HTTPS) and at rest (with Advanced Encryption Standard, AES-256), ensuring that all sensitive personal, regulatory, and financial information remains protected from interception or unauthorized access.

Our solution is also engineered to comply with the strictest data privacy regulations, aligning with federal and state standards such as NIST, FedRAMP, and CJIS as appropriate. Fine-grained data classification and field-level encryption can be applied to particularly sensitive fields (e.g., personally identifiable information, payment details), bolstered by configurable data retention policies and automated redaction where required. Comprehensive penetration testing and vulnerability assessments are conducted on a regular basis, while integrated threat detection tools continuously monitor for potential cyber threats—including intrusion attempts, malware, and phishing—triggering automated alerts and incident response workflows if risks are detected.

Every platform release incorporates the latest cybersecurity advancements, informed by real-world threat intelligence and collaboration with government security experts. Ongoing employee security awareness training and security operations center (SOC) oversight further reinforce the platform's defenses.

All licensing and permit data will be safeguarded through automated, geo-redundant backup processes, ensuring that critical records are continuously protected across multiple, regionally distributed data centers. Full and incremental backups are performed at regular intervals, with integrity checks and point-in-time recovery options available to restore data to any recent state in the event of accidental deletion, corruption, or cyberattack.

Disaster recovery (DR) capabilities are rigorously tested and documented, with Recovery Time Objectives (RTO) and Recovery Point Objectives (RPO) that meet or exceed state agency requirements. In the event of a data center outage or catastrophic incident, failover procedures automatically redirect platform operations to backup environments with minimal service disruption. Regular DR drills and incident response simulations ensure staff readiness and validate the effectiveness of these safeguards.

Additionally, the platform provides immutable system and audit logs, secure archival storage, and compliance reporting to help agencies demonstrate adherence to state and federal continuity mandates. By protecting data integrity, ensuring rapid recovery, and maintaining uninterrupted public access, our solution upholds the trust and operational resilience essential for West Virginia's licensing and permitting processes.

ADA/WCAG 2.1 Accessibility

Licensing and permitting portals are designed to be fully accessible to all West Virginians, including individuals with disabilities, ensuring equitable access to essential government

services. The platform rigorously adheres to ADA and WCAG 2.1 accessibility standards, incorporating features such as screen reader compatibility, high-contrast display options, keyboard navigation, and responsive, mobile-friendly layouts. These measures guarantee that users with visual, auditory, motor, or cognitive impairments can seamlessly navigate, complete applications, and track their progress without barriers.

Comprehensive accessibility testing is conducted throughout the development lifecycle, involving both automated tools and real-world user feedback from the disability community. Accessibility documentation, including VPAT (Voluntary Product Accessibility Template) reports, is maintained and made available to agencies to demonstrate ongoing compliance with state and federal regulations.

By prioritizing universal design and inclusive technology, West Virginia's licensing and permitting solution not only meets legal requirements but embodies a commitment to public service, ensuring every resident can participate fully in government processes and benefit from digital transformation.

By leveraging each of these strengths, West Virginia can modernize its licensing and permitting infrastructure to deliver a seamless, efficient, and secure experience for applicants and agencies alike. The system's agility allows for quick addition of new license types or changes in requirements, while robust integration and disaster recovery guarantees reliability for both government staff and the public. Ultimately, these advancements foster a more responsive, transparent, and trustworthy permitting and licensing environment throughout the state.

Continuous Improvement and Future-Readiness with Salesforce

A key advantage of the Salesforce platform is its unwavering commitment to continuous improvement, which directly benefits West Virginia's licensing and permitting modernization initiatives. Salesforce operates on a robust release cycle, delivering three major platform updates annually, each packed with new features, security enhancements, and innovations tailored to public sector needs. These updates are automatically pushed to all customers, ensuring that West Virginia's solution remains up-to-date with the latest compliance mandates, accessibility guidelines, and cybersecurity threats—without disruptive upgrades or costly migrations.

