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Header 1

List View

General Information | Contact | Default Values | Discount | Document Information | Clarification Request

Procurement Folder: 850622

Procurement Type: Central Master Agreement

Vendor ID: VS0000022094

Legal Name: Sourcing Advisory Services, LLC

Alias/DBA: Integris Applied

Total Bid: \$246,000.00

Response Date: 03/30/2021

Response Time: 12:51

Responded By User ID: IA-Sales

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Solicitation Description: Wide Area Network Consulting Services (OT21102)

Total of Header Attachments: 1

Total of All Attachments: 1



Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Consulting Services Rate	1000.0000	HOUR	246.000000	246000.00

Comm Code	Manufacturer	Specification	Model #
80101507			

**Commodity Line Comments:** Unit price is \$246 per hour. Further description is provided in the attached solicitation response.

**Extended Description:**

Consulting Services Rate





# Connecting West Virginia

RESPONSE TO CRFQ ISC2100000022

**WIDE AREA NETWORK  
CONSULTING SERVICES**

*A.K.A.*

**DATA TRANSPORT 2.0 AND VERTICAL  
REAL ESTATE CONSULTING SERVICES  
(OT21102)**

**Sourcing Advisory Services, LLC (dba Integrus Applied)**  
**Response to CRFQ ISC210000022**  
**The Woodlands, TX**

**March 30, 2021**

**Ms. Jessica Chambers, Buyer**

**Dear Ms. Chambers and the West Virginia Office of Technology Team:**

Integrus Applied appreciates the opportunity to provide the West Virginia Office of Technology (WVOT) with information about our capabilities, experience, and expertise in strategizing and sourcing wide area network services.

While West Virginia's need for a new network contract has been foreseen for several years, the COVID-19 Pandemic accelerated demand for online access to connect West Virginians remotely to school, work, and public services.

As we think about current challenges, history often offers perspective. We chose the cover image of the Harper's Ferry Train Station because it reminds us that while technology has continued to evolve, the need to stay connected has been ever-present.

When that station was built, modern rail lines were becoming the new information super highways, having replaced the prior means of transit and information flow via river boats or horse-drawn travel. What formerly took weeks and months would soon take hours and days. The dawning of that industrial age offers parallels for our information age today.

Demand for quality data networks is accelerating even more rapidly, partly triggered by the COVID-19 Pandemic. As citizens, schools, and government are relying on their data network services more than ever, state technology leaders have come to the forefront. The need for ever-present information has become assumed as a "given" – but the reality is that network infrastructure, particularly in rural areas, has not been able to meet that expectation.

In today's world, we are seeing important trends in the managed network services, among them:

- An increased need for reliable network bandwidth – and for the expansion of broadband and mobility services including to rural areas.
- Greater requirements for flexibility in volume fluctuations and mobility for personnel (even before the COVID-19 Pandemic), requiring contract structures and terms that support resiliency.
- More flexible service delivery models, such as software defined networking (SDN).

Recognizing the critical need for WVOT to modernize and make adaptable its data network footprint, we have assembled a team with valuable perspectives on these trends and a deep working knowledge of public sector network services procurement, contract, and governance strategies. These perspective and knowledge are not just theory – they are grounded in our experiences.

If selected for further conversations with WVOT, we are confident this team will provide the right support to WVOT as it defines and implements a new sourcing strategy for its wide area network services under Data Transport 2.0 and Vertical Real Estate.

While I recognize that by action of submitting our documents through wvOASIS, the below are affirmed, as a good procurement consultant, I ensure all such administrative responses are fully addressed. Therefore I hereby affirm:

- *Receipt of Addendum 01 dated March 25, 2021.*
- *Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract. (Address and contact information below.)*

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

We look forward to speaking with you and working with the team.

**Kind Regards,**



**Tim Ryckman, Managing Director**

**Integr**is Applied

18 Shawnee Ridge Ct,  
The Woodlands, TX 77382  
+1 248 321 9959

[tim.ryckman@integrisapplied.com](mailto:tim.ryckman@integrisapplied.com)



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## 1. Integrus Applied Team

### 1.1 An Introduction

The mission of Integrus Applied (formally “Sourcing Advisory Services, LLC”) is to facilitate healthy service relationships. Over the last decade, we have led our clients through some of the largest state government IT services procurements to-date, including your neighbor, the Commonwealth of Virginia. Our team has served as advisors, service providers, and government executives – which means we have seen these initiatives from all angles. Along the way, we have developed new approaches to sourcing relationships, disentangled clients from complex contracts, and implemented transitions involving multiple procurements and multiple government agencies.



These transactions and our support involved far more than procurements. Rather, they have represented key components of significant change initiatives. We have helped our clients address stakeholder concerns, manage the organizational and skillset changes required, and communicate with legislatures, governors and the citizens our clients serve.

As a firm, we have worked across both private and public sectors, and have been able to develop best practices with experience from both environments. In recent years, we have led or advised sourcing and transformation initiatives, including network services at the Georgia Technology Authority (GTA) and the Virginia Information Technologies Agency (VITA), the US Department of Defense’s Defense Health Agency (DHA), and have advised on strategy for the state of Texas TEX-AN program.

Integrus Applied is registered with the US federal government’s System for Advanced Award Management (054228029/8VJZ5) as a Women Owned Small Business. Registration with the State of Texas is underway. When certified in Texas, Integrus will register with West Virginia.

In our proposed service to WVOT, we have partnered with

CostWellness, a firm which has specialist experience in cost reduction and service optimization across a broad



range of IT categories, particularly in telecommunications. Categories relevant to WVOT’s needs are Data Networks (e.g., MPLS, SD WAN, Broadband, Wireless, and Fiber), Vertical Assets (buy side and sell side, both rural and urban), and telecommunications cost assessments. The principals of the firm have deep backgrounds in telecommunications sales and delivery, and telecom billing and expense management.

In addition to our work directly with clients on sourcing initiatives, we are also recognized as a thought leader nationally in public sector IT strategy. For example, through our partnership with the National Association of State Chief Information Officers (NASCIO) we have conducted studies and co-authored reports such as [The State CIO Operating Model: Bridging Trends and Action](#) (also known as CIO As A Broker model).

Integrus Applied’s capabilities and engagement methodology cover the full life cycle of strategic planning, procuring, implementing, and governing contracts (as shown in the figure below).



**Integr**is Applied | Guides | Facilitators | Advisors

In the subsequent pages, you'll read more about our experience and our engagement approach. We hope that should WVOT find us qualified to advise and support its vision, that we will have an opportunity to work jointly with you to develop a full project plan.

## 1.2 Capabilities

The Integr

is Applied team brings to WVOT the most extensive set of public sector strategic sourcing qualifications in the market. In the last six years we have completed nineteen public sector procurements across a range of IT services valued in excess of \$2.4 billion.

But our value extends far beyond the transactions. Each of these procurements represented a core component in our clients' strategic programs to improve government responsiveness. Our support included stakeholder management, financial analysis, organizational change management, communications support,

implementation and integration with multiple suppliers. All this work has prepared us to meet WVOT's current needs, and we are confident that we will add tremendous value to your program.

State IT environments are complex – serving a variety of agencies with different missions, geographic presence, connectivity needs, and even business hours. WVOT as the shared services agency, and its leadership, must interface with numerous stakeholders, representing both the state as an enterprise and the differing agency customers individually. The challenges are not simply technical, but they involve politics, communication, budgeting, and chargeback. Having been on the long journey of significant public sector change initiatives, we know how important it is to clarify the starting point, open communication with stakeholders, establish a vision, and execute on plan. We have walked these paths before, and we can guide you along the way.

