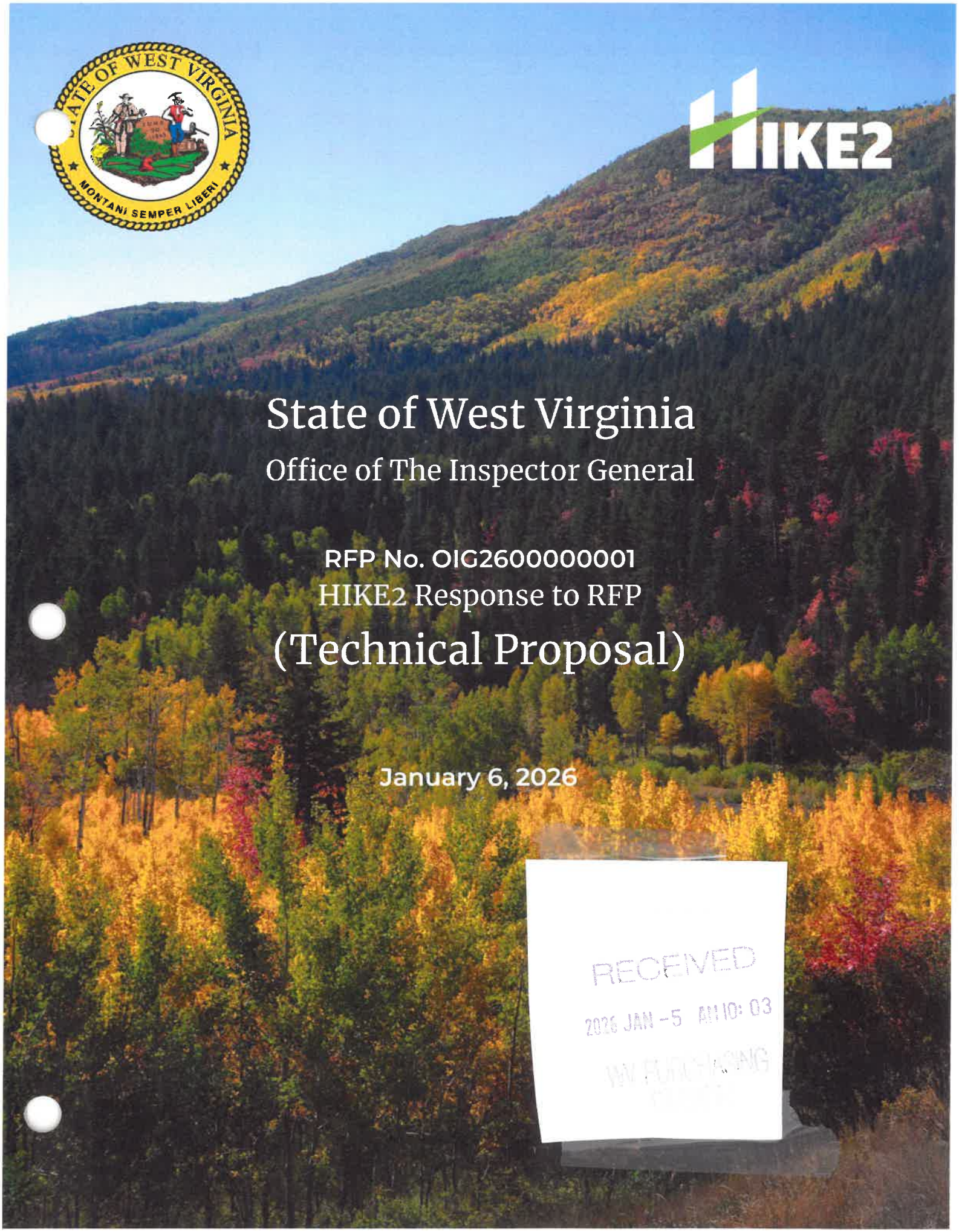


State of West Virginia

Office of The Inspector General

RFP No. OIG2600000001

HIKE2 Response to RFP

(Technical Proposal)

January 6, 2026

RECEIVED
2026 JAN -5 AM 10:03
PURCHASING

Table of Contents

Table of Contents 2
1. Cover Letter & Executive Summary 6
2. Company Overview 8
Company Background 8
HIKE2's Breadth of Services 9
Summary of HIKE2's Key Expertise 11
Government & Oversight Domain Experience 11
Technical Prowess in Salesforce & Integration 11
Human-Centered & Outcome-Focused Approach 12
Why HIKE2? 12
3. Purpose and Scope 13
4. Proposed Solution 14
Solution Overview 16
Alignment to Mandatory Requirements 17
5. Methodology & Implementation Plan 18
Project Phases & Timeline 18
Phase 1: Design (Months 1–2) 19
Phase 2: Configuration & Build (Months 3-4) 20
Phase 3: Train & Deploy (Month 5) 20
Post-Implementation Support (Month 6 onward) 21
Methodological Rigor with Flexibility 21
Design Thinking + Agile in Practice 21
5. Qualifications 22
Full Implementations in Other States 22
Statewide Case/CRM/Investigations Management for State Agencies 22
Additional Qualifications 23
6. Experience & Case Studies 24

Case Study 1: State of Montana Office of Public Defender (Montana OPD) | Salesforce & CaseCloud™ (AdvoLogix) Implementation & External Portal....25

Case Study 2: State of Indiana Office of the Attorney General | Salesforce + CaseCloud™ (AdvoLogix) Implementation....29

Case study 3: State of Montana Local Government Services Bureau | Salesforce CRM & Customer Experience Portal....33

Case Study 4: Erickson Immigration Group | Salesforce CRM & Customer Experience Portal Implementation....38

7. Project Specifications....43

7.1 Background and Current Operating Environment....43

7.2 Project Goals and Mandatory Requirements....44

7.2.1 Goals and Objectives....44

7.2.1.1 Cloud-Based System....44

7.2.1.2 Compliance with CJIS, FedRAMP, and HITECH....44

7.2.1.3 Streamlined Investigative Processes....45

7.2.1.4 Multi-User, High-Performance Access....45

7.2.1.5 Secure Integration with State Systems....45

7.2.1.6 Demonstrated Implementation Experience....45

7.2.1.7 Qualified Project Team....45

7.2.2 Mandatory Project Requirements....46

7.2.2.1 Criminal Justice Information Services (CJIS) Security Policy....46

7.2.2.2 Federal Risk and Authorization Management Program (FedRAMP)....46

7.2.2.3 Health Insurance Portability and Accountability Act (HIPAA) and HITECH....47

7.2.2.4 Role-Based Access Control (RBAC)....49

7.2.2.5 Case Lifecycle Management....50

7.2.2.6 Audit Trails and Reporting....53

7.2.2.7 Document and Evidence Management....54

7.2.2.8 System Integration Capabilities....55

7.2.2.9 Data Exchange Standards....56

7.2.2.10 System Resilience and Continuity of Operations....56

7.2.2.11 Training and Support....57

7.3 Qualifications and Experience....58

7.3.1 Qualification and Experience Information 58
7.3.2 Mandatory Qualification and Experience Requirements 60
7.4 Oral Presentations 60
8. Pricing Overview & Value Proposition 61
9. Contract Award 61
10. Performance 61
11. Payment 62
12. Travel 62
13. Facilities Access 62
14. Vendor Default 62
15. Miscellaneous 63
16. Acknowledgment of Contractual Addenda and Attachments 63
17. Conclusion 65

Issuing Entity Information

Issuing Representative

OFFICE OF THE CITY ATTORNEY
Email: crystal.g.hustead@wv.gov
(304) 558-2402

Issue Date

December 9, 2025

Submission Due Date
January 6, 2026

Offeror Submittal Instructions

Return Proposal

Bid Clerk
Department of Administration, Purchasing Division
2019 Washington Street East
Charleston, WV 25305-0130

Offer Submission

Offers submitted in hardcopy form:

- One copy of Technical Proposal
- One copy of the Cost Proposal
- Supporting Addendum(s)

Offeror Contact Information and Authorization

Offeror Name & Address
HIKE2, LLC
3706 Butler Street
Pittsburgh, PA 15201

Authorized Offeror (Single Point of Contact):
Matthew Lydic
Matthew Lydic

Offeror Phone Number
(412) 716-7623

Offeror Email Address
Matthew.Lydic@HIKE2.com

1. Cover Letter & Executive Summary

Office of the Inspector General
Attn: RFQ Review Committee – Investigation & Fraud Case Management RFQ
1900 Kanawha Blvd. E, Bldg 6, Rm B-171
Charleston, WV 25305

Dear RFQ Review Committee,

HIKE2 is pleased to submit this response to the State of West Virginia Office of the Inspector General's Request for Proposal (RFP OIG2600000001) for a statewide Investigation and Fraud Case Management solution, beginning with the IFM Division. We appreciate the opportunity to share our qualifications, understanding, and recommendations. HIKE2 LLC is a leading public-sector technology consulting firm with deep expertise in cloud platforms, Salesforce Government Cloud+, compliance & risk management, data & analytics, and human-centered design.

Executive Summary of Our Solution:

The Office of Inspector General (OIG) oversees nine key divisions including Investigations and Fraud Management, Quality Review, Human Rights, Foster Care Ombudsman, and Health Facility Licensure & Certification each requiring unique workflows and reporting capabilities. HIKE2 understands that the State seeks a **modern, secure, and scalable platform** to unify these diverse functions while ensuring compliance with state and federal requirements.

Based on our experience delivering similar solutions for commissions, legal aid organizations, and state agencies, HIKE2 recommends a secure, Salesforce Government Cloud+ case management platform that will:

- **Comprehensive Case Management for IFM Division**: Provide an investigative workspace where IFM Staff will be able to fully interact with the solution (e.g. referral intake, case assignments, entering case notes, documentation and evidence, analysis reporting and closures).

- **Scalable Case Management**: Scale to support centralized investigative and oversight cases across OIG's nine supported divisions into one system. Supports intake, triage, investigations, resolutions, and reporting with role-based access.

- **Integrated Document & Records Management**: Embed documents, evidence, correspondence, and notes directly into case files. Ensure version control, secure sharing, and audit trails.

- **Advanced Reporting & Analytics**: Provide real-time dashboards for leadership oversight, track caseloads and performance metrics, and enable ad hoc reporting for compliance reviews.

- **User-Centric Design**: Deliver intuitive interfaces tailored to investigators, auditors, analysts, and administrators. Streamline case intake, task management, and reporting, minimizing training time.

- **Security, Compliance & Scalability**: Ensure full compliance with FedRAMP, HIPAA, CJIS, and NIST standards while providing scalability across OIG divisions. Role-based security and audit trails safeguard sensitive case data.

- **Future-Ready Architecture**: Built on Salesforce Government Cloud+, the solution integrates with existing state systems, including HR, finance, and justice platforms, reducing data silos and redundant entry.

HIKE2 brings extensive public-sector experience and a proven track record of delivering Salesforce case management for organizations such as the **Montana Office of Public Defender (OPD), Indiana Attorney General, Virginia Indigent Defense Commission, and the Santa Cruz County Public Defender's Office.** These projects required complex data migration, compliance-driven workflows, and integration with court and government systems. We will bring the same rigor and innovation to West Virginia OIG.

In the following sections, we provide a detailed overview of our company, our understanding of OIG's requirements, our proposed Salesforce solution and implementation approach, and relevant government case studies. We have structured our response according to the State's RFQ requirements and aligned it to the specifications listed in Section 4.1–4.10 of the solicitation.

On behalf of the HIKE2 team, thank you for the opportunity to submit this response. We are enthusiastic about the prospect of partnering with the State of West Virginia to modernize the Office of the Inspector General's case management capabilities. We welcome the chance to discuss our response in more detail, provide a live demonstration of our Salesforce solution, and answer any questions.

Sincerely,

Matthew Lydic

Matthew Lydic
Principal and Public Sector Practice Lead
HIKE2, LLC
3706 Butler Street, Pittsburgh, PA 15201
Email: Matthew.Lydic@hike2.com | Phone: (412) 716-7623

2. Company Overview

Company Background

HIKE2, LLC is a digital consulting firm founded with a mission to bridge the gap between innovative technology and real-world business challenges. HIKE2 specializes in delivering end-to-end solutions from strategic advisory through implementation and ongoing support. We focus on the public sector and other highly regulated industries, bringing a deep understanding of government processes and constraints.

As an organization, HIKE2 offers a full lifecycle of services. We help clients define strategy, design user-centric solutions, implement cloud platforms, integrate data and analytics, infuse AI innovations, and provide continuous support post-deployment.

Our team is composed of seasoned consultants, solution architects, UX/UI designers, data scientists, and certified engineers. HIKE2's professionals hold numerous technical certifications, including Salesforce (platform developer and administrator credentials), MuleSoft integration specialists, Tableau analytics professionals, and Formstack developers as well as industry-recognized project management and agile certifications (PMP®, Lean Six Sigma, Business Process Engineering, Certified Scrum Master, etc.). This blend of skills allows us to tackle complex projects with confidence and rigor.

HIKE2 is proud to be a **Salesforce Consulting Partner** and has been delivering successful Salesforce-based solutions for over 15 years. Our leadership and principal consultants each have 15+ years of experience with cloud CRM platforms and digital transformation initiatives in both the private and public sectors. We bring this expertise to every engagement, ensuring that our clients benefit from industry best practices and proven solution accelerators.

Our experience is not limited to technology, we also place emphasis on change management and user adoption, knowing that even the best system is only as good as its acceptance by its users. In short, HIKE2 combines innovative technology know-how with practical, people-focused consulting to drive meaningful results for our clients.

HIKE2's Breadth of Services

HIKE2 operates at the intersection of strategy, technology, and human-centered design. The breadth of services we offer as a trusted partner includes:

- **Cloud Platforms & Solutions:** Implementation and optimization of cloud-based systems, with a specialization in Salesforce (Sales Cloud, Service Cloud, Experience Cloud, etc.) and related ecosystem tools. We leverage low-code/no-code approaches for rapid development where possible and custom development when necessary for complex requirements.

- **Data & Analytics:** Data strategy, architecture design, and analytics solutions that turn information into insights. We build data integration pipelines (often using MuleSoft or similar tools), data warehouses, and interactive dashboards (using tools like Tableau or Power BI) to support data-driven decision-making for our clients.

- **AI & Innovation:** Introduction of emerging technologies such as artificial intelligence, machine learning, and intelligent automation. Our team has delivered AI pilots and projects for example, implementing chatbots, predictive analytics, and natural language processing to enhance client services. We stay at the forefront of innovation to help government clients capitalize on new opportunities (e.g. using AI to improve search in legal knowledge bases, or automating document classification).

- **Human-Centered Design (HCD):** User research, UX/UI design, and service design that ensure any solution is intuitive and meets the actual needs of users. We conduct stakeholder interviews, persona development, journey mapping, and iterative prototyping to create interfaces and processes that delight end-users (in this case, attorneys and staff) and increase adoption rates.

- **Compliance & Risk Management:** Advisory services around IT security, data privacy, and regulatory compliance. We embed security by design into our solutions, ensuring adherence to relevant standards (such as CJIS, HIPAA, FedRAMP, NIST, and other state/local regulations). We also help clients identify and mitigate project risks through proactive planning and governance.

- **Public Sector Advisory:** Consulting on strategy and operations tailored to government agencies. This includes business process re-engineering, organizational change management, procurement support, and overall project management. We understand the unique environment of public sector organizations, from budget cycles and stakeholder engagement to transparency requirements and provide guidance to navigate these effectively.

By offering this wide range of services under one roof, HIKE2 can serve as a one-stop partner for clients like the City of Los Angeles. From envisioning the future state of a civil case management solution, through designing and building it, to training users and maintaining the system, we have the capabilities to ensure project success from start to finish.

Summary of HIKE2's Key Expertise

HIKE2's expertise relevant to the State of West Virginia Office of Inspector General's RFQ can be summarized in three core strengths: deep government and oversight experience, advanced Salesforce technical capability, and a human-centered approach to solution delivery.

Government & Oversight Domain Experience

HIKE2 has extensive, referenceable experience working with government oversight, legal, and justice agencies at the state, county, and city levels. Our portfolio includes projects for indigent defense commissions, legal aid organizations, attorney general offices, compliance and adjudication units, and licensing/regulatory bodies.

This means we are already familiar with many of the challenges the West Virginia Office of the Inspector General faces: managing high volumes of investigations, ensuring confidentiality and security, complying with state and federal standards (CJIS, HIPAA, NIST), and coordinating operations across multiple divisions.

We are currently working with several organizations to replace outdated case management systems and migrate sensitive data to Salesforce Government Cloud+, directly analogous to OIG's modernization efforts. This expertise enables us to offer proven, low-risk approaches while tailoring the solution to West Virginia's specific environment.

Technical Prowess in Salesforce & Integration

Technology is at the core of HIKE2's delivery model. We leverage Salesforce Government Cloud+ as a secure, FedRAMP-authorized foundation for investigative and case management. We know how to maximize Salesforce's configuration capabilities, data models, workflows, automation, and security while integrating with third-party systems such as HR, finance, and court or justice databases.

We design all integrations to be modular and extensible, ensuring the system can evolve with new requirements or technologies, including future AI-driven innovations. This technical excellence ensures the State's investment in Salesforce will deliver long-term value.

Human-Centered & Outcome-Focused Approach

A defining differentiator for HIKE2 is our human-centered design (HCD) approach and relentless focus on measurable outcomes. We begin every project by engaging with the investigators, auditors, analysts, administrators, and leadership who will use or benefit from the system. This ensures the system reflects real-world workflows, reduces manual burdens, and accelerates adoption.

For the OIG, this means investigators can easily record and track cases, supervisors can quickly access dashboards to assess workloads, and executives can rely on reports for compliance and oversight. Our approach ensures the platform is intuitive, accessible, and embraced by staff. We measure success not only by technical completion but by outcomes such as faster case resolution and reduced administrative overhead.

HIKE2 emphasizes iterative delivery, providing incremental improvements and "quick wins" throughout implementation. This approach gives stakeholders visible progress early and builds confidence in the solution, ensuring long-term adoption and sustainability.

Why HIKE2?

Choosing HIKE2 means selecting a partner that understands government oversight challenges and has a proven record of success. Key reasons include:

- **Public Sector Expertise**: HIKE2 is a trusted partner for agencies including the Virginia Indigent Defense Commission, Santa Cruz Public Defender's Office, and the Legal Aid Society of New York. We deliver complex, compliance-driven solutions on time and within budget.

- **Integrated Team of Experts**: Our delivery teams include Salesforce-certified architects, government IT specialists, case management domain consultants, and UX designers. This multidisciplinary approach ensures technology, compliance, and usability are all addressed.

- **Track Record of Innovation**: We have implemented modern Salesforce solutions that integrate workflows, document management, and analytics for agencies handling tens of thousands of cases annually. Examples include data migration from legacy SQL databases, integration with state court systems, and deployment of Salesforce Shield for audit logging.

- **Human-Centered Philosophy**: HIKE2 believes technology must serve people. We design solutions that reduce administrative burden, simplify case intake, and enable collaboration across divisions. This philosophy has consistently resulted in high adoption and measurable ROI for our clients.

In summary, HIKE2 offers the State of West Virginia OIG a combination of **public sector experience, Salesforce technical expertise, and a collaborative, user-first approach** that ensures a modern case management system delivering value for years to come.

3. Purpose and Scope

The State of West Virginia requires a secure, modern case management system to improve efficiency, ensure compliance, and support future scalability. The current environment relies on disparate systems and manual processes that create inefficiencies, limit visibility, and increase the risk of data security vulnerabilities. To fulfill its mission, the Office of the Inspector General (OIG) needs a unified platform that standardizes investigative workflows, enforces compliance with state and federal regulations, and provides reliable oversight across its divisions.

HIKE2 proposes a Salesforce Government Cloud-based solution that directly addresses these needs. Salesforce, as a FedRAMP High–authorized platform, provides a government-grade foundation with built-in security, encryption, and continuous monitoring. This ensures the confidentiality, integrity, and availability of sensitive OIG data. The platform is highly configurable, enabling the State to design and adapt workflows for each OIG function while maintaining a consistent, unified environment.

Key capabilities of HIKE2's Salesforce solution include:

- **Workflow Automation**: Automates end-to-end case management, including intake, triage, assignment, investigation, resolution, and closure. This reduces manual intervention, enforces consistent processes, and accelerates time to resolution.

- **Division-Specific Configurability**: Tailor workflows and data models for each OIG division (e.g., Investigations, Fraud Management, Human Rights, Foster Care Ombudsman, Licensing & Certification) while preserving enterprise-wide standards.

- **Comprehensive Reporting and Analytics**: Delivers real-time dashboards and advanced reporting capabilities, providing leadership with visibility into case trends, investigator performance and more.

- **Secure Integration**: Connects seamlessly with existing State systems, including HR, financial, and justice applications to eliminate data silos and ensure accuracy across platforms (not in scope).

- **Accessibility and Mobility**: Ensures compliance with WCAG 2.1 AA and Section 508 standards, providing equitable access for all users. With Salesforce's mobile-ready design, investigators can securely access and update cases from the field.
- **Scalability and Future-Readiness**: Provides a flexible architecture that adapts as OIG needs evolve, supporting additional users, divisions, or functionality without costly redevelopment.

By implementing Salesforce Government Cloud+, West Virginia will gain a modernized case management system that enhances accountability, transparency, and operational efficiency. The solution not only meets today's functional and compliance requirements but also positions the OIG to respond quickly to future policy changes, regulatory updates, or emerging investigative needs.

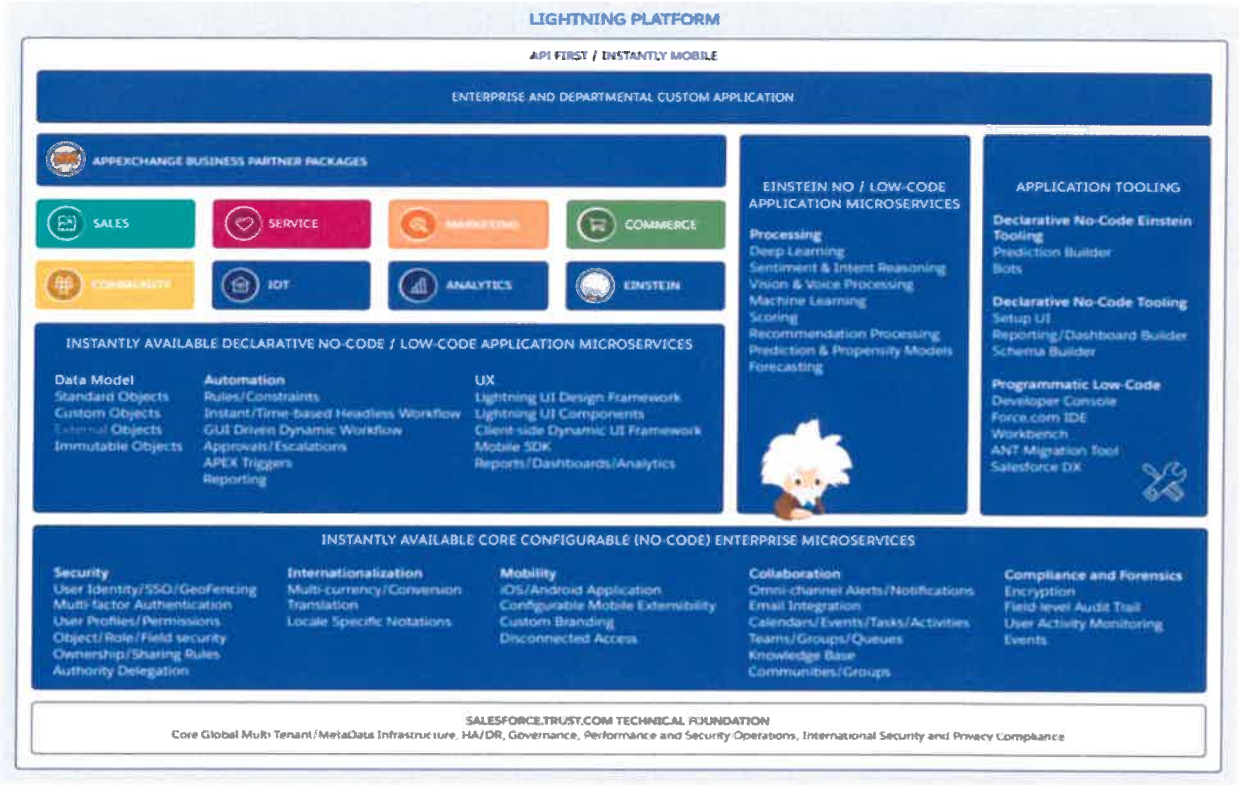
4. Proposed Solution

HIKE2 proposes a secure, unified Case Management System built on **Salesforce Government Cloud+** as the foundation for the West Virginia Office of the Inspector General (OIG). This platform will serve as the central hub for case intake, investigation, resolution, document management, and oversight reporting, ensuring the OIG can operate with efficiency, compliance, and scalability.

Unlike legacy or siloed systems, Salesforce provides a **configurable, cloud-native environment** where case data, documents, workflows, and communications are consolidated in one governed and auditable system. As a FedRAMP-authorized platform, Salesforce Government Cloud+ delivers **government-grade security**, meeting CJIS, HIPAA, and NIST 800-53 compliance requirements.

Key components of the proposed solution include:

- **Salesforce Platform Overview**
    - **Cloud-Native Architecture –** Accessible via any modern browser or mobile app, eliminating the need for local infrastructure. Automatic upgrades three times per year ensure the system remains secure and state-of-the-art.
    - **Role-Based Access and Security** – Granular user profiles and permissions safeguard sensitive investigative data while ensuring appropriate access for staff, supervisors, and leadership.
    - **Integrated Data and Workflows** – Case records unify all related activities, tasks, communications, and documents in a single view.
    - **Automation and AI** – Built-in automation reduces manual work by handling assignments, reminders, and routing. Salesforce Einstein AI can surface relevant patterns, recommend actions, and improve knowledge management.
    - **Analytics and Reporting** – Dashboards and reports provide real-time visibility into caseloads, timelines, performance, and compliance.



- **Document Management and Evidence Handling**
  Salesforce includes robust document storage with the ability to manage pleadings, evidence, correspondence, audio, video, and images at the case level. Files are **searchable, auditable, and secure**, with role-based access ensuring proper chain of custody. Integrations with external repositories (such as SharePoint or Box) can further extend storage and collaboration capabilities.

- **Collaboration and Accessibility**
  OIG divisions will access the system via a **web-based, mobile-ready interface**. Collaboration features such as Salesforce Chatter, notifications, and dashboards keep staff aligned. The platform complies with **WCAG 2.1 and Section 508 accessibility standards**, ensuring equitable access for all users.

- **eSignature Integration**
  Native integration with tools such as **DocuSign or Adobe Sign** enables secure digital signature workflows. Investigators and staff can generate, route, and store signed documents directly within Salesforce, complete with full audit trails.