Salesforce's investment in its public sector ecosystem extends beyond core functionality. The platform regularly introduces new modules, purpose-built components, and best-practice templates for government processes, enabling rapid adoption of evolving standards. For example, recent releases have delivered enhanced records management capabilities, sophisticated analytics for transparency and oversight, and advanced identity verification tools to streamline constituent engagement—all of which can be rapidly enabled for West Virginia as requirements change or expand.

Public Sector Solutions Inherits Power of the Platform

Built on the world's #1 CRM platform



Figure 5 Public Sector Solutions: Power of the Platform

Crucially, the Salesforce AppExchange ecosystem offers a marketplace of pre-vetted, security-reviewed applications and integrations, allowing West Virginia agencies to extend functionality without custom development or risk exposure. Agencies can adopt new tools for citizen self-service, workflow automation, or regulatory compliance, confident that each addition conforms to Salesforce's stringent security protocols and seamlessly interoperates with the existing platform.

Salesforce's proactive approach to security and privacy is foundational to its continuous improvement ethos. Every platform update incorporates the latest advances in cyber defense, encryption, access control, and threat detection, informed by collaboration with government security experts and real-world intelligence. This ensures West Virginia's permitting environment is fortified against emerging risks, while regular penetration testing, compliance audits, and transparent trust reporting provide peace of mind to both government staff and the public.

By leveraging Salesforce's ongoing innovation and its dynamic ecosystem, West Virginia is assured not only a cutting-edge permitting solution at launch, but also a platform that evolves in step with the demands of modern governance. This future-ready foundation empowers agencies to quickly respond to legislative changes, public expectations, and technological advancements—delivering a secure, adaptable, and sustainable public service for years to come.

Proven Track Record: Enabling Government Transformation Nationwide

[the response below aligns to RFI requirements 3.2.2 Provide examples of previous work products and 3.3.1 Examples of previous solutions of similar size and scope]

With more than three decades of public sector experience and thousands of government cloud projects, IBM brings proven expertise in licensing and regulatory modernization. Since 1995, we have successfully implemented state licensing system consolidations, inspection scheduling automation, and one-stop shop citizen portals — all directly aligned with the RFI's objectives. Our track record includes engagements such as:

Utah Department of Agriculture & Food (UDAF) – Delivered a Salesforce licensing and inspection solution that replaced an underperforming vendor platform, integrated UtahID SSO, digitized over 70 intake forms, and supported multiple license types with tailored workflows for renewals, inspections, citations, and CE tracking. Integrated with Google Drive, the State's payment processor (Chase Orbital), and the State financial system — resulting in reduced manual processes, improved data integrity, and an enhanced constituent experience.

Utah Department of Commerce – Implemented a Consumer Protection Case Management system on Salesforce with online complaint intake, investigation workflows, and a self-service portal. Expanded to three additional divisions (Real Estate, Professional Licensing, and Securities) without reengineering, each retaining unique workflows and fee structures. Integrated with state licensing/permitting systems, federal databases, and payment processors, providing a model for multi-board scalability.

Wyoming Office of State Lands & Investments (OSLI) – Built a custom Salesforce application to manage ~4 million acres and 40,000 parcels, tracking multiple land use types (grazing, temporary, special use) and integrating with the State's GIS system for advanced spatial search. Automated billing, fee maintenance, and invoice generation improved efficiency and consolidated multiple legacy systems.

New Jersey Department of Community Affairs (NJCA) – Modernized its inspection processes by transitioning from outdated, paper-based methods to a streamlined, cloud-based system. The new solution features mobile apps for inspectors, a secure portal for property owners, and centralized data management, greatly improving workflow efficiency, accessibility, and public safety. This transformation led to significant reductions in inspection backlogs and cycle times, as well as notable increases in revenue for key programs. Ongoing enhancements continue to optimize scheduling, reporting, and real-time visibility for the agency.

Salesforce Public Sector Credentials

U.S. State and local governments have leveraged the Salesforce platform to modernize their licensing operations—dramatically accelerating digital transformation while safeguarding operational continuity and compliance. These success stories are grounded in Salesforce's ability to rapidly configure and deploy comprehensive “one-stop-shop” solutions that integrate seamlessly with legacy systems and evolving agency requirements.

