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State of West Virginia
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BID RECEIVING LOCATION

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VENDOR

Vendor Customer Code: VS0000040786 **Vendor Name :**
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09/14/22 10:03:05
 WV Purchasing Division

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Vendor Signature X  **FEIN#** 300008265 **DATE** September 12, 2022

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

RFP FOR OT ASSESSMENT AND CONSULTING SERVICES (OT23016)
Solicitation Number CRFP 0231 OOT230000001

TECHNICAL RESPONSE

Brimstone Consulting Group, a division of ZRG Partners, LLC

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Date: September 12, 2022

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PROPOSAL CONTACT AND CERTIFICATION

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

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contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise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

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

Brimstone Consulting Group, a division of ZRG Partners, LLC



Signature

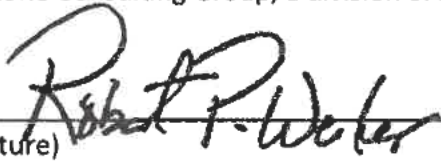
September 12, 2022

Robert P. Weiler, Managing Founder
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CERTIFICATION OF RFP REVIEW

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.

Brimstone Consulting Group, a division of ZRG Partners, LLC



(Signature)

September 12, 2022

Robert P. Weiler, Managing Founder
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EXECUTIVE SUMMARY OF REVISIONS TO INITIAL RFP

We appreciate the opportunity to refine our proposed approach to helping the West Virginia Office of Technology (WVOT) succeed in achieving the goals detailed in the RFP. Again, our proposed approach goes beyond a focus on technology to simultaneously:

- produce WVOT's desired deliverables
- create buy-in and momentum for transformation within the WVOT organization
- build stronger relationships with the departments / customers serviced by WVOT
- establish mechanisms that will ensure changes are sustained over the long-term

In the hopes of helping the selection team in their review of our proposal, we've summarized changes we made to our previous response below:

- Brimstone proposes facilitating 2-3 sessions with WVOT Leadership at the outset of the effort to refine and align around the Phase 1 Project Plan, identify success metrics, further scope Phase 1 deliverables, and prepare to launch Technology Acceleration Teams.
- Develop Phase 1 deliverables (IT Financial Report, Service Rate Catalog, IT & Investment Portfolio, Annual IT Report) using 8–10-person Technology Acceleration Teams composed of WVOT experts, Brimstone Technology SMEs, and Brimstone process coaches.
- Brimstone to serve in an advisory capacity to WVOT Project Management Office (PMO) on sustainable implementation of Deliverables / solutions, in both Phase 1 and Phase 2.
- For the Phase 1 Five-Year Technology Roadmap, leverage existing roadmaps from selected other states to more efficiently develop the WVOT roadmap.
- For the Phase 2 State Technology Strategic Plan, use a train-the-facilitator approach that prepares WVOT resources to align department-level technology roadmaps with the state-level roadmap.
- Throughout the effort, use an approach that is primarily virtual / remote, with a few key meetings in-person as determined in collaboration with WVOT leadership

OVERVIEW OF OUR APPROACH

Our proposed approach is a comprehensive, large-scale effort designed to transform WVOT in accordance with the CIO's vision and goals detailed in the RFP. Foundational to and integrated throughout our proposed process will be use of technology assessment and measurement frameworks such as ITIL, CMMI, and others that will help WVOT build an agile, learning organization for the long-term. Our solution will also integrate a framework for organizational transformation and change that Brimstone has developed over its 30-year history of working with organizations on this front.