"GTA values its partnership with Integr

is Applied.

Their insight and ingenuity have helped our organization move beyond traditional approaches to sourcing and embrace methods that bring us the value we are looking for. They have served us well and are an important contributor to the success we have built over the years."

**CALVIN RHODES**  
CHIEF INFORMATION OFFICER  
STATE OF GEORGIA

Awarded Date	Procurement	Participants	Winners	TCV (M)
Aug 2014	Hosted Contact Center	AT&T, IIG, Mitel Netsolutions, Verizon	hexphase	Convenience
Mar 2015	MSI	Caggemini, HPES	Caggemini	\$287
April 2015	SaaS (eprocurement)	Periscope, Onvia, Perfect Commerce	atstat	\$10
Sep 2015	MNS	AT&T, CenturyLink & IBM	PERFECT COMMERCE	\$442
June 2017	Mainframe	Atos, DXC & IBM	ATOS	\$84
Jan 2018	EUC & VDI	Gantech, HCL, IBM & NTT Data	NTT DATA	\$161
Jan 2018	Print and Mail	IBM & Xerox	xerox	\$27
Jun 2018	Server	Atos, AT&T, DXC, HCL, IBM, NTT Data & Unisys	UNISYS	\$220
Nov 2018	MSS	Atos, AT&T, DXC, EMC, HCL, IBM, NTT Data & Unisys	ATOS	\$35
Sep 2016	Mainframe	Atos, CAS Severn, HPES & IBM	Hewlett Packard Enterprise	\$35
Aug 2017	MSI	Caggemini, CGI, SAIC	SAIC	\$167
Mar 2018	Messaging	ABS Tech, Archive1, AT&T, Carousel, Dimension DATA, IBM, Microsoft, SADA Systems & Tempus Nova	TEMPUS NOVA	\$19
Feb 2018	Managed Security (MSS)	Atos, Carahsoft, Deloitte, DXC, IBM, MAI	Atos	\$71
May 2018	TAP	SAIC	SAIC	\$70
Aug 2018	Server / Storage / DC	Atos, DXC, IBM & Unisys	UNISYS	\$225
Aug 2018	MNS	Verizon	verizon	\$293
Sep 2018	EUS	Iron Bow, NCS, NTT Data, Unisys	IRON BOW	\$189
Sep 2018	Managed Print	Xerox, Canon, Iron Bow, NCS	xerox	\$30
Jan 2019	SaaS (eprocurement)	Periscope, Accenture, Perfect Commerce, KPMG, (ivalua)	ivalua	\$42
				<b>\$2,407M</b>

### 1.3 Client Engagement Summaries

Below are summaries of our most recent and most important strategic sourcing clients.



**Virginia Information Technologies Agency.** Built strategy and implemented roadmap to replace entrenched incumbent supplier with best-of-breed Multisourcing Services Integrator (MSI) delivery model, and procured and negotiated new contracts for all service towers including network with Verizon. Engagement included goals identification, organizational restructuring, financial case development, and sourcing strategy evaluation and implementation. Over the course of the program, achieved run-rate savings of more than 20% (run-rate reduction of \$64M annually). Negotiated significant contract changes with incumbent Verizon to support a move to an MNS strategy and fully integrate the network services contract with the MSI program.

**Annual full program contract value: \$195.9 Million**

**Annual network services contract value: \$53.3 Million**



Integrus Applied has been an invaluable partner in our journey to modernize our enterprise delivery model. They have helped us assess our cost, develop business cases and establish new pricing structures for the entire Commonwealth. They speak our language and understand how to work with agencies, budget offices, and CIOs.

**DAVID SWYNFORD**  
DEPUTY STATE TREASURER  
VIRGINIA DEPARTMENT  
OF THE TREASURY



**Georgia Technology Authority.** Developed and implemented second-generation sourcing strategy to improve service delivery, evolve service offerings, and ensure continual competitiveness. Negotiated relationship redefining scope and contract changes with incumbent together with sourcing transactions with new suppliers. Re-procured Managed Network Services contract with incumbent AT&T. Following transition to new operating model, established the "Market Test & Rebid" Program for ongoing customer and supplier engagement. A video describing the program is available here: <https://integrusapplied.com/case-study-georgia-technology-authority/>

**Annual full program contract value: \$197.7 Million**

**Annual network services contract value: \$55.5 Million**



There are a lot of companies that do detailed assessments and develop lists of recommendations. There's a handful that can take those recommendations and translate them into ideas for a better way of doing things.

Integrus Applied is one of the very few that can do both, and also apply a huge depth of experience to stand with the client in implementation, maximizing the chances of success.

**JOE WEBB**  
DEPUTY STATE CIO  
STATE OF GEORGIA



**Social Security Administration.** After awarding a large 10-year voice contract for 60,000 employees and 1,500 sites, CostWellness was retained as executive consultants to the SSA Steering Committee. Our role is to work across the entire program, ferreting out risks and serving as a bulwark against mission creep and related expense overruns. Our team meets regularly with leadership and staff level across SSA Customer, SSA IT, and the primary Vendor and Subcontractors to provide advice and recommendations to SSA leadership, up to the SSA Commissioner. We are the Leadership's telecom and network experts, and the program is targeted to save \$1M per week.

## 1.4 Virtual Project Management and Execution

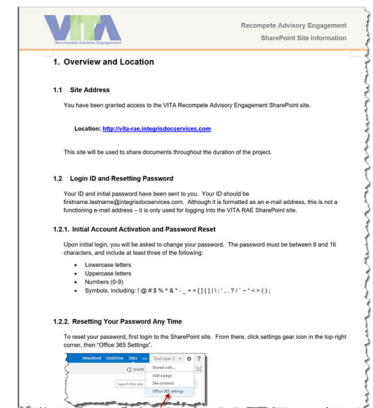
The COVID-19 Pandemic has forced a remote-work environment. For all the risks, fears, and challenges associated with this pandemic, we are fortunate that technology allows us to be effective and, in some ways more efficient even when we cannot be geographically together. Although replacing the in-person experience of human connection is near-impossible, the Integris Applied Team was and is well positioned to continually support our clients.

Over the years, we have made investments in, and now have expanded the use of, online collaborative tools. These tools are regularly used with our clients to ensure a high-quality relationship whether in-person or remote. We employ technologies such as whiteboard cameras and *Microsoft Teams*.

For some clients, we have made our tools available on an as-a-service model, including client-dedicated conference rooms in *GoToMeeting* and client/supplier data stores via our *Integris Document Services* hosted *SharePoint* library.



- **Integris Document Services** libraries have been used on engagements where clients did not have cost-effective tools of their own, or for various reasons could not host project data on incumbent systems. For example, at VITA we created a dedicated *SharePoint* environment for all strategy documents, which was not accessible to incumbent supplier employees. At GTA, due diligence data rooms were hosted via our services to give equal access to solicitation respondents, whether or not they were incumbents. Although not included in our proposal, we could provide such a library to WVOT if needed. Such libraries can be created with a custom URL (such as <https://wvot-dataroom.integrisdcservices.com>). When hosting documents on behalf of clients, we work with necessary client information security personnel to ensure compliance with applicable policies.



- Our **GoToMeeting** service has been used by clients to host large service provider meetings, such as pre-solicitation conferences. We can record the webinars, edit if needed, then post them on *YouTube* (or elsewhere). Over the last several years on the VITA engagement, we found such recordings to be especially helpful for market engagement. Service provider team members who may not have been able to attend an in-person pre-solicitation conference frequently watched these videos. For an example of such a video, see VITA's Managed Security Services procurement, which is [posted on YouTube at this link](#).

## 2. Engagement Approach

### 2.1 Our Understanding

We have stayed connected with and observed West Virginia over the last few years, including its work on the Data Center 2.0 program and the legislative changes to West Virginia Code, which introduced a new strategic initiative under the “Vertical Real Estate Management Act”. Today, in addition to WVOT’s traditional mandate, its need to continue serving its customer agencies and constituents despite the operating model shift due to the COVID-19 Pandemic, and to increasingly mature as a shared services organization through functions such as financial chargeback, WVOT is faced with new endeavors such as more efficiently leveraging the state’s vertical real estate.

For purposes of this CRFQ, we understand and paraphrase WVOT’s requirements as follows:

- Assessing the current environment, to include data gathering on current circuits, usage, tower assets, and ownership
- Recommendations for the future, to include upgrades to new architecture, new sourcing model, increased resiliency, and improved costs
- Improved methods of billing, ordering, and chargeback for all associated services
- Development and execution of necessary procurements to meet the future-state needs

Should WVOT choose to move forward, we look forward to learning more about the requirements and expectations. We stand ready to support WVOT in these goals, and look forward to the potential opportunity to speak with you about plans to achieve them.

### 2.2 Engagement Methodology

#### 2.2.1. Market and Customer Engagement Generally

Integrus Applied’s tagline is *Facilitating Healthy Service Relationships*, and that means that we take a holistic view of the relationships between the vendors contracted as service providers, the central shared services technology agency (i.e., in this case, WVOT), and the end consumers of technologies (i.e., customers). We have seen numerous challenges in procurements over the years, particularly when public sector agencies are trying to engage the commercial marketplace to do something that is novel for the agency. The issues include customers not understanding the plan or recognizing the benefit of the change, customers frustrated at not being heard, conflicts of goals between the state as an enterprise and the customers individually, buyers having trouble defining specific requirements for a solution that needs to be crafted, etc.

At both the Georgia Technology Authority (GTA) and the Virginia Information Technologies Agency (VITA), we found the procurement efforts as executed via RFPs were most effective when we had organized teams of customers and stakeholders working together and engaging the marketplace.

This approach is effective for several reasons, including that it helps:

- Customers see the “art of the possible” and create buy-in for the process
- Potential service providers to understand more about the state’s goals, constraints, and timing
- The technology agency organize its solicitation program

Although WVOT has defined a specific set of project steps, which we see as targeted to develop RFP requirements, we hope that if given the opportunity to meet with WVOT to develop a project plan, that approaches like the above may also be molded into the project timeline. Our experience has demonstrated that taking the steps up front can pay dividends down the road with a more efficient procurement, better solutions, and happier customers.



**2.2.2. Integris Applied Delivery Model: *Design -> Build -> Implement -> Sustain***

Integris Applied has an overall delivery model structured in four phases of Design (assessment and recommendation), Build (solicitation development), Implement (procurement process/negotiation), and Sustain (transition and ongoing governance/management). Our model is a structured framework of “building blocks”, which can be adjusted to fit the unique goals, situations, and constraints within any particular client. At left is a chart, which shows these four components of our model, and are further explained in the following sections.



We anticipate developing a specific plan with WVOT, to ensure we are moving efficiently right from the start. Whenever possible, we prefer to do administrative onboarding before official start (e.g., badging, system access, cyber security training). We often refer to this as “Week Zero (0)” in our project timelines. Also if possible, we would initiate data gathering requests and schedule meetings with key subject matter experts and stakeholders.

In working with WVOT, we hope to identify a Program Manager, schedule kickoffs, establish a project Core Team, and schedule a cadence of meetings, such as weekly, fortnightly, with the Core Team or other stakeholders. The Core Team is usually a small cross-functional team of decision-makers within WVOT and its stakeholders who can guide and influence the program. Typically, this includes an executive from each area such as technology and operations, finance and administration, and contracts and procurement.

Although the solicitation document requires a bi-weekly status report, our normal course of business is to provide a weekly status report. These reports will include the prior week’s accomplishments, upcoming week’s activities, and any problems and risks identified. Reporting will be compiled by our Executive Support Office function, with our Project Director’s oversight, before submitting to the WVOT Program Manager.

Starting a project on the right foot, and keeping it continually aligned as issues arise, is critical to accomplishing WVOT’s goals. Part of our pre-start is establishing our DAIR tracker for this engagement. We will work with WVOT in to populate this tool and maintain it throughout the engagement, formally reporting on it at the completion of each phase.

For ongoing quality assurance, our firm has internal review panels (sometimes marked as “stage gate” on our timeline) where we provide status updates, share current documents or draft deliverables (where not client-confidential), key decisions, risks, and long-term view with colleagues who understand these environments and transactions, but who are not close to the day-to-day activities on the account. Often, we gain great insight from alternative perspectives during stage-gate reviews. Because each client engagement is different, and because we trust our team members, our firm operates on a model that empowers the dedicated Integris Applied client team to make the day-to-day decisions with their client.

One of the most important startup activities is identifying data gathering lists and sources. We hope to work with WVOT as we develop the timeline, to also identify those sources and get requests initiated. All of this “pre-start” work will help us begin with some momentum.

DAIR Tracker
<p><b>Guiding Principles:</b> Documents the purpose of the activity or project to ensure alignment; documents goals and objectives.</p>
<p><b>Decisions:</b> Items that have been decided or resolved and need to be captured as requirements. Generally, these come from Assumptions, Issues or Risks that were being tracked.</p>
<p><b>Assumptions:</b> Basic premises that need to be validated or negotiated with other parties.</p>
<p><b>Issues:</b> Items that need to be resolved before the conclusion of the project. Often this serves to hold ideas that will be naturally addressed at a later stage.</p>
<p><b>Risks:</b> Potential events outside of the project’s control that may impact the effectiveness or completion of the project.</p>

**2.2.3. Design: the first 60 days**

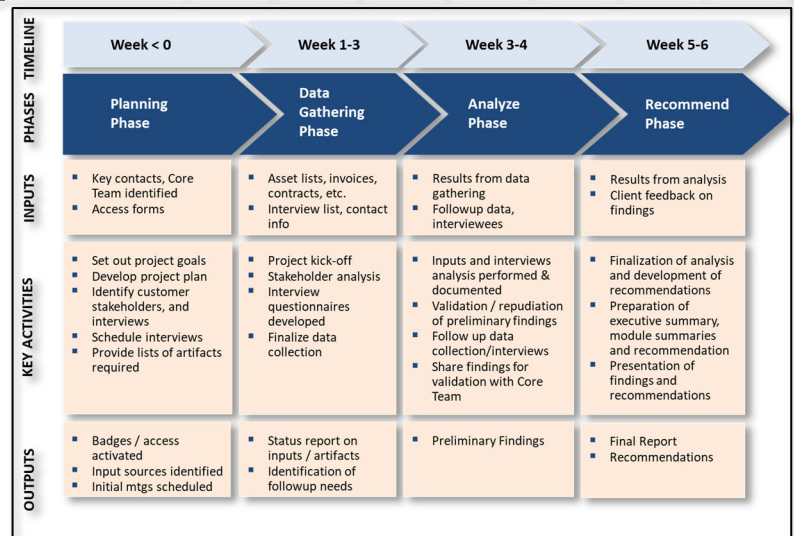
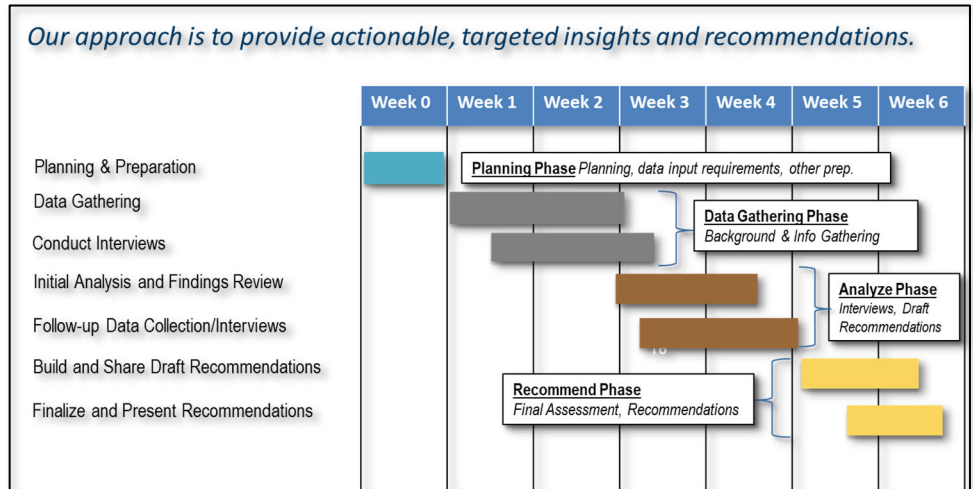
WVOT’s timeline indicates an assessment and recommendation phase over the first sixty (60) days. Although we hope to work with WVOT directly to plan a specific timeline, we have provided for reference our standard approach to assessments.