The Arizona Registrar of Contractors (AZROC) is responsible for issuing and maintaining contractor licenses, investigating and citing violators, adopting construction standards, educating the public and contractors on rules, policies and procedures, and assisting in dispute-resolution statewide.

It currently issues over 43,000 licenses to construction companies and investigates roughly 7,000 claims per year. And this work was largely a paper-based, form-heavy, manual process.

Approximately 20% of an applicant's waiting time was used to complete the process. Contractor complaints took 4-5 months to address, and new licensing applications took up to four months. "However, the expectations of many of our customers changed to wanting digital access to services anytime and anywhere," recalled Jeff Fleetham, AZROC Director. "The ROC to modernize technology and expand self-service options while continuing to reduce 'red tape.'"

AZROC launched its licensing, renewals, and investigations solution on the FedRAMP-authorized Salesforce Platform. It is an automated, digital case management system that guides customers through the various steps and forms required to obtain a license, initiate an investigation, or update their credentials:

The information submitted through the system is captured in a profile-like setting, giving AZROC a 360-degree view of the customer request. The configuration capabilities available via the Platform enables AZROC to capture information unique to the mission (think: picklists fields with options like "activation date" or "permit close date") without having to write custom code.

The Platform's configuration capabilities also helped support AzROC's three-fold process covering its major operations – accounting, compliance, legal, and licensing – allowing the team to offer a consistent user experience on the front end without having to sacrifice the necessary program-specific workflows on the backend.

APIs share information between departments, and push notifications alert staff of new action items. Insights and best practices from the Salesforce AppExchange marketplace accelerated design and deployment time even more.

The results were exceptional:

- Estimated savings of 8,000 hours of data entry.
- Eliminated the need of a 3rd party application, saving an estimated \$100,000 annually
- Built-in address verification and standardization function that reduced returned/rejected mail by \$25K (or 5,250 pieces of mail).
- Estimated 59% reduction in application deficiencies.
- Reduced customer phone and email inquiries into the department by 18%.

In addition to the numbers, AZROC's digital transformation completely changed how customers conducted business with the organization. "Let's say you were deployed overseas, and you want to be a licensed contractor when you came home. You had to wait until you returned to begin the licensing process," said Director Fleetham. "Now, once license exams are integrated, the entire process can be completed online; and the minute you jump off the plane you're a licensed construction professional in the State of Arizona."

The State of Minnesota currently has a "License Minnesota" website, www.license.mn.gov, which allows citizens to find information on nearly 600 businesses, professional, recreational, or vehicle licenses from 45 Minnesota State Agencies and Boards. The site describes each license requirement, fees, and application process, and links to a paper form in support of the online application process. The State of Minnesota Office of IT Services is deploying an e-licensing system, powered by the Salesforce Platform, with integrated payment options using a U.S. Bank payment gateway. This system will support online application submission, payment, and back-office management for five key State Agencies. The Minnesota Enterprise e-Licensing System (ELS) will extend License Minnesota's functionality to allow citizens to apply for and renew their professional/occupational licenses and business/commercial licenses online through a single-entry point.

Massachusetts Department of Early Education and Care, an agency within the Department of Education, provides license applications and inspections to Daycare facilities and providers. There are currently over 11,000 care providers in the Commonwealth of Massachusetts with 50 new applicants each month. To apply for a license, care provider applicants had to physically mail in paper applications. During facility inspections, inspectors manually documented findings on paper forms and then had to type up and enter results into computer systems upon arrival back into the office. Early Education and Care wanted to move away from these and other intensive manual processes and are doing so by implementing a robust Salesforce Case and License Management solution that includes the Community Cloud. Applicants are able to complete and submit applications online, electronically sign them, and have them automatically routed to the proper users. Early Education and Care employees are able to update applicants on the status of their application and stay in touch with them throughout the process through email communications. Instead of inspectors manually typing in facility visit reports, Salesforce enables them to use a mobile application to capture and save inputted results, including photographs and electronic signatures, in real-time. Early Education and Care also implemented Communities with knowledge bases that give providers and parents a separate, online, centralized portal to discuss best practices and collaborate with one another. Overall, the Salesforce solution helps Early Education and Care automate workflows, streamline processes, and work more efficiently while offering better communication and understanding to providers and parents.

By choosing a platform with a proven track record in the public sector, West Virginia can move forward with confidence—knowing its modernization initiative is built on a foundation that has delivered measurable results for leading states and millions of applicants nationwide. The experience and lessons learned from these reference implementations directly inform best practices, risk mitigation strategies, and accelerated timelines for West Virginia's own digital transformation journey.

Implementation Approach and Timeline Considerations

[the response below aligns to RFI requirements 3.2.1 Please describe your ability and methodology to establish a One-Stop-Shop permitting solution and 3.2.7 How would you ensure that the solution will be operational by the deadline indicated in the statute and legislative rule.]

An outstanding solution design is only as good as its implementation. That's where we shine. We specialize in large system integrations—particularly those that combine customer portal, data hub, and system integration components. Our team understands the issues encountered by siloed agencies and systems, and how to release constraints for integrated data sharing and interoperability. Our approach applies proven methodologies and solutions to address West Virginia's comprehensive requirements.

Our agile-oriented framework prioritizes intelligent user experience and a solution design to address requirements while maximizing native capabilities for long-term scalability as well as a continuous focus on quality, stakeholder collaboration, organizational change management, and strong governance. This framework is the foundation of our successful delivery with state and local governments, blending Enterprise Design Thinking, Agile, and Lean Startup Principles to deliver a program at speed and with reduced risk.

Timeline Estimate

With a project initiation no later than **January 2026**, IBM anticipates an **11–12 month implementation window** culminating in a fully operational platform by **January 1, 2027**. While this timeline is compressed compared to standard statewide permitting implementations, it remains achievable due to three factors:

1. **Configuration-first delivery** – Salesforce Public Sector Solutions, OmniStudio, and Flow will be leveraged to minimize custom development, accelerating build and testing cycles.
2. **Proven accelerators** – IBM will deploy reusable assets from prior licensing and permitting programs (workflow templates, prebuilt inspection models, training modules) to shorten discovery and development phases.
3. **Agile sprint cadence** – Two-week sprint cycles with integrated testing and stakeholder playbacks provide continuous progress validation, reducing rework and maintaining velocity.

MVP vs. Full Go-Live

Given the timeline compression, IBM recommends a **phased MVP approach** rather than a single big-bang launch. This allows West Virginia to realize early value while reducing deployment risk:

- **MVP Release (Month 6–7):** Core applicant portal (Experience Cloud), initial set of high-volume permits, fee/payment processing, GIS integration, and agency dashboards. This phase enables public-facing use and provides immediate transparency benefits while additional agencies prepare for onboarding.
- **Expansion Phases (Months 7–11):** Sequential onboarding of additional agencies and permit categories, implementation of advanced case management workflows, and

integrations with legacy portals or financial systems via MuleSoft. Change management and training ramp up in parallel to prepare agency staff statewide.

- **Final Stabilization (Month 12):** Statewide User Acceptance Testing (UAT), performance testing, training delivery, and go-live readiness checkpoints. A structured hyper-care period follows to rapidly address issues and optimize adoption.

This approach balances speed with quality, delivering a system that is functional, reliable, and aligned to legislative mandates by the January 2027 deadline.

Key Milestones

- **Q1 2026 – Initiation and Planning:** Project kickoff, stakeholder alignment, detailed project plan, solution blueprint, and requirements traceability matrix.
- **Q2 2026 – Configuration and Early Development:** Foundational Salesforce configuration (PSS, Experience Cloud, identity and access model), initial data migration, and sprint-based development of priority workflows.
- **Q3 2026 – MVP Release:** Launch of the applicant portal with core permits, online fee payments, GIS integration, and basic reporting dashboards. Initial agencies begin live operations on the platform.
- **Q3–Q4 2026 – Expansion Phases:** Incremental onboarding of additional permits and agencies, expanded case management, compliance workflows, and advanced reporting capabilities. MuleSoft integrations connect legacy permitting portals and financial systems.
- **Q4 2026 – Testing, Training, and Go-Live Readiness:** Execution of system, integration, and regression testing. User acceptance testing with agency staff statewide. Training delivery across stakeholder groups. Go/No-Go readiness assessment.
- **January 2027 – Statewide Operational Launch:** Full deployment across all agencies and permit types, supported by IBM's hyper-care model for issue remediation, stabilization, and transition to ongoing operations.

Risk Mitigation for Compressed Timeline

To deliver on this accelerated schedule, IBM will:

- Employ **parallel workstreams** for data migration, integration development, and configuration.
- Utilize **sandbox and pre-production environments** to support overlapping build and test cycles.
- Run **early pilot testing** during the MVP phase to validate workflows with real applicants and agency users.
- Leverage **organizational change management (OCM)** from the outset to prepare stakeholders, minimizing adoption delays at go-live.

Project Management Methodology

Success in complex projects is best achieved through a professional business relationship predicated on mutually agreed responsibilities, a baselined operating model, and near real-time access to project operational data, cost transparency, and risk allocation. IBM brings our Worldwide Project Management Methodology (WWPMM) to be used as our implementation strategy, with its robust experience-based practices to help manage West Virginia's One-Stop-Shop Permitting program to help achieve measurable results. WWPMM is built on PMI's Project

Management Body of Knowledge (PMBOK®) standards and is a method that incorporates components refined over years of project management implementations to govern projects ranging from small and straightforward to large and complex. By leveraging the IBM WWPMM framework, the project benefits from structured planning, clear milestones, and ongoing quality reviews, providing early visibility into risks and ensuring that all deliverables stay aligned with the timeline. This disciplined approach is designed to keep the implementation on track so that the solution is fully operational and ready for use by January 1, 2027.

Four tenets of the WWPMM approach that will provide the structure for West Virginia's success and establish the framework for business-driven measurable outcomes are:

1. **Project management process:** We propose to conduct a definition and planning phase in which the scope of the project and its accompanying risk factors are understood and agreed upon. This includes communication, document, schedule, quality, resource, risk, budget, change control, planning, and reporting processes, and management
2. **Project organization and responsibilities:** We plan to collaborate with the State to define and agree on the key project team members and their roles and responsibilities, including appropriate client sponsorship and involvement to help achieve project results.
3. **Projects and their phases:** We propose to divide the work in phases to provide the opportunity to reassess risks at key milestones throughout the project.
4. **Project management system:** We customize a project management system to define and apply the appropriate governing processes for project activities, including monitoring metrics and reporting. This system will help provide governance and management of the development and M&O activities of the project.

The WWPMM framework consists of several interrelated components, classified as Practices, Activities, and Work Products that operate in concurrence to help achieve desired project outcomes. We plan to work with the State to streamline and align the project management practices, activities, and work products with the State's existing project management processes to develop an Integrated Project Management Plan during the planning phase of this engagement. This plan will also list the project contractual deliverables and milestones that will be tracked and communicated throughout the project.

Quality is an important aspect of our Project Management Methodology. Our Quality Processes are designed to improve client satisfaction and solution competitiveness, while at the same time helping achieve our Delivery Excellence objectives around managing triple constraints of a project: scope, cost, and schedule. Quality Reviews are conducted by our IBM consulting Delivery Excellence experts who are independent of the project team. The Quality review process covers a number of aspects:

- **Project Launch** validates the establishment of the necessary support, relationships, agreements, and procedures so projects can be successfully delivered. The output is a collection of plans, processes, procedures, and records, which directs the project team activities and provides the current state and history of the project. This includes producing our Project Management Plan, Project Schedule with Work Breakdown Structure and Critical Path as well as finalized processes for change control, communications, and resource management.
- **Seven Keys to Success®** analyzes the project's health in a standard format thereby enabling early warning and course correction.
- **The Phase Gates Review (PGR)** process implements a series of phased reviews at critical milestones during the project delivery lifecycle. The goal of the PGR process is to validate

that the work products exist, meet the necessary quality standards, and are consistent with the project plan and the service line delivery method.

