



# Establishing the Strategy

PROPOSAL FOR WEST VIRGINIA OT ASSESSMENT AND CONSULTING SERVICES  
[SOLICITATION No. CRFP OOT2300000001]

**BID OPENING DATE: SEPTEMBER 15, 2022**  
**BID OPENING TIME: 1:30 PM ET**  
**BUYER: JESSICA L. HOVANEK**  
**FAX NUMBER: 304-558-3970**



**Sourcing Advisory Services, LLC (dba Integris Applied)**  
18 Shawnee Ridge Court, The Woodlands, TX 77382

**Solicitation No. CRFP OOT2300000001**  
**Bid Opening Date: September 15, 2022**  
**Bid Opening Time: 1:30 PM ET**  
**Fax Number: 304-558-3970**

**September 15, 2022**

**Ms. Jessica L. Hovanec, Buyer**  
**Department of Administration, Purchasing Division**

Dear Ms. Hovanec and the WVOT Team:

Integris Applied appreciates the opportunity to provide the West Virginia Office of Technology (WVOT) with a proposal to study its current situation, design strategic roadmaps for the future, and work collaboratively to support implementation.

Since its founding over a decade ago, Integris Applied has been the leading advisory firm focused on state CIOs and their organizations. We have led our clients through some of the largest government IT services transformation programs in the country, including the Texas Department of Information Resources (DIR), the Georgia Technology Authority (GTA), the Virginia Information Technologies Agency (VITA), and the Department of Defense's (DoD) Defense Health Agency (DHA). All of these programs offer relevant examples for WVOT.

We take our role in facilitating healthy service relationships between buyers of IT services, service providers, and the customers they collectively support very seriously. Our name "Integris" comes from Latin roots meaning "whole" or "one", and we see it as our purpose to build a holistic relationship between all parties.

We have built a proposal and pricing that we believe will best serve West Virginia. However, we also recognize that there may be opportunities for tightened alignment and refinement. If invited to Oral Presentations, we look forward to clarifying or improving the proposal further.

Our prior clients have enjoyed working with our team, and our collaborative and experience-based approaches have resulted in important and successful change programs. If we are selected by WVOT, we look forward to getting to know the full team and establishing long-term relationships.

Kind Regards,



**Tim Ryckman**  
**Managing Director and Primary Contact for this Proposal**  
248.321.9959  
tim.ryckman@integrisapplied.com

## Table of Contents

1.	Executive Summary and Our Understanding .....	3
2.	Company Overview .....	5
3.	Proposed Approach and Methodology to Meet Goals and Objectives.....	6
3.1	Program Overview and Delivery Model .....	6
3.1.1.	Startup Activities through Detailed Project Plan: Week 0 through Day 30 .....	8
3.1.2.	Assessment Approach: More than Just the Deliverables .....	10
3.1.3.	Project Organizational Structure .....	11
3.1.4.	Remote and Hybrid Work .....	21
3.2	Phase 1 .....	22
3.2.1.	Preliminary Information Technology (IT) Financial Report.....	22
3.2.2.	Service Rates Catalog.....	22
3.2.3.	Information Technology & Investment Portfolio System (I-TIPS) Analysis .....	25
3.2.4.	Five-year Strategic Technology Roadmap.....	26
3.2.5.	Annual Information Technology (IT) Report.....	28
3.3	Phase 2 .....	28
3.3.1.	IT Governance Implementation .....	28
3.3.2.	Information Technology & Investment Portfolio System (I-TIPS).....	30
3.3.3.	State Technology Strategic Plan .....	30
3.4	Additional/Optional Services .....	31
3.4.1.	Principal/Executive Consultant (50 Hours) .....	32
3.4.2.	Senior Consultant(s) (200 Hours).....	32
3.4.3.	Consultant(s) (200 hours) .....	32
3.4.4.	Financial Subject Matter Expert(s).....	32
4.	Qualifications and Experience .....	32
4.1	Virginia Information Technologies Agency (VITA) .....	33
4.2	Georgia Technology Authority (GTA).....	35
4.3	Department of Defense, Defense Health Agency (DHA) .....	37

## 1. Executive Summary and Our Understanding

The West Virginia Office of Technology (WVOT) has great opportunity ahead. The signing of SB486 in April 2021 advances the role and duties of both the CIO and the Office of Technology. A vote passing this bill was more than simple title change or updated definitions; rather, it represents legislators' and the Governor's recognition that information technology is a critical component of government operations and citizen experience, and that this Office can and must lead the state in modernization.

WVOT now is looking to answer many questions and address many challenges related to its path forward. How must we change our delivery model? How do we establish enterprise standards and security while giving our agencies what they uniquely need? What are our current resources and how can they best be used? How do we address our technology debt? How much will it cost to modernize? How should we bundle costs and charge our agencies? What are our risks? The Integris Team can help answer these questions because we have walked in your shoes. Our dedication to the public sector and its need for effective technology partnerships has guided our work. We have the experience and understanding to develop a strategy that is in the best interest of West Virginia, and can effectively be implemented by the Office of Technology.

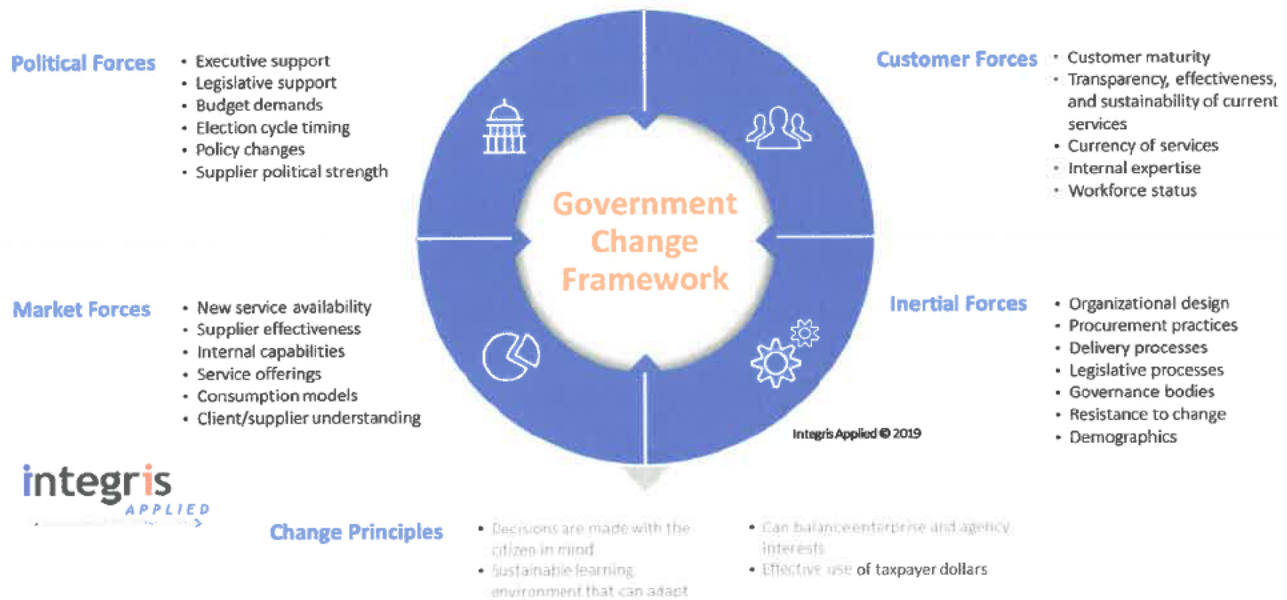
The deliverables laid out in the RFP are just a small sample of what the WVOT must do. Establishing standards, unifying architecture, and overseeing technology investments will require understanding and management of the stakeholders, technology, costs, and marketplace. In our experience, the technology itself is the easy part. In a political environment such as state government, the CIO must balance competing needs of the state and the agencies, legislators and commissioners, standardization and choice, security and availability, costs and capacity.

### TECHNOLOGY IS THE LEAST OF YOUR CHALLENGES



For these reasons, Integris Applied developed the Government Change Framework, which helps government IT leaders think through the various forces they will need to address to implement change.

## CHANGE IN GOVERNMENT IS A JOURNEY



## 2. Company Overview

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 strategic change and modernization programs in the country. 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 supplier and customer relationships, disentangled complex contracts, and implemented transitions involving multiple stakeholders and



“GTA values its partnership with Integrus 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

multiple government agencies. We have helped our clients address stakeholder concerns, manage the required organizational and skillset changes, and communicate with legislatures, governors and the citizens they serve.

Our key public sector reference clients all contained activities of direct relevance to WVOT. Integrus Applied was founded in 2010, when we designed a new sourcing and service delivery strategy for the Texas Department of Information Resources (DIR) to operate under a then-novel Multisourcing Services

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

Integration (MSI) governance model. That program is now considered by Gartner analysts to be the leading example of MSI (also known as SIAM – Service Integration and Management) in the marketplace today. We have continued to evolve the model at other clients such as the Georgia Technology Authority (GTA), the Virginia Information Technologies Agency (VITA), and the US Department of Defense’s Defense Health Agency (DHA). Many of these programs have won awards over the years, with the most recent being [VITA at National Association of State Chief Information Officers \(NASCIO\) \(https://www.nascio.org/wp-content/uploads/2020/09/NASCIO\\_MSI\\_Entry\\_2020\\_FINAL.pdf\)](https://www.nascio.org/wp-content/uploads/2020/09/NASCIO_MSI_Entry_2020_FINAL.pdf) in October 2020.

Each of these programs involved assessing the current situation, designing a strategy, and leading through implementation. Each of these programs also involved a maturing government shared services agency wrestling with questions such as chargeback, rate setting, legacy applications/infrastructure, organizational design, and governance models. In Section 4 (Qualifications and Experience), we further describe these case studies. We would be happy for you to speak directly with the client executives themselves.

In addition to our client work, we are also recognized as a thought-leader nationally in public sector IT strategy. Through partnership with the National Association of State Chief Information Officers (NASCIO) Integrus Applied conducted studies and co-authored reports such as [The State CIO Operating Model: Bridging Trends and Action \(https://www.nascio.org/wp-content/uploads/2019/02/NASCIO\\_CIOasBroker\\_OperatingModels.pdf\)](https://www.nascio.org/wp-content/uploads/2019/02/NASCIO_CIOasBroker_OperatingModels.pdf) also known as CIO as a Broker model).

### About Integrus Applied

Integrus Applied LLC (formally “Sourcing Advisory Services, LLC”), was established in in October 2010 in Georgia and later incorporated in Texas in 2012. It is a privately held company.

Principals include Diane Druitt, owner and Tim Ryckman, Managing Director.

Integrus Applied was certified April 20, 2021, as a Woman Owned Historically Underutilized Business (HUB) business in Texas.

Much of our work with other clients also involves procurement activities, and the Integris Applied team brings the most extensive set of public sector strategic sourcing qualifications in the market. This activity gives us extensive knowledge of market offerings, services costs, and potential delivery models. Since 2015 we have completed numerous

Awarded Date	Procurement	Participants	Winners	TCV (M)
Mar 2015	MSI	Cappgemini, HPES	Cappgemini	\$287
Sep 2015	MNS	AT&T, CenturyLink & IBM	at&t	\$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	HPES	\$35
Aug 2017	MSI	Cappgemini, 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	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	VDN	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
Dec 2021	All IT / Apps	Private Sector Client – Multiple Parties		\$30
Aug 2022	MSI	Perspecta/Cappgemini, Mantech, Deloitte	Perspecta Cappgemini	\$2,000

procurements across a range of IT services valued in excess of \$4.3 billion.

These sourcing programs were key to clients meeting their strategic goals, which variously included consolidation, modernization, cost savings, increased service quality, greater agility, and improved government responsiveness. Our support covered financial analysis, solution design, process improvements, organizational change management, implementation, and integration of multiple suppliers.

All of this work has prepared us to meet WVOT’s strategic planning needs, and we are confident that Integris Applied will add tremendous value to your program.

“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. Integris 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

### 3. Proposed Approach and Methodology to Meet Goals and Objectives

#### 3.1 Program Overview and Delivery Model

In response to the RFP requirements and to ease your reading, we thought it best to provide an overall summary of our approach in this section, followed by more specific responses to the Phase 1 and Phase 2 deliverables.

The Integris Applied standard four-phase approach to these engagements is called “i-Map” and aligns with the RFQ requirements. i-Map is a framework of building blocks, which will be adjusted to fit the unique goals, situations, and constraints within any particular client. The chart below shows these four components of our model which are explained in the following sections.