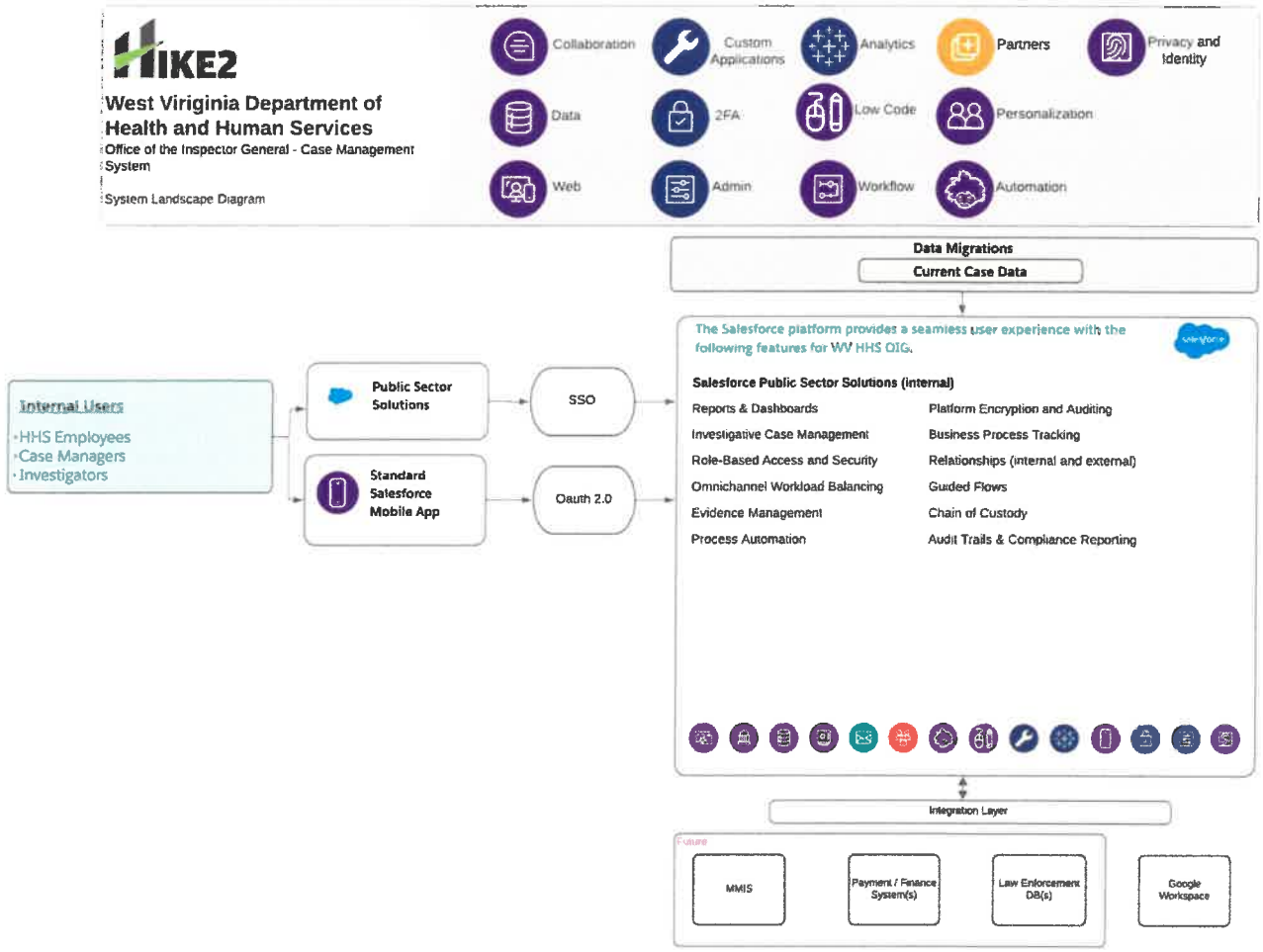
- **Future-Ready and Scalable**
  The solution is designed to expand as OIG's needs evolve. New case types, workflows, or integrations (e.g. connections to state HR, finance, or court systems) can be added without costly redevelopment.

AI-powered features like automated tagging and predictive analytics can be layered in over time.

Solution Overview

At a high level, HIKE2's Salesforce Government Cloud+ solution will consist of:

- A core Public Sector Solutions case management platform supporting investigative intake, triage, assignment, investigation, and case resolution across OIG operations.
- A secure, role-based Salesforce foundation including applications, navigation, console experience, and access controls tailored for investigators, supervisors, administrators, and leadership.
- A flexible investigative data model supporting people, organizations, activities, evidence, and related records, designed for auditability and future expansion.
- Configurable case management capabilities enabling multiple investigative categories, lifecycle stages, and association of internal and external parties through case roles and teams.
- Intelligent workload routing and capacity management using Omni-Channel to support efficient assignment, presence awareness, and supervisory oversight.
- Guided user experiences and standardized workflows using OmniStudio and Salesforce automation to streamline intake, investigation, and closure processes.
- Integrated collaboration and communication tools, including internal case discussions and standardized email communications, to support coordinated investigative work.
- Robust reporting and analytics delivering real-time dashboards and operational reports for case oversight, performance monitoring, and compliance needs.
- Native integration with Google Workspace to associate emails, documents, and calendar activity with investigative records.
- Structured training and enablement to support user adoption, system administration, and long-term operational success.



This platform will function as the **single source of truth** for OIG operations, eliminating silos and enabling transparency across the case lifecycle.

Alignment to Mandatory Requirements

This proposed solution is designed to fully address the requirements outlined in the RFP. In **Section 7 (Mandatory Requirements)** of this response, HIKE2 provides detailed explanations of how Salesforce Government Cloud+ satisfies each requirement (Sections 4.1 through 4.10). This includes compliance with security standards, scalability to support unlimited users and cases, workflow automation, robust reporting, audit trails, accessibility, and disaster recovery.

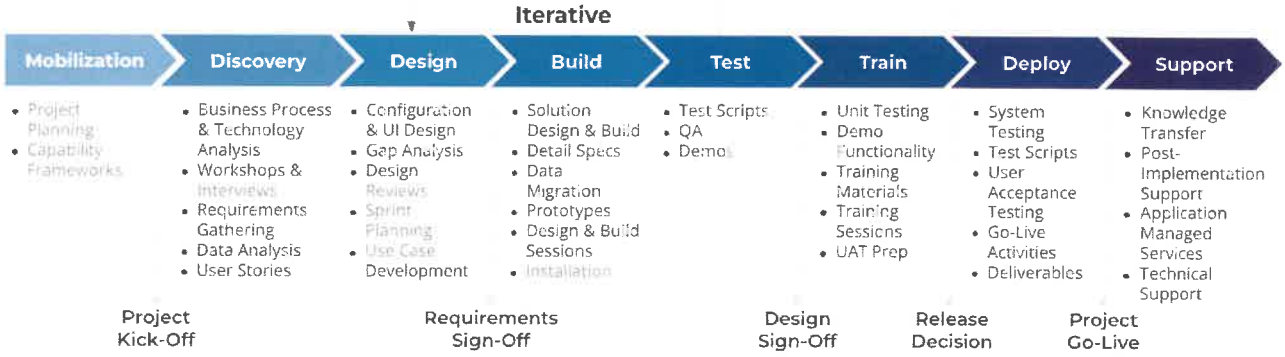
By leveraging Salesforce Government Cloud+, the State of West Virginia OIG will gain a **secure, modern, and future-ready case management system** that not only meets today's operational requirements but also scales to support tomorrow's oversight needs.

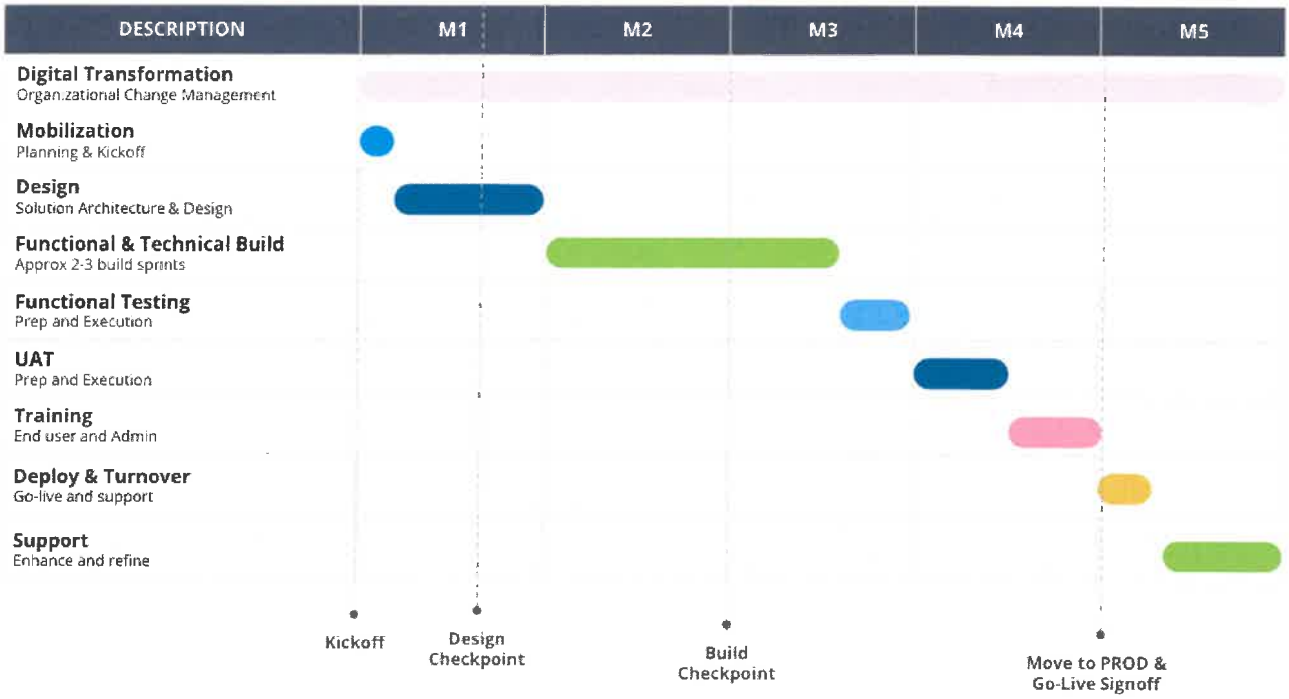
5. Methodology & Implementation Plan

HIKE2 approaches implementation projects with a proven blend of **human-centered design, agile delivery, and disciplined project management**. For the State of West Virginia OIG case management initiative, we propose a structured yet flexible implementation plan that ensures the solution meets user needs, aligns with compliance requirements, and is delivered on time and within budget.

Project Phases & Timeline

Based on comparable government projects, we estimate an implementation period of approximately **5 months** from kickoff to deployment. Our phased approach provides transparency, incremental value, and early opportunities for user feedback. The timeline below reflects our standard approach:





Phase 1: Design (Months 1–2)

- **Kickoff (Month 1):**
  Establish project governance, finalize scope, and confirm timelines. Deliverables include a Project Charter, Work Plan, Communication Plan, and Risk Management Plan.

- **Understand (Months 1–2):**
  Conduct discovery workshops and interviews with investigators, auditors, analysts, and administrators. Using **Human-Centered Design (HCD)**, we map current processes, identify bottlenecks, and document user needs. Deliverables include Requirements Documentation, As-Is and To-Be Process Maps, User Personas, and Use Cases.

- **Ideate (Months 1-2):**
  Translate requirements into solution concepts. Our team develops data models, security frameworks, and integration specifications (when in-scope). Interactive prototypes and wireframes are created for case dashboards, investigation workflows, and reporting screens. Deliverables include initial user stories with solution design and screens for early user feedback.

Phase 2: Configuration & Build (Months 3-4)

- **Build (Months 3-4):**
  Using Agile sprints (2–3 weeks each), we configure Salesforce to support case intake, investigation workflows, document management, and reporting. Custom code (Apex, Lightning Web Components) is developed only where necessary. Parallel workstreams handle early training material development and (in projects where scoped) data and integration setup. Each sprint concludes with a stakeholder demo to ensure transparency and alignment. Deliverables include configured system modules, working prototypes, migrated sample data, and sprint review outputs.

- **Test (Months 3-4):**
  Rigorous testing ensures compliance, accuracy, and performance. Testing includes:
  - Unit and Integration Testing by HIKE2's development team.
  - System Testing across end-to-end workflows by QA specialists.
  - User Acceptance Testing (UAT) with OIG staff to validate real-world scenarios.
  - Deliverables include Test Plans, Issue Logs, and a fully validated solution.

Phase 3: Train & Deploy (Month 5)

- **Training & Change Management (Months 4-5):**
  We deliver a comprehensive training program using a **train-the-trainer model** supported by manuals, quick reference guides, and recorded tutorials. Live branch-specific training sessions ensure every user is prepared. Change management activities include leadership communications, town halls, and system previews to build enthusiasm and reduce adoption risk. Deliverables include a Training Plan, Training Materials, and Change Management Communications.

- **Deploy (Month 5):**
  The solution is migrated to production and made available to users. Go-live is carefully planned to minimize disruption, with legacy systems accessible in read-only mode for reference during transition. HIKE2 provides **hypercare support** immediately following deployment, ensuring rapid resolution of issues. Deliverables include Go-Live Readiness Checklists, Production Data Migration, and Hypercare Support Logs.

Post-Implementation Support (Month 6 onward)

Following stabilization, HIKE2 transitions to **Application Managed Services (AMS)**, providing ongoing support, enhancements, and release management. We partner with OIG to continuously improve the system, ensuring that the platform evolves alongside changing business and compliance requirements.

Methodological Rigor with Flexibility

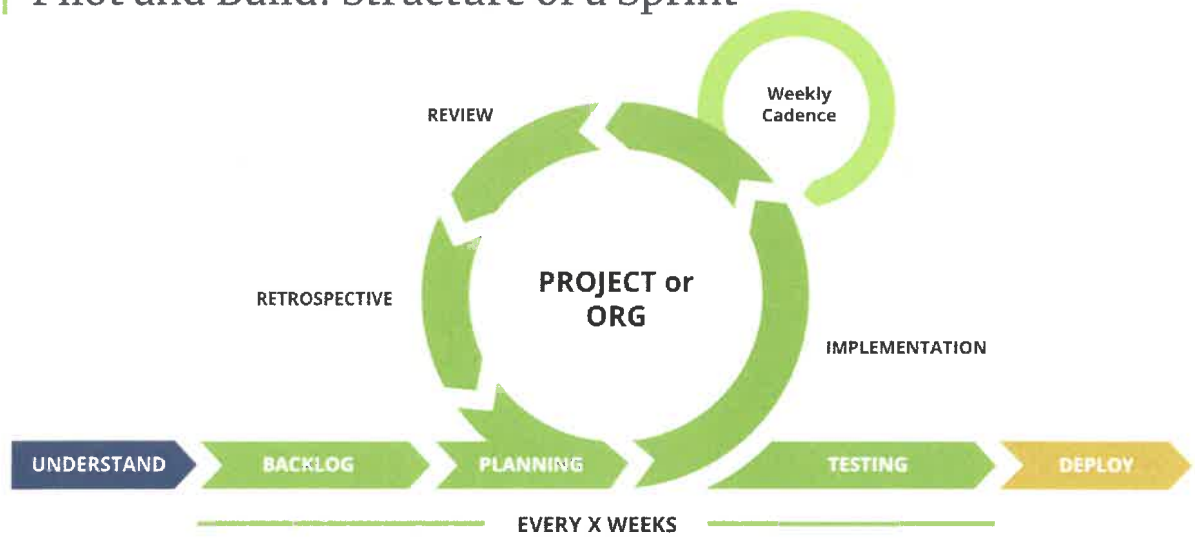
HIKE2's approach balances rigor with adaptability:

- **Rigor:** Clear governance, documentation, and compliance with State IT standards.
- **Flexibility:** Agile methods ensure evolving needs can be prioritized, with must-have features delivered by go-live and nice-to-have enhancements scheduled for post-implementation.

Design Thinking + Agile in Practice

PROPOSED SOLUTION

Pilot and Build: Structure of a Sprint



Our methodology combines **Design Thinking** with **Agile delivery**. Stakeholders participate throughout—attending workshops, reviewing prototypes, joining sprint demos, and testing the system. This iterative engagement builds ownership, reduces risk, and ensures that the final solution reflects both user needs and organizational goals.

5. Qualifications

The State requires a vendor with proven experience, financial stability, and technical capacity to deliver a secure, public-sector case management system. HIKE2 meets and exceeds the mandatory qualifications outlined in Section 3 of the RFQ.

Full Implementations in Other States

HIKE2 has successfully completed multiple Salesforce Government Cloud+ implementations across the United States, including:

- **Montana Office of the Public Defender (OPD)** – Comprehensive case and document management system for 25,000+ annual cases.
- **Montana Department of Justice (DOJ) –** Prosecutorial case management system.
- **Virginia Indigent Defense Commission (VIDC)** – Statewide deployment for 600+ attorneys and staff.
- **District of Columbia Office of the Attorney General (Child Support Services Division) –** Salesforce-based case management for 75,000 children and families.

These implementations demonstrate HIKE2's ability to deliver enterprise-scale, statewide Salesforce solutions in diverse government environments.

Statewide Case/CRM/Investigations Management for State Agencies

HIKE2 has provided statewide systems for at least three government entities:

- **Montana OPD** – Unified case/document management across all state public defense offices.
- **Virginia Indigent Defense Commission –** Statewide deployment across multiple defender offices.
- **District of Columbia OAG (Child Support Services Division) –** Statewide (district-wide) child support case management integrated with federal/state benefits systems.

Each project required compliance with strict data protection, CJIS, HIPAA, and NIST standards, proving HIKE2's ability to deliver secure statewide platforms.

All references represent projects delivered within the last five years and can attest to HIKE2's ability to deliver complex, statewide Salesforce Government Cloud+ solutions on time and on budget.

Additional Qualifications

- **Technical Capacity**: HIKE2's delivery team includes Salesforce-certified architects, developers, and administrators with deep Government Cloud+ expertise.
- **Financial Stability**: HIKE2 is a financially sound consultancy with a strong record of delivering successful government IT projects.
- **Human-Centered Design**: Our approach ensures user adoption and sustainability, producing solutions that are intuitive and outcome-focused.

The State requires a vendor with proven experience, financial stability, and technical capacity to deliver a secure, public-sector case management system. Past performance in similar government environments is essential.

- **Proven Experience**: HIKE2 has successfully implemented Salesforce Government Cloud+ for multiple public sector clients, including the Virginia Indigent Defense Commission, Santa Cruz County Public Defender's Office, and the Legal Aid Society of New York. These projects involved complex data migrations, compliance-driven workflows, and integrations with justice and court systems—directly analogous to West Virginia OIG's needs.
- **Technical Capacity**: Our delivery team includes Salesforce-certified architects, developers, and administrators who specialize in Government Cloud+ deployments. We bring advanced knowledge of Salesforce Shield, workflow automation, and secure API integrations, ensuring that the solution is both technically robust and adaptable.
- **Human-Centered Design**: As emphasized in our Company Overview, HIKE2 applies Human-Centered Design (HCD) principles to ensure systems are intuitive for investigators, administrators, and executives. This results in high adoption rates, improved user satisfaction, and long-term sustainability.
- **Financial Stability**: HIKE2 is a financially stable consultancy with a strong record of delivering government IT projects nationwide. Our financial health ensures that West Virginia can depend on us not only for implementation but also for long-term support.

6. Experience & Case Studies

Building on the qualifications outlined above, HIKE2's experience demonstrates our ability to deliver the type of secure, scalable, and compliant case management system required by the State of West Virginia. The following examples illustrate how our proven track record directly supports our qualifications.

Some of HIKE2's other commercial and public sector clients have included (and many more with projects currently under non-disclosure):

Public Sector

Law Firms

Case Study 1: State of Montana Office of Public Defender (Montana OPD) | Salesforce & CaseCloud™ (AdvoLogix) Implementation & External Portal

1. Name of Client	State of Montana Office of the Public Defender (Montana OPD)
2. Contract Value	Approximate contract value: $2,500,000 (initial setup and ongoing phases over 4 years)
3. Nature and Scope of Project:	HIKE2 implemented a comprehensive, statewide Salesforce and Mitratech CaseCloud™ (AdvoLogix) Case Management System for the Montana Office of the Public Defender. The project replaced legacy JustWare and SharePoint systems and introduced modern digital capabilities including workflow automation, approvals, advanced analytics, external communications, and client/service provider engagement portals. The implementation included: • Integrations with PayZang and SABHRS • Automated workflows, approvals, and form generation (~100 dynamic templates) • Billing and spend management for internal and external providers • Secure, FedRAMP-aligned configuration • SMS messaging and multichannel communications • Enterprise-level document and file management • External web portal supporting over 25,000 annual users • Migration of all case, client, and document data from legacy systems **Comparison to the Commonwealth's Project:** This engagement closely mirrors the Commonwealth's required scale, scope, and complexity. The Montana OPD project involved statewide users, high-volume caseloads, advanced workflow needs, sensitive client populations, and significant systems integration and migration. It is representative of HIKE2's ability to deliver enterprise-level justice system modernization within aggressive timelines (10 months) while supporting extensive stakeholder groups and secure public-sector requirements.
Project Duration:	• **Start Date Year:** 2021 • **End Date Year:** 2021 (initial deployment); and ongoing enhancements continued through 2024)
6. Nature of the Client:	The Montana Office of the Public Defender (OPD) is a statewide government agency responsible for indigent defense services across all 56 Montana counties. The project was managed by the OPD **Development & Operations Bureau**, which oversees technology, operations, and statewide case management systems.

7. Nature of Client Audience:	End users included: • Public defenders • Investigators • Administrative staff • Social services teams • Office management and leadership External audiences included: • Contract attorneys • Social service partners • Court staff • Over 25,000 indigent and incarcerated clients accessing the public portal annually
8. Number of Attorneys:	Approximately **350 internal attorneys and legal professionals**.
9. Description of Effort:	**Start-Up:** Discovery workshops, requirements gathering, data assessment, and solution design. **Peak Effort:** • Development of complex workflows, approvals, and automated forms • Integration with PayZang and SABHRS • Complete data and document migration from JustWare and SharePoint • Analytics and dashboard development • SMS and multichannel communications setup • External client/service provider portal design and build **Ongoing Effort:** Training, change management, stabilization support, and multi-year enhancement phases.

10. Client Contact Information:	Two project reference contacts are required; the primary reference is listed below. A second OPD contact is available upon request. **Reference Contacts:** **Name:** Koan Mercer **Title:** Acting Director for State of Montana OPD **Department:** Montana Office of the Public Defender **Full Address:** 17 West Galena, Butte, Montana 59701 **Telephone:** 406-523-5179 **E-mail:** kmercer@mt.gov **Relation/Role to Project:** Executive Sponsor and Project Lead — responsible for oversight, decision-making, and validating HIKE2's performance. **Name:** Kyle Belcher **Title:**Technical Lead for State of Montana OPD **Department:** Montana Office of the Public Defender **Full Address:** 17 West Galena, Butte, Montana 59701 **Telephone:** 406-381-8577 **E-mail:** KBelcher@mt.gov **Relation/Role to Project:** Project leader with technical oversight responsibilities.

Case Study 2: State of Indiana Office of the Attorney General | Salesforce + CaseCloud™ (AdvoLogix) Implementation

1. Name of Client	State of Indiana Office of the Attorney General.
2. Contract Value	Approximate contract value: Approximately $650,000 (available from client upon request)
3. Nature and Scope of Project:	HIKE2 implemented the Salesforce Platform and Mitratech CaseCloud™ (AdvoLogix) for the State of Indiana Office of the Attorney General (OAG), replacing the agency's legacy Time Matters system with a modern, secure, cloud-based legal case management system. Indiana OAG manages all major matter types across **eight divisions**, including Appeals, Advisory, Licensing, Unclaimed Property, Consumer Protection, Litigation, Complex Litigation, Medicaid Fraud Control, and the Solicitor General Division. HIKE2's implementation addressed the firmwide need for secure case handling, document management, time tracking, and streamlined workflows. The project involved: • Migrating **extensive case records**, including ~300 document templates and over **5TB of files** • Designing and deploying a **complex, highly granular security model** protecting confidential and legally sensitive data • Implementing case blocking and redaction processes • Supporting attorneys and staff across **450 users** • Establishing a FedRAMP-aligned configuration • Migrating time and expense records from legacy systems • Developing consistent matter structures across all eight divisions **Comparison to the Commonwealth's Project:** This project showcases HIKE2's ability to deliver a statewide, multi-division implementation requiring advanced data security, complex matter types, extensive document migration, and broad cross-agency coordination. The Indiana OAG engagement is representative of HIKE2's strengths in public-sector legal transformation, system modernization, large-scale migration, and the delivery of secure legal technology solutions aligned with government requirements.
Project Duration:	• **Start Date Year:** 2020 • **End Date Year:** 2021
6. Nature of the Client:	The State of Indiana Office of the Attorney General is a statewide legal authority responsible for litigation, consumer protection, legal advisories, appeals, licensing enforcement, and other critical public-sector legal operations. The project was managed by the **Office of the CTO**, involving leadership across all major sections of the OAG.

7. Nature of Client Audience:	End users included: • Attorneys across eight diverse legal divisions • Paralegals • Investigators • Administrative and operations staff Approximately **450 internal users** utilized the system for case management, time tracking, document management, and legal workflow activities.
8. Number of Attorneys:	Approximately **450 attorneys and staff** across the Office.
9. Description of Effort:	**Start-Up:** • Requirements discovery across eight divisions. • Identification of matter types, data structures, and access requirements. • Mapping of legacy Time Matters data, documents, and templates **Peak Effort:** • Development of a complex security model with granular permissions, hierarchical access, and confidential matter controls. • Migration of ~5TB of documents and ~300 templates. • Implementation of time tracking, case management, and division-specific workflows. • Case blocking and redaction capability development. • Testing, UAT cycles, and validation across large user groups. **Ongoing Effort:** • Enhancements, troubleshooting support, and optimization. • Continued cross-team collaboration ensuring adoption and operational stability. The Indiana OAG publicly praised HIKE2's delivery discipline and user acceptance testing alignment: *"With our increased focus of clearly defining UAT, pass, fail, and still providing feedback, we are delivering as agreed upon. I am very proud of the HIKE2 team!"* **— Dwayne Sawyer, Client Lead, State of Indiana Office of the Attorney General.**

10. Client Contact Information:	Two project reference contacts are required; the primary reference is listed below. A second OPD contact is available upon request. **Reference Contacts:** **Name:** Sreenath Bangaru **Title:** Chief Technology Officer **Department:** State of Indiana Office of the Attorney General **Full Address:** 302 W. Washington St., 5th Floor, Indianapolis, Indiana 46204 **Telephone:** (317) 232-6201 **E-mail:** Sreenath.Bangaru@atg.in.gov **Relation/Role to Project:** Executive technical sponsor overseeing statewide CMS modernization. **Name:** Dwayne Sawyer **Title:** Director of Operations, Information Technology **Department:** State of Indiana Office of the Attorney General **Full Address:** 302 W. Washington St., 5th Floor, Indianapolis, Indiana 46204 **Telephone:** (317) 374-1272 **E-mail:** dwayne.sawyer@atg.in.gov **Relation/Role to Project:** Secondary project oversight and stakeholder representative.

Case study 3: State of Montana Local Government Services Bureau | Salesforce CRM & Customer Experience Portal

1. Name of Client	State of Montana, Department of Administration – State Financial Services Division, Local Government Services Bureau	
2. Contract Value	Approximate contract value: Available upon request.	
3. Nature and Scope of Project:	HIKE2 partnered with the State of Montana's Department of Administration, State Financial Services Division, to design and implement a modern Salesforce Public Sector Foundations (PSF/PSS) CRM and a comprehensive Experience Cloud public portal used by local government entities, auditors, vendors, state agencies, and Montana citizens. The Local Government Services Bureau (LGSB) is responsible for ensuring uniform financial accountability across Montana's counties, municipalities, school districts, and special districts. The Bureau oversees required financial reporting, audits, budget submissions, and compliance with statutory timelines. The implementation included: • A fully integrated **internal + external portal** supporting 1,300+ external stakeholders • **Salesforce Public Sector Foundations CRM** for internal workflows • **Data migration** of historic government financial data • **FedRAMP-aligned configuration** suitable for government security requirements • **API integration with SABHRS**, Montana's statewide financial system • **OKTA single sign-on (SSO)** implementation • Automated workflows, stage-based tracking, and statutory deadline calculations • Constituent-facing services for document submission, reporting, and secure access **Comparison to the Commonwealth's Project:** This project demonstrates HIKE2's ability to deliver secure, high-volume, constituent-facing portals with workflow complexity, public-sector integrations, and multi-level data visibility. The Commonwealth's project aligns closely with the Montana Bureau's needs for user experience modernization, data migration, compliance automation, reporting dashboards, and integrations with statewide systems. This engagement exemplifies HIKE2's proficiency in implementing Salesforce Public Sector solutions, managing sensitive local government data, and supporting large-scale public portals serving diverse communities.	
Project Duration:	4. **Start Date Year:** 2023	5. **End Date Year:** 2025

6. Nature of the Client:	The **State of Montana, Department of Administration, State Financial Services Division** oversees statewide fiscal operations and supports local governments in meeting statutory financial and reporting obligations. The Local Government Services Bureau manages budgets, audits, compliance requirements, and public transparency of submitted financial data. The project was managed by leadership within the Bureau with oversight from the Department of Administration.
7. Nature of Client Audience:	End users include: • **20 internal Bureau staff** responsible for financial oversight, audit tracking, compliance, and reporting • **1,300+ external users**, including: ○ Local government finance officers (cities, counties, school districts, special districts) ○ External auditors and CPAs ○ Vendors ○ Other state agencies ○ Citizens accessing financial reports and public data.
8. Number of Attorneys:	Not applicable (financial and administrative agency). **Equivalent internal professional staff:** 20 internal users.

9. Description of Effort:	**Start-Up:** • Stakeholder interviews and process documentation • Mapping statutory requirements for budget/audit deadlines • Persona and journey analysis for internal and external user groups • Data assessment and migration planning **Peak Effort:** • Implementation of Salesforce Public Sector Foundations CRM • Development of a comprehensive external Experience Cloud portal • API integrations with the SABHRS financial system • OKTA SSO configuration for secure portal access • Implementation of workflow automation, deadline calculation, fee assessment logic, and document submission flows • Creation of dashboards and reports for deadlines, workload, exceptions, compliance, and transparency • Configuration of notification and alert systems to support internal review and constituent communication **Ongoing Effort:** • Enhancements to portal functionality for evolving statutory and operational needs • Support for additional integrations, workflow changes, and reporting improvements • Continued optimization to improve user experience for citizens and government entities The solution enables local governments, auditors, legislators, and citizens to securely access, submit, and review financial documents while giving Bureau staff real-time insights into deadlines, workloads, and compliance metrics. This frees staff to focus on higher-value services and improves transparency and accountability across the state.

10. Client Contact Information:	Two project reference contacts are required; the primary reference is listed below. A secondary EIG reference is available upon request. **Reference Contacts:** **Name:** Kyler Baker **Title:** Department of Administration Lead **Department:** State Financial Services Division – Local Government Services Bureau **Full Address:** 125 N Roberts St., Helena, MT 59601 **Telephone:** (406) 444-3541 **E-mail:** Kyler.Baker2@mt.gov **Relation/Role to Project:** Project sponsor and primary point of contact overseeing the statewide CRM and portal modernization initiative. **Name:** Danielle Vincent **Title:** Bureau Chief **Department:** State Financial Services Division – Local Government Services Bureau **Full Address:** 125 N Roberts St., Helena, MT 59601 **Telephone:** 406-444-3887 **E-mail:** Danielle.Vincent@mt.gov **Relation/Role to Project:** Primary business owner oversight and stakeholder.

Case Study 4: Erickson Immigration Group | Salesforce CRM & Customer Experience Portal Implementation

1. Name of Client	Erickson Immigration Group (EIG).	
2. Contract Value	Approximate contract value: Available upon request.	
3. Nature and Scope of Project:	HIKE2 partnered with Erickson Immigration Group (EIG) to implement Salesforce CRM and Salesforce Experience Cloud to transform the firm's client experience, operational efficiency, and case transparency. EIG serves a broad client base, including Fortune 500 companies and high-growth startups, driving a high-touch, client-centered immigration program that requires reliable communication, real-time data, and secure case coordination. To support these needs, HIKE2 implemented Salesforce CRM for EIG's internal teams and designed **Aurora**, an award-winning, highly customized Experience Cloud customer portal. Aurora enables foreign nationals and corporate clients to directly manage immigration matters, view case status, submit required documents, complete tasks, and receive timely communications, dramatically improving transparency and satisfaction. The project included: • Salesforce CRM implementation with tailored case/matter structures • Complex security and role-based access models • Aurora customer-facing portal design, development, and deployment • Advanced analytics and dashboards for internal leadership • Workflow automation, communication streamlining, and Slack + Einstein integrations • Ongoing multi-year innovation following the successful launch. **Comparison to the Commonwealth's Project:** This engagement demonstrates HIKE2's mastery in delivering large-scale customer/constituent-facing Experience Cloud portals integrated with legal case management workflows—directly relevant to the Commonwealth's need for secure, intuitive, and high-volume digital engagement solutions. The project also reflects HIKE2's expertise in human-centered design, complex security modeling, high-volume case management (40,000+ cases annually), and cross-organizational workflow modernization.	
Project Duration:	6. **Start Date Year:** 2021	7. **End Date Year:** 2022
6. Nature of the Client:	Erickson Immigration Group (EIG) is a global corporate immigration law firm providing high-touch legal and advisory services to Fortune 500 companies and emerging-growth organizations. The project was managed by the firm's executive leadership, including the Managing Shareholder.	

7. Nature of Client Audience:	Internal and external users included: • **100–150 EIG employees**, including attorneys, paralegals, operations, and support staff • **1,000+ foreign nationals** interacting with the Aurora portal at any given time • High-volume case traffic (40,000 cases annually) requiring secure and predictable workflows.
8. Number of Attorneys:	Approximately **100–150 internal employees**, including attorneys, legal teams, and support staff.

9. Description of Effort:	**Start-Up:** • Discovery sessions with EIG leadership and operations teams • Audit of existing workflows, pain points, and client experience gaps • Definition of portal personas, customer journeys, and functional requirements **Peak Effort:** • Implementation of Salesforce CRM to unify case management activities • Development of Aurora, a fully customized Experience Cloud portal • Configuration of complex security, privacy, and permission layers • Integration of analytics, dashboards, Slack, and Einstein for enhanced insights and automation • Alignment of workflows for 40,000+ annual cases • Cross-team UAT and iterative refinement to align with EIG's high-touch service model **Ongoing Effort:** • Continued partnership to extend Aurora functionality • Strategic enhancements and innovation cycles • Support for internal efficiency expansion and customer experience evolution The results included an **80% reduction in communication noise**, a **dramatically improved user experience**, and a platform **better aligned with executive leadership needs**.

10. Client Contact Information:	Two project reference contacts are required; the primary reference is listed below. A secondary EIG reference is available upon request. **Reference Contacts:** **Name:** Justin Parsons **Title:** Managing Shareholder **Department:** Erickson Immigration Group (EIG) **Full Address:** 2101 Wilson Blvd #1100, Arlington, VA 22201 **Telephone:** (703) 678-4509 **E-mail:** justin@eiglaw.com **Relation/Role to Project:** Executive sponsor and primary project leader responsible for validating HIKE2 performance and outcomes. **Name:** Additional EIG reference available upon request **Title:** To be provided **Department:** Erickson Immigration Group (EIG) **Full Address:** 2101 Wilson Blvd #1100, Arlington, VA 22201 **Telephone:** TBD **E-mail:** TBD **Relation/Role to Project:** Secondary oversight and project stakeholder

7. Project Specifications

7.1 Background and Current Operating Environment

The West Virginia Office of the Inspector General (OIG) oversees investigative, audit, and oversight operations across multiple divisions, each tasked with identifying and reducing fraud, waste, and abuse. HIKE2 understands that these divisions currently rely on legacy systems, shared spreadsheets, and manual workflows that limit collaboration, data accuracy, and timely reporting.

HIKE2 proposes a Salesforce Government Cloud+ solution configured and deployed by HIKE2 that consolidates all investigative and oversight functions into a unified, secure case management environment. Salesforce Government Cloud, a FedRAMP High–authorized platform, provides the security, scalability, and configurability necessary to modernize the OIG's operations while maintaining full compliance with CJIS, HIPAA/HITECH, and NIST 800-53 standards.

The scope of the RFP (and thus our proposal response here) is focused on the IFM Division (initially 35 users). Our implementation will provide:

- A unified case management system with automated workflows for intake, triage, investigation, and closure.
- Real-time dashboards and analytics to improve visibility and performance tracking.
- Secure collaboration among investigators, supervisors, and leadership.
- Mobile and remote access through FedRAMP-authorized authentication.
- Interoperability with existing State and external systems through standards-based APIs.

The result is a single, authoritative source of truth for OIG investigations, enabling data-driven oversight and more efficient case resolution.

7.2 Project Goals and Mandatory Requirements

HIKE2 fully supports the State's objectives to implement a secure, cloud-based case management system that enhances efficiency, transparency, and accountability. The Salesforce Government Cloud+ platform, implemented by HIKE2, satisfies all mandatory requirements while enabling rapid adoption and sustainable scalability.

This solution ensures:

- Security and Compliance: End-to-end encryption, multifactor authentication, audit logs, and adherence to CJIS and FedRAMP High security policies.
- Operational Efficiency: Automation of manual tasks, configurable workflows, and streamlined approvals.
- Data Transparency: Role-based dashboards and performance metrics supporting leadership decision-making.
- Scalability and Flexibility: Ability to expand across divisions and integrate with future State initiatives.
- Ease of Use: Modern, accessible, and intuitive interface minimizing user training time.

HIKE2's proposed system not only meets all RFP requirements but also empowers OIG to continuously evolve through configuration rather than code, reducing long-term maintenance costs and dependency on third-party vendors.

7.2.1 Goals and Objectives

HIKE2's Salesforce Government Cloud+ solution fulfills each project goal and objective defined by the State as follows:

7.2.1.1 Cloud-Based System

Salesforce Government Cloud+ provides a **FedRAMP High** and **DoD IL4**–authorized cloud environment specifically designed for government agencies. HIKE2 will deploy and configure the OIG's case management system entirely within this secure infrastructure, ensuring compliance with all federal and State cloud standards.

7.2.1.2 Compliance with CJIS, FedRAMP, and HITECH

The platform natively satisfies **CJIS**, **FedRAMP**, and **HIPAA/HITECH** requirements through encryption, access controls, and continuous monitoring. HIKE2 will configure field-level encryption, audit trails, and MFA to meet CJIS policy mandates and provide documentation verifying compliance.

7.2.1.3 Streamlined Investigative Processes

HIKE2 will automate OIG's investigative workflows to eliminate manual tracking and redundant data entry. Configurable Salesforce Flows will guide users through standardized processes for intake, assignment, investigation, and closure reducing administrative overhead and cycle times.

7.2.1.4 Multi-User, High-Performance Access

Salesforce Government Cloud+ supports thousands of concurrent users with 99.9% uptime and no degradation in performance. HIKE2 will configure permissions and profiles to support simultaneous multi-division use while maintaining strict access control.

7.2.1.5 Secure Integration with State Systems

When scoped for future phases, HIKE2 can connect the new OIG system to existing State platforms (HR, Finance, and Justice Systems) using secure RESTful APIs or MuleSoft middleware. All integrations will use encrypted channels (TLS 1.2+), and no confidential data will be stored outside the State's authorized systems.

7.2.1.6 Demonstrated Implementation Experience

HIKE2 brings extensive experience deploying Salesforce Government Cloud+ solutions for public-sector justice and oversight agencies, including:

- Montana Office of the Public Defender (25,000+ annual cases)
- Virginia Indigent Defense Commission (statewide case management)

These engagements demonstrate our ability to deliver secure, enterprise-scale Salesforce solutions on time and within budget.

7.2.1.7 Qualified Project Team

HIKE2's project team includes certified Project Management Professionals (PMP®), Certified Information Systems Security Professionals (CISSP®), and Salesforce Certified Technical Architects. All personnel assigned to this engagement possess extensive experience of implementing government-grade case management systems.