Knowing where you are, and where you want to go, are critical to creating a roadmap for the future. If you don’t know where you are, you will not see the challenges in getting where you want to go. If you don’t know where you are going, then any path will take you there. We understand the intent of this phase is to increase clarity and understanding of the current environment (e.g., current circuits/assets, utilization, etc.) and present opportunities (e.g., move toward SDN, specific site profiles and upgrades, etc.).

The figures at the right show both a summary and detail of our standard approach to an assessment over 4-6 weeks.

We will also suggest that this phase be used to begin engaging customers and potential service providers in the marketplace.

While the most important work is engagement with personnel who understand the unique goals, constraints, timing, and data sets – much of the initial assessment can be accelerated through data gathering templates and checklists.



Personnel Needs					
Data Item	Cons. Mgmt	Rate Review	Chgback Review	Fin. Proc's	Description
CIO					Periodic (typically weekly or fortnightly depending on project)
CFO/Finance Director					
Finance Staff					
Service Delivery Leader	●	●	●	●	MSA, Financial Exhibits (especially pricing sheet, RU description, FRM), Service Management Manual (Particularly the portions that describe RU measurement), personal projection matrix
Contract Manager	●	●	●	●	Previous 36 months; Client Survey, Interviews, technical delivery reports,
Agency IT Leader	●		●	●	Last 36 months, including consumption volumes, work requests, new services
Agency Finance Leader	●	●	●		Extract of asset management database or CMDB
	●			●	Any operational reports available, including incident reports, aggregations of scans, order information, utilization reports
		●			Contract Exhibits describing SLA methodology and metrics; monthly SLA performance reports for previous 36 months
	●	●	●		Prior 36 months of consumption, with focus on the pricing units consumption; other related volumes may be relevant
	●		●		Prior 36 months of chargeback invoices, and whatever mapping or design documents are available
	●		●	●	Prior 36 months of disputes
			●	●	Existing library of process documentation and associated tools, templates, and job aids

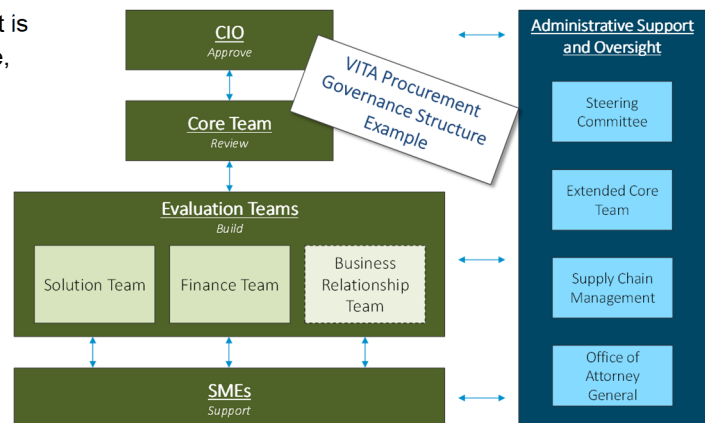
**2.2.4. Build: 60-90 days**

Solicitations of the scale and complexity of West Virginia’s WAN services, Vertical Real Estate, and E-Rate require a detailed structure and process. The RFPs and resulting contracts will run into the hundreds of pages. The inputs to such documents will cover process instructions and evaluation, overall program operating and governance model, required terms and conditions for West Virginia and WVOT in particular, forecasted volumes, service level metrics and methodology, as well as service requirements, solution, and transition plans. Developing such a package with input from all the key stakeholders may seem insurmountable. Fortunately, the Integris Applied Team has done this work many times, and have a process and templates ready to customize for and with WVOT.

In describing our approach for solicitation development, it is helpful to organize thoughts in the components of People, Process, and Tools/Templates.

**People**

As described earlier in this response, we anticipate having a program Core Team and a resource pool to be involved in procurement streams. When it comes time to run a procurement, we expect there will be a dedicated team which will exist from requirements development through to solicitation response evaluation – and ideally, including individuals who were involved in the Design phase. The procurement team is typically comprised of a technical solution lead, a



finance lead, and a procurement officer. In addition to those individuals, we have also found it best practice to include some customer representatives from other agencies. Although many of these individuals (particularly customer representatives) keep their “day jobs”, it’s best if they can be relatively dedicated to the procurement effort. They help develop the requirements for the individual RFPs that most impact their divisions or users, including statement of work requirements, service level metrics, and reports.

**Process**

The process we follow provides an efficient structure to what could easily seem like (and frankly, very much is) many weeks sitting in a conference room group-writing a book.

At the beginning of the solicitation phase, we will have a kickoff with all team members to explain the process, their role, and overall structure of documents that make up the RFP.

The structure we apply is a series of drafts from Draft 0, to Draft 3 and final release, as further described below.

- **DRAFT 0** can be considered the Integris Applied boilerplate templates to be customized to WVOT. These documents are brought forward from other state clients and reflect decades of best practices and lessons learned in procuring managed services. We will work to identify which documents to include in the package during the Design phase and in the early stages of Build (Solicitation Development), and these will include potentially existing statement of work language from the incumbent contract or other applicable contracts.
- **DRAFT 1** is the first set of documents that have been broadly customized to the WVOT scope. They should have most or all of the relevant sections covered in scope for consideration, and sample requirements pulled into the relevant documents. This is the first set of documents given to the procurement team to begin reading and editing. For the editing process, we generally start with kickoff meetings to go through the full list of documents in the team’s review path and communicate the value of their input in the process. The team may divide up some sections to allocate work and may decide to bring some SMEs in to cover certain areas. Following that, there are iterations of individual editing, followed by team review and editing. The goal at the end of the Draft 1 phase is that the team members have significantly refined the overall scope within the documents. Draft 1 can be considered complete if an outsider were to read the documents and have a pretty solid understanding of the overall scope.
- **DRAFT 2** is the round where the team, through a similar process of individual editing and team review, further refines the requirements and other language in the way they think well-articulates their needs. This is more of a detailed, requirement-by-requirement review of the language to make sure all of the details are covered. Draft 2 stage is complete when we target sharing some documents with other stakeholders for review – perhaps the Core Team, perhaps some other customer or stakeholder reviewers, perhaps a customer panel, etc. There still may be open notes and place holders, but Draft 2 is the targeted time to incorporate feedback.
- **DRAFT 3** is the version that can really be considered the final draft, and is ready for release, except for activities like final cleaning, etc. This is the version that is sent for formal outside review if necessary, including via the Purchasing Division, Attorney General’s Office, or State Budget Office as may be required.
- **Final Release**, as the name implies, is the final package for posting on the procurement portal (wvOASIS) and release to the public. This version will have incorporated all necessary feedback, have had formatting fixed, headers and footers standardized, and meta-data cleaned.

Although the process sounds entirely serial, and that one problem document might hold up a move from “Draft 1” to “Draft 2”, the reality is that we work with you document-by-document, and some documents may advance to a higher draft level as they are completed. The approach gives a framework for managing to a predictable schedule, and with the flexibility to adapt within the challenges of a particular SME’s availability, a legal question to resolve, etc.

**Tools and Templates**

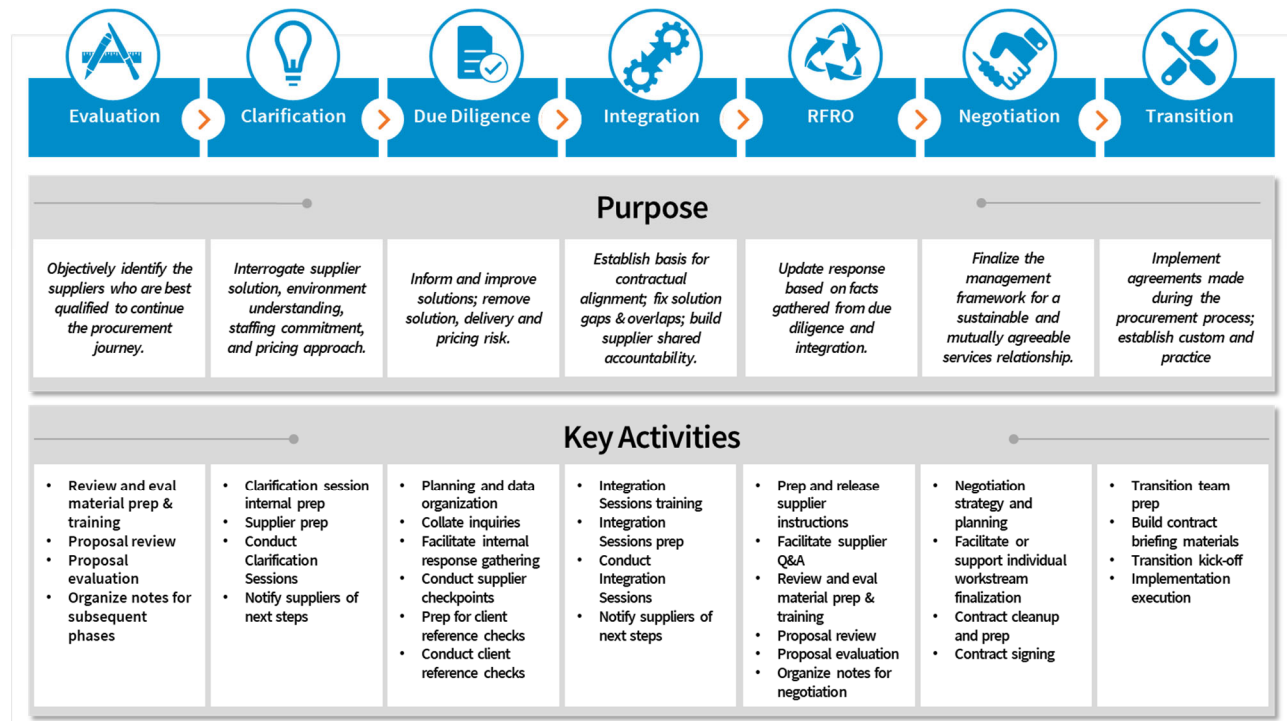
A typical RFP for a complex network services arrangement may include 40-60 documents. A great accelerator of this process is the set of Integris Applied templates that have been successfully used by multiple state government clients. These must be adjusted and conformed to the rules and processes at West Virginia, typically based on early conversations with procurement officers and legal support.

Such templates include:

- Administrative Instructions
- Definitions and acronyms
- Governance frameworks
- OLA and SMM outlines
- Service requirements for various towers (e.g., field services)
- Transition-in plans
- Transition-out plan
- Service level methodology
- Service level metrics
- Pricing provisions
- Pricing units
- Pricing forms
- Financial responsibilities matrices
- Key personnel forms
- Personnel (FTE) matrices

### 2.2.5. Implement: *Day 90 and beyond*

The Integris Applied Team has extensive experience assisting our clients in all stages of procurement processes, with specialized expertise in creating integrated managed services relationships. We also understand that a procurement must produce sustainable outcomes and establish the framework for relationship that benefits both the buyer and the seller. We look beyond the transaction and use the procurement process to help all parties establish the precedents and expectations necessary for successful implementations.



The procurement activities depicted in the figure above are primary components of Integris Applied's *i-Map Methodology* – our process for implementing sourcing programs. While each public sector jurisdiction's specific procurement statute and process guides vary, we have been able to work with local procurement officers to meld our experiences with their



processes to produce more effective outcomes. This methodology is consistent with the work we recently performed in both Virginia and Georgia.

The diagram describes the stages in a manner typical of many procurements, and in working with WVOT and the Purchasing Division, we will adjust the sequencing and focus as may be appropriate. We recognize that some of these stages may overlap slightly may recur, or may extend based on the number of service providers or selection decisions. We will be ready to support WVOT with other changes or additional staff as situations warrant.

All stages of the procurement are critical to finding the right ongoing solution, terms, and price. Integrus Applied always works with the local procurement teams to find the best-fit between local procurement processes and our methodology and we usually find improvements we can each incorporate based on this collaboration.

### 2.3 Project Staffing and Governance

This program requires the right expertise, organizational structure, and reach-back to fully support all aspects of the WVOT program from assessment and design, to solicitation (which may vary from the current plan based on the design work), and post-award support. Therefore, we are proposing a Project Director and a specialist Telecommunications/Network Expert, supported by our reach-back team that can adapt and adjust through the life of the engagement. We can make all resumes available upon request. We anticipate that if invited to speak with WVOT, then we may refine the staffing approach in accordance with the finalized project plan.

The following individuals have been identified as potentially core the project, and of course we may modify with the input of WVOT based on the final project planning.

- Project Director (oversight, planning, communication): Deb Fox
- Specialist Telecommunications / Network Expert: Christopher Corr, Scott Nason
- Financial Director: Alejandro Gandara
- Contract Manager/Executive Support Office: Lynn McNeal
- Engagement Oversight Partner: Tim Ryckman

### 2.4 Project Planning and Pricing Approach

Our proposed hourly pricing has been submitted separately, but we thought it would be helpful to describe our approach to pricing such engagements, and the special considerations particularly given the travel uncertainties due to the COVID-19 Pandemic.

As required by the CRFQ, we have provided a single hourly price. Typical for projects such as WVOT's, we work with the client to construct a fixed price statement of work (SOW) based on the project plan, and we fully anticipate molding a project with WVOT's input that will describe clearly-defined outcomes for a fixed price. Our understanding is that, should we be qualified by this CRFQ process, that we will work with WVOT to develop a project plan and total price.

Prior to the travel restrictions and the work-from-home models in place due to the COVID-19 Pandemic, we had always worked at or near full time at client office locations. During procurements, this included facilitating large meetings such as orals/clarification sessions, due diligence meetings, contract negotiations, and transition planning. Over the last year, however, we have seen procurements work effectively with entirely remote teams. While it is difficult to replace the face-to-face time with clients and service providers, we have all learned to adapt.

We expect that over the first phase of this project, work may be largely remote. We also anticipate that once one or several procurements begin, we may need to host team development or evaluation meetings, or service provider sessions. It is important to maintain fairness between potential service providers in a public procurement, and there may be some remote or local sessions.

The net result is that we have provided a reduced price due to the expectation of roughly 50% travel. Our expectation is that travel will be limited or nonexistent early in the SOW and may increase later.

### 3. Vendor Reference Case Studies

#### 3.1 Defense Health Agency (DHA)

<b>Overview</b>	<p><b>Department of Defense, Defense Health Agency (DHA) – Service Integration</b>  <b>Client Engagement: March 2020 to present</b>  <b>Integrus Scope: strategy setting, service design, procurement support</b></p> <p>The delivery of health services in the United States military has historically been aligned to each of the military branches of services (Air Force, Army, Navy, etc.). The DoD established DHA, as part of a larger effort meant to reorganize and accomplish a more integrated delivery of health care programs and services. Since establishing its current strategy map in 2017, the DHA has been pursuing the consolidation of medical operations and the consolidation of IT operations.</p>
<b>Design</b>	<p>In early 2020, the DHA engaged Integrus Applied to examine its proposed multi-provider IT service delivery model.</p> <p>Integrus Applied began by running a series of workshops with the DHA IT staff to understand the underlying business needs and to validate the potential alignment of services. The output of those sessions validated their strategy and articulated the essential capabilities required: a common IT delivery environment, common IT processes, decision making governance, and mechanisms for service provider accountability.</p> <p>Integrus worked with DHA on a service design structure that would enable these features across multiple service providers utilizing an integration function. Integrus began with the ITIL 4 structure for General IT Service, Service Management, and Technical Management, and then extended that where DHA needed additional functions.</p> <p>Integrus supported DHA in creating a precise estimate of the cost of the new contract that supported their base case for funding. The estimate accounted for the steady-state costs for running the environment, costs for transitioning from the legacy contractors, and the costs for transforming to the common integrated environment.</p>
<b>Build</b>	<p>Integrus continues to work with DHA on the acquisition of services that support their new model. Integrus has been part of creating all acquisition documents from requirements to evaluation materials.</p> <p>One of the key areas that Integrus helped define was service integration. This function is the essential work of making a multi-provider environment work, and was made up of the following:</p> <ul style="list-style-type: none"> <li>• <b>Integrated Service Provider Management</b>, to manage delivery and deliverables across service providers, each providing a particular technical capability.</li> <li>• <b>Integrated Governance</b>, to ensure that decisions are made at the right level and enabling transparency of service delivery performance.</li> <li>• <b>Operating Level Agreements</b>, to align the delivery of multiple service providers and provide accountability for meeting their shared inter-dependencies.</li> <li>• <b>Service Management Manual</b>, to provide for a single enterprise library of processes to be utilized across all service providers and to ensure the currency of those processes.</li> <li>• <b>Service Management Systems</b>, to manage the common systems for cross functional services and provide for integration and training to the service providers and customer business units.</li> <li>• <b>Service Review and Reporting</b>, to provide transparency and consistency in reporting across all service providers and ensure the required performance levels are achieved.</li> <li>• <b>Program Management Functions</b>, to attend to cross-organizational dependencies and risks, such that conflicts and constraints are resolved across the multiple service providers.</li> </ul> <p>The procurement of the first services under this model are still underway. Publicly available materials are posted at: <a href="https://beta.sam.gov/opp/b0bb18e4b270480f95ccf0bb3105444b/view">https://beta.sam.gov/opp/b0bb18e4b270480f95ccf0bb3105444b/view</a></p>

### 3.2 Georgia Technology Authority (GTA)

<b>Overview</b>	<p><b>Georgia Technology Authority (GTA) – Delivery Model Restructuring</b>  <b>Client Engagement: Nov 2012 to Mar 2020</b>  <b>Integrus Scope: strategy setting, service design, procurement support</b></p> <p>The GETS program was established in 2008 by the central IT agency of Georgia state government, the Georgia Technology Authority (GTA), to modernize the state’s technology, reduce the risk created by an aging IT infrastructure and improve the ability to provide services to citizens. The program produced an “as a service” consumption model for the state, reduced operational risk through improved security and disaster recovery, simplified budgeting, and improved cost tracking and transparency. As the program evolved and new technologies became available, GTA recognized that an evolution in its delivery model was required.</p>
<b>Design</b>	<p>In 2012, GTA engaged Integrus Applied to examine its delivery model. After an assessment of business requirements, Integrus was asked to create an improvement program. Integrus Applied helped GTA identify and achieve three core goals for the program:</p> <ul style="list-style-type: none"> <li>• Improve service delivery for the enterprise and the agencies;</li> <li>• Innovate and evolve the service offerings;</li> <li>• Ensure cost competitiveness and transparency.</li> </ul>
<b>Build and Implement</b>	<p>The engagement with Integrus has reshaped GTA’s outsourced service delivery model and provided for the governance of services that focuses on agency engagement and future needs. Key milestones from Integrus include:</p> <ul style="list-style-type: none"> <li>• Procurement of a Multisourcing Services Integrator in March 2015 and disentanglement of the incumbent services from the MSI services;</li> <li>• Re-procurement of Managed Network Services (MNS) for over 1,200 State of Georgia customers for Local Area Network, Wide Area Network and Voice Services;</li> <li>• Analyzed the requirements and business need for E-rate capable services;</li> <li>• Re-procurement of the End User Computing Services for over 40,000 State of Georgia users;</li> <li>• Re-procurement of Server Services to include additional Service Components of Cloud (Hosted) Services, Cloud Brokerage Services, and Storage as a Service;</li> <li>• Implementation of Managed Security Services;</li> <li>• Procurement of Contact Center Services providing hosted and virtual contact center options to agencies.</li> <li>• <b>Integrus Applied-led procurements have met or exceeded all savings targets.</b></li> </ul> <p>GTA’s work on its service delivery model and the use of best practices recently earned it an International Association of Outsourcing Providers (IAOP) 2019 Global Excellence in Outsourcing Award: <a href="https://gta.georgia.gov/press-releases/2019-01-29/gta-receive-award-innovative-approach-sourcing-it-services">https://gta.georgia.gov/press-releases/2019-01-29/gta-receive-award-innovative-approach-sourcing-it-services</a></p>
<b>Sustain</b>	<p>Integrus provided post-award support to GTA for the transition of services from the incumbent to the MSI and for its implementation of governance and operating level agreements. Integrus provided training to GTA staff to manage all the other service provider transitions.</p> <p>The Center for Digital Government recently recognized Georgia for its progress with a rare “A” grade: <a href="http://www.govtech.com/cdg/digital-states/Digital-States-Survey-2018-Results.html">http://www.govtech.com/cdg/digital-states/Digital-States-Survey-2018-Results.html</a></p>

### 3.3 Virginia Information Technologies Agency (VITA)

<b>Overview</b>	<p><b>Virginia Information Technology Authority - IT Infrastructure Services Program</b>  <b>Client Engagement: Nov 2015 to Jan 2020</b>  <b>Integrus Scope: strategy setting, service design, procurement support, transition and disentanglement</b></p> <p>In 2006, the Commonwealth of Virginia implemented a ground-breaking and broad outsourcing of IT services; however, by 2015, Virginia recognized it needed to change its strategy to improve the delivery of IT services. The Commonwealth of Virginia hired Integrus Applied to conduct a comprehensive 10-month assessment of the IT delivery model, contract structure, financial model, and governance structure. The assessment covered \$250M per year in IT services provided to over 80 executive branch agencies. The deliverables included:</p> <ul style="list-style-type: none"> <li>• Business case for transition and disentanglement from the incumbent;</li> <li>• Assessment of current contract terms and conditions;</li> <li>• Assessment of individual agency needs in a future state model;</li> <li>• Recommendation for the service design and service integration model;</li> <li>• Recommendation for moving to more managed services for networks;</li> <li>• Recommendation for organizational and governance frameworks.</li> </ul> <p>The analyses demonstrated that current pricing was above market rates and should be recomputed, and that the current IT services contract was preventing the Commonwealth from modernizing its services and needed to be disentangled.</p> <p>The assessment reports are available on VITA’s website at: <a href="https://www.vita.virginia.gov/supply-chain/infrastructure-contracts/archive-reports--project-materials/">https://www.vita.virginia.gov/supply-chain/infrastructure-contracts/archive-reports--project-materials/</a></p>
<b>Design</b>	<p>In 2016, Integrus Applied began assisting Virginia in the implementation of the assessment recommendations, guiding VITA through a change program that has produced an integrated service delivery platform and an agency-centric governance model.</p> <p>As part of that, Integrus helped VITA design services for all the legacy services and build procurements for those services, which include those services that provide field services, desktop management, application support, and managed voice and data networks.</p>
<b>Build and Implement</b>	<p>The resulting procurements employed an extensive sourcing program covering \$250M/ year in incumbent scope. The program produced eight successful procurements for mainframe, email, service integration, managed security services, data center services, end user services, managed network services, and print &amp; mail services. All service providers are integrated with the service integrator, and have transitioned services from the previous incumbent.</p> <p>After careful analysis and multiple reviews with the team, VITA determined to maintain their existing provider of carrier services, which was Verizon. Integrus Applied led VITA through a process to modify their contract to increase scope, improve pricing, add managed network services provisions, build a transformation plan, and integrate with the other providers. This started internally by defining requirements similar to a full RFP, and externally by engaging senior Verizon leadership for executive alignment sessions. The result of these sessions was that Verizon provided a sales and solutioning team (similar to what they would have done on a competitive procurement) to re-design the entire offering and contract.</p>

<b>Sustain</b>	<p>Integrus Applied supported VITA's transition from the management of a single incumbent provider to a management framework for multiple service providers. Integrus Applied also supported VITA in the creation of a comprehensive change program to include:</p> <ul style="list-style-type: none"> <li>• Design and implementation of an "agency-centric" platform governance model;</li> <li>• Design of the VITA organization structure to manage the multi-provider environment;</li> <li>• Implementation of organizational changes required to support the new PRO structure;</li> <li>• Identification of scope, function, roles and responsibilities of the new organization;</li> <li>• Identification and mitigation strategies for the impact of the new structure on the remaining organization.</li> </ul> <p>With both the transition and the new governance structure, Integrus Applied helped design a stakeholder management framework to facilitate and guide outreach and participation from the Virginia agencies and to support enterprise-wide communications.</p>
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### 3.4 Texas Department Information Resources (DIR)

<b>Overview</b>	<p><b>Texas Department of Information Resources (DIR) – Network and Security Services Assessment</b>  <b>Client Engagement: Apr 2015 to Jul 2015</b>  <b>Integrus Scope: current state assessment, change justification, procurement support</b></p> <p>DIR Communications Technology Services (CTS) group serves more than 700 state and local government entities through their TEX-AN (Texas Agency Network) program. TEX-AN provides a suite of state master contracts providing local voice services, long distance services, internet, metro ethernet, small office/home office (SOHO), and voice over IP (VOIP) services. Contracts may be used by state and local government, public education, and other public entities in Texas. All contracts are E-rate certified.</p> <p>In 2014, DIR implemented a statewide security framework based on NIST 800-53. Security assessments against the framework showed many gaps or widely varying levels within the state agencies. DIR hired Integrus Applied to assess the existing technology contracts and to identify security services that it could contract for that would allow agencies to address the security gaps. In addition, the assessment addressed the network operations center managed by CTS and how those operations would work with the proposed security services. The Integrus engagement was over two 8-week periods, the first focused on the assessment and the second focused on the procurement requirements and RFP documents.</p>
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<b>Design and Build</b>	<p>Integrus began the assessment with data gathering and alignment. The alignment included a clear statement of purpose for examining security services and making additional security services available to DIR’s network customers. The alignment included conducting a pre-mortem with the DIR stakeholders to ensure the planned activities would be able to address their expectations and produce the desired guidance.</p> <p>Integrus reviewed over 400 contract documents as part of the assessment examining the alignment of desired capabilities and to what was available in existing contracts. From this complete understanding of what was available to DIR customers, Integrus was able to propose a suite of security services that would best compliment their network services. In addition, Integrus reviewed the most recent security audit and security assessments for the identified gaps and ensured the proposed security services would be capable of addressing the gaps.</p> <p>Integrus completed the assessment with a document of justifying the establishment of these network and security services. That justification identified:</p> <ul style="list-style-type: none"> <li>• Business goals and objectives of DIR Customers based on identified business needs;</li> <li>• Results of certain agency surveys and interviews on their need for network and security services;</li> <li>• Results from review of agency legislative appropriations requests;</li> <li>• Assessment of existing contract vehicles for similar services;</li> <li>• Review of other information sources, including DIR policy and planning documents, the Texas Legislature study of legacy systems, and the DIR Information Resources Deployment Review.</li> </ul>
<b>Implement</b>	<p>Integrus worked with DIR to develop a complete set of procurement documents that would support the acquisition of the additional network and security services. DIR would use those to conduct an RFP to award one or more contracts for Managed Security and Network services. Those documents included:</p> <ul style="list-style-type: none"> <li>• Complete document of contract scope of work that defines the desired services;</li> <li>• Document on the service performance metrics and reporting that identified SLAs and service targets;</li> <li>• Model of the costs associated with the desired services that could be used to set budgetary expectations and assist in RFP evaluations;</li> <li>• Procurement forms for bidders to use to describe their services and associated charges. Those forms include instructions for respondents, description of bidder solutions, unit rates and volume incentives, FTE rate cards for associated services (e.g. installation), identification of staffing, and bidder pricing assumptions.</li> </ul> <p>After the completion of the engagement, Integrus provided additional support to DIR for aligning and adjusting the security SOW such that it supports other technology initiatives within DIR.</p>

### 3.5 Maricopa County Community College District

<b>Overview</b>	<p><b>Nevada, Maricopa County, Community Colleges District (MCCCD) – Managed Network Services Assessment</b> <b>Client Engagement: Aug 2017 to Oct 2017</b> <b>Integrus Scope: provide independent assessment of the MCCCD Managed Network Services strategy with particular focus on the Network Operations Center</b></p> <p>MCCCD has followed a path similar to many large enterprises in its recognition and use of technology as a strategic (rather than tactical) asset. As an academic institution, MCCCD’s core capability is teaching and learning, not running and managing a technology enterprise. Furthermore, the quasi-autonomous nature of the 10 colleges that comprise MCCCD creates challenges for technology management and innovation. The IT operations supports approximately 250,000 students, 13,000 faculty and staff, 23,319 desktops, and 6800 VOIP devices. In 2014, the Information Technology Services (ITS) group of MCCCD began a 5-year journey to modernize the MCCCD network infrastructure and IT workforce through a combination of internal changes and strategic acquisitions.</p> <p>One of the key steps in this journey was the establishment of a new Network Operations Center (NOC) and a new Security Operations Center (SOC). The county was looking to buy these capabilities from the marketplace and before moving forward with the acquisition the MCCCD Governing Board hired Integrus Applied to validate its technical and strategic direction.</p>
<b>Design</b>	<p>Integrus used its expertise in network architecture, managed network services, and public sector procurement to make a full assessment of the MCCCD network and sourcing strategy.</p> <ul style="list-style-type: none"> <li>• Reviewed outages and incident management for the past year;</li> <li>• Reviewed bi-annual penetration testing reports for past year;</li> <li>• Reviewed network diagrams and network architecture;</li> <li>• Reviewed network management processes as available;</li> <li>• Reviewed RFP requirements documents for Managed Network Services, Network Operations Center, and the MCCCD proposed contract terms.</li> <li>• Reviewed RFP process and procurement plan for the Managed Network Services RFP, including evaluation criteria.</li> <li>• Conducted interviews of all ITS staff and stakeholders in the community colleges.</li> </ul>
<b>Build</b>	<p>Integrus Applied found no concern with the technical direction or proposed acquisition solution being pursued by MCCCD and recommended that the county go forward with its acquisition.</p> <p>Integrus Applied found that ITS was appropriately focused on their goals for fixing an understaffed organization, upgrading aging technologies, and remediating multiple security breaches. However, ITS could better achieve their goals through additional “soft” IT skills:</p> <ul style="list-style-type: none"> <li>• maintain more formal business case and defined criteria for success in the acquisition</li> <li>• establish a project governance process to engage stakeholders and promote decision making</li> <li>• develop an enterprise wide technology roadmap that serves as a communications vehicle to MCCCD leadership</li> <li>• develop a sourcing strategy that supports the roadmap showing where expertise is to be retained or purchased</li> <li>• commit to organizational change management that communicates strategic decisions and improves engagement</li> <li>• improved inter-department communications to promote cooperation from the colleges</li> </ul>

## 4. APPENDIX

### 4.1 Stages in a Sourcing Program

The following is not a tailored project plan, but rather provides guidance for scoping projects similar to what WVOT is requesting.

When considering a full sourcing program, and how to scope timing, expertise, and price, it is helpful to consider the various stages. Below, we have indicated four key stages for a relatively large, but generally single-tower IT managed services procurement. By “single tower”, we mean a procurement for an industry-standard scope category, such as server/storage management, end user computing, or managed network services.

Also below, we have described potential components and timeframes of stages. They may or may not all be applicable for a specific effort. And within each, the unique goals and constraints of a particular client environment will affect choices of what to cover in a given stage.

	Assessment / Recommendation	Initial Market Engagement	Procurement	Transition	Ongoing Governance
<b>Purpose</b>	Study current environment, define broad roadmap for sourcing program	Coordinate internal stakeholders, learn market offerings, further define sourcing program, and project plans to marketplace	Conduct acquisition phase, including building documents through to evaluation and negotiations.	Help ensure relationships gets going "on the right foot"	Support ongoing interactions between customers, central agency, and suppliers
<b>Timeframe</b>	6 weeks to 3 months	2-4 months	6-10 months	4-8 months	Ongoing
<b>May include</b>	<ul style="list-style-type: none"> <li>- Gathering current data</li> <li>- Conducting stakeholder surveys</li> <li>- Reviewing current contracts</li> <li>- Assessing pricing to market</li> <li>- Defining initial business case</li> <li>- Developing sourcing roadmap</li> </ul>	<ul style="list-style-type: none"> <li>- Building rough RFI or RFS documents</li> <li>- Establishing program governance/stakeholder committee(s)</li> <li>- Conduct RFI</li> <li>- Facilitate response review</li> <li>- Facilitate supplier meetings</li> </ul>	<ul style="list-style-type: none"> <li>- Building procurement documents</li> <li>- Defining requirements, service levels, financial structure</li> <li>- Working with procurement officers and internal/external counsel to refine/define documents and process</li> <li>- Facilitating supplier Q&amp;A and Due Diligence</li> <li>- Conducting evaluation sessions</li> <li>- Conducting supplier oral Clarification Sessions and Integration Sessions</li> <li>- Negotiations and final solutioning</li> <li>- Facilitating document iteration and finalization</li> </ul>	<ul style="list-style-type: none"> <li>- Establishing governance model</li> <li>- Work with client project managers on tracking transition/transformation events</li> <li>- Model or lead governance meetings</li> <li>- Support process (re)definition</li> <li>- Support deliverable tracking</li> <li>- Support decision-making</li> <li>- Fill gaps or support learning curve in emerging organizational capabilities</li> </ul>	<ul style="list-style-type: none"> <li>- Model or lead governance meetings</li> <li>- Ongoing budget and business case tracking</li> <li>- Support deliverable tracking</li> <li>- Support decision-making</li> <li>- Fill gaps or support learning curve in emerging organizational capabilities</li> </ul>
<b>Total FTEs</b>	2 - 3	1 - 2	1 - 2.5	1 - 2	1 - 2
<b>Sourcing*</b>	High	Med	High	Low	Low
<b>Solution*</b>	High	Med	High	High	Low
<b>Finance*</b>	High	Med	High	Med	Med
<b>Governance*</b>	Low	Low	Low	Med	Med

*\*These categories represent the experience of persons in roles, further described in Section 4 above. "High" = near full time; "Med" = about half time, "Low" = a few hours per week. These roles and effort levels vary across the life of a project, and may be combined in a single contracted advisor and/or supplemented with client team members.*



**Integrus Applied** is an information technology advisory firm dedicated to facilitating complex service relationships where each of the parties' competing and collaborative business objectives are identified, honored, and achieved – both in the short-term and long-term. We are experienced practitioners in the field, with backgrounds in service providers, client IT organizations, and public and private sectors. Specialty focus areas include multisourcing and multiparty integration, collaborative negotiation, and public sector transparency.

**For more information or to schedule a consultation with our experienced advisors, please contact:**

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STATE OF WEST VIRGINIA  
Purchasing Division

# PURCHASING AFFIDAVIT

**CONSTRUCTION CONTRACTS:** Under W. Va. Code § 5-22-1(j), the contracting public entity shall not award a construction contract to any bidder that is known to be in default on any monetary obligation owed to the state or a political subdivision of the state, including, but not limited to, obligations related to payroll taxes, property taxes, sales and use taxes, fire service fees, or other fines or fees.

**ALL CONTRACTS:** Under W. Va. Code §5A-3-10a, no contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

**EXCEPTION:** The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. Code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

**DEFINITIONS:**

**"Debt"** means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.


**"Employer default"** means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

**"Related party"** means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

**AFFIRMATION:** By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (*W. Va. Code §61-5-3*) that: (1) for construction contracts, the vendor is not in default on any monetary obligation owed to the state or a political subdivision of the state, and (2) for all other contracts, that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

**WITNESS THE FOLLOWING SIGNATURE:**

Vendor's Name: Sourcing Advisory Services, LLC (dba Integris Applied)

Authorized Signature:  Date: March 30, 2021

State of \_\_\_\_\_

County of \_\_\_\_\_, to-wit:

Taken, subscribed, and sworn to before me this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

My Commission expires \_\_\_\_\_, 20\_\_.

**AFFIX SEAL HERE**

**NOTARY PUBLIC** \_\_\_\_\_



**ADDENDUM ACKNOWLEDGEMENT FORM**  
**SOLICITATION NO.: ISC2100000022**

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

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

**Addendum Numbers Received:**

(Check the box next to each addendum received)

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

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

**Sourcing Advisory Services, LLC (dba Integris Applied)**

\_\_\_\_\_  
Company



\_\_\_\_\_  
Authorized Signature

**March 30, 2021**

\_\_\_\_\_  
Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.  
Revised 6/8/2012