**Assess, Model, Plan**  
Engaged Stakeholders, Roadmaps & Recommendations

**Measure, Govern, Improve**  
Governance Model, Forums & Processes



**Define, Communicate, Engage**  
RFPs, Transformation Planning & Organizational Change

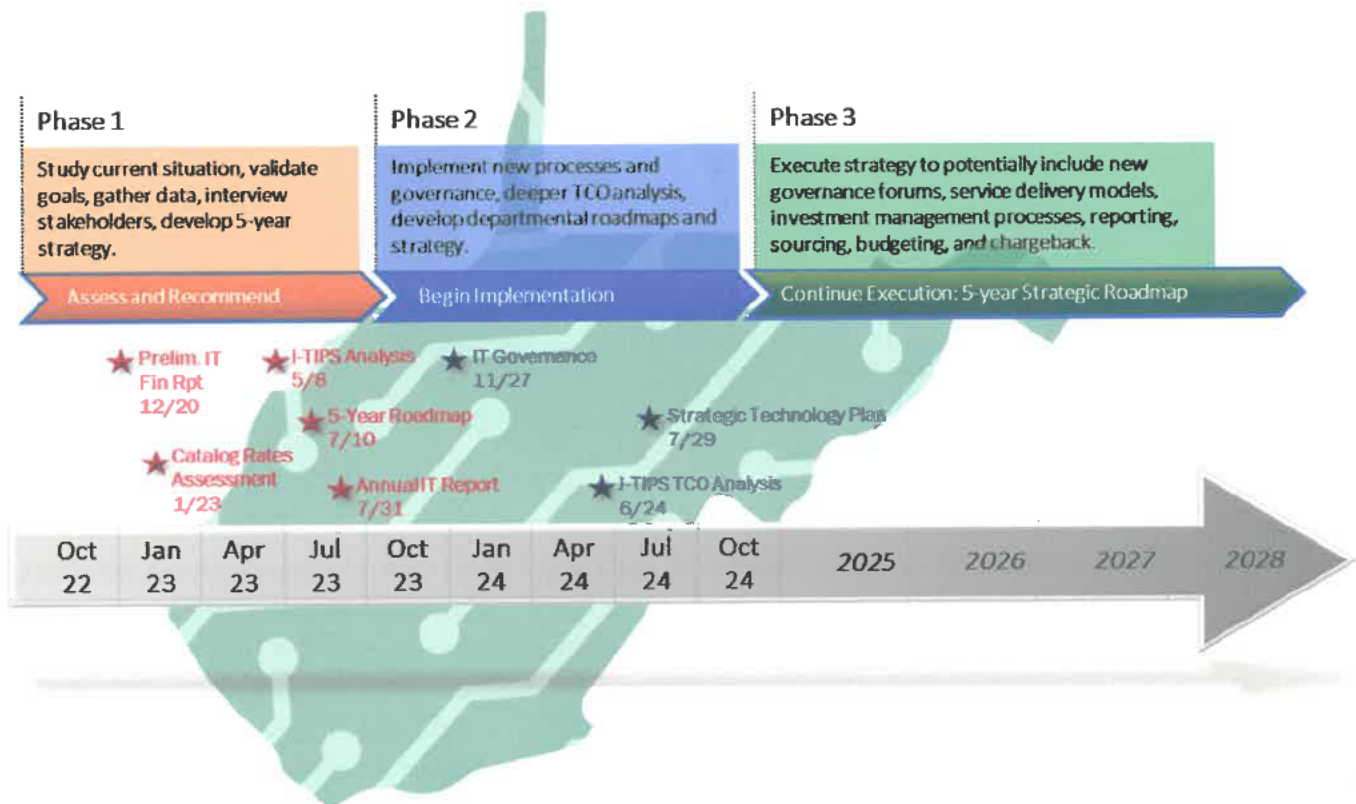
**Validate, Transition, Integrate**  
Dynamic Delivery Model

WVOT’s Phase 1 deliverables are part of what we call our “Design” phase – which involves assessing, developing a model, and planning the Build and Implementation. Phase 2 deliverables, represent Build and Implementation. In general, our approach to all assessment and strategy engagements, and to this one, is to guide our clients along the journey of decision making – rather than just providing reports. Although we bring experience from industry and comparable government clients, there is no “industry standard” or “one-size-fits-all” approach. Therefore, you will see events in our timeline to help both WVOT and its stakeholders come to the correct decisions on strategy.

We have built a high-level project plan for the Phase 1 and Phase 2 deliverables, and you will see snippets of these throughout the proposal. We recognize that the assessment deliverable project plan detail will need to be finalized with the WVOT team, and of course Phase 2 (and potentially beyond) will be informed and determined via Phase 1. If invited for Oral Presentations as part of this RFP process, we look forward to answering questions or re-aligning these activities to better fit your needs and factors such as data and team member availability. Our proposal is therefore heavy on examples and images (and we have many more which we did not include), to portray our credibility on these subjects. This project timeline and proposal and price is committed as part of this RFP submission process, but we look forward to further tailoring our specific plan to fit you and finalizing the detailed Project Plan within thirty (30) days of award.



*Building a fact-based, experience-proven, and customer-engaged strategy.*



As the RFP did not provide precise start date, we assumed a late October or early November start in our proposed timeline. This could be adjusted for the actual contract award date, and within reason we see no trouble completing the Annual IT Report by the end of July 2023.

**3.1.1. Startup Activities through Detailed Project Plan: Week 0 through Day 30**

We always start our projects with a conceptual “Week 0”, which is just the administrative items to handle sometime in the weeks before the official start (e.g., initiate system access and badges, schedule kickoff, etc.). In Phase 0 above, both the Startup activities and some of the ongoing Project Management activities (such as the meetings and reports) are initiated and maintained through the life of the project.

We will work with WVOT’s Project Leadership<sup>1</sup> to schedule kickoffs, establish a project Core Team, and schedule a cadence of meetings, such as weekly or fortnightly, with the Core Team or other stakeholders. The Core Team is usually a small cross-functional team of decision-makers within WVOT who can guide and influence the program. Typically, this includes an executive or expert from each key area such as technology and operations, finance and

<sup>1</sup> Note: we will use the term “Project Leadership” throughout the proposal to refer to the person or persons identified by the CIO or the WVOT Leadership Team to be our primary client interface.

administration, customer relationship management, and contracts. This meeting may also include other stakeholders and customers, or perhaps a subsequent more “public” kickoff can occur with that group later.

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 Project Leadership.

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 (Decisions, Assumptions, Issues, Risks) tracker for this engagement. We will work with WVOT 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 of the experience level of our team members, our firm operates on a model that empowers the dedicated Integris Applied client team to make most decisions with their client. For WVOT the interactive feedback this provides better supports decision making by the executive and senior leadership team.

Another important activity in Week 0 to get off to a fast start is to begin data gathering. We have prepared a list of artifacts to request upon award that will inform and guide our planning efforts.

The RFP requires a detailed Project Plan to be delivered within one month of the contract award. Based on the above kickoff meetings, initial data and team availability, and Core Team meetings, we will collaboratively develop and deliver the detailed Project Plan within the required timeframe.

For this proposal, we have begun developing a Project Plan, which is subject to further refinement. An extract of that plan is shown below, highlighting these startup activities and core initial assessment tasks.

#### DAIR Tracker

**Guiding Principles:**

Documents the purpose of the activity or project to ensure alignment; documents goals and objectives.

**Decisions:**

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.

**Assumptions:**

Basic premises that need to be validated or negotiated with other parties.

**Issues:**

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.

**Risks:**

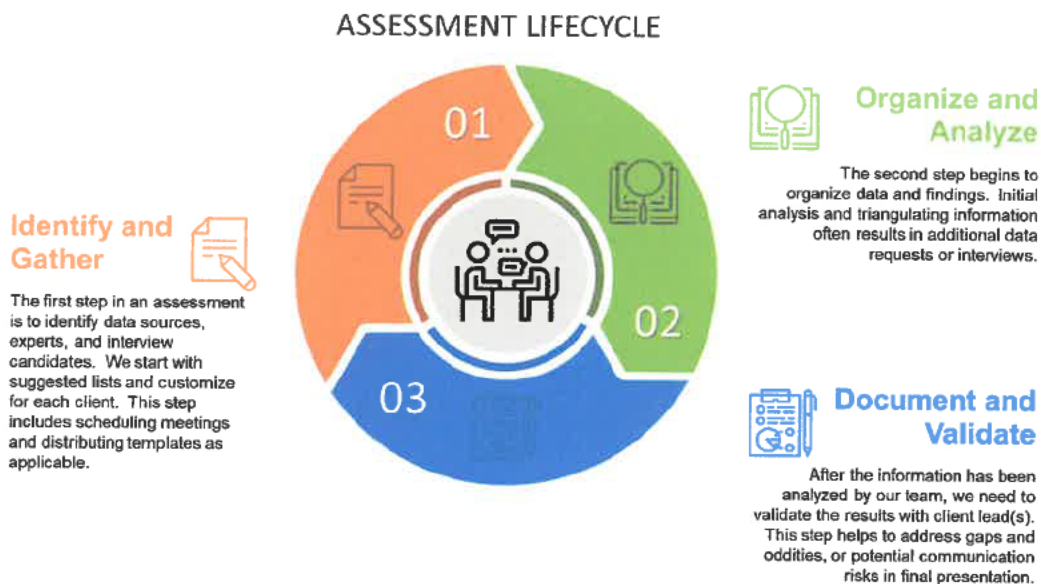
Potential events outside of the project’s control that may impact the effectiveness or completion of the project.



supplement the interviews with a survey. Internal to WVOT, we would also propose reviewing the processes, governance forums, and organizational design.

In the first month after award, we will work with the WVOT Core Team to validate and further define these data requests and interviews.

We have a functional “Assessment Lifecycle” approach, as shown in the diagram below. Each of the three stages (1. Identify and Gather, 2. Organize and Analyze, and 3. Document and Validate) can potentially feed one another. All of these fit within our “Design” phase of the I-MAP methodology. You will see in our timeline that each of the sub-tasks follow this methodology.



The validated findings from each will support what we see as the capstone Phase 1 deliverable: the Five-Year Strategic Technology Roadmap. While obviously the Annual IT Report is listed after the Roadmap in the RFP, we believe the Annual IT Report will contain materials from the Roadmap.

Standard in our approach is to provide a draft deliverable (due two to four weeks before final), in which we typically provide an overall template, document outline, and summary findings to the WVOT Project Leadership. This allows some validation and re-alignment of the final report before its due date.

In addition the RFP required Deliverables, we plan to provide WVOT Leadership with a Situational Assessment targeted for completion in May. This report will document findings and assist in stakeholder alignment for future recommendations and change management activities.

### 3.1.3. Project Organizational Structure

The Integris Team will bring to WVOT a senior team that believes in getting its hands dirty. Our experience and history demonstrates that we are never ones to provide a recommendation and then walk away. We believe in our clients’ success and in working with you to find creative and lasting outcomes to your challenges. We bring to WVOT a depth of experience to allow us to hit the ground running with our assessment. We also have a depth of experience to continue in phases beyond the deliverables contemplated in this RFP.



### Focused

Individuals entirely or primarily on West Virginia through project duration. We look forward to working with you onsite as needed, such as the kickoff meeting and briefings.



**Deb Fox**  
Senior Advisor,  
Assessment  
and Governance



**Tim Ryckman**  
Project Executive



**Mark Gallagher**  
Advisor,  
Solution and  
Service Design



**Gerardo Fernandez**  
Data and Financial  
Analysis Support



### Leveraged Experts

Individuals who will remain connected with project activities, and may be fully engaged in key stages: includes specialist expertise such as contracts, finance, etc.



**Geoffrey Master**  
Senior Expert,  
Contracts and Legal



**Chris Leiner**  
Senior Advisor,  
Solution and  
Service Design



**Rory McClure**  
Senior Expert,  
Service Integration



**Lynn McNeal**  
QA and Executive  
Support Office

Integris Applied proposes a staff who have all worked on projects that are directly relevant to West Virginia's situation. All of our personnel are certified in ITIL 4, and others have certifications in various continuous improvement and/or project management framework. All proposed personnel are very experienced, with 20+ years in IT and 10+ years consulting on strategic assessments and change programs.

Assigned Staff	Defense Health Agency	Virginia Information Technologies Agency	Georgia Technology Authority	Texas Department of Information Resources
Tim Ryckman	Yes	Yes	Yes	Yes
Deb Fox	Yes	Yes	No	No
Chris Leiner	No	No	Yes	No
Mark Gallagher	No	Yes	Yes	No
Geoffrey Master	No	Yes	Yes	Yes
Lynn McNeal	No	Yes	Yes	No
Rory McClure	Yes	Yes	Yes	Yes
Gerardo Fernandez	Yes	Yes	No	No

### 3.1.3.1. Tim Ryckman: Principal Consultant / Project Executive

For the WVOT program, we are proposing Tim Ryckman as the overall Project Executive. Tim has led or been significantly involved in our reference clients in state government – all of which have direct relevance to the West Virginia. His prior clients have appreciated Tim enough to keep him engaged through the entire life cycle of their programs. He brings a blend of experience across these efforts that is well-suited to lead this engagement, including operational, finance, procurement, and contractual. In addition to leading the effort for WVOT, he will be focused on the financial assessment activities.



An accomplished leader and advisor with a blend of expertise in IT operations, contracting, and finance, Tim has led numerous projects as a client and advisor in sectors ranging from automotive to investment banking to public sector. He has consulted regarding IT and sourcing strategy, conducted assessments of financial performance (including rate reviews), built long-term program budget forecasts, assessed and re-written service level agreements, and led teams through procurements and negotiations.

“Tim worked for us starting in 2012 and through 2014, initially to help find cost savings, and then to implement a program to improve our services and our customer agency relationships. He then helped design and run our Services Integration Initiative to separate scope from the incumbent infrastructure provider and move us to a multisourcing model. His expertise and commitment was key to the success of our program to this day.”

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

In the last twelve years under Integris Applied, Tim has focused almost exclusively on public sector. Prior to his advisory career, Tim worked at Delphi Corporation as an IT service delivery manager and as global finance lead for data and voice managed network services.

Over the last two years, Tim has shared his time between the Department of Defense’s Defense Health Agency (DHA) for its approach to MSI, and a private sector client which was a US-based retailer going through a divestiture. At DHA, he created the 10-year program financial forecast. In the latter example, he worked with the client to quickly organize and re-negotiate or re-source 80+ contracts within a year. He also worked with them on budgeting and sourcing process improvements.

The most recent example of long-term relationship is at VITA, where in 2015 Tim conducted the assessment and recommendation to disentangle

VITA from its long and monolithic agreement with Northrop Grumman. Over 2016-2018 he led the sourcing program, and many of the individual transactions directly, to acquire a Multisourcing Services Integrator (MSI) and multiple tower service providers. Following the transactions, Tim stayed on to assist the Commercial Contract Management team in defining processes, organizing contract tools and libraries, writing communications, and making key decisions.

Prior to VITA, Tim worked at GTA where in 2012 he initiated a cost and consumption assessment, followed by annual budgeting and chargeback improvements (working collaboratively with agency IT and finance personnel). In 2013 he developed and led a renegotiation program with their incumbents IBM and AT&T to evolve services, reduce costs, and improve their relationship with the state agencies. In the latter part of 2013, Tim first introduced the idea of a distinct service integration function to Georgia CIO Calvin Rhodes. Following extensive analysis and planning, Tim and the Integris Applied Team

“I worked directly with Tim starting in 2016, after Integris completed their assessment and when we were launching our first procurement for cloud-based messaging. We then worked together on all the subsequent procurements, and he stayed on through transition to assist me in building out my new contract management team. Tim’s role in the procurements and beyond was always appreciated. He brought process and supplier engagement approaches to evolve our own, great leadership of our evaluation teams and in speaking on VITA’s behalf in clarification sessions and negotiations, and experienced guidance in decisions and supplier communications. Tim was a joy to work with.”

**AMY PIERCE**

CPPB, VCO  
MANAGER: COMMERCIAL CONTRACTS  
COMMONWEALTH OF VIRGINIA

determined to disentangle cross-functional services from the IBM agreement and establish a new platform for service delivery at GTA.

Tim was also extensively involved in the DIR strategy to replace IBM with an MSI and multiple service component providers in 2010-2012. He and several colleagues developed the concepts that – while novel and even somewhat controversial at the time – have become standard to any multisourced delivery environment today: such as integration sessions, shared service levels, and operating level agreements. During the solicitation process, he led due diligence, clarification sessions, evaluation sessions, and final negotiations.

Full Bio: <https://integrisapplied.com/our-team/tim-ryckman/>

### Representative Engagements

- Department of Defense / Defense Health Agency (2020-Present): Assisting in Enterprise IT Services (EITS) Program with strategy, financial modeling, and communications.
- US Retailer – Divestiture / Private Equity (2021-2022): Rationalized 200+ vendors for firm to operate as a standalone entity. Established or re-negotiated 80+ contracts.
- Commonwealth of Virginia (2015-2020): Key participant in Commonwealth of Virginia comprehensive 10-month assessment of the Virginia Information Technology Agency's (VITA) delivery model, contract structure, financial model and governance structure. Then led initiatives to transform the agency to a multi-supplier integration service operation followed by a series of large procurements and participated in the disentanglement from the previous supplier.
- State of Georgia (2012-2015): Brought in to identify cost savings opportunities and building a consumption management program. Identified issues in with agency customer relationships and define program of services evolution, contract renegotiation, and customer communication and training. Introduced multisourcing service integration and led collaborative renegotiations with incumbent, in parallel with procurements for service integration and new delivery towers.
- Media and Communications Provider (2012): conducted assessment of service management and governance organization for new multisource endeavor and established governance forums. Conducted financial analysis for multisourced \$100M application development project.
- Texas Department of Information Resources (2010-2011): Support MSI procurement effort, including due diligence, solutioning, and contract negotiations.
- Automotive Original Equipment Manufacturer (2010): Conducted assessment of service levels for 20 existing contracts with 900 specific metrics.
- Investment Bank (2008): Advised client regarding scope and strategy for outsourcing \$350M annual spend of network services; gathered and rationalized network and site inventory; facilitated service provider due diligence; led statement of work negotiation sessions.

### Education and Certifications

- Master of Business Administration, University of Michigan: Stephen M. Ross School of Business, Ann Arbor, MI - Emphasis in IT and Finance
- Bachelor of Science – Management Information Systems, Oakland University, Rochester, MI - Departmental Honors in Management Information Systems - Dean's List
- ITIL 4 Foundation

### 3.1.3.2. Deb Fox: Senior Advisor, Assessment and Governance

Deb Fox has both hands-on and management experience in large, complex governance roles as well as strategic planning. She has led Governance strategy and implementation efforts in a number of business environments to help clients develop, implement and execute operating models to achieve the expected value from their vendor relationships



Prior to joining Integris Applied she performed these services at Information Services Group (ISG) for a global Hotel Chain, global Agri business, large Financial Services Institutions in Banking and Insurance, Manufacturing concerns and Life Sciences organizations. Earlier in her career, Deb was responsible for Strategy and Portfolio Planning in the Office of the CIO for a US based regional health insurance company. Deb also served as Vice President of Information Technology for national property and casualty insurance carriers and as the CIO for a regional carrier. Deb began her career in an engineering role in the defense industry.

Full Bio: <https://integrisapplied.com/our-team/deb-fox/>

#### Representative Engagements

- Department of Defense / Defense Health Agency (2022-Present): Supporting governance design and transition management to a multi-supplier environment.
- International Financial Organization (2021): Redesign of the Vendor Management Organization introducing improved processes and training for the organization in support of a transition to a multi-supplier IT ecosystem.
- Virginia Information Technologies Agency (2019-2020): IT Governance operating model design and implementation for a multisourced environment. Established the Governance Framework and supporting processes to support both the transition and ongoing service management and governance.
- US Department of Agriculture (2019-2020): Advised the Office of the CIO concerning operating model change management to improve efficiencies in the IT organization.
- Global Investment bank (2018): Led the transition of services program and established the Governance Framework and supporting processes to support both the transition and ongoing service management in a multi-supplier environment.
- Rental Car Organization (2017): Designed target operating model and organizational change management to support critical legacy system re-platforming effort.
- Multinational Agri Business (2015-2017): Developed Sourcing Strategy, supported infrastructure multi-supplier sourcing transition, application rationalization and target operating model design.

#### Education and Certifications

- Master of Business Administration (MBA), Concentration in Management Information Systems in Business, Drexel University, Philadelphia, PA
- Bachelor of Science (BS) Commerce and Engineering, Drexel University, Philadelphia, PA
- Project Management Professional (PMP) Certification
- Society for Information Management (SIM)
- Kaizen yellow belt
- ITIL trained



### 3.1.3.3. Gerardo Fernandez: Data and Financial Analysis Support

As a senior executive and consultant with 30+ years of combined strategic sourcing, financial management, and program management experience, Gerardo employs a collaborative management style based on expectations and accountability. He has held roles across the spectrum of service relationships – from service provider, to buyer, to sourcing consultant in the private and public sectors. Bilingual in English and Spanish, Gerardo has worked extensively in the US and Latin America.



Gerardo has advised both C-level executives and operational teams in the areas of sourcing strategy, finance, performance management, multisourcing services integration (MSI), governance, and implementation. He has led acquisitions across a variety of service towers: scoping, developing business cases, building requirements, facilitating proposal evaluations, negotiating contracts, and managing implementation. Gerardo is focused on ensuring organizations achieve their goals – whether they are cost savings, improved service delivery quality, improved governance structure, or overall effective service relationships.

Prior to joining Integris Applied in 2018, Gerardo worked for IBM Global Services, a US Fortune 100 company and several major Latin American firms.

Full Bio: <https://integrisapplied.com/our-team/gerardo-fernandez/>

#### Representative Engagements

- Freddie Mac (2020-2022): As IT Risk and Supplier Management Lead, implemented IT Vendor Sourcing and Procurement Processes, including building strong partnerships with Office of CIO, PMO, IT Divisions, IT CFO, Supply Chain, and Business Areas. Tracked financial value and impact of IT contracts. Worked with tower leads to develop RFPs, SOWs, and proposal evaluations.
- Virginia Information Technologies Agency (2016-2020): Advised multisourcing services integration (MSI) program by delineating scope, creating RFPs, conducting evaluations, and supporting implementation.
- Global Chemical Manufacturer / Private Equity (2019): Negotiated and established numerous IT contracts to support spin-off organization. Prepared go-to-market processes for new IT services acquisitions.
- US Fortune 100 Firm (2014-2015): Managed large-scale IT outsourcing transition projects in multi-vendor environments.
- Latin American Multinational Firms (2008-2012): As Project Director, supported clients in Financial, Energy and Mining, Retail, Manufacturing, Food & Beverages sectors.
- IBM Global Services (2000-2008): As Executive Program Manager in Contract Initiation Services, consulted project executives, client executives, and business office managers on definition and implementation of complex IT outsourcing engagements.

#### Education and Certifications

- Master of Business Administration, Instituto Tecnológico Autónomo de México, Mexico City, Marketing & Finance
- Bachelor of Science, Universidad Iberoamericana, Mexico City,
- PMI PMP (Project Management Professional) Certification ( [REDACTED] )
- ISACA CRISC (Risk & Information Systems Control) Certification
- ITIL 4 Foundation Certificate in IT Service Management

### 3.1.3.4. Mark Gallagher: Advisor, Solution and Service Design

Mark is a seasoned senior consultant with over 25 years of IT experience, including several big-budget initiatives such as the fourth largest umbrella health and human services state agency in the nation (with an annual \$3 billion budget supported by \$200 million of IT services) and an infrastructure deployment for the country's fifth largest public level 1 trauma center (resulting in the surrounding community benefiting from more than \$100 million of outreach services). At Integris Applied, he has been a key resource for helping mold the successful shared services strategies with the State of Georgia.



Specialty areas include business process re-engineering and outsourcing, IT infrastructure, networking, cloud services, datacenter assessments, data management, IT lifecycle management, enterprise technology strategy, program and project management, public and private partnerships.

Prior to his advisory role with Integris Applied, Mark has worked as a consultant for a global information technology firm as well as several large providers of telecommunications services, network infrastructure, advanced technologies, audio-visual, data center, and building technology solutions.

Full Bio: <https://integrisapplied.com/our-team/mark-gallagher/>

#### Representative Engagements

- Georgia Technology Authority (2016-2019) Represented client in establishing and evolving a shared IT services platform with multiple providers and integrators supporting multiple public sector agencies. Built master services agreements, flexible contracting, and agency engagement models.
- Georgia Technology Authority (2014-2015) Led contact center re-sourcing strategy for a public sector IT agency, disentangling a large single-sourced arrangement and replacing it with a menu of providers. Project created choice for the customers, and competitiveness amongst the providers.
- IT Service Provider (2013-2014): Integrated project management and engineering management tools at an IT service provider to improve their delivery processes and create new sales opportunities.

#### Education and Certifications

- DeVry Institute of Technology, Electronic Engineering Technology
- Kaizen Facilitator, MSI Certified Kaizen Facilitator
- ITIL 4 Foundation Certificate in IT Service Management

### 3.1.3.5. Geoffrey Master: Senior Expert, Contracts and Legal

Geoffrey brought extensive sourcing and commercial transaction experience to Integris Applied. His background includes contracting (deal structure, documentation, negotiation) and oversight of business agreements for full range of information technology and business process transactions (outsourcing, cloud, systems implementation, software development, licensing and consulting). He has deep knowledge of transactions and documentation / contractual issues and negotiation support.



Prior to joining Integris Applied in 2015, Geoffrey was the Corporate & Securities Partner for Mayer Brown LLP / Mayer Brown JSM. He was also the Senior Legal Manager and International Counsel for

Electronic Data Systems Corporation (EDS), Partner and General Counsel for The Capital Markets Company; Law Firm Associate and Partner for McGinnis, Lochridge & Kilgore and Adjunct Professor – Business Planning for The University of Texas School of Law

Full Bio: <https://integrisapplied.com/our-team/geofrey-master/>

#### Representative Engagements

- Private Sector US Retail Client (2021-2022): Assisted development of contract templates and acquisition processes.
- Georgia Technology Authority and Virginia Information Technologies Agency (2015-2019) provided strategy, contract reviews, and procurement advice.
- International Financial Information and Research Firm (2009): supported client in connection with its Philippine based multi-year knowledge process outsourcing (KPO) for legal, research and business services, providing for establishment of a client-dedicated delivery center with build-operate-transfer rights in order to accelerate client's global expansion through rapid deployment of a Manila based organization.
- Global Metals and Mining Conglomerate (2007-2009): represented client in negotiation of a series of global outsourcing arrangements, including master service agreements with multiple suppliers supporting extensive services scope spanning IT (ITO), finance and accounting (FAO), human resources (HRO), procurement and site operations, as well as global projects involving business consulting, systems implementation and data center migration and consolidation.
- State of Texas (2006-2007): represented State in one of the then largest-to-date state government IT outsourcing (ITO) transactions including data center consolidation, migration and operation for 27 State agencies and commissions.

#### Education and Certifications

- L.M. (in Taxation), New York University
- J. D. (with Honors), The University of Texas (1979), Texas Law Review, Order of the Coif;
- M.P.A., The University of Texas (LBJ School of Public Affairs)
- B.A. (with High Honors), The University of Texas (1975), Phi Beta Kappa
- Admitted to bars of New York, Texas, District of Columbia, and Hong Kong (Law Society)
- ITIL 4 foundation certified
- Kaizen green belt

#### 3.1.3.6. Lynn McNeal: Quality Assurance and Executive Support Office

Lynn McNeal is an IT outsourcing veteran with 35 years of international and domestic experience. He has twenty years of experience working as a service provider and fifteen years of experience consulting to users of outsourcing and transformation services. Lynn advised clients on all aspects of IT sourcing and transformation strategies, organization change and governance.