7.2.2 Mandatory Project Requirements

HIKE2 confirms that the proposed solution, delivered on Salesforce Government Cloud, satisfies all mandatory project requirements defined by the State of West Virginia. The platform is designed specifically for government workloads and supports stringent security, compliance, operational, and scalability needs. HIKE2 will configure, implement, and support the system in alignment with all State and Federal mandates.

7.2.2.1 Criminal Justice Information Services (CJIS) Security Policy

HIKE2 will configure Salesforce Government Cloud+ to fully comply with CJIS Security Policy requirements. This includes:

4.2.2.1.1 Encryption of all data at rest and in transit using FIPS 140-2–validated cryptographic modules.
4.2.2.1.2 Multi-factor authentication (MFA) for all users accessing CJIS data.
4.2.2.1.3 Role-based access control to ensure users only access data appropriate to their role.
4.2.2.1.4 Detailed audit logging of all user access and system activity.
4.2.2.1.5 Secure session management and automatic timeout controls

HIKE2 will work with State CJIS authorities to validate compliance and support audits as required.

7.2.2.2 Federal Risk and Authorization Management Program (FedRAMP)

HIKE2 proposes a solution hosted on the Salesforce Government Cloud, which operates within a secure environment authorized at the FedRAMP High impact level. Salesforce Government Cloud+ maintains an active Authorization to Operate (ATO) issued by the Federal Government and is continuously monitored in accordance with FedRAMP requirements. This ensures that all systems supporting the West Virginia Office of the Inspector General meet the highest federal security standards for confidentiality, integrity, and availability.

7.2.2.2.1 Proof of an Active Authorization to Operate (ATO) :

Salesforce Government Cloud+ holds an active **FedRAMP High Authorization to Operate (ATO)** issued by a federal authorizing authority and recognized by the Joint Authorization Board (JAB). Upon request by the State, HIKE2 will provide documentation confirming the current ATO status, including the authorizing agency, authorization boundary, and impact level. This documentation will verify that the hosting environment fully satisfies FedRAMP High requirements prior to system deployment.

7.2.2.2.2 Third-Party Security Assessment Documentation:

Salesforce Government Cloud+ undergoes independent security assessments conducted by an accredited Third-Party Assessment Organization (3PAO) as required under the FedRAMP program. HIKE2 will provide documentation summarizing the completed security assessment, including the scope of testing, applicable NIST 800-53 controls, and remediation status. This documentation demonstrates that the hosting environment has been formally evaluated and validated against FedRAMP High security controls.

7.2.2.2.3 Continuous Monitoring Documentation:

Salesforce Government Cloud+ operates under a continuous monitoring program consistent with FedRAMP requirements. This program includes routine vulnerability scanning, patch management, configuration management, incident detection and response, and security control validation. HIKE2 will provide documentation describing these continuous monitoring practices, including processes for identifying and remediating vulnerabilities, managing system updates, and responding to security incidents prior to contract award.

7.2.2.2.4 Quarterly FedRAMP Compliance Reporting:

Salesforce Government Cloud+ produces quarterly continuous monitoring reports demonstrating ongoing compliance with FedRAMP High requirements. These reports include vulnerability scan results, risk assessments, and remediation activities. HIKE2 will make these quarterly reports available to the State upon request, ensuring transparency and continued assurance that the hosting environment remains compliant throughout the life of the contract.

7.2.2.3 Health Insurance Portability and Accountability Act (HIPAA) and HITECH

HIKE2's proposed solution is designed to support compliance with the Health Insurance Portability and Accountability Act (HIPAA) and the Health Information Technology for Economic and Clinical Health (HITECH) Act. Salesforce Government Cloud+ provides the administrative, physical, and technical safeguards required to protect Protected Health Information (PHI) and other sensitive data processed by the West Virginia Office of the Inspector General.

HIKE2 will configure the system to ensure that PHI is accessed, stored, transmitted, and audited in accordance with HIPAA Privacy and Security Rules. Access to PHI will be restricted through role-based permissions, multi-factor authentication, and audit logging. All data containing PHI will be encrypted at rest and in transit, and system activity will be continuously monitored to detect and respond to potential security events. HIKE2 will also support the State's breach notification and incident response requirements as defined under HITECH.

7.2.2.3.1 Administrative, Physical, and Technical Safeguards:

HIKE2 ensures implementation of all required administrative, physical, and technical safeguards as defined in 45 CFR §§164.308–316. Administrative safeguards include documented security policies, role-based access governance, workforce authorization controls, audit oversight, and periodic security reviews. Physical safeguards are provided through Salesforce Government Cloud's FedRAMP High–authorized data centers, which enforce controlled facility access, environmental protections, hardware security, and secure media disposal. Technical safeguards include unique user identification, multi-factor authentication, encryption of data at rest and in transit, automatic session timeouts, and comprehensive audit logging of all PHI access and modification.

7.2.2.3.2 Breach Notification Procedures:

HIKE2 supports breach notification procedures consistent with HITECH Section 13402 and 45 CFR Part 164, Subpart D. Salesforce Government Cloud+ operates under a documented incident response and breach management program aligned with FedRAMP and NIST standards. HIKE2 will coordinate with the State to ensure that any suspected or confirmed breach involving PHI is promptly identified, investigated, documented, and reported within required timeframes. Notification workflows will align with State policies and Federal reporting requirements, including notification to affected parties, oversight authorities, and regulatory bodies as applicable.

7.2.2.3.3 Business Associate Agreement (BAA):

HIKE2 acknowledges the requirement to complete the West Virginia Business Associate Agreement (BAA) provided as Attachment C. HIKE2 will execute the BAA and include it in the proposal as required. The executed BAA will be provided prior to contract award and will govern the handling, safeguarding, and disclosure of PHI in accordance with HIPAA and HITECH requirements.

7.2.2.3.4 Access Control, Encryption, and Audit Mechanisms for PHI:

The Salesforce Government Cloud+ platform enforces strict access control, encryption, and audit mechanisms for all PHI processed by the system. Access to PHI is restricted through role-based permissions, multi-factor authentication, and least-privilege access principles. All PHI is encrypted at rest using AES-256 and in transit using TLS 1.2 or higher. Comprehensive audit logs record all access, modification, and transmission of PHI, supporting compliance monitoring, forensic analysis, and regulatory audits.

7.2.2.3.5 HIPAA and HITECH Training: HIKE2 ensures that all personnel with access to PHI complete annual HIPAA and HITECH training. Training covers data privacy obligations, secure handling of PHI, incident reporting procedures, and compliance responsibilities. Training completion is tracked and documented to support audit and compliance requirements. HIKE2 will also support the State in aligning training expectations with internal policies and oversight standards.

7.2.2.4 Role-Based Access Control (RBAC)

HIKE2's proposed solution includes a comprehensive security architecture built on **Salesforce Government Cloud+** that enforces Role-Based Access Control (RBAC) using least-privilege principles. The platform is designed to ensure that users can access only the data and system functionality required to perform their assigned duties. Security controls are centrally managed, continuously monitored, and fully auditable, supporting the Office of the Inspector General's operational and compliance requirements.

7.2.2.4.1 Role-Based Access Control (RBAC):

HIKE2 will configure RBAC using Salesforce profiles, permission sets, and role hierarchies to restrict access to only those functions, records, and data elements necessary for each user's role. Access controls can be applied at the object, field, record, and workflow levels, ensuring sensitive investigative and health-related information is protected in accordance with least-privilege principles. RBAC configurations are fully configurable by authorized agency administrators.

7.2.2.4.2 Multi-Factor Authentication and Session Timeout Controls:

Salesforce Government Cloud+ enforces multi-factor authentication (MFA) for all users accessing the system. HIKE2 will configure MFA policies consistent with State and CJIS requirements. Session timeout controls will be enforced to automatically terminate inactive sessions, reducing the risk of unauthorized access. Authentication and session activity are logged for audit and compliance purposes.

7.2.2.4.3 Secure Remote Access:

The system supports secure remote access for authorized users through encrypted connections and strong authentication controls. All remote access sessions are protected using TLS 1.2 or higher encryption, and access from outside the State network is governed by role-based permissions and MFA. HIKE2 will ensure that data accessed remotely is subject to the same security, logging, and monitoring controls as on-network access.

7.2.2.4.4 Security Information and Event Management (SIEM):

Salesforce Government Cloud+ provides comprehensive event logging and monitoring capabilities that support integration with Security Information and Event Management (SIEM) tools. HIKE2 will enable system activity logging and support integration with the State's SIEM platform to monitor user activity, detect anomalous behavior, and support incident investigation and response.

7.2.2.4.5 Data Loss Prevention (DLP) and Intrusion Detection and Prevention Systems (IDPS):

HIKE2's solution supports integration with Data Loss Prevention (DLP) and Intrusion Detection and Prevention Systems (IDPS) through Salesforce's security controls and API integrations. These capabilities help prevent

unauthorized data exfiltration, detect malicious activity, and enforce data handling policies across the environment. Security alerts and events can be forwarded to State-managed security tools for centralized monitoring.

7.2.2.4.6 User Role Assignment and Revocation:

Authorized agency administrators can immediately assign, modify, or revoke user roles and permissions within Salesforce Government Cloud. Changes take effect in real time, ensuring rapid response to personnel changes, security events, or policy updates. All role and permission changes are logged and auditable.

7.2.2.4.7 Administrative Control of System Configuration:

The system allows designated administrators full control over administrative configuration without vendor assistance. This includes the ability to edit fields, labels, data types, validation rules, dropdown values, picklists, workflows, alerts, and other configuration elements. This capability ensures the agency can rapidly adapt the system to evolving operational, regulatory, or reporting requirements without reliance on external resources.

7.2.2.4.8 Logging and notification of all administrative and configuration changes:

HIKE2 will configure Salesforce Government Cloud+ to ensure that all administrative and configuration changes are logged and can be reviewed for audit and compliance purposes. The platform supports detailed auditability for configuration actions, including changes to user permissions, roles, security settings, workflow logic, validation rules, field definitions, and other administrative controls. HIKE2 will also enable notification mechanisms and governance processes so that designated agency administrators and security stakeholders receive visibility into key configuration changes, supporting change management, accountability, and security oversight.

7.2.2.5 Case Lifecycle Management

HIKE2's proposed solution on Salesforce Government Cloud+ fully supports end-to-end case lifecycle management for investigative, audit, and oversight activities conducted by the West Virginia Office of the Inspector General. The system is designed to manage cases from initial intake through final disposition while maintaining full auditability, data integrity, and compliance with State and Federal requirements.

HIKE2 will configure the platform to support standardized and configurable lifecycle stages, including intake, screening, assignment, investigation, review, resolution, closure, and archival. Each stage can be tailored to specific OIG divisions or case types while maintaining enterprise-wide consistency and oversight.

The system enforces required data capture, validation rules, and workflow transitions at each stage of the lifecycle, ensuring that cases progress in accordance with agency policy. Supervisors and administrators will have real-time visibility into case status, workload distribution, and timeliness metrics. All lifecycle events, status

changes, and user actions are logged and auditable, supporting compliance, quality assurance, and performance reporting.

7.2.2.5.1 The ability to log complaints, referrals, or leads and route them for review:

The system will enable staff to log complaints, referrals, and leads through configurable intake forms and standardized data capture. HIKE2 will configure routing rules that automatically direct new intakes to the appropriate queue, division, or reviewer based on criteria such as referral source, allegation category, jurisdiction, program area, severity, or required response timeframe. Routing actions will be logged and visible to supervisors.

7.2.2.5.2 Support automated or manual assignment of a unique case identifier upon creation of a new record:

HIKE2 will configure the solution to generate a unique case identifier automatically at record creation using configurable numbering rules aligned to OIG conventions. Where required, the system will also support authorized staff manually assigning or overriding the identifier according to agency policy, with all actions tracked in the audit history.

7.2.2.5.3 Support ad hoc workflows that allow the ability to generate custom, on-demand reports and/or memos that aren't covered by regular, predefined report and automatic generation of related tasks:

The platform will support ad hoc workflows that allow authorized users to initiate on-demand processes such as generating custom reports, memoranda, or summaries beyond standard templates. HIKE2 will configure workflow actions that automatically generate related tasks (e.g., evidence collection, interview scheduling, supervisor review, legal referral) and assign them to appropriate staff, ensuring consistency, traceability, and timely completion.

7.2.2.5.4 The ability for all users to enter case notes to document case activity:

All authorized users will be able to enter, edit, and view case notes directly within the case record. HIKE2 will configure structured and narrative note types, including tagging, categories, and time-stamped entries. Notes will be governed by role-based access controls, preserved in the case audit trail, and available for reporting and case chronology views.

7.2.2.5.5 Assign cases to investigators, monitoring status, and ensuring accountability:

The solution will support assignment of cases to investigators or teams using automated assignment rules and supervisor-driven assignments. Supervisors will be able to monitor case status, workload distribution, task completion, and timelines through real-time dashboards and queues. Assignment and status changes will be logged to ensure accountability and support performance reporting.

7.2.2.5.6 Allow user defined items requiring higher-level approval such as case status changes, or investigator generated report or memo approvals:

HIKE2 will configure approval processes to require higher-level authorization for user-defined actions such as case status transitions, closures, escalations, and approvals of investigator-generated reports or memos. Approval routing will be configurable by role, division, case type, and threshold criteria. All approvals, denials, and comments will be time-stamped and retained in the audit history.

7.2.2.5.7 Secure storage and management of documents, images, videos, and other evidence, with full chain-of-custody tracking:

The solution will provide secure evidence handling with controlled access, encryption, and complete audit logging. HIKE2 will configure evidence objects and file handling so that documents, images, videos, audio files, and supporting materials are associated to the case record with metadata (e.g., source, date received, evidence type). Chain-of-custody will be supported through logged actions such as upload, access, modification, transfer, and export, providing tamper-evident traceability for audits and potential legal proceedings.

7.2.2.5.8 Tools to manage subpoenas, subjects, and witnesses within a case record:

HIKE2 will configure structured tracking for subpoenas, subjects, and witnesses as related records within the case. The system will support status tracking, key dates, document attachments, contact details, and workflow-driven tasks for follow-up activities. Role-based security will restrict access to sensitive witness and subject information, while enabling investigators and supervisors to manage these elements consistently across investigations.

7.2.2.5.9 Advanced search across structured and unstructured data, and secure export of case records in auditable formats:

The solution will support advanced search across structured data fields (e.g., case identifiers, subjects, program areas, dates, statuses) and unstructured content (e.g., notes and document metadata where applicable) within the security model. HIKE2 will configure search visibility to respect RBAC permissions. The system will support secure export of case records and related documentation in auditable formats, ensuring exports are logged, access-controlled, and traceable for compliance and disclosure purposes.

7.2.2.5.10 Allow administrator(s) to control file management and data retention:

HIKE2 will configure administrative controls that allow designated administrators to manage file handling and retention requirements, including policies for retention periods, archival rules, access restrictions, and controlled deletion in accordance with State policy. Administrative actions impacting retention and file management will be logged, and governance controls will support compliance, audit readiness, and records management obligations.

7.2.2.6 Audit Trails and Reporting

HIKE2's proposed solution on Salesforce Government Cloud+ provides comprehensive audit, reporting, and analytics capabilities designed to support investigative oversight, regulatory compliance, and management decision-making for the West Virginia Office of the Inspector General. The platform delivers real-time visibility into investigative activity, workload distribution, and outcomes while maintaining full auditability and data integrity across all system interactions.

7.2.2.6.1 Configurable Role-Based Dashboards:

The solution will provide configurable dashboards tailored to user roles such as investigators, supervisors, and administrators. HIKE2 will configure dashboards to display key metrics including case status, workload distribution, task progress, timelines, and investigative outcomes. Dashboards will be role-aware, ensuring users see only the information authorized for their role while enabling leadership to maintain enterprise-wide visibility.

7.2.2.6.2 Alerts for Tasks and Case Assignments:

The system will provide automated alerts and notifications to users when new tasks are created or case assignments are made. Notifications can be delivered through in-application alerts and secure email, based on agency policy. Alert rules will be configurable by administrators to support operational priorities and response timelines.

7.2.2.6.3 Caseload and Assignment Tracking:

HIKE2 will configure tracking of caseloads and assignments by investigator, team, and division. The system will capture timelines, task status, completion rates, and workload distribution metrics. Supervisors and administrators will be able to analyze productivity, identify bottlenecks, and rebalance workloads using real-time dashboards and reports.

7.2.2.6.4 Standardized and Regulatory Reporting:

The solution will support generation of standardized reports required by federal and state regulations, including fraud statistics, investigative results, and audit-ready documentation. Reports can be scheduled, filtered, and exported in approved formats. All reported data will be sourced directly from the authoritative case record to ensure accuracy and consistency.

7.2.2.6.5 Permanent, Tamper-Evident Audit Logs:

Salesforce Government Cloud+ maintains permanent, tamper-evident audit logs capturing system access, data modifications, transaction, and administrative actions. HIKE2 will ensure audit logs are retained in accordance

with State retention policies and can be securely exported to support internal reviews, external audits, and regulatory examinations.

7.2.2.6.6 Automated Memoranda and Investigative Documentation:

The system will provide automated tools to generate structured or narrative memoranda of investigation, summaries, and briefing documents using data drawn from multiple points within the case file, including subject information, witness interviews, evidence entries, financial records, and investigative notes. HIKE2 will configure customizable memo templates aligned with agency investigative standards. Generated documents will be properly formatted, securely stored within the case record, and available for controlled export and review.

7.2.2.7 Document and Evidence Management

HIKE2's proposed solution on Salesforce Government Cloud+ provides comprehensive document management and file handling capabilities to support the storage, viewing, import, export, and generation of documents in government-accepted formats. The system is designed to ensure compatibility with Microsoft Office and Google Workspace, promote accessibility, and enable secure sharing with authorized internal and external stakeholders. All document handling capabilities are governed by role-based access controls, encryption, and audit logging to ensure compliance with CJIS and FedRAMP High requirements.

7.2.2.7.1 Support upload, storage, search, and retrieval of documents: The system will support upload, secure storage, search, and retrieval of documents in PDF, Microsoft Word (.docx), Excel (.xlsx), PowerPoint (.pptx), text (.txt), image (.jpg, .png, .tiff), and audio/video (.mp3, .mp4, .wav) formats. Documents will be associated directly with case records and indexed for authorized search and retrieval based on metadata and access permissions.

7.2.2.7.2 Document Preview Capabilities:

The solution will allow documents to be previewed using thumbnail or first-page views where supported. Files containing images and audio will open securely within the system or approved viewers and will not be subject to unsupported preview functions. Preview behavior will respect file type limitations and security controls.

7.2.2.7.3 Export of Reports and Case Documentation:

The system will allow authorized users to export reports, memoranda, and case summaries in both PDF (.pdf) and Microsoft Word (.docx) formats. Export actions will be governed by role-based permissions and logged to ensure traceability and compliance with disclosure and audit requirements.

7.2.2.7.4 Word Processing Functions within Narrative Fields:

Narrative fields within the system will support routine word processing functions including spell check, cut and paste, text formatting, and structured content entry. These features will enable investigators and staff to efficiently create and edit case notes, memoranda, and summaries directly within the application.

7.2.2.7.5 File Metadata and Chain-of-Custody Preservation:

The system will maintain original file metadata, including author, creation date, and source, for all documents uploaded or generated within the system. Chain-of-custody will be preserved through comprehensive audit logging that records file access, modifications, downloads, and transfers, supporting evidentiary integrity and audit readiness.

7.2.2.7.6 Encryption of Files at Rest and in Transit:

All files stored within the system will be encrypted at rest using AES-256 encryption and encrypted in transit using TLS 1.2 or higher. These controls align with CJIS and FedRAMP High standards and ensure the confidentiality and integrity of investigative and health-related information throughout its lifecycle.

7.2.2.7.7 Secure Bulk Download and Export:

The system will permit secure bulk download or export of case documentation for lawful disclosure, audit, or prosecution purposes. Bulk export capabilities will be restricted to authorized roles and governed by access controls, logging, and approval workflows as required by agency policy. All bulk export activity will be auditable and traceable.

7.2.2.8 System Integration Capabilities

HIKE2's proposed solution on Salesforce Government Cloud+ provides secure, standards-based integration capabilities with State and Federal systems as applicable. The platform is designed to support interoperability while maintaining strict security controls, encryption, auditability, and compliance with CJIS, FedRAMP High, and State IT requirements. When included in the scope for future work, HIKE2 will design, implement, and govern integrations to ensure reliable data exchange without introducing security risk or data duplication.

- HIKE2 can support secure integration with the Medicaid Management Information System (MMIS) to enable access to relevant eligibility, claims, and program data required for investigative and oversight activities. Integrations will use secure APIs or approved data exchange mechanisms, with all data transfers encrypted in transit and governed by role-based access controls. Data access will be limited to authorized users and logged for audit and compliance purposes.
- The solution can support integration with State financial and payment systems to enable visibility into financial transactions, reimbursements, and payment activity relevant to investigations. HIKE2 will

configure integrations using secure, authenticated interfaces and ensure that financial data is accessed and stored in accordance with State policies. All integration activity will be auditable and subject to role-based permissions.

- HIKE2 will enable integration with Google applications such as Gmail, Google Docs, and Google Drive to support productivity and document collaboration where authorized by the State. Integrations will allow controlled access to emails and documents while maintaining encryption, access controls, and audit logging. Shared content will remain subject to the same security and retention policies as data stored within the case management system.
- Where applicable and authorized, the solution can support secure integration with law enforcement databases such as NCIC and Nlets. HIKE2 will ensure that any access to law enforcement data complies with CJIS requirements, State policy, and governing memoranda of understanding. Integration access will be restricted by role, encrypted in transit, and fully logged to support accountability and audit requirements.

7.2.2.9 Data Exchange Standards

HIKE2's proposed solution on Salesforce Government Cloud+ supports industry-standard data exchange protocols, including HL7, FHIR, XML, and RESTful APIs, to enable secure and compliant data sharing with authorized systems. The platform is designed to support both inbound and outbound data exchange while preserving data integrity, confidentiality, and compliance with CJIS, FedRAMP High, HIPAA, and State IT requirements.

When integrations are added to scope, HIKE2 will implement integration patterns that ensure data is transmitted only through encrypted channels and accessed exclusively by authorized users and systems. All data import and export activity will be governed by role-based access controls, validation rules, and audit logging to ensure traceability and prevent unauthorized disclosure or modification of data.

7.2.2.10 System Resilience and Continuity of Operations

HIKE2's Salesforce Government Cloud+ solution is designed to ensure system resilience, high availability, and continuity of operations for mission-critical investigative and oversight functions. The platform incorporates redundancy, disaster recovery, and incident response capabilities that meet or exceed State and Federal requirements, ensuring uninterrupted service and rapid recovery in the event of system failures or security incidents.

7.2.2.10.1 Disaster Recovery Plan (DRP): Salesforce Government Cloud+ maintains a documented Disaster Recovery Plan that supports a Recovery Time Objective (RTO) of no more than twenty-four (24) hours and a Recovery Point Objective (RPO) of no more than one (1) hour. HIKE2 will provide documentation describing the disaster recovery architecture, recovery processes, and testing practices, and will support the State in aligning these capabilities with internal continuity planning requirements.

7.2.2.10.2 Geographically Redundant Hosting: The solution is hosted in geographically redundant, FedRAMP High–authorized data centers located within the continental United States. Data is replicated across multiple secure locations to ensure availability and resilience. All hosting facilities are operated in accordance with Federal security standards and are continuously monitored for compliance.

7.2.2.10.3 System Uptime: Salesforce Government Cloud+ provides a minimum system uptime of 99.9 percent, excluding scheduled maintenance windows that are communicated in advance. HIKE2 will coordinate with Salesforce and the State to ensure transparency around maintenance activities and to minimize operational impact on OIG users.

7.2.2.10.4 Incident Response Plan: Salesforce Government Cloud+ operates under a documented Incident Response Plan aligned with NIST and CJIS requirements. HIKE2 will coordinate with Salesforce and the State to ensure that any outage, data breach, or security incident is promptly identified, investigated, and reported. Mandatory notification to the Agency will occur within one (1) hour of discovery, with ongoing communication and documentation provided until resolution is complete.

7.2.2.11 Training and Support

HIKE2 will provide comprehensive training and support services to ensure successful adoption and ongoing operation of the Salesforce Government Cloud–based case management system, including:

- Initial and refresher training delivered using an in-person train-the-trainer model, with role-based sessions for investigators, supervisors, administrators, and leadership.
- A staffed help desk with defined Service Level Agreements (SLAs) for incident response and resolution.
- 24/7/365 help desk support with documented response and resolution timeframes to support mission-critical operations.
- Updated user manuals, administrator guides, and training materials maintained throughout the life of the contract to reflect system updates and configuration changes.
- Annual CJIS Security Awareness Training completed by all HIKE2 personnel with access to Agency systems, with documentation provided to the Agency within seven (7) business days upon request.

7.3 Qualifications and Experience

HIKE2 provides documented qualifications and experience delivering secure, cloud-based case management solutions for public-sector investigative, oversight, and justice agencies. Our experience includes FedRAMP High–authorized environments, CJIS-compliant systems, and implementations supporting fraud detection, investigations, and evidence management.

7.3.1 Qualification and Experience Information

7.3.1.5 Corporate History and Relevant Experience: HIKE2 is a U.S. based consulting firm with extensive experience delivering Salesforce-based solutions for government and regulated industries. Our experience includes:

- Design and implementation of cloud-based case management systems for investigative, oversight, and justice agencies.
- Solutions supporting fraud, waste, and abuse detection, case tracking, and evidence management.
- Deep familiarity with **CJIS Security Policy**, **FedRAMP High**, **HIPAA/HITECH**, and state data-protection statutes.
- Proven delivery of secure systems in highly regulated public-sector environments

7.3.1.6 Comparable Project Experience: HIKE2 has successfully delivered projects comparable in size, scope, and complexity to this RFP. Representative projects include:

- **Client organization and project title:** State and county justice, legal, and oversight agencies (references provided separately).
- **Project objectives and outcomes:** Modernization of legacy case systems, workflow automation, improved auditability, and enhanced security compliance.
- **Project duration and methodology:** Agile and phased implementations, typically completed within 6–12 months

- **Technologies and platforms:** Salesforce Government Cloud, secure integrations, and FedRAMP-aligned architectures.
- **Measurable results:** Improved investigator efficiency, enhanced compliance posture, reduced manual processes, and improved reporting accuracy

7.3.1.7 Proposed Staffing Plan: HIKE2 will provide a qualified project team with clearly defined roles and responsibilities, including:

- Certified Project Manager responsible for overall delivery and agency coordination.
- Salesforce Government Cloud+ Solution Architect responsible for system design and security alignment.
- Salesforce Public Sector Solution specialists supporting configuration and testing.

- Training and change management resources supporting adoption and user readiness

Résumés for key personnel include education, certifications, public-sector experience, and relevant technical expertise.

7.3.1.8 Technical Competence and Project Methodology: HIKE2 demonstrates technical competence through a standardized delivery methodology that includes:

- Requirements gathering and validation with agency stakeholders.
- Secure system configuration aligned to CJIS and FedRAMP High controls.
- Data migration planning and validation.
- Quality assurance and security testing.
- User acceptance testing and go-live readiness.
- Post-implementation support and optimization.

This approach ensures predictable delivery, high-quality outcomes, and compliance alignment.

7.3.1.9 Quality Assurance and Risk Management: HIKE2 employs a structured quality assurance and risk-management framework to ensure timely, high-quality delivery of services, including:

- Defined **change control procedures** to manage scope, schedule, and configuration updates.
- **Issue tracking and escalation processes** with clearly defined severity levels and response timelines.
- Proactive **risk identification and mitigation planning**, with regular review during project governance meetings.
- Continuous monitoring of **quality metrics**, including schedule adherence, defect resolution, and user acceptance results.
- Formal documentation and reporting of quality and risk status throughout the project lifecycle

7.3.1.10 Customer Support Model: HIKE2 provides a mature customer-support model designed to meet public-sector service expectations, including:

- Defined hours of operation with optional extended and 24/7/365 support coverage.
- A staffed help desk with tiered support and documented escalation paths.
- Clearly defined response and resolution times aligned to Service Level Agreements (SLAs).
- Proven history of meeting or exceeding service-level obligations under prior government contracts.
- Use of established tools for performance monitoring, ticket tracking, reporting, and trend analysis.

7.3.2 Mandatory Qualification and Experience Requirements

HIKE2 meets and exceeds all mandatory qualification and experience requirements identified by the Agency and provides verifiable documentation supporting compliance.

7.3.2.5 Verifiable FedRAMP, CJIS, and HITECH Experience: HIKE2 provides verifiable documentation demonstrating successful implementation of secure, cloud-based systems within the past five (5) years, including:

- Implementation of at least one cloud-based system authorized at the FedRAMP High impact level.
- Implementation of at least one system that fully complies with the CJIS Security Policy.
- Implementation of at least one system that complies with HITECH requirements.
- Evidence of continuous monitoring and vulnerability management consistent with NIST SP 800-53 Rev. 5 controls.
- Demonstrated experience supporting FedRAMP continuous monitoring, reporting, and remediation.
- Submission of relevant security certifications, FedRAMP listings, audit reports, and compliance attestations supporting the proposed solution.

7.4 Oral Presentations

HIKE2 acknowledges that the Agency may, at its discretion, require oral presentations as part of the RFP evaluation process. HIKE2 is fully prepared to participate in an oral presentation if requested and will make qualified project and technical leadership available to present and clarify proposal information in accordance with Agency instructions.

7.4.1 Oral Presentation Requirement: HIKE2 acknowledges that no oral presentation is required for this solicitation. HIKE2 will comply with any future instructions provided by the Agency should the requirement change via addendum.

8. Pricing Overview & Value Proposition

HIKE2 understands that the State of West Virginia requires both cost transparency and a solution that delivers long-term value to justify the investment in a new case management platform. Our proposed Salesforce Government Cloud+ solution aligns with this expectation, offering predictable subscription pricing, implementation services based on proven delivery models, and ongoing support to ensure sustainability.

Per RFP instructions, pricing is provided in a separate document, titled "West Virginia OIG RFP – Cost Proposal - HIKE2". The scope of our quoted solution will support up to 35 users from the IFM Division. Additional users and Divisions can be subsequently added through additional contracts.

9. Contract Award

The State will award the contract to the vendor that provides the best value, balancing cost, compliance, and capability.

HIKE2 ensures best value by delivering a Salesforce solution that reduces long-term costs, minimizes risk, and provides flexibility for future needs. By leveraging a secure cloud platform, the State eliminates expenses tied to on-premises infrastructure.

Additionally, Salesforce's scalability means the platform can be expanded across agencies or new functional areas without requiring costly redevelopment. Combined with HIKE2's expertise in public sector case management, this approach ensures West Virginia receives a future-proof investment that meets both today's needs and tomorrow's challenges.

10. Performance

The State requires a solution that performs reliably, with high system availability and measurable outcomes.

HIKE2 ensures performance by leveraging Salesforce's **99.9% uptime SLA** and government-grade disaster recovery capabilities. The platform dynamically scales with demand, ensuring fast response times even as caseloads increase.

HIKE2 establishes performance metrics at project initiation, including system response times, user adoption rates, and improvements in case processing efficiency. Continuous monitoring and reporting dashboards keep both HIKE2 and the State informed, ensuring transparency and accountability.

11. Payment

The State requires payment terms tied to the acceptance of deliverables and clear accountability for costs.

HIKE2 aligns with this approach, offering milestone-based billing for implementation services and annual subscription billing for Salesforce licenses.

Deliverables such as configuration completion, UAT acceptance and go-live are tied directly to payment milestones, ensuring that the State only pays when value has been delivered and verified.

12. Travel

The State requires that all vendor travel comply with government policy and be minimized to control costs.

HIKE2 minimizes travel by leveraging virtual collaboration tools and conducting the majority of implementation remotely. When travel is required for critical workshops or training, HIKE2 fully complies with West Virginia's per diem and travel reimbursement policies, ensuring cost transparency and alignment with State requirements.

13. Facilities Access

The State requires that vendor personnel accessing government facilities follow security protocols.

HIKE2 acknowledges these requirements and ensures that all personnel comply with security screenings, identification policies, and access restrictions. With Salesforce GovCloud+, the majority of work can be performed securely in the cloud, minimizing the need for on-site presence while maintaining compliance with State facility policies.

14. Vendor Default

The State requires assurances that the vendor will not default, and if so, the State reserves the right to terminate and pursue remedies.

HIKE2 mitigates the risk of vendor default through rigorous project management, risk identification, and escalation processes. Our methodology includes proactive reporting and corrective action planning, ensuring potential issues are addressed before they impact delivery. In the unlikely event of a challenge, HIKE2 commits to immediate remediation at no additional cost, protecting the State's investment.

15. Miscellaneous

The State requires adherence to confidentiality, contract assignment rules, governing law, and ownership of deliverables.

HIKE2 fully complies with these provisions. All State data remains confidential, protected by Salesforce Shield's encryption and audit capabilities. HIKE2 will not assign or subcontract without State approval. The contract will be governed by the laws of the State of West Virginia, and all configurations, documentation, and deliverables will remain the property of the State.

16. Acknowledgment of Contractual Addenda and Attachments

HIKE2 acknowledges receipt of and familiarity with all contractual addenda, exhibits, appendices, and attachments issued as part of **RFP OIG2600000001**. HIKE2 understands that these documents contain mandatory terms and conditions governing the resulting contract and affirms its ability to comply fully with all applicable requirements.

HIKE2 specifically acknowledges the following documents and confirms its agreement to execute or comply with each, as applicable, upon selection for award and prior to contract execution:

- **Software as a Service (SaaS) Addendum**, governing the delivery, security, availability, and management of cloud-based services, including data ownership, encryption, audit rights, incident response, disaster recovery, and subcontractor compliance.

- **HIPAA Business Associate Addendum (BAA)**, establishing obligations related to the protection of Protected Health Information (PHI) in accordance with HIPAA and HITECH requirements.

- The **Federal Funds Addendum** is included as an attachment at the end of this proposal and incorporates applicable federal procurement and compliance requirements under 2 C.F.R. Part 200, if and when federal funds are utilized.

- **Exhibit A and Exhibit B – Required Contract Provisions**, including mandatory statutory and regulatory clauses applicable to state and federally funded contracts.

- **HIKE2 acknowledges receipt of Appendix A**, which is designated to be completed by the Agency's Procurement Officer prior to execution of the applicable addendum. HIKE2 understands that Appendix A documents Agency-specific determinations regarding data classification and security requirements and confirms that no completion by the vendor is required at proposal submission. HIKE2 agrees to provide any required vendor information and to comply with Appendix A upon award and contract execution.

HIKE2 confirms that none of the above documents require completion or execution by the vendor at proposal submission unless explicitly stated in the solicitation. HIKE2 further agrees that, upon award, it will cooperate fully with the Agency to complete any required vendor information and will execute all required addenda, exhibits, and appendices **without exception or material modification**, subject to final contract review and approval by authorized representatives of both parties.

HIKE2 affirms that it has identified **no exceptions** to the contractual terms and conditions associated with this solicitation.

- HIKE2 acknowledges receipt of Addendum No. 1 (Q and A), dated December 29, 2025. HIKE2 confirms that Addendum No. 1 has been reviewed, incorporated into this proposal, and is attached as part of the submission.

17. Conclusion

HIKE2 appreciates the opportunity to respond to the State of West Virginia's Request for Proposal (RFP OIG2600000001) on behalf of the Office of Inspector General. We are confident that our Salesforce Government Cloud+–based solution directly addresses the State's requirements for a secure, modern, and scalable case management system.

Throughout this response, we have demonstrated:

- **Domain Expertise:** HIKE2 understands the unique needs of public sector case management, including compliance, oversight, and integration with legacy systems. Our experience with indigent defense, inspector general, and legal aid organizations equips us to support West Virginia OIG with a proven, tailored approach.

- **Technical Solution:** By leveraging Salesforce Government Cloud+, we offer a cloud-based platform that meets all security, reporting, integration, and accessibility requirements of the RFQ. With built-in compliance for CJIS, HIPAA, and FedRAMP standards, Salesforce ensures data protection while enabling efficiency and transparency.

- **Implementation Methodology:** HIKE2's human-centered design and agile delivery model ensures smooth implementation with minimal disruption. Our certified Salesforce team will collaborate with OIG stakeholders to configure workflows, migrate data, and deliver training to ensure adoption across the agency.

- **Public Sector Experience:** HIKE2 has successfully delivered Salesforce solutions for government clients such as the Virginia Indigent Defense Commission, Santa Cruz County Public Defender, and the Legal Aid Society. These projects demonstrate our reliability and ability to deliver transformative outcomes in environments with strict compliance and operational demands.

- **Ongoing Support:** Beyond implementation, HIKE2 offers application managed services (AMS) and long-term Salesforce support to keep the system secure, compliant, and continuously optimized for agency needs.

The value of this solution extends beyond technology. By modernizing case management, the Office of Inspector General will gain improved efficiency, real-time oversight capabilities, and the ability to better serve the citizens of West Virginia.

Next Steps: HIKE2 is prepared to engage in any follow-up discussions, provide demonstrations of Salesforce capabilities, and work with the State to refine scope and pricing as necessary. Should the Office of Inspector General proceed with a formal contract award, HIKE2 will mobilize immediately to ensure a seamless project launch.

We are honored by the opportunity to submit this RFP response and look forward to partnering with the State of West Virginia. With HIKE2's expertise and Salesforce Government Cloud+, the Office of Inspector General will be equipped with a secure, scalable, and future-ready case management system that meets today's needs and supports tomorrow's growth.

As a next step, we anticipate and welcome the opportunity to move forward in the RFP process:

We would be eager to participate in any follow-up discussions or clarifications that the State may request. If there are specific questions about our response or if you'd like to explore certain aspects (e.g., deeper dive into technology, demonstration of capabilities), we are prepared to accommodate promptly.

Should the State proceed to a formal Request for Proposals (RFP) or a more detailed procurement, HIKE2 will respond with a fully developed proposal.

This RFP response can serve as a foundation, we would refine our solution and pricing with more precision, and include any additional documentation required (such as a project plan, staffing plan, service level agreements, etc., as per RFP instructions).

We recommend a live demo or presentation as a logical next step. In such a session, we could showcase a prototype or example system to illustrate the user experience we've described.

We could also introduce key team members so you can assess the people behind the proposal. These interactions often help solidify understanding on both sides and build confidence and trust.

We will be responsive to any requests for additional information. We have provided contact information (Matthew Lydic as our Single Point of Contact), and he will ensure swift replies to any State inquiries.

We understand that the State may also invite select vendors for product demonstrations as mentioned in the RFI. HIKE2 is not a software manufacturer, but we can coordinate with our partners to demonstrate the recommended solution in action. We reiterate our willingness to arrange a tailored demo scenario that aligns with City Attorney use cases, should we be invited to do so.

Before closing, we express our sincere enthusiasm for this project. Modernizing an Inspector General's office system is transformative; it empowers the attorneys and staff who serve justice on behalf of the State, and by extension, it benefits every resident of Los Angeles.

HIKE2 is passionate about projects that make government work better for people. This opportunity aligns perfectly with our mission and strengths. We are committed to going above and beyond to ensure the State OIG achieves its goals and is extremely satisfied with the results.

Thank you for considering our RFP response. We appreciate the time and effort the State team will invest in reading and evaluating our submission. We trust that our response demonstrates our capability, thoughtfulness, and alignment with your needs.

We look forward to the possibility of advancing to the next stage and ultimately becoming your partner in this important initiative. If given the chance, HIKE2 will deliver a case management solution that not only meets the State's requirements but becomes a showcase for legal innovation in the public sector.

Next Steps: Please feel free to reach out to our point of contact for any follow-up. We are ready to:

- Attend a Q&A session or interview if the State holds one.
- Provide additional materials or references upon request.
- Begin preliminary scoping discussions under appropriate conditions if needed to refine the plan.

We are excited about the prospect of working together to help the WV OIG achieve new heights of efficiency, collaboration, and service to the public.

On behalf of the HIKE2 team, we appreciate the opportunity to share our experience in support of this RFP.

Thank you for your review, and we look forward to additional discussions.