- **Conditions of Satisfaction (CoS)** are an output from a structured discussion with the client to set and manage their expectations. These conditions describe the client priorities during various phases of the engagement and provide the client with objective criteria to use when assessing their satisfaction with IBM.

The IBM WWPM represents best practices common across implementation projects where we continuously capture and incorporate results and lessons learned to use as our governing methodology. We use a **Method Adoption Workshop** early in the planning phase where IBM collaborates with the State to align on the project management processes and methods to help achieve defined KPIs for successful and measurable business outcomes. We have successfully deployed this PM approach to deliver meaningful outcomes across our state and local government engagements.

Project Phases & Deliverables

Requirements, Discovery, and Design: The core of our requirements and design approach is to maintain alignment with the State's desired outcomes, bring user needs into focus, and create a solution design that maximizes the value of the underlying solution platform (e.g. minimizes customization to promote flexibility, resilience, security, and extensibility over time). We do this through optimized touchpoints with West Virginia stakeholders including representative users and our own subject matter experts to rapidly co-create the right solution design aligned to your requirements. Rapid discovery interviews help our team create personas that organize our understanding of user needs to inform both solution design and change management activities. We conduct targeted playback with key stakeholders including representative users to validate solution assumptions, priorities, and future state experience. The solution blueprint captures a set of design phase artifacts including a more detailed solution design, system context diagrams, implementation plan, data quality plan, risk mitigation strategy, and preliminary change management plan to carry forward into development sprints. During this phase, we produce the solution blueprint that includes systems requirement documentation along with a requirements traceability matrix, gap analysis, and representations of current state and to be workflow. Our work plan builds time in to validate these work artifacts and associated requirements with West Virginia stakeholders and sponsors – so that we can focus on building the right solution, building the solution right, and making the solution successful across all subsequent phases.

Configuration & Development: Further augmenting the solution blueprint, our multidisciplinary team collaborates to finalize the high-level technical design, system design documentation, data and security plan, data conversion and migration plan, logical and physical data model, and data dictionary that guide detailed solution implementation. We continually leverage the solution blueprint to guide configuration and development activities – focusing initially on the foundational setup and then tackling highest priority capabilities via a sprint-based plan. We validate and update the requirements traceability matrix and gap analysis throughout development. Capabilities are decomposed into user stories that populate the product backlog. At the beginning of each two-week sprint, user stories are assigned to the development squads based on validated priority. Sprint demonstrations are organized to provide visibility into progress and to collect timely feedback on configured workflow and capabilities. The velocity with which we can deliver desired capabilities is aided through a set of accelerators – including our IBM Consulting Advantage tools that improve developer efficiency and configured workflows that align to West Virginia's requirements. This approach allows us to work efficiently toward the activities that migrate data from legacy data warehouses, integrate with existing capabilities, and configure the new integrated solution to address State needs.

Quality and Testing: IBM's quality assurance and testing approach is informed by our significant experience developing and launching large, complex, digital transformation programs. We build quality in at every step while following a structured set of testing that includes user acceptance, accessibility, regression and unit tests through manual and automated means. During the configuration activities, we work to produce a Test Management Plan that governs each phase of testing and then utilizes requirements documentation to prepare test cases and test scripts. Furthermore, we leverage IBM's existing library of proven testing assets to customize the issue resolution tracking for end-to-end integration and user acceptance testing (UAT). Reusable test assets are leveraged for system, system integration testing, end-to-end testing, performance testing, and user acceptance testing. We create test data to validate coverage and understand dependencies across test modules, APIs, and external systems. Furthermore, we test positive and negative scenarios at different levels (unit, system integration, and end-to-end tests).

To execute test planning, management and execution, we utilize a proven set of best practice aligned testing templates, assets, and tools to enable overall quality management and efficient execution of testing activities. This includes utilizing Salesforce greenfield testing capabilities to maximize coverage in both functionality, data, and automation as well as the IBM Test Automation accelerator and Selenium for test automation.

Through prior Salesforce implementations, IBM has created a leading progressive automation method that will enable continuous regression testing. Our testers use this framework to create optimized test cases leveraging IBM's model-based test design tool, Combinatorial Test Design (CTD), and automate the test cases leveraging Selenium. CTD is a statistical model-based technique that uses multi-variable mathematical algorithms to cover the complete business requirements. CTD focuses on a set of unique and optimized combinations that are likely to expose most of the defects. The CTD model produces a test suite in which high-risk combinations are covered.

Effectively, our proposed framework will bring the following values:

- Enhance test coverage with model-based testing technique leading to defect prevention early in the life cycle
- Minimize rework associated with test case design/modifications for incremental builds in Agile sprints
- Enable BDD (Behavior Driven Development) testing integrating with open-source Cucumber/Selenium

Finally, user acceptance testing allows State representative users to execute activities in the test environment before making the decision to release in production. The State of West Virginia is responsible for the leadership, coordination, execution, and overall success of the User Acceptance Testing with their representative users. IBM will work collaboratively with the State's leader to analyze and remediate findings from UAT. Agreed to defects and vulnerabilities identified during this phase are documented, prioritized, and added to the product backlog as issues. The IBM team will work under the direction and priority of West Virginia to manage and remediate these issues.

Governance and Organizational Change Management: Our proven governance and change management model underpins the delivery of the entire One-Stop Shop Permitting program, across all tasks and phases. Our proposed multi-tiered joint governance model promotes sustained focus and responsiveness to the State's priorities by implementing a management structure and set of controls that emphasize transparency, trust, and quality. In addition, we infuse Organizational Change Management throughout. We focus on engaging stakeholders and preparing the organization for change across the full program lifecycle.

Organizational Change Management (OCM) is important in preparing the State for this One-Stop Shop Permitting transformation, readying stakeholders for the associated change of embracing new workflows, capabilities, and experiences; engaging them throughout the journey and amplifying their voice to reinforce successful outcomes; and ultimately working to maximize value realization. Our OCM approach is designed to work closely with the State team to support effective communications and training. By bringing users into the process from the beginning, as defined within the design activities, the organization is already primed once the solution is deployed. These early activities are critical inputs to completing the stakeholder analysis, communications plan, change impact analysis, and change network mobilization plan.

Training: Training is planned to complement our OCM activities defined above. While the solution is designed with end-users in mind and leveraging best practice experience design to maximize intuitive adoption, we recognize that training is a critical piece of any successful solution deployment and that training artifacts need to remain relevant across the system lifecycle. Our team will work collaboratively with the State sponsor and project leader to finalize a training plan that covers the scope, objectives, schedule, tools, and artifacts comprising training. At a minimum, IBM plans to produce a user manual as well as interactive materials for self-paced and live training. We develop and hone this content during the implementation phase in order to proactively address opportunities for improving end user ease of use and ultimately, system adoption.

Deployment and Hyper-care: We understand that even with the greatest focus on quality during configuration & development, it is imperative to plan for rapid issue remediation and incident management during the deployment and post launch period. Prior to Go Live, we work closely with the State to validate user roles, permissions, and readiness. Deployment starts with the right checklist and Go Live Readiness Assessment that is conducted as part of the detailed Cutover Plan – with Go / No Go decision taking place at least 24 hours in advance of deployment. We prepare for all contingencies, including taking precautions and establishing protocol in the event that a rollback is required. We prepare the Release Management Plan and Hypercare or Initial Support Plan and take care to document full deployment results. All of this work sets the stage for subsequent hyper-care – where issues and incidents take top priority for rapid remediation. We apply proven methods to prioritize the defects and enhancements to optimize end user satisfaction, manage risk, and maintain a secure solution. A core component of hyper-care is robust release management practices that deliver code enhancement and issue bug fixes via planned releases on a periodic basis. Governance plays a critical role in focusing hyper-care efforts on the highest priority activities while the product backlog is an ongoing asset to maximize the value of the solution.

Pricing Model

[the response below aligns to RFI requirements 3.3.2 Please describe pricing strategy options available to address the cost of buildout and maintenance of the program, including user fee options.]

To support a sustainable, cost-effective implementation and long-term operation of the One-Stop-Shop Permitting Platform, the following pricing strategy options are proposed. These options reflect flexible funding models based on Salesforce's subscription-based licensing, predictable support costs, and potential for user fee recovery.

Buildout and Implementation Costs

The initial cost of the platform implementation typically includes:

- **Salesforce License Subscriptions** (billed annually or multi-year at discounted rates)
- **Implementation Services:**
 - Business process discovery and design
 - Configuration and development
 - Data migration and system integration
 - Testing and training
- **Third-Party Tools** (if required, such as document generation or digital signature)
- **Sandbox and Pre-production Environments**

Buildout Cost Strategy Options:

Option	Description
Fixed-Fee Implementation	A structured, milestone-based fixed cost for end-to-end delivery.
Time-and-Materials (T&M)	Flexible hourly billing model; suited to phased or agile delivery.
Phased Implementation by Agency/Module	Costs distributed over multiple phases to align with available funding cycles.
Co-funded with State/Federal Grants	Supports cost-sharing via infrastructure, broadband, or regulatory modernization programs.

B. Maintenance and Operational Costs

Post-deployment recurring costs include:

- Salesforce Annual Licensing
- MuleSoft API Usage (if used for high-volume integration)
- Premier or Signature Success Support
- Ongoing Enhancements and Optimization
- System Monitoring, Backup, and DR Support

Maintenance Strategy Options:

Component	Pricing Model
Licensing	Annual per-user or login-based subscription
Support Services	Fixed monthly or annual managed services fee
Enhancements/Change Orders	Optional T&M or mini-fixed fee packages

C. User Fee Recovery Model (Optional)

To help offset implementation and operational costs, the platform can support **transaction-based user fees**. These fees can be aligned to permit types or complexity levels and collected directly through the portal at time of application or renewal.

User Fee Recovery Options:

Model	Details
Flat Application Fee	One-time fee per submission; varies by permit class
Tiered Fee Model	Fees based on application complexity, agency, or project type
Subscription/Annual Renewal	License or permit maintenance fees paid annually via self-service portal
Convenience or Technology Fee	Nominal fee added to recover processing and platform costs

All fee structures are fully configurable in Salesforce and can be updated without code changes to adapt to evolving fiscal policies or regulatory guidance.

Additional Information

[the response below aligns to RFI requirements 3.3.3 Any marketing materials, technical data or other relevant information to the solution.]

Appendix – RFI Requirements Matrix

For convenient reference, the following table details West Virginia's RFI requirements and indicates the corresponding sections within this document where our responses to each requirement may be found.

#	Requirement	Document Location
3.1	General Information Being Sought	
3.1.1	We are seeking information for vendors to describe their ability to provide a "one-stop shop" for obtaining and renewing permits, licenses and business registrations as described WV Code §5A-13-1 et seq. and legislative rule 148CSR25. The intent of this program is to revolutionize and streamline West Virginia's permitting system by creating an online dashboard for processing and tracking permits for construction, economic development, infrastructure, and natural resource projects.	Pgs. 3-10
3.2	Specific Questions	
3.2.1	Please describe your ability and methodology to establish the One-Stop-Shop permitting solution.	Pgs. 18-23
3.2.2	Provide examples of previous similar work products.	Pgs. 14-17
3.2.3	Identify your company name, primary contact person, phone and email.	Pg. 2
3.2.4	Describe how your solution would address adding additional permits and licenses for the participating agencies, when necessary, as well as adding additional agencies and their permitting requirements that may come online after the fact.	Pgs. 10-11
3.2.5	How would you address permitting portals currently in use by state agencies?	Pg. 11
3.2.6	Describe how you handle security and privacy/cyber security as well as backups and disaster recovery within your solution?	Pg. 11
3.2.7	How would you ensure that the solution will be operational by the deadline indicated in the statute and legislative rule?	Pgs. 18-23
3.3	Information Being Sought	
3.3.1	Examples of previous solutions of similar size and scope.	Pgs. 14-17
3.3.2	Please describe pricing strategy options available to address the cost of buildout and maintenance of the program, including user fee options.	Pgs. 24-25
3.3.3	Any marketing materials, technical data or other relevant information to the solution.	