Prior to joining Integris Applied in 2014, he was the partner responsible for Latin America for Information Services Group (ISG) and served in a wide variety of roles in the US and Europe with Electronic Data Systems (EDS).



Full Bio: <https://integrisapplied.com/our-team/lynn-mcneal/>

### Representative Engagements

- Virginia Information Technologies Agency (2015-2020): Supported the successful multi-year initiative to transform its monolithic infrastructure outsourcing into a Multi Supplier Integration (MSI) model with multiple Best-of-Breed suppliers resulting in \$110 million dollars of savings.
- Georgia Technology Authority (2014): Provided quality assurance and executive support office functions to assist Georgia's MSI and multi-tower procurement strategy.
- Latin American Food Company (2008-2009): Guided renegotiation for \$160 million dollar outsourcing contracts then aided their expansion via acquisition into the North American market.
- Multiple European Private Sector Clients (2007-2011): Led a combined European and Latin American team with representatives from 16 countries to develop consistent requirements simultaneously in English and Spanish for parallel infrastructure outsourcing in Latin America and Europe.
- German Financial Services Firm (2006-2007): Led UK and US procurement of desktop services for a major investment bank.
- Multinational Chemical Company (2004-2006): Led multi-year effort for a Fortune 100 chemical company to renegotiate and reprocur infrastructure and applications services.

### Education and Certifications

- Master of International Management, Thunderbird School of Global Management, Arizona State University
- Bachelor of Arts degree in General Sciences from Oregon State University, Corvallis, OR
- ITIL foundation
- Kaizen yellow belt

### 3.1.3.7. Chris Leiner: Senior Advisor, Solution and Service Design

Chris Leiner is a seasoned IT leader who specializes in strategic transformations, transition and project governance. He has extensive experience in guiding client teams through the definition, contracting and ongoing management of strategic projects and provider relationships. Chris has deep experience in managing and leading client teams in service transition and digital enablement.

Chris has over 40 years experience in advising both Global 100 companies and government agencies in a variety of industries. These include pharmaceuticals, retail, airlines/transportation, media, energy, and financial services. When he joined Integris Applied in 2016, he brought this experience to bear in the public sector, where he led the Georgia Technology Authority's (GTA's) strategic transformation of core data center infrastructure including server, storage, and disaster recovery, and cloud brokerage. Chris' procurement leadership alone has covered more than \$12B in total contract value.



Full Bio: <https://integrisapplied.com/our-team/chris-leiner/>

**Representative Engagements**

- Sigura [f/k/a Innovative Water Systems] (2019-2021): Short term project to transform newly acquired company to meet requirements of their private equity owners. Developed IT strategy, IT policies and critical governance processes.
- Georgia Technology Authority (2017-2019: Led procurement process to source Managed Security Services including a SOC, SIEM and security awareness training. Led the team in creating SOWs, identifying SLAs and creating the entire contract package. Led integration sessions with the new provider and the service integrator. The project resulted in enhanced and standard security services across the state agencies.)
- Georgia Technology Authority (2015-2016): Led procurement process to source Server, Storage, Identity Management, Public Cloud Services and Data Center Support. Led the team in creating SOWs, identifying SLAs and creating the entire contract package. Led integration sessions with the new provider and the service integrator. The project resulted in approximately 30% cost reduction and improved services.
- Global Agrochemical Company (2014-2015): Led all phases of a full infrastructure, end user support and service desk contracting process.
- Global News and Financial Services Company (2013-2014); Led all phases of a full infrastructure, end user support and service desk contracting process. Over 95,000 users, 125,000 servers and associated storage was in-scope.
- Largest Bank in Denmark (2011-2012: Led the negotiations a full infrastructure contract.)
- Major US Airline(2006-2007): Supported creation of SOWs and SLAs for a 5 year \$2B Infrastructure contract.

**Education and Certifications**

- Bachelor of Arts in Finance / Real Estate from Georgia State University
- ITIL 4 foundation certified
- Kaizen yellow belt

**3.1.3.8. Rory McClure: Senior Expert, Service Integration**

A senior IT professional with 25+ years of IT experience and a deep background in managing technical operations and technical consolidation. Rory has a proven capability to deliver complex projects with cross-organizational teams. He has led technical operations in private companies, public companies, and state government. Rory has been the lead in very large outsourcing engagements, both as an advisor and a client. He possesses the ability to evaluate complex situations and articulate the essential elements that compel decisions.



Prior to joining Integris Applied in 2010, Rory worked for the Georgia Technology Authority as the Products and Services Officer. He also held positions at Georgia Department of Human Resources, Office of Information Technology; Swifttel Communications Cyber South Networks; Pentacon, Inc. and IBM.

Full Bio: <https://integrisapplied.com/our-team/rory-mcclure/>

**Representative Engagements**

- Provided advice for the Department of Defense, Defense Health Agency to validate their service delivery strategy and to create requirements and financial structures for acquiring services to support the selected service delivery model. (2020-present)

- Facilitated the change in service delivery from a single provider of IT services to a Multi-supplier Service Integrator (MSI) model for the Commonwealth of Virginia for agreements worth over \$1.2 billion. (2015-2020)
- Facilitated and negotiated a change in service delivery from a single infrastructure provider to an MSI model for the State of Georgia for agreements worth over \$800 million without displacing the incumbent service provider.
- Provided advice and guidance, from inception through commencement of services, for agreements worth over \$1.3 billion in outsourced infrastructure services for the State of Texas. The agreements transitioned services from a single IT outsourcer to multiple best-of-breed tower providers with an overall service integrator, under an integrated multi-supplier model of service delivery.
- Rory provided executive leadership in implementing a service management organization to govern two external service providers in a state outsourcing agreement. The agreements transitioned 14 state agencies, affected over 650 positions, and successfully moved the state infrastructure to more secure and consistent management.

#### Education and Certifications

- BS in Computer Science, University of North Texas, Denton TX
- BA in Theatre, University of North Texas, Denton TX
- ITIL 4 foundation certified
- Kaizen yellow belt

### 3.1.4. Remote and Hybrid Work

As understood in the RFP requirements and the Q&A responses, we will plan to work remotely, but to be onsite as/when required by WVOT. These will include key meetings such as Project Kickoff and Executive Briefings.

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 the technical transition was difficult for many organizations, and fully replacing the in-person experience of human connection is near-impossible, the Integris Applied Team was and is 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 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 *Teams/SharePoint* library.



### 3.2 Phase 1

As indicated in Section 3.1 above (with particular focus in 3.1.1 and 3.1.2), we propose an assessment to cover data, assets, rates, and processes via data requests and interviews. These activities (shown in summary in the chart at the end of Section 3.1.1) will help support the specific deliverables below and a broad assessment of WVOT’s opportunities for the future. We believe this is a value add and differentiator in our proposal. Our capabilities in these areas are included in the proposal for Phase 1, and will be further described in Section 3.4 below.

#### 3.2.1. Preliminary Information Technology (IT) Financial Report

All effective financial analysis is built on a bedrock of understanding the current financial situation. We describe the current and forecasted spending – prior to the change initiative – in the form of a Base Case. Integris Applied will begin the first Deliverable of the WVOT assessment by building a comprehensive financial Base Case. Starting immediately and working with financial staff of the WVOT, we will begin and initial data collection of all costs (direct, indirect, and hidden IT costs) and contracts. This will be the foundation for producing each of the four deliverables in Phase 1. The Base Case will continue to evolve during the life of the entire West Virginia IT modernization effort. We have direct, hands-on experience creating similar financial models in other government clients, and then either directly managing or guiding our clients through maintaining those models for budgeting and forecasting in future years. The Georgia Technology Authority, for example, can track its program growth, unit cost changes, and overall program savings going back 15 years due to our involvement from the beginning of their program.

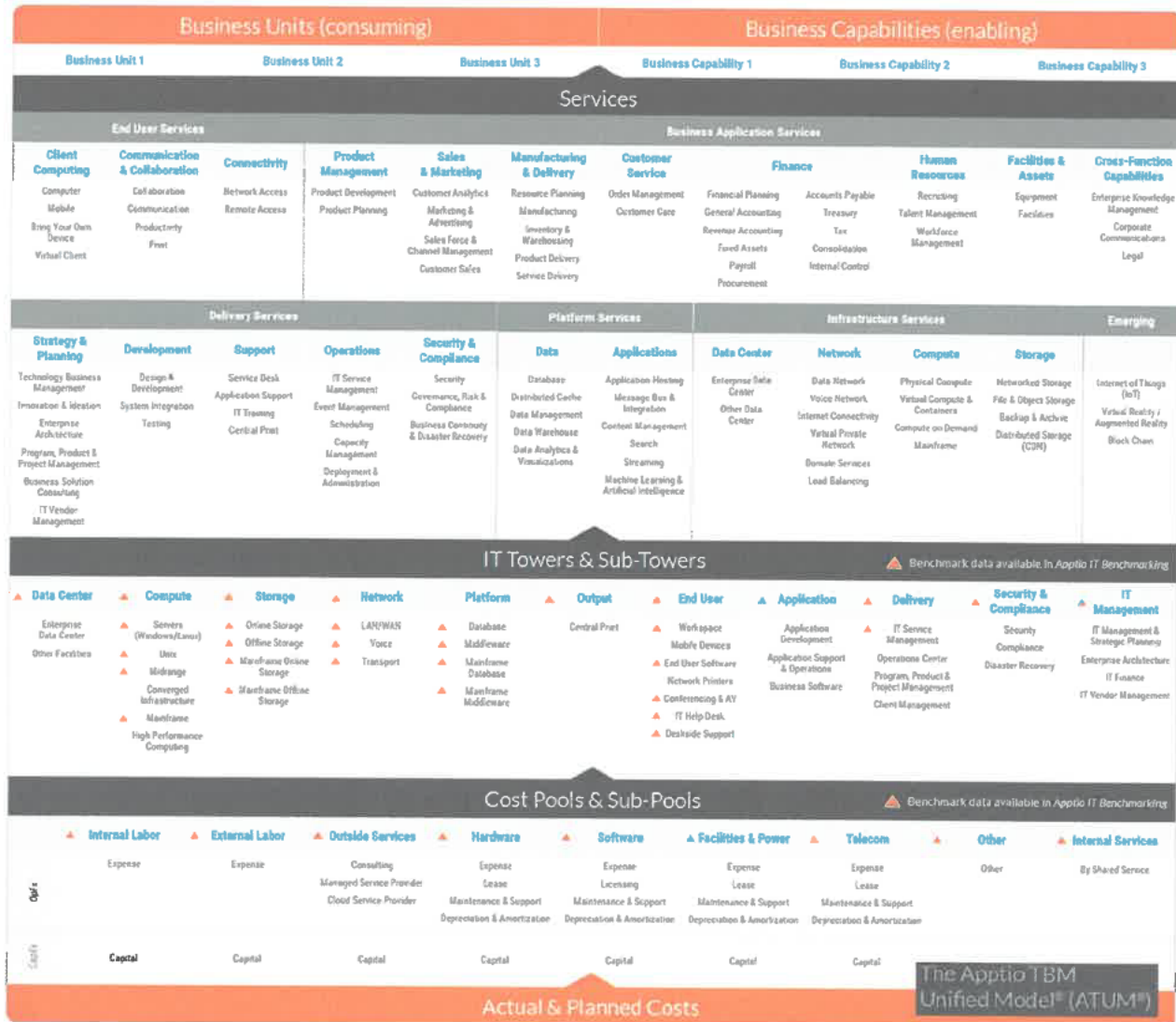
Telling the Story about Data Sources



The initial Base Case will then form the basis for the Preliminary IT Financial Report with specific attention to the estimated technology spend (holistic & by department), technology debt, and the inventory of technology investments for FY23 & FY24 budgets. Understanding technology debt will also require inventory data (which we recognize is typically relatively inaccurate in most clients), standard refresh cycles, and contract terms.

#### 3.2.2. Service Rates Catalog

While we always recommend that central shared services IT organizations use a chargeback methodology for cost recovery, they are seldom without challenges or complaints. TBM (Technology Business Management) is becoming an industry-accepted framework for organizations to categorize IT costs. Although the principles behind this framework go back decades, TBM standardizes a financial lexicon for use across projects, companies, and sectors. Increasingly our clients are asking about the *why* and *how* of TBM. TBM can be used to help forecast and maintain a budget, clarify and organize chargeback, and build and continually communicate a case for change.



The central IT organization hears the proverbial customer complaint: “you want to charge me how much for a PC per month?... I can go to Best Buy and get my own laptops for a small fraction of that cost”. This complaint is a false allegation that highlights the complexity of measuring and allocating the true cost of IT. The ultimate cost (or price to the customer) of the IT service is much more than just the purchased hardware. We may assume that the customer just does not understand the value of the bundled service, but in some cases the customer is correct – we may be charging them for components of services that they do not really need or want. Further, we may not be driving the right transformation or modernization, or funding refresh and evolution, because of the way pricing drives incentives.