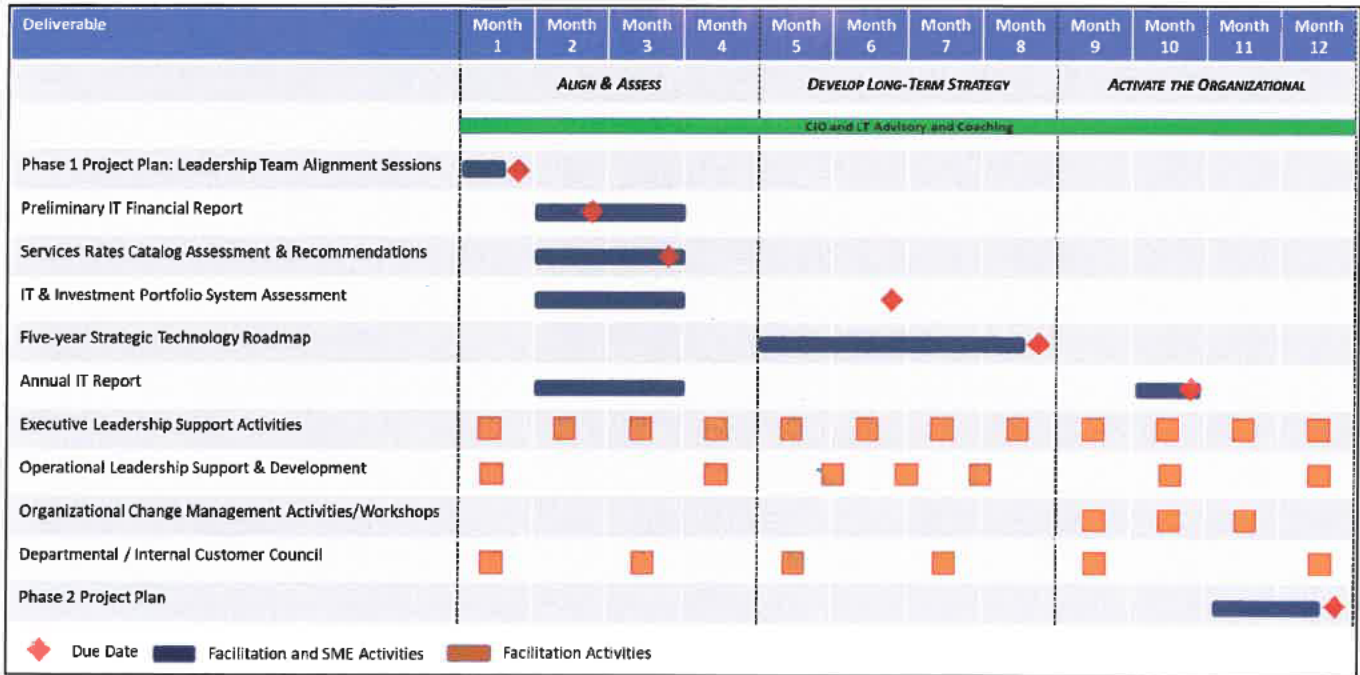
Integrated throughout our approach are numerous activities designed to ensure close collaboration with you, advisory and coaching, and hands-on learning opportunities for WVOT leaders and employees. We will work hand-in-hand with you and others in your organization to ensure work activities are tailored to your organization and needs, develop leadership capabilities throughout the organization, and transfer relevant knowledge and information to WVOT resources. This will help ensure the changes you make are sustainable over the long-term.

The team of experts we have assembled for the work with WVOT are well-versed in the use of these frameworks – which we will use as starting points to drive the actions and outcomes desired by WVOT. We’ve assembled an experienced team of both Technology and Transformation/Change consulting experts to help you achieve your transformation goals. Our team brings the collection of subject matter expertise, internal and external experience, and process consulting expertise that we believe is critical for WVOT to be successful in achieving the objectives detailed in the RFP. And the solutions we propose will be tailored to your unique organizational context in a way that will help ensure you build and sustain an agile, modernized, value-added Technology practice for the State of West Virginia.

We’ve learned from our lengthy experience in helping organizations transform that, while no two change efforts are identical, they all follow certain patterns. We have an extensive set of interventions, tools, and methods that we will draw from to create a context-specific solution for WVOT. The process we propose, including the associated solutions, will be adjusted to meet the specific needs of WVOT and its key constituents.

We’ve structured our proposed solution based on our understanding of the goals and deliverables detailed in the RFP – and have integrated some additional recommendations we have for how to best accomplish your goals. Our initial understanding of these and a high-level proposed approach is reflected in the transformation roadmap below:

WVOT TRANSFORMATION ROADMAP, PHASE 1:



WVOT TRANSFORMATION ROADMAP, PHASE 2:



PHASE 1

ALIGN AND ASSESS

Goals

The first step in our proposed process involves alignment sessions with the WVOT Leadership Team to accomplish the following:

- Help the Brimstone team gain a deeper understanding of WVOT's unique market and organizational realities, current vision and direction, current strategy, enablers, and obstacles.
- Refine and align around the Phase 1 Project Plan
- Identify success metrics that will demonstrate improvements in reliability, security, and cost-effectiveness as a result of the transformation work and that can be used to communicate the value of the investment to legislative and other stakeholders.
- Further scope Phase 1 deliverables including the Preliminary Financial Report, Service Rates Catalog, IT & Investment Portfolio, and Annual IT Report.
- Prepare to launch Technology Acceleration Teams (described in more detail below) focused on producing Phase 1 deliverables.
- Align around and prepare to launch a "council" of departmental / internal customers that will serve as an advisory group to WVOT and accelerate a shift in the nature of relationships that WVOT has with users of its services.

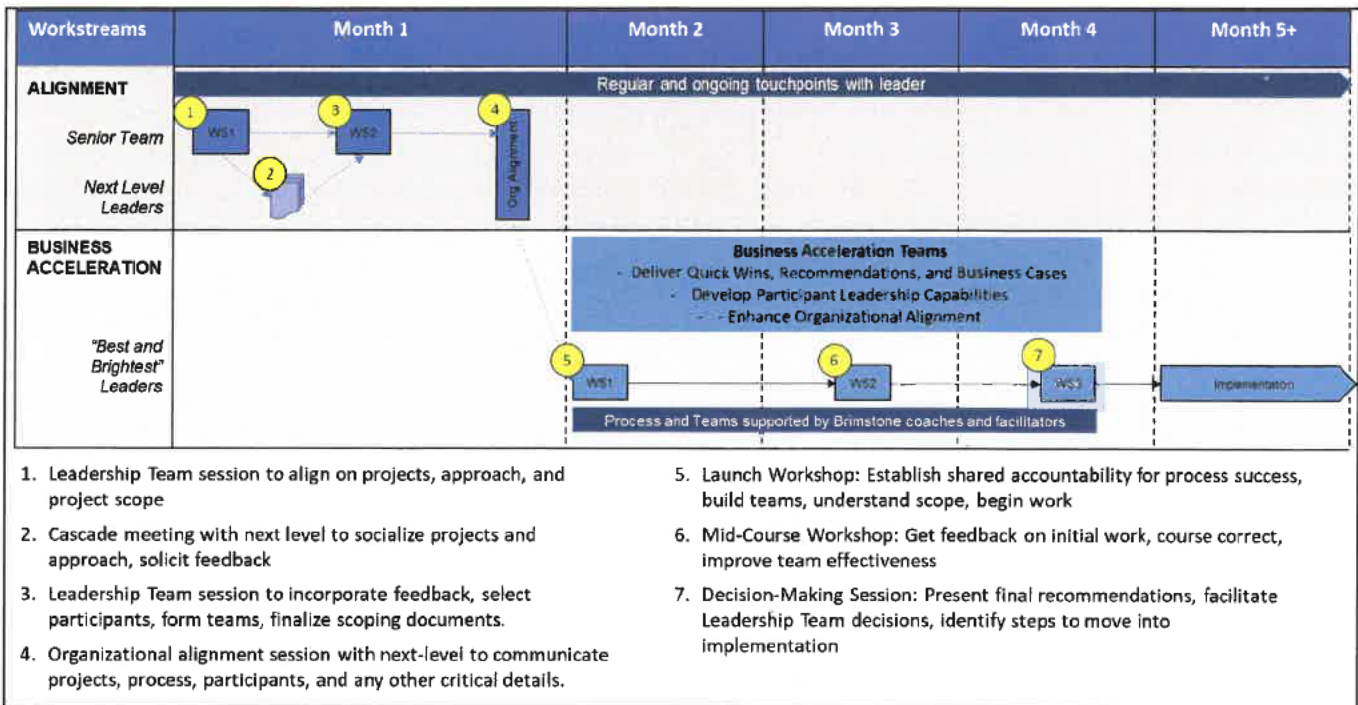
Proposed Solutions

Working in collaboration with CIO Spence and selected others, Brimstone will design, facilitate, and codify the outputs of 2-3 working sessions with the WVOT Leadership Team. We will leverage similar work we have done with other clients in designing these sessions, with our **Strategy-to-Execution** solution serving as the foundation (see next page). This process helps leadership teams achieve (and sustain) alignment around the organization's key priorities and execution plan. This alignment drives better operating discipline, higher levels of trust, more open communication, and improved decision-making. Preparation for the process will likely include individual interviews with the WVOT leadership team to assess perspectives on the organization's current realities, opportunities, leadership, and organizational culture. Key inputs for the process will include the CIO's vision and goals, some of which were detailed in the RFP. We will work closely with the CIO throughout the process to ensure the vision and goals are clearly communicated, understood, and leveraged.

Part of our proposed solution, based on successful work with other technology organizations, is to involve key stakeholders external to WVOT (i.e., other state departments) from the earliest parts of the effort. The goal of this is to leverage the process to strengthen relationships with these internal

customers and shift the role of WVOT from transactional to a value-added, strategic service delivery partner. While there are a number of options for involving these stakeholders, we have found that establishing and facilitating a “council” of internal customers early in the process has significant impact and involves these customers in an efficient and powerful way.

STRATEGY-TO-EXECUTION PROCESS



The second step in our proposed process is to launch Technology Acceleration Teams that will produce the following deliverables detailed in the RFP:

- Preliminary IT Financial Report (Deliverable 4.2.2.1.3.1.1)
- Services Rates Catalog Assessment and Recommendations (Deliverable 4.2.2.1.3.1.2)
- IT and Investment Portfolio System Assessment (Deliverable 4.2.2.1.3.1.3)
- Annual IT Report (Deliverable 4.2.2.1.3.1.5)

Our experience tells us that the best answers to the critical issues facing your organization reside within your own organization—and that you will need a disciplined process to surface and act upon those answers. Combining your own people’s expertise with the external subject matter expertise we will not only produce the optimal solutions, but simultaneously build buy-in and ownership of those solutions within your organization to help ensure successful implementation.

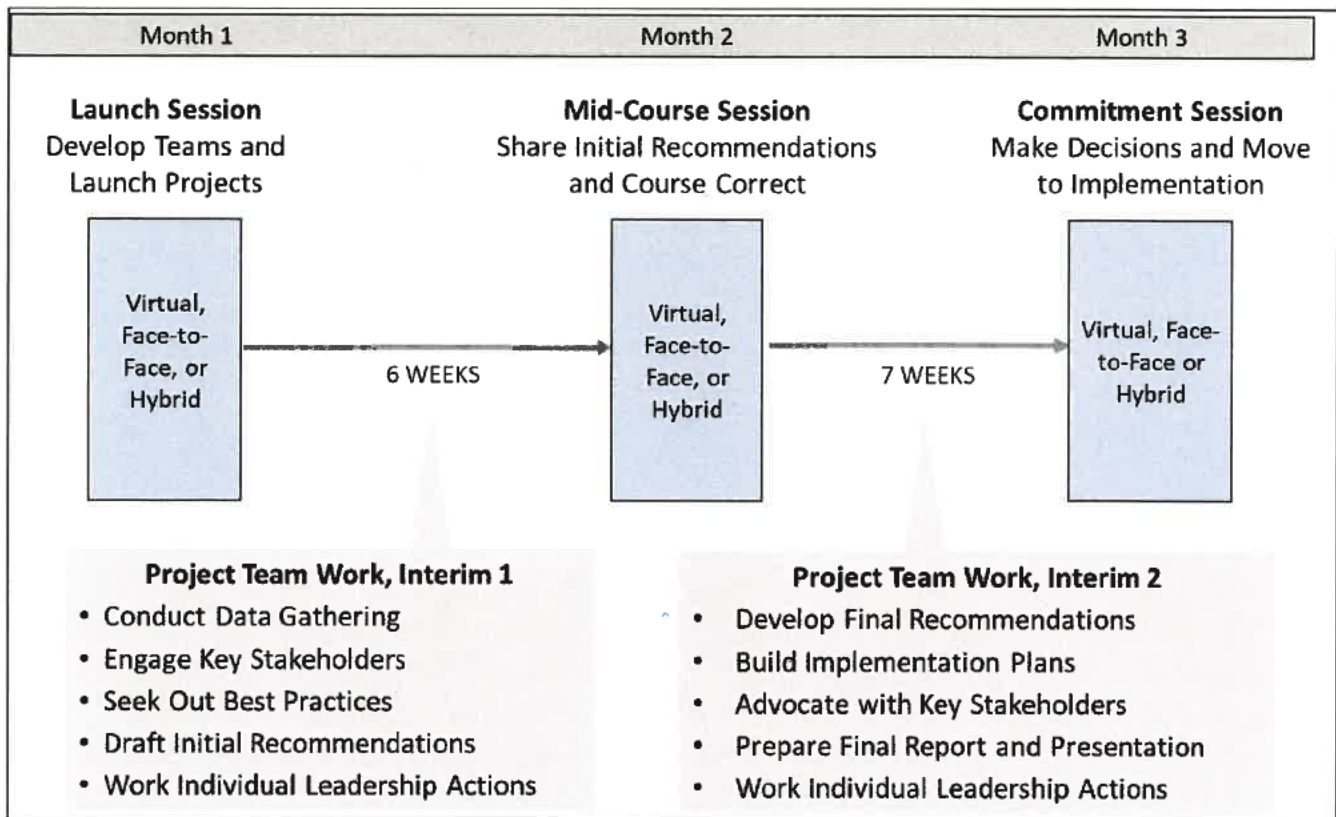
Proposed Solution

Technology Acceleration Teams is our 90-day process (see below) that accelerates dialogue, alignment, leader development, and progress on critical business issues. Cross-functional project teams, each composed of 6–8 of the organization’s “best and brightest” leaders, are tasked with conducting an assessment and delivering practical, actionable, measurable recommendations and implementation plans to address critical issues such as those detailed as essential functions in the RFP. We propose establishing four Technology Acceleration Teams, each focused on one of the following deliverables, as well as a “link team” (composed of one member from each Acceleration Team) to coordinate and integrate (when applicable) activities across the teams:

- Preliminary IT Financial Report (Deliverable 4.2.2.1.3.1.1)
- Services Rates Catalog Assessment and Recommendations (Deliverable 4.2.2.1.3.1.2)
- IT and Investment Portfolio System Assessment (Deliverable 4.2.2.1.3.1.3)
- Annual IT Report (Deliverable 4.2.2.1.3.1.5)

These teams are supported by Brimstone process coaches and our Technology Consulting experts. The process involves three workshops attended by leadership team and project team members, with interim work between workshops. Leadership Team members serve as sponsors of project teams.

Technology Acceleration Teams Process



Brimstone consultants will design, facilitate, and support all aspects of the process, coach Sponsors, project teams, and individual participants. We will provide a number of practical tools for project team use which we have found through experience help the teams accomplish the desired objectives. And throughout the process, we will ensure that project teams do the stakeholder management necessary to ensure support and buy-in for their recommendations.

At the conclusion of the process, the project teams document and present their current state assessment, "to be" recommendations, and prioritization recommendations to the leadership team for decision-making. These recommendations also include a business case and a preliminary implementation plan, which helps the leadership team make decisions about priorities and investment. Project team participants also report-out on the individual leadership learnings they experienced during the process.

How We Will Ensure the Success of Technology Acceleration Teams

Our experienced Technology Consulting team will serve as coaches / members of the Technology Acceleration Teams throughout the process. Our Transformation Consulting team will manage the overall process, as well as serve as process and leadership coaches for each team. All Technology Acceleration teams will likely begin their work with an initial interview and assessment phase, in which they will be working closely with the key stakeholders, leveraging existing systems and work products to collect data and identify any gaps. Leveraging agile practices, they will iterate with the WVOT leadership team to produce the deliverables identified within the timeframe and provide recommendations and actions to mature the processes of the team to a higher level of maturity on the CMMI scale.

For all four deliverables in this phase, our team will work closely with Acceleration Team members from WVOT to collect and assess the status of your technology offerings including the portfolio of projects and services that WVOT provides for the State of West Virginia and your business partners. We will help the teams dive deep into the detailed financial information, comparing the information to industry best practices and models for cost recovery. We will then identify strengths, gaps, and recommendations. Working closely with the WVOT leadership team and key business partners we will ensure the Teams identify clear requirements for deliverables and that the overall outcomes are accurate, clear, comprehensive, sustainable and drive alignment across the WVOT and business partner leadership teams.

With regard to establishing selection criteria to identify top business applications (part of Deliverable 4.2.2.1.3.3), our SMEs will help the assigned team begin by evaluating the business impact and value of each application. Then, through an iterative process in collaboration with internal WVOT experts, refine those criteria so that they best reflect the unique realities of end users in the State of West Virginia. In our experience, using a tiered approach to categorize applications on the basis of business criticality, contractual requirements, service availability requirements, and risk is a valuable and practical approach.

With regard to delivery of both the **Preliminary IT Financial Report** (Deliverable 4.2.2.1.3.1.1) and the **Annual IT Report** Annual IT Report (Deliverable 4.2.2.1.3.1.5), we propose starting work on both early in the overall effort. The assigned teams will work closely with one another, with CIO Spence, and with the leadership team to co-create an approach and content that accomplishes the desired results with constituencies. This will involve a rapid, iterative approach guided by our team of Technology SMEs with guidance from the WVOT leadership team. We will ensure the assigned team draws upon similar work we've done and examples from our past engagements to help make this process as efficient as possible. The resulting Preliminary and Annual Reports will be business focused and value based. This will be achieved by developing a strong sense of what matters to the stakeholders across the WV Departments and pulling together metrics/outcomes that are specific, measurable, value based and matter to the WVOT Leadership team.

How We Will Support Implementation of Technology Acceleration Team Recommendations

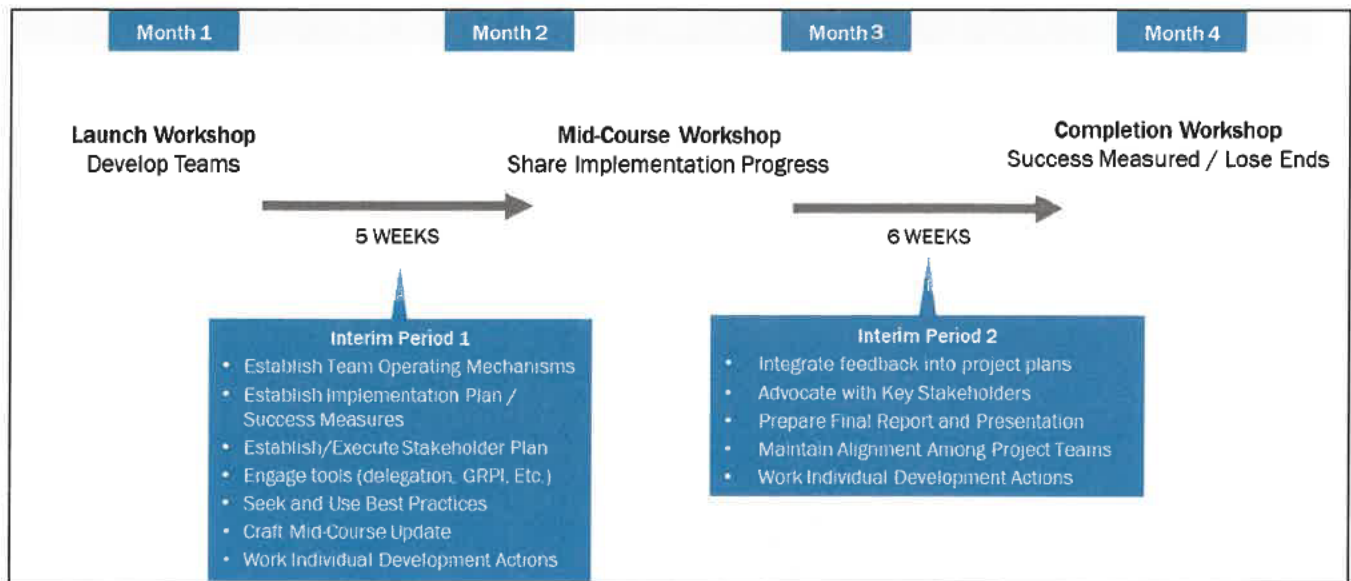
With regard to implementation of Technology Acceleration Team Recommendations, we propose collaborating with the WVOT Program Management Office (PMO) in an advisory capacity. Our experience tells us that transitioning ideas to implementation (and sustaining the change) is where many organizations fall short. The organizations that are most successful at execution are those that take a deliberate and disciplined approach to implementation – and build a supporting set of mechanisms to drive success. Again, combining your own people's expertise with the external subject matter expertise we provide will help ensure efficient, sustainable implementation of the solutions developed for your targeted transformation areas.

In our experience, the goals of successfully transitioning recommendations to implