



**ORIGINAL  
Cost Proposal**

**West Virginia State  
Treasurer's Office**

**Comprehensive Records Assessment  
Consultant**

**Solicitation No.: CRFP STO2000000002**

**Due 01/13/2020 @ 1:30 P.M.**



1410 Spring Hill Road, 4<sup>th</sup> Floor  
McLean VA 22102  
DUNS: 173064267, TIN: 04-3581891  
[www.iqbqinc.com](http://www.iqbqinc.com)

**Submitted to:**  
Bid Clerk  
Department of Administration  
Purchasing Division  
2019 Washington Street East  
Charleston, WV 25305

**STATEMENT OF CONFIDENTIALITY/DISCLAIMER**

Any company financial data included in this proposal shall not be disclosed outside the recipient, and shall not be duplicated, used, or disclosed—in whole or in part—for any purpose other than to evaluate this proposal. This restriction does not limit the recipient's right to use information contained in such financial data if it is obtained from another source, without restriction.

## Table of Contents

<i>Section</i>	<i>Page</i>
Cover Letter .....	1
1.0 Attachment A – Cost Sheet.....	3

## Cover Letter

January 13, 2020

State of West Virginia  
Melissa Pettrey  
Department of Administration  
Purchasing Division  
2019 Washington Street East  
Charleston, WV 25305

Subject: Solicitation No. CRFP STO200000002 Comprehensive Records Assessment  
Consultant – Cost Proposal

Ms. Pettrey,

The IQ Business Group, Inc. (IQBG) is pleased to submit this response to the State of West Virginia, Department of Administration, on behalf of the West Virginia State Treasurer's Office, for Solicitation No. CRFP STO200000002 Comprehensive Records Assessment Consultant. Clearly, based on the issuance of this RFP, the Agency realizes the importance of a well thought out, designed and implemented Enterprise Records Management (ERM) program; and, understands that the challenges related to document and records storage, retrieval, version control, protecting confidential and vital information, record holds, and retention and disposition management are not trivial ones.

Founded in 1998, IQBG is a leading provider of Enterprise Content and Records Management (ECRM) solutions to highly-regulated industries and the public sector. Our core competencies include enterprise content management (ECM), enterprise records management (RM), information governance (IG), business process improvement, and litigation or public record discovery and response. Our subject matter experts (SMEs) and engineers combine industry intelligence with leading technologies to provide best practice, end-to-end records lifecycle management, and organization/change/program management.

There are many ways in which IQBG differs from the competition beyond our large number of satisfied clients. IQBG's ECRM practice is comprised of some of the industry's leading content and records management authorities. Our people helped write professional certification training materials for the Association of Information & Image Management (AIIM), have served as the former US technical expert to the International Standards Organization (ISO), chaired AIIM's Emerging Technologies committee, have served on the AIIM and ARMA Boards, and teach Records Management related courses at various universities. IQBG professionals are frequently asked to write articles for numerous periodicals and speak at industry conferences.

Of significant relevance to the Agency, IQBG personnel developed the ERM Assessment methodology adopted by AIIM as its industry standard. IQBG is proposing to use this same methodology – called our ERM/ECRM High-Level Assessment (HLA) – to perform the requested professional services for the Agency that will provide the Agency with a detailed roadmap for records retention and handling; an improved retention schedule; a change management policy related to records; an action plan to implement the ERM program; delivery of staff training requirements; policy recommendations to guide the modernization of the records program.

The HLA accomplishes all deliverables specified in the Agency's RFP scope of services including assessing the feasibility and benefits from acquiring a records management software solution. IQBG's has performed our proposed HLA for many clients, including over thirty (30) State and Local Government clients similar in size and requirements scope to the Agency's project. IQBG's HLA is a direct match for the scope of work defined and the deliverables requested in the Agency's solicitation. As our consultants reviewed the Agency's RFP, we were pleased with how directly your requested deliverables matched our proven HLA methodology and approach.

The team members being proposed for the Agency's project are the same team members that have completed multiple ERM Assessment projects over the last several years. We believe our proposal reflects our competence to perform the required services requested in the Agency's RFP, as evidenced by our proven methodology; our team's training, education, experience and overall knowledge of ERM/ECRM; how well our HLA – ERM/ECRM Assessment methodology matches the Treasurer's Office requirements; and, how well our similar ERM/ECRM Assessment and Roadmap engagements have gone with many similar clients.

IQBG is recognized in the industry as a top unbiased ERM/ECRM advisory services firm with deep government sector experience. Important to the Agency when it comes to recommending ECRM solutions that might be a good match to Agency ERM requirements, IQBG has been involved in nearly \$5B of ECRM procurements for clients in the public sector (including the IRS, U.S. Postal Service, U.S. Department of the Interior) and private sector (including Coca-Cola Enterprises, American Express, Intel).

Without knowing your budget requirements, we have done our best to scope a proposal that delivers all requested deliverables with a high value to cost ratio. However, we consider our client projects as teaming engagements (as evidenced by the long-term nature of our client relationships), and we can suggest ways to reduce the budget by sharing responsibilities, streamlining deliverables or eliminating those not specifically requested, and working as more of a guide to the Agency if that approach is desired. Also, please note that the fixed cost proposal includes the development of a draft RFP for the Agency to use for an ECRM software solicitation if the Agency determines that a procurement is appropriate.

IQBG is very excited about the Agency's strategic ERM initiative. We look forward to having an opportunity to discuss our proposal with you and Treasurer's Office representatives; and, would welcome the opportunity to participate in Oral Presentations if the Agency determines that is appropriate. If you have any questions, please do not hesitate to contact us.

We look forward to being given the opportunity to work with the State of West Virginia and the Treasurer's Office, and we welcome any questions you may have.

Respectfully,



Eric Wadsworth  
Chief Executive Officer (CEO)  
The IQ Business Group, Inc.  
857-277-4870 | [ewadsworth@iqbginc.com](mailto:ewadsworth@iqbginc.com)

**1.0 Attachment A – Cost Sheet**

**REQUEST FOR PROPOSAL**

**WV State Treasurers Office Solicitation# CRFP STO200000002**

**Attachment A: Cost Sheet**

Vendor must complete this Cost Sheet and submit it with its proposal, in a separately sealed marked envelope within the proposal response package. All costs are to be incorporated into the fee categories below. No separate reimbursement for fees not included in the contract award.

Milestone/Progress Payments - Agency will consider milestone/progress payments for the services to be provided when at least 50% of the work has been completed for each Item/Category total listed below; however, no more than two progress payments per Item/Category will be considered. With such payments, retainage of 10% will be withheld from each invoice until the project has been completed. Otherwise, all contract services and deliverable items will be paid upon completion of the final project acceptance, and training by the Agency. Vendor shall provide all required itemization/details on its invoice to support a payment request. If no indication is made below, it will be presumed that the vendor will not request milestone/progress payments.

  X   Vendor intends on requesting milestone payments. Once the project is completed, a final invoice must be submitted by the Vendor for the total retainage amount withheld.

**Fee Categories:**

Item 1: Assessment and Discovery (§ 4.2.1.1)	Total: \$ <u>  160,560  </u>
Item 2: Reports and Documents (§ 4.2.1.2)	Total: \$ <u>  59,040  </u>
Item 3: Training (§ 4.2.1.3)	Total: \$ <u>  28,800  </u>
<b>TOTAL COST: \$ <u>  248,400  </u></b>	



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

State of West Virginia  
 Request for Proposal  
 34 – Service - Prof

Proc Folder: 653533

Doc Description: Comprehensive Records Assessment Consultant

Proc Type: Central Purchase Order

Date Issued	Solicitation Closes	Solicitation No	Version
2019-12-02	2020-01-06 13:30:00	CRFP 1300 STO2000000002	1

**BID RECEIVING LOCATION**

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

**VENDOR**

Vendor Name, Address and Telephone Number:

The IQ Business Group, Inc.  
 1410 Spring Hill Road, 4th Floor  
 :Lean, VA 22102  
 . J3-436-6990

**FOR INFORMATION CONTACT THE BUYER**

Melissa Pettrey  
 (304) 558-0094  
 melissa.k.pettrey@wv.gov

Signature X

FEIN # 04-3581891

DATE 01/13/2020

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

**ADDITIONAL INFORMATION:**

Request for Proposal

The West Virginia Purchasing Division is issuing this solicitation as a request for proposal ("RFP"), for the West Virginia State Treasurer's Office (hereinafter referred to as the "Agency") to provide a Consultant for a Comprehensive Assessment of Records Generation, Storage, Retrieval and Destruction practices; both in the electronic and paper records, per the specifications and terms and conditions as attached hereto.

\*Online submissions of Request for Proposals is prohibited.\*

INVOICE TO		SHIP TO	
WEST VIRGINIA STATE TREASURERS OFFICE 322 70TH ST SE		WEST VIRGINIA STATE TREASURERS OFFICE 322 70TH ST SE	
CHARLESTON	WV25304	CHARLESTON	WV 25304
US		US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Business and corporate management consultation services	1.00000	JOB	\$160,560.00	\$160,560.00

Comm Code	Manufacturer	Specification	Model #
80101500			

**Extended Description :**

Assessment and Discovery (Per Specifications Section 4.2.1.1)

Vendor should complete and submit Attachment A:Cost Sheet with their Proposal.

INVOICE TO		SHIP TO	
WEST VIRGINIA STATE TREASURERS OFFICE 322 70TH ST SE		WEST VIRGINIA STATE TREASURERS OFFICE 322 70TH ST SE	
CHARLESTON	WV25304	CHARLESTON	WV 25304
US		US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
2	Business and corporate management consultation services	1.00000	JOB	\$59,040.00	\$59,040.00

Comm Code	Manufacturer	Specification	Model #
80101500			

**Extended Description :**

Reports and Documents (Per Specifications Section 4.2.1.2)

Vendor should complete and submit Attachment A:Cost Sheet with their Proposal.



INVOICE TO		SHIP TO	
T VIRGINIA STATE TREASURERS OFFICE 322 70TH ST SE		WEST VIRGINIA STATE TREASURERS OFFICE 322 70TH ST SE	
CHARLESTON	WV25304	CHARLESTON	WV 25304
US		US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
3	Business and corporate management consultation services	1.00000	JOB	\$28,800.00	\$28,800.00

Comm Code	Manufacturer	Specification	Model #
80101500			

**Extended Description :**

Training (Per Specifications Section 4.2.1.3)

Vendor should complete and submit Attachment A:Cost Sheet with their Proposal.

<b>STO2000000002</b>	<b>Document Phase</b> Final	<b>Document Description</b> Comprehensive Records Assessment Consultant	<b>Page 4</b> <b>of 4</b>
----------------------	--------------------------------	---	------------------------------

**ADDITIONAL TERMS AND CONDITIONS**

See attached document(s) for additional Terms and Conditions