## Common Rate Catalog / Chargeback Problems

<b>Value of the bundle unclear</b>	<ul style="list-style-type: none"> <li>• Not communicated well or includes undesired services</li> <li>• Combined apples and oranges</li> <li>• Just plain too expensive</li> </ul>
<b>Misaligned incentives</b>	<ul style="list-style-type: none"> <li>• E.g., spurring consolidation, transformation, use of DR service</li> <li>• Economics of consumer not aligned with seller</li> </ul>
<b>Cross-subsidization</b>	<ul style="list-style-type: none"> <li>• One agency covering some central overhead cost for another</li> <li>• Causes federal funding issues</li> <li>• May work until someone flexes</li> </ul>
<b>Administratively complex</b>	<ul style="list-style-type: none"> <li>• Bundling, tracking, costing, billing may be too burdensome (complex to operate)</li> <li>• Reduced transparency can generate agency frustration and stifle cost reduction efforts (complex to use)</li> </ul>
<b>Overrecovery / underrecovery</b>	<ul style="list-style-type: none"> <li>• Central agency recovering too much or too little</li> <li>• May run into local statutory constraints, decisions about rate resetting, federal funding issues</li> </ul>
<b>Not investing in refresh and innovation</b>	<ul style="list-style-type: none"> <li>• States make erratic investments in IT if not moved to opex model</li> <li>• Monthly rates should include refresh of assets and investment in future innovation or transformational needs</li> </ul>
<b>Tension of enterprise standards vs agency choice</b>	<ul style="list-style-type: none"> <li>• Limited, bundled options may support enterprise needs of standardization and security, but frustrate agencies</li> </ul>
<b>Not funding the shared services agency itself</b>	<ul style="list-style-type: none"> <li>• Lacking additional cost recovery from customer agencies, suppliers, or other sources to fund shared services agency mandate or growth</li> </ul>

Each state has its own goals and constraints that guide the design and optimization of shared pricing and chargeback. Problems in rate setting or chargeback are a common source of complaints and disputes with agency customers – and worse – can result in federal funding audits and penalties. WVOT has specific goals to accomplish via its delivery model, and the charges and costs must be aligned to achieve those goals within any operating constraints. Central IT organizations can ensure accurate cost recovery, provide funding for initiatives, and improve customer relationships through an aligned cost allocation and chargeback model. Our approach to chargeback structure development begins first by seeking to understand these goals and constraints for WVOT and its key stakeholders. We then align these goals back through the contract pricing strategy.

Integrus Applied evaluates the current contract pricing for characteristics that do not align to good industry practices. Pricing units in contracts must effectively triangulate on three goals:

1. align business consumption drivers,
2. correlate with underlying fixed and variable cost, and
3. appropriately drive incentives to deliver service to price.

Specific areas of review and rationalization include: pricing terms, minimum volume commitments, cost of additional or reduced volumes. We also look for financial disincentives for the supplier to provide new services or control volumes as well as factors that may impact the supplier’s willingness to support a transition-out, such as exit fees.

For WVOT in particular, we have already downloaded and begun reviewing the online Service Catalog. However, it will be important to study the goals, concerns, and cost drivers within your specific environment to assess and recommend changes. Sample catalog and chargeback materials from other clients are shown below.

### Allocating Cost to Agencies

- The cost of the program is ultimately funded through agency budgets, and so the model must project cost by agency
- Using proportions of current spend by agency by tower, we can estimate future proportions
- The diagram at the right shows some of the components and how they can be estimated for the future



## Chargeback Methodology Building the Algebra Problem

**Chargeback Methodology**

Supplier Charges

Allocation Method

Inter Tower Allocations

Intra Tower Allocations

Overhead Allocations

Cost Unitization

Supplier	Allocation Method	Inter Tower Allocations	Intra Tower Allocations	Overhead Allocations	Cost Unitization
Microsoft - SQL Server License	Direct	N/A	N/A	N/A	N/A
IBM - Business Cloud Manager	Direct	N/A	N/A	N/A	N/A
Microsoft - Office 365	Direct	N/A	N/A	N/A	N/A
Oracle - Database	Direct	N/A	N/A	N/A	N/A
VMware - vSphere	Direct	N/A	N/A	N/A	N/A
IBM - Mainframe	Direct	N/A	N/A	N/A	N/A
Oracle - ERP	Direct	N/A	N/A	N/A	N/A
VMware - ESX	Direct	N/A	N/A	N/A	N/A
IBM - z/OS	Direct	N/A	N/A	N/A	N/A
Oracle - Fusion	Direct	N/A	N/A	N/A	N/A
VMware - NSX	Direct	N/A	N/A	N/A	N/A
IBM - Watson	Direct	N/A	N/A	N/A	N/A
Oracle - Analytics	Direct	N/A	N/A	N/A	N/A
VMware - Horizon	Direct	N/A	N/A	N/A	N/A
IBM - Cognos	Direct	N/A	N/A	N/A	N/A
Oracle - BI	Direct	N/A	N/A	N/A	N/A
VMware - vSAN	Direct	N/A	N/A	N/A	N/A
IBM - SPSS	Direct	N/A	N/A	N/A	N/A
Oracle - CRM	Direct	N/A	N/A	N/A	N/A
VMware - SDDC	Direct	N/A	N/A	N/A	N/A
IBM - QMC	Direct	N/A	N/A	N/A	N/A
Oracle - SCM	Direct	N/A	N/A	N/A	N/A
VMware - vCloud	Direct	N/A	N/A	N/A	N/A
IBM - Tivoli	Direct	N/A	N/A	N/A	N/A
Oracle - HR	Direct	N/A	N/A	N/A	N/A
VMware - vCenter	Direct	N/A	N/A	N/A	N/A
IBM - Business Analytics	Direct	N/A	N/A	N/A	N/A
Oracle - Marketing	Direct	N/A	N/A	N/A	N/A
VMware - vMotion	Direct	N/A	N/A	N/A	N/A
IBM - Business Process	Direct	N/A	N/A	N/A	N/A
Oracle - Procurement	Direct	N/A	N/A	N/A	N/A
VMware - vTools	Direct	N/A	N/A	N/A	N/A
IBM - Business Intelligence	Direct	N/A	N/A	N/A	N/A
Oracle - Talent	Direct	N/A	N/A	N/A	N/A
VMware - vSphere	Direct	N/A	N/A	N/A	N/A
IBM - Business Optimization	Direct	N/A	N/A	N/A	N/A
Oracle - Risk	Direct	N/A	N/A	N/A	N/A
VMware - vCloud	Direct	N/A	N/A	N/A	N/A
IBM - Business Analytics	Direct	N/A	N/A	N/A	N/A
Oracle - Compliance	Direct	N/A	N/A	N/A	N/A
VMware - vCenter	Direct	N/A	N/A	N/A	N/A
IBM - Business Analytics	Direct	N/A	N/A	N/A	N/A
Oracle - Risk	Direct	N/A	N/A	N/A	N/A
VMware - vSphere	Direct	N/A	N/A	N/A	N/A
IBM - Business Analytics	Direct	N/A	N/A	N/A	N/A
Oracle - Risk	Direct	N/A	N/A	N/A	N/A
VMware - vCenter	Direct	N/A	N/A	N/A	N/A
IBM - Business Analytics	Direct	N/A	N/A	N/A	N/A
Oracle - Risk	Direct	N/A	N/A	N/A	N/A
VMware - vSphere	Direct	N/A	N/A	N/A	N/A

### 3.2.3. Information Technology & Investment Portfolio System (I-TIPS) Analysis

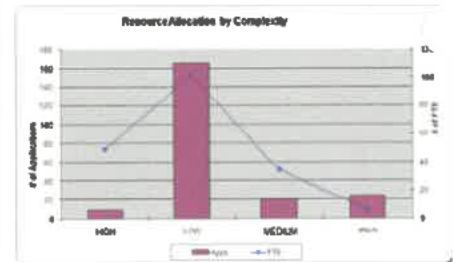
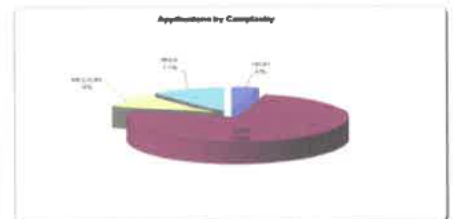
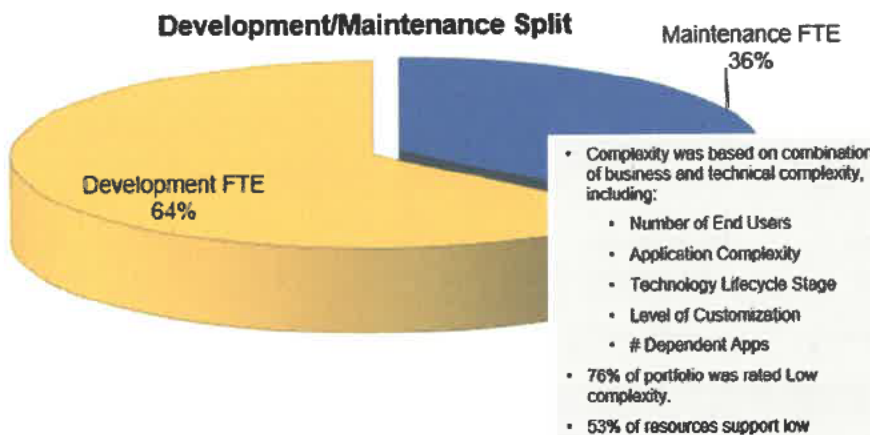
Leveraging the work completed to expand the Base Case to respond to the previous deliverable, Integris Applied will next complete the validation, inventory, risk, and financial analysis of the top 100 business applications through the State's I-TIPS. This analysis will include contractual and service breakdowns, applications by category, key technical information, and business criticality. Since the RFP does not specifically define what "top 100" means (i.e., cost, business impact, user count, etc.) we will initially work with WVOT to understand its own definitions or propose an approach. The result of this assessment will be a better profile of the full application portfolio.

*The following paragraph is speculative based on our experience, and so we offer an apology if in fact the application data is pristine.*

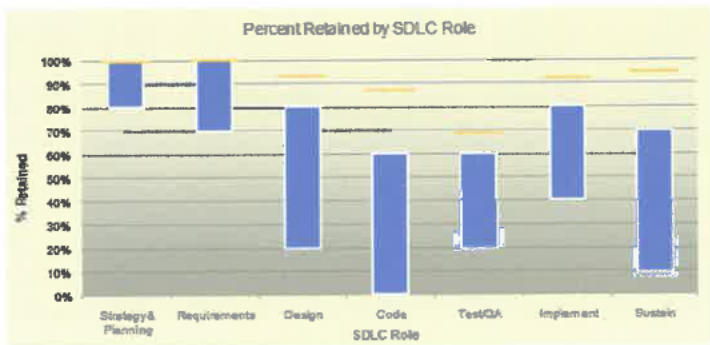
The fact that the State has an investment portfolio system is a great indication that you have data relatively organized, but in our experience, we recognize that the system may be incompletely or incorrectly populated in some cases. Typically, a full review will require external validation such as contract information and application owner interviews. Frequently individuals or agencies have varying views of risk (impact and criticality). It's possible that the infrastructure supporting individual applications is not correctly sized or configured in alignment with the risk. Some applications may be redundant between agencies.

We see this assessment as essentially an inventory to confidently document the application portfolio. This assessment will then support the Phase 2 deliverable which will more fully assess TCO and develop plans for modernization.

Examples of application portfolio reviews from previous clients are shown below.



- Across all SDLC roles, XXX has taken a conservative approach to sourcing compared to the industry
- Significant opportunity exists in Design, Code, Test/QA, Implement and Sustain

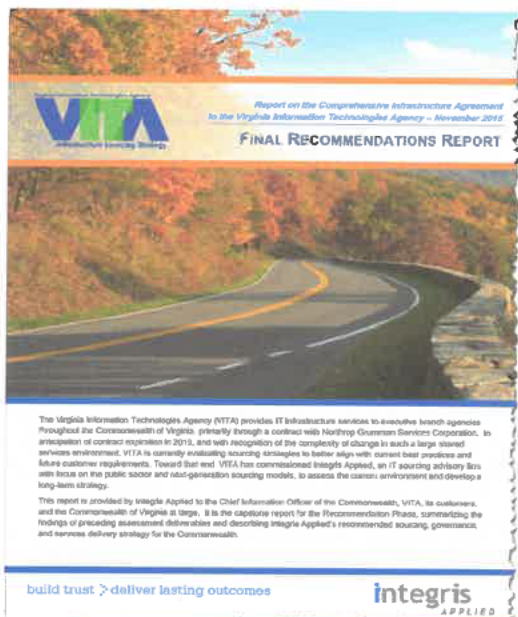


### 3.2.4. Five-year Strategic Technology Roadmap

The new language in West Virginia §5A-6 regarding the Office of Technology and §5A-6B regarding the Cyber Security Program provide only a high-level set of expectations, but not *how* or *when precisely* to implement specific actions. The Five-year Strategic Technology Roadmap will create a high-level plan for WVOT to fully establish its digital government capability, become a good steward of funding, empower government through technology and shared services, and securely protect data and information systems.

Our approach to the assessment – beyond simply a cost and applications portfolio review – will more fully document the needs and goals of West Virginia. As part of this deliverable, we will also produce a SWOT Analysis (Strengths, Weaknesses, Opportunities, and Threats). We will have an understanding of costs and contract options, technical debt, process improvements, and governance model changes. Our hands-on experience from other states will inform executable strategies.

While we have assisted multiple clients with strategic roadmaps, perhaps the best comparable example is your neighboring state of Virginia. Below are examples of our assessment and recommendation materials, which became part of their strategic roadmap.

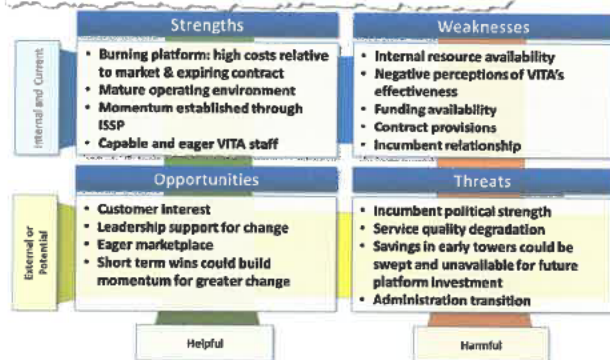


The Virginia Information Technologies Agency (VITA) provides IT infrastructure services to executive branch agencies throughout the Commonwealth of Virginia, primarily through a contract with leading Common Services Corporation. In anticipation of contract expiration in 2013, and with recognition of the complexity of change in such a large shared services environment, VITA is currently evaluating sourcing strategies to better align with current best practices and future customer requirements. Toward that end, VITA has commissioned Integris Applied, an IT sourcing advisory firm with focus on the public sector and state-governance sourcing models, to assess the current environment and develop a long-term strategy.

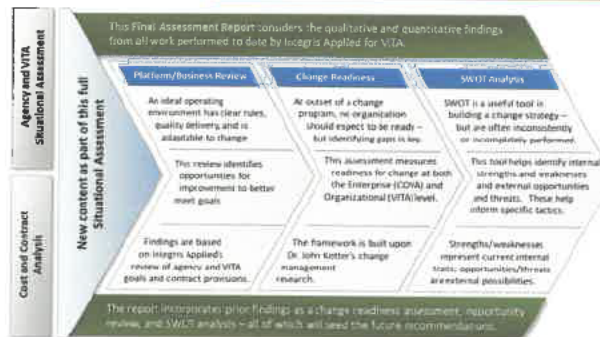
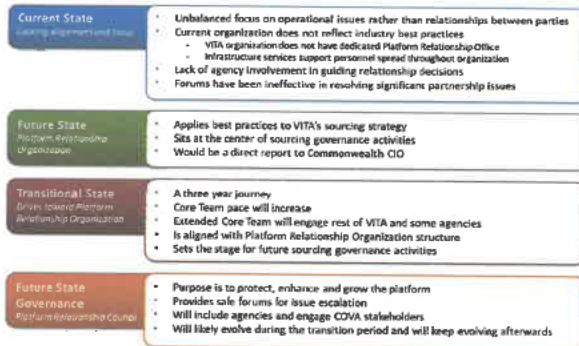
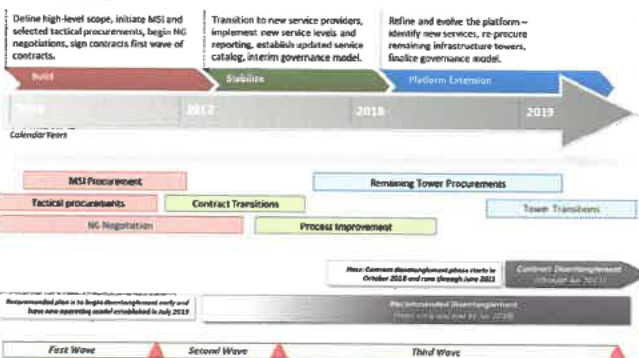
This report is provided by Integris Applied to the Chief Information Officer of the Commonwealth, VITA, its customers, and the Commonwealth of Virginia at large. It is the capstone report for the Recommendation Phase, summarizing the findings of preceding assessment deliverables and describing Integris Applied's recommended sourcing, governance, and services delivery strategy for the Commonwealth.

build trust > deliver lasting outcomes

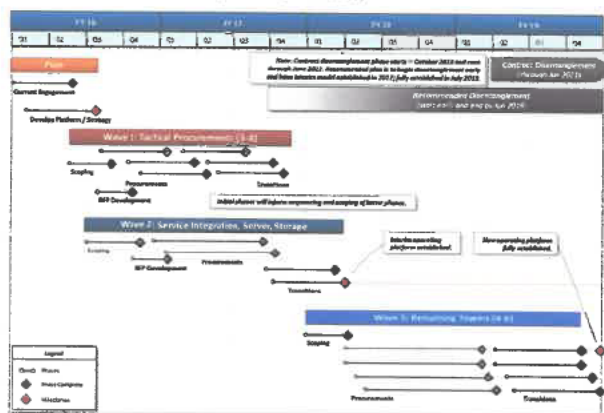
**integris**  
APPLIED



**Timeline**



**4-Year Plan v2 (start now; two waves)**



### 3.2.5. Annual Information Technology (IT) Report

Finally, Integrus Applied will complete the Annual IT Report providing an executive-level insight into IT governance and strategic planning efforts. As required, the report will include both financial and metrics-based data providing accurate information to make facts-based decisions about the allocation of limited state resources to support technology. The Report will contain information relating to IT Vision & Strategy, Cybersecurity, IT Investment Management, WVOT Enterprise Services Review, IT Excellence in WV, and any applicable appendix and/or reports.

Other state clients, such as Georgia Technology Authority, have had similar requirements to produce Annual IT Reports as outward communication to stakeholders (agencies, oversight board, legislature, governor's office, etc.), and we experience assisting with their development.

We recognize this deliverable as unique versus the other Phase 1 deliverables in several respects. First, given that it has a specific calendar timeline, it must be completed on schedule regardless of the start timing of this assessment contract, and therefore the status of the other deliverables. While under the current proposed timeline we fully expect and commit to completing all prior deliverables before August 2023, if WVOT's start date or schedule changes, we can still support an August Annual IT Report. Also, because this report is public facing and may reflect other aspects of WVOT's activities, we anticipate working even more collaboratively with WVOT leadership on its development than the other deliverables.

## 3.3 Phase 2

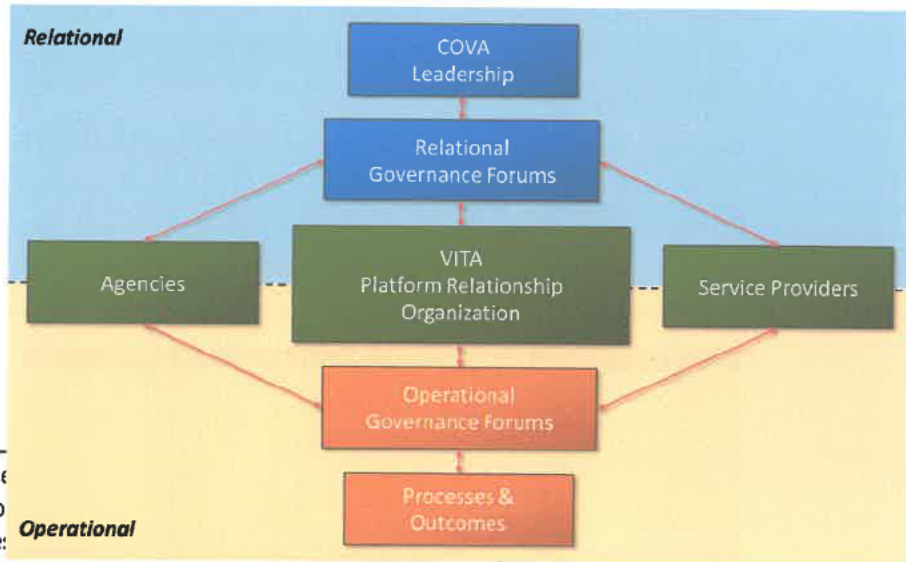
While the RFP marks Phase 1 as potentially 12 months and Phase 2 as starting after Phase 1 (implying that Phase 2 would start sometime in late fall 2023), we anticipate that Phase 1 will complete earlier (i.e., on or around August 2023). In our proposed timeline, we assume a September 2023 start for Phase 2, but we can move it up or back depending on the WVOT's situation at that time. We also believe that the actions in Phase 2 will include the activities contemplated in the deliverables described below and will be significantly informed by the strategic roadmap determined via the Phase 1 assessment. We look forward to working collaboratively with WVOT leadership on calibrating the Phase 2 activities more precisely to executing the plan.

### 3.3.1. IT Governance Implementation

We bring significant experience in governance assessment, recommendations, and implementation. Because "IT Governance" can mean slightly different things to different individuals, it may help for us to articulate a definition here for clarity. Governance seeks to ensure customer objectives are continually met through efficient and effective service IT services. Through clarified decision making, it effectively balances supply and demand, and the potentially competing needs of various parties in the delivery relationship (e.g., enterprise and agencies, suppliers and customers, costs and services). Ultimately governance happens through forums (meetings), organizational structure, processes, and shared data.

Following our plan in Phase 1 to conduct an assessment with stakeholder interviews, a study of organizational structure, and a process maturity assessment, we will be well-positioned to make recommendations for improvement. During Phase 2 we expect to be *implementing* new forums – not just recommending new policies and procedures.

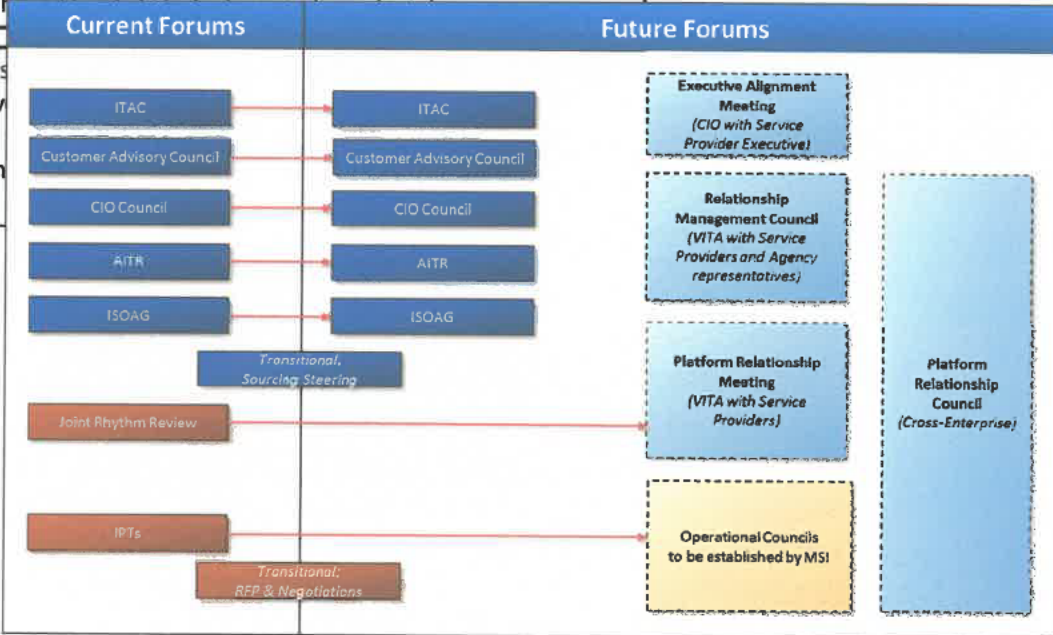
We have helped with organizational design, process improvements, policy and procedure manuals, advising critical decisions, and facilitating meetings at all our public sector reference clients. At VITA for example, we designed a new model of Relational and Operational Governance as shown in the images below. As part of Phase 2, we will assist WVOT with the definition and implementation of these improvements.



<b>VITA</b>	<ul style="list-style-type: none"> <li>• Sits at the center of proposed</li> <li>• Retains decision rights for o</li> <li>• Accountable to the agencies</li> <li>• Manages outcomes through its Platform Relationship Office (PRO)</li> <li>• Appoints agency participants on governance forums</li> </ul>
-------------	--

<b>Agencies</b>	<ul style="list-style-type: none"> <li>• Will have representation at all levels of governance</li> <li>• At least one agency represented on all Operational Councils</li> <li>• Three agency representatives on Relationship Management Council (RMC)</li> <li>• Participation s</li> </ul>
-----------------	---

<b>Enterprise</b>	<ul style="list-style-type: none"> <li>• Existing forums</li> <li>• Engages in gov Council (PRC)</li> <li>• Approves agen</li> </ul>
-------------------	--



### 3.3.2. Information Technology & Investment Portfolio System (I-TIPS)

We understand this Phase 2 I-TIPS assessment as a deeper TCO analysis of the full application portfolio, with costs more understood and aligned under a TBM framework. We anticipate that by this time in the schedule, and with the existing data gathered in Phase 1, we will provide recommendations beyond TCO for rationalization of the application portfolio.

While we do not yet know the recommendations until we study the data, below is one example of detailed cost analysis performed at another client.

## Agency Impact Analysis

Stub + Year 1								Year 1							
Agency	Server	%	Mainframe	%	Print	%	Other	%	Total	%	Agency	Server	%	Mainframe	%
	-\$19	-30%	\$0	0%	\$0	0%	\$0	0%	-\$19	-30%		-\$16	-30%	\$0	0%
	\$362	30%	-\$103	-27%	\$56	56%	\$133	66%	\$447	30%		\$300	30%	-\$87	0%
	\$1,422	33%	\$4,388	33%	\$0	0%	\$104	63%	\$6,114	23%		\$1,631	15%	\$3,778	0%
	-\$153	-47%	\$0	0%	\$0	0%	\$16	47%	-\$136	-38%		-\$133	-45%	\$0	0%
	-\$1,217	-72%	-\$24	-7%	-\$76	-83%	\$15	52%	-\$1,403	-83%		-\$1,139	-92%	-\$18	0%
	\$126	6%	\$0	0%	\$0	0%	\$42	80%	\$167	6%		\$124	7%	\$0	0%
	-\$101	-16%	\$0	0%	\$0	0%	\$16	43%	-\$85	-13%		-\$91	-17%	\$0	0%
	-\$1,974	-20%	\$0	0%	\$0	0%	\$162	72%	-\$1,812	-18%		-\$1,714	-20%	\$0	0%
	\$82	87%	\$0	0%	-\$6	-18%	\$44	50%	\$120	57%		\$69	85%	\$0	0%
	\$354	7%	\$4,112	32%	\$35	17%	\$21	59%	\$4,524	25%		\$297	7%	\$3,535	0%
	\$354	9%	\$0	0%	\$5	2%	\$80	38%	\$440	10%		\$294	9%	\$0	0%
	-\$130	-23%	\$0	0%	\$0	0%	\$19	78%	-\$111	-20%		-\$113	-22%	\$0	0%
	-\$1,080	-13%	\$19	0%	-\$3	-24%	\$103	77%	-\$960	-11%		-\$945	-12%	\$14	0%
	\$20	7%	\$0	0%	\$16	0%	-\$3	80%	\$34	20%		\$15	6%	\$0	0%
	-\$184	-14%	\$0	0%	-\$11	-8%	\$137	95%	-\$58	-4%		-\$165	-15%	\$0	0%
	-\$550	-12%	\$0	0%	\$0	0%	\$125	56%	-\$430	-9%		-\$488	-13%	\$0	0%
	\$254	41%	\$0	0%	\$0	0%	\$28	80%	\$281	43%		\$200	41%	\$0	0%
	-\$3	-11%	\$0	0%	\$0	0%	\$5	96%	\$2	7%		-\$3	-11%	\$0	0%
	\$64	1%	-\$2,596	-23%	-\$233	-3%	\$105	42%	-\$2,660	-12%		\$41	1%	-\$2,215	0%
	\$594	26%	\$0	0%	\$0	0%	\$117	81%	\$713	29%		\$505	26%	\$0	0%
	-\$799	-13%	\$280	13%	\$62	0%	-\$1	80%	-\$458	-11%		-\$584	-13%	\$241	0%
	-\$3,013	-23%	-\$2,161	-93%	\$0	0%	-\$2	80%	-\$5,176	-19%		-\$2,618	-23%	-\$1,830	0%
	-\$23	-1%	\$45	16%	\$0	0%	\$69	72%	\$91	4%		-\$26	-2%	\$41	0%

Agency	Server	%	Mainframe	%	Print	%	Other	%	Total	%
	\$231	6%	\$0	0%	-\$5	0%	\$33	81%	\$260	7%
	-\$1,587	-31%	\$0	0%	\$0	0%	-\$34	80%	-\$1,621	-30%
	\$170	5%	\$0	0%	\$0	0%	\$13	12%	\$182	5%
	-\$4,340	-47%	\$0	0%	\$33	0%	\$61	81%	-\$4,267	-43%
	-\$4,503	-23%	-\$182	0%	-\$1,179	0%	-\$14	80%	-\$5,877	-23%
	\$222	30%	\$0	0%	\$0	43%	\$0	0%	\$222	30%
	-\$9,806		-\$182		-\$1,173		\$59		-\$11,100	
	\$43	3%	\$0	0%	\$0	0%	\$0	0%	\$43	3%
	-\$1,151	-73%	\$0	0%	\$0	0%	\$0	0%	-\$1,151	-72%
	\$26	30%	\$0	0%	\$0	0%	\$0	0%	\$26	30%

Agency	Server	%	Mainframe	%
	\$188	6%	\$0	0%
	-\$1,371	-51%	\$0	0%
	\$175	5%	\$0	0%
	-\$3,763	-47%	\$0	0%
	-\$3,937	-23%	-\$204	0%
	\$191	30%	\$0	0%
	-\$8,558		-\$204	
	\$33	8%	\$0	0%
	-\$995	-72%	\$0	0%
	\$22	30%	\$0	0%

### 3.3.3. State Technology Strategic Plan

As stated in the RFP requirements for this deliverable, Integris Applied will provide a State Technology Strategic Plan aligned with department-level strategic roadmaps identifying business outcomes and intended benefits. We understand this plan as a more detailed, updated (due to additional work in Phase 2), and agency-specific roadmap for modernization in the coming years. We anticipate that by this point, WVOT's successes and stated plans will be creating greater credibility and influence across West Virginia state leadership and agencies, meaning that we can begin identifying and implementing recommendations.

As an example of work product similar to what we may produce for WVOT, here are illustrations from other state clients. At Georgia Technology Authority (GTA), for example, we assisted with individual agency project planning and budgeting for several years. GTA had responsibility for providing infrastructure but needed to work jointly with the agencies to develop the budget (specifically because GTA knew its own transformation plans and service rate





For each specific project, we align individuals to client-specific roles. Generally, we tend to categorize individuals as follows:

- **Project Director / Executive:** capable of leading a project team, and who would interface with client executives, set strategic direction, and ensure that the team ultimately delivers appropriately to the client.
- **Senior Advisor / Consultant:** a senior expert with 10 or more years of work experience and capable of leading workstreams within a project.
- **Advisor / Consultant:** experienced person with domain knowledge, but usually works under the guidance of a Senior Advisor or Director.
- **Senior Subject Matter Expert:** varies by function, but each is an individual with significant domain knowledge and considered a leader in their field (e.g., service integration, contracts/legal, cyber security).
- **Analyst / Support:** a junior individual who supports the team members; highly skilled at software tools and/or data analysis, allowing senior personnel to focus on client interface and strategic direction.

In the sections below, we indicate which individuals on this proposal fall into these categories.

#### 3.4.1. Principal/Executive Consultant (50 Hours)

The Principal / Executive Consultant proposed on this project is Tim Ryckman. Additionally, Deb Fox is capable of serving in this capacity based on her experience across other clients, but for this project she is defined as a Senior Consultant.

#### 3.4.2. Senior Consultant(s) (200 Hours)

Senior Consultants proposed on this project are Deb Fox, Chris Leiner, Rory McClure, and Geoffrey Master.

Rory McClure and Geoffrey Master are considered Senior Subject Matter Experts in their fields and will be supporting the team as their domain expertise may be needed.

#### 3.4.3. Consultant(s) (200 hours)

Consultants proposed for this project are Mark Gallagher and Lynn McNeal.

Lynn McNeal has served in various leadership capacities over his career and brings a wealth of experience to his role in strategic quality assurance and internal support of the WVOT engagement.

#### 3.4.4. Financial Subject Matter Expert(s)

Tim Ryckman is also the Financial Subject Matter Expert proposed on this project. Gerardo Fernandez will also support Tim in analysis activities. We may bring in an additional financial expert to be named later at no additional charge.

## 4. Qualifications and Experience



#### 4.1 Virginia Information Technologies Agency (VITA)

Conducted assessment of existing contracts/service model, built strategy and implemented the transition to replace the single long-term incumbent supplier with best-of-breed MSI delivery model and multiple tower suppliers.

Client Engagement: 2015 to 2020

Annual contract value: \$195.9 Million

End Users: 250,000

Integrus Scope: strategy setting, service design, procurement support, transition, governance improvements and disentanglement, organizational change management, communication, training, program financial TCO/savings assessment, chargeback redesign

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:

- Business case for transition and disentanglement from the incumbent;
- Assessment of current contract terms and conditions;
- Assessment of individual agency needs in a future state model;
- Recommendation for the service design and service integration model;
- Recommendation for moving to more managed services for networks;
- Recommendation for organizational and governance frameworks.

"Integrus Applied designed our strategy in 2015 to move to a new multisourcing service delivery model, and identified significant program cost savings despite the impact of a complex disentanglement from our incumbent.

They guided us through several waves of procurements, and supported our team through evolution of our organizational structure and governance models.

Integrus Applied's leadership and execution helped us implement this new method of service delivery that's yielding benefits already."

**NELSON MOE**  
CHIEF INFORMATION OFFICER  
COMMONWEALTH OF VIRGINIA

The analyses demonstrated that current pricing was above market rates and should be recompeted, and that the current IT services contract was preventing the Commonwealth from modernizing its services and needed to be disentangled.

Over the course of the assessment, VITA established a web site to describe the full journey (and listing all reports), which is available via the Internet Archive here:

<https://web.archive.org/web/20201016184716/https://www.vita.virginia.gov/supply-chain/infrastructure-contracts/archive-reports--project-materials/>

Overview

	<p>HQ Address: 7325 Beaufont Springs Dr, Richmond, VA 23225</p> <p>Responsible contact person: Amy Pierce: Director, Supplier Strategy &amp; Performance</p> <p>Telephone: 804-687-9610</p> <p>NASCIO Report Submission: Pioneering a New Method of State IT Services Delivery  <a href="https://www.nascio.org/wp-content/uploads/2020/09/NASCIO_MSI_Entry_2020_FINAL.pdf">https://www.nascio.org/wp-content/uploads/2020/09/NASCIO_MSI_Entry_2020_FINAL.pdf</a></p>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>Design</b></p>	<p>In 2016, Integris 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, Integris 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>



## 4.2 Georgia Technology Authority (GTA)

Georgia Technology Authority

Developed and implemented second-generation MSI sourcing strategy to improve service delivery, evolve service offerings, and ensure continual competitiveness.

Client Engagement: 2012 to 2020

Annual contract value: \$197.7 Million

Number of End Users: 40,000+ e-mail; 100,000+ voice

Integr Scope: strategy setting, service design, procurement support, organizational change management, communication, training, program financial TCO/savings assessment, budgeting, chargeback redesign, governance design, relationship health checks

“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. Integris 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

The Georgia Enterprise Technology Services (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.

HQ Address: 47 Trinity Ave SW, Atlanta, GA 30334

Responsible contact person: Joe Webb, Deputy Executive Director

Telephone: 678-451-6707

Case Study: <https://integrisapplied.com/case-study-georgia-technology-authority/>

Video: <https://www.youtube.com/watch?v=M8qoYAatesQ>

Overview



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:

- Improve service delivery for the enterprise and the agencies;
- Innovate and evolve the service offerings;
- Ensure cost competitiveness and transparency.

The engagement with Integrus reshaped GTA’s outsourced service delivery model and provided for the governance of services that focused on agency engagement and future needs. Recommendations that were realized in the procurement phase included the following:

- Procurement of a Multi-sourcing Services Integrator in March 2015 and disentanglement of the incumbent services from the MSI services;
- 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;
- Re-procurement of the End User Computing Services for over 40,000 State of Georgia users;
- Re-procurement of Server Services to include additional Service Components of Cloud (Hosted) Services, Cloud Brokerage Services, and Storage as a Service;
- Re-procurement of Mainframe Services to a hosted mainframe service;
- Implementation of Managed Security Services;
- Procurement of Contact Center Services providing hosted and virtual contact center options to agencies.
- Integrus Applied-led procurements have met or exceeded all savings targets.

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:

<https://gta.georgia.gov/press-releases/2019-01-29/gta-receive-award-innovative-approach-sourcing-it-services>

Design

<p><b>Overview</b></p>	<div data-bbox="243 241 519 352" data-label="Image"> </div> <div data-bbox="544 273 1396 315" data-label="Section-Header"> <p><b>4.3 Department of Defense, Defense Health Agency (DHA)</b></p> </div> <div data-bbox="251 331 1364 403" data-label="Text"> <p>MSI strategy, requirements scoping, procurement support, business case development, governance design, and transition management.</p> </div> <div data-bbox="251 462 730 499" data-label="Text"> <p>Client Engagement: March 2020 to present</p> </div> <div data-bbox="251 520 600 556" data-label="Text"> <p>Annual contract value: \$500M+</p> </div> <div data-bbox="251 558 592 592" data-label="Text"> <p>Number of End Users: 188,000</p> </div> <div data-bbox="251 598 1437 672" data-label="Text"> <p>Integrus Scope: strategy setting, service design, procurement support, organizational change management, communication, training, program financial TCO/savings assessment, budgeting, cost recovery</p> </div> <div data-bbox="251 745 1477 940" data-label="Text"> <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 Department of Defense 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 global IT operations.</p> </div> <div data-bbox="251 1018 876 1054" data-label="Text"> <p>HQ Address: 7700 Arlington Blvd, Falls Church, VA 22042</p> </div> <div data-bbox="251 1071 1039 1108" data-label="Text"> <p>Responsible contact person: Al Rodriguez: Program Manager, EITS PMO</p> </div> <div data-bbox="251 1123 535 1159" data-label="Text"> <p>Telephone: 703-593-8110</p> </div>
<p><b>Design</b></p>	<div data-bbox="251 1255 1453 1327" data-label="Text"> <p>In early 2020, the DHA engaged Integrus Applied to examine its proposed service delivery model and options for engaging the market of IT services.</p> </div> <div data-bbox="251 1348 1445 1501" data-label="Text"> <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 if they were to utilize a multi-provider model of service delivery. The output of those sessions validated their strategy to pursue a multi-provider approach and articulated the essential capabilities DHA wanted to establish:</p> </div> <div data-bbox="267 1522 1461 1831" data-label="List-Group"> <ul style="list-style-type: none"> <li>• <b>Common Environment:</b> the environment should support the dynamic addition and removal of other lines of IT service without requiring re-design and re-integration.</li> <li>• <b>Common Processes:</b> the environment should have an enterprise set of processes that can be utilized world-wide, and that emphasizes the use of single processes, while adapting to local procedures and local department needs.</li> <li>• <b>Decision Making Governance:</b> the DHA must retain all decision making for directing contractors but empower the operational delivery to respond to business needs and events across the multiple service providers.</li> </ul> </div>

- **Service Provider Accountability:** the environment must be able to hold the multiple service providers accountable to their deliverables and to a standard of performance. In addition, the environment should provide tools for minimizing inter-provider disputes and finger pointing.

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 Services, Service Management, and Technical Management, and then extended that where DHA needed additional functions.

Integrus helped DHA build a Cost Benefit Analysis that examined the current cost of delivery across a group of impacted contracts and examined the benefits and risks of bundling them into a single contract vehicle. DHA was able to project a significant cost savings over the projected term.

In addition, 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. Integrus was able to do that based on having built and implemented these kinds of structures with large clients multiple times in the past.



**Integr**is 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.



# REQUEST FOR PROPOSAL

- 6.8. Availability of Information:** Proposal submissions become public and are available for review immediately after opening pursuant to West Virginia Code §5A-3-11(h). All other information associated with the RFP, including but not limited to, technical scores and reasons for disqualification, will not be available until after the contract has been awarded pursuant to West Virginia Code of State Rules §148-1-6.3.d.

By signing below, I certify that I have reviewed this Request for Proposal in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship; and that, to the best of my knowledge, the bidder has properly registered with any State agency that may require registration.

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

(Company)

**Tim Ryckman, Managing Director**

(Representative Name, Title)



**Phone: 248-321-9959 / Fax: 832-442-9346**

(Contact Phone/Fax Number)

**September 15, 2022**

(Date)



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

State of West Virginia  
 Centralized Request for Proposals  
 Consulting

<b>Proc Folder:</b> 1089655			<b>Reason for Modification:</b>
<b>Doc Description:</b> RFP for OT Assessment and Consulting Services (OT23016)			
<b>Proc Type:</b> Central Master Agreement			
<b>Date Issued</b>	<b>Solicitation Closes</b>	<b>Solicitation No</b>	<b>Version</b>
2022-08-22	2022-09-15 13:30	CRFP 0231 OOT2300000001	1

**BID RECEIVING LOCATION**

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

**VENDOR**

**Vendor Customer Code:** VS0000022094

**Vendor Name :** Sourcing Advisory Services, LLC dba Integris Applied

**Address :** 18 Shawnee Ridge Ct

**Street :**

**City :** The Woodlands

**State :** Texas **Country :** USA **Zip :** 77382

**Principal Contact :** Tim Ryckman, Managing Director

**Vendor Contact Phone:** 248-321-9959 **Extension:**

**FOR INFORMATION CONTACT THE BUYER**  
 Jessica L Hovanec  
 304-558-2314  
 jessica.l.hovanec@wv.gov

**Vendor Signature X**  **FEIN#** 27-3704910 **DATE** September 15, 2022

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



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

State of West Virginia  
 Centralized Request for Proposals  
 Consulting

<b>Proc Folder:</b> 1089655		<b>Reason for Modification:</b>	
<b>Doc Description:</b> RFP for OT Assessment and Consulting Services (OT23016)		Addendum #1 to attach vendor questions and answers.	
<b>Proc Type:</b> Central Master Agreement			
<b>Date Issued</b>	<b>Solicitation Closes</b>	<b>Solicitation No</b>	<b>Version</b>
2022-09-08	2022-09-15 13:30	CRFP 0231 OOT2300000001	2


**BID RECEIVING LOCATION**

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

**VENDOR**

**Vendor Customer Code:** VS0000022094  
**Vendor Name :** Sourcing Advisory Services, LLC dba Integris Applied  
**Address :** 18 Shawnee Ridge Ct  
**Street :**  
**City :** The Woodlands  
**State :** Texas **Country :** USA **Zip :** 77382  
**Principal Contact :** Tim Ryckman, Managing Director  
**Vendor Contact Phone:** 248-321-9959 **Extension:**

**FOR INFORMATION CONTACT THE BUYER**  
 Jessica L Hovanec  
 304-558-2314  
 jessica.l.hovanec@wv.gov

**Vendor Signature X**  **FEIN#** 27-3704910 **DATE** September 15, 2022

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

State of West Virginia  
**VENDOR PREFERENCE CERTIFICATE**

Certification and application is hereby made for Preference in accordance with **West Virginia Code**, §5A-3-37. (Does not apply to construction contracts). **West Virginia Code**, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the **West Virginia Code**. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Vendor Preference, if applicable.

1. **Application is made for 2.5% vendor preference for the reason checked:**  
 Bidder is an individual resident vendor and has resided continuously in West Virginia, or bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia, for four (4) years immediately preceding the date of this certification; **or**,  
 Bidder is a resident vendor partnership, association, or corporation with at least eighty percent of ownership interest of bidder held by another entity that meets the applicable four year residency requirement; **or**,  
 Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; **or**,
2. **Application is made for 2.5% vendor preference for the reason checked:**  
 Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or**,
3. **Application is made for 2.5% vendor preference for the reason checked:**  
 Bidder is a nonresident vendor that employs a minimum of one hundred state residents, or a nonresident vendor which has an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia and employs a minimum of one hundred state residents, and for purposes of producing or distributing the commodities or completing the project which is the subject of the bidder's bid and continuously over the entire term of the project, on average at least seventy-five percent of the bidder's employees or the bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years and the vendor's bid; **or**,
4. **Application is made for 5% vendor preference for the reason checked:**  
 Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; **or**,
5. **Application is made for 3.5% vendor preference who is a veteran for the reason checked:**  
 Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; **or**,
6. **Application is made for 3.5% vendor preference who is a veteran for the reason checked:**  
 Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.
7. **Application is made for preference as a non-resident small, women- and minority-owned business, in accordance with West Virginia Code §5A-3-59 and West Virginia Code of State Rules.**  
 Bidder has been or expects to be approved prior to contract award by the Purchasing Division as a certified small, women- and minority-owned business.
8. **Application is made for reciprocal preference.**  
 Bidder is a West Virginia resident and is requesting reciprocal preference to the extent that it applies.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) rescind the contract or purchase order; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

**Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.**

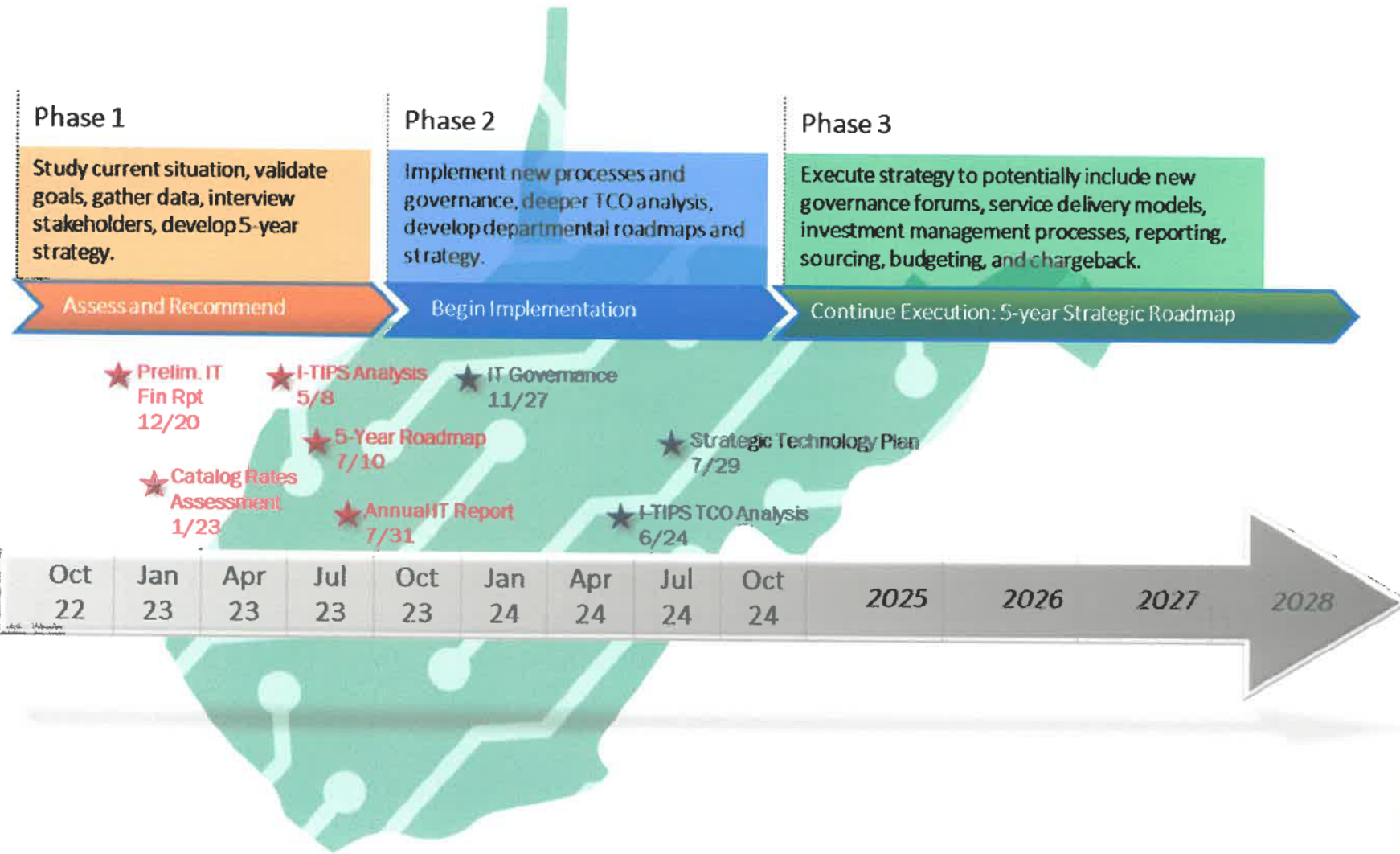
**Bidder:** Sourcing Advisory Services, LLC dba Integris Applied

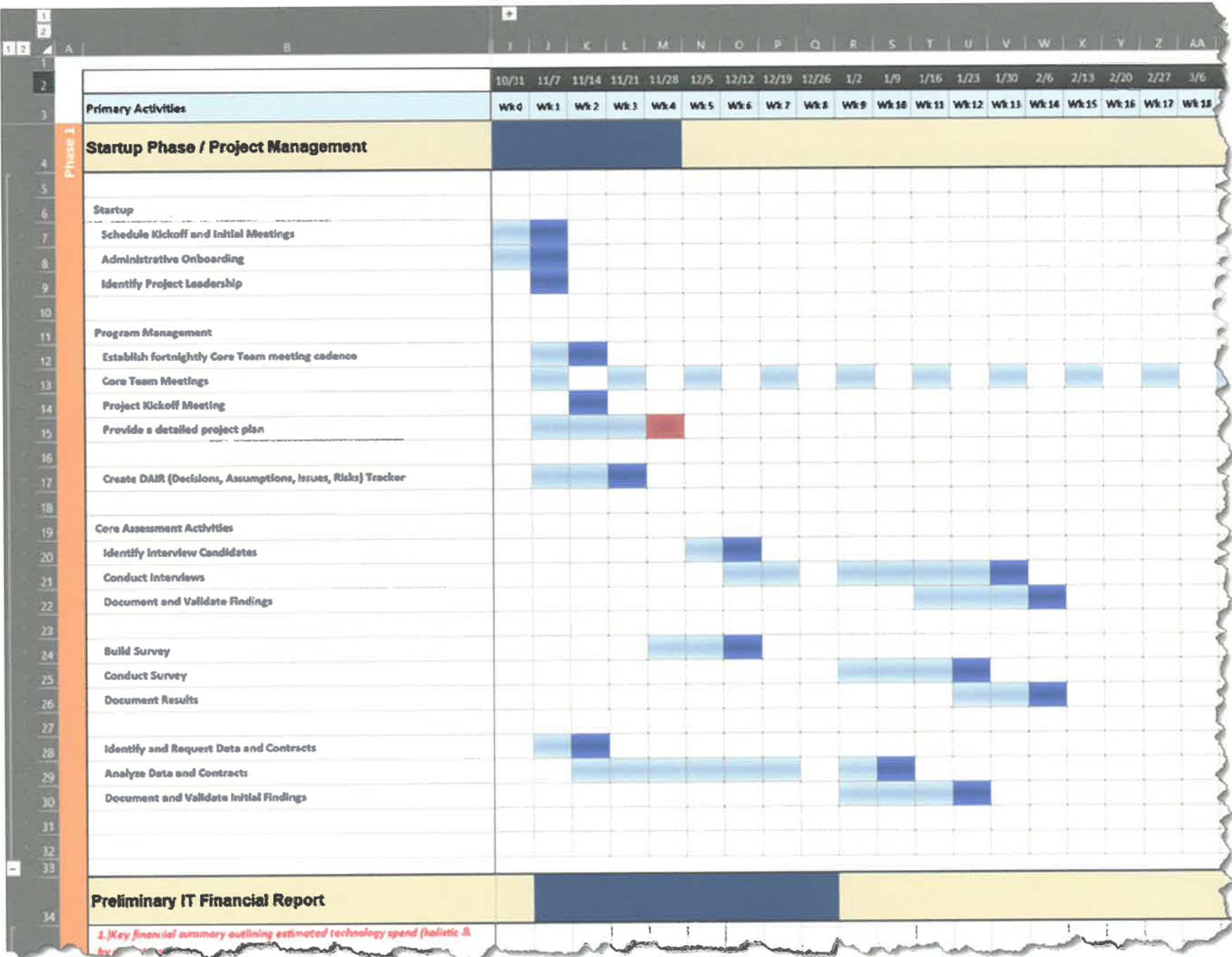
**Signed:** 

**Date:** September 15, 2022

**Title:** Managing Director

*Building a fact-based, experience-proven, and customer-engaged strategy.*





1. Key financial summary outlining estimated technology spend (holistic & by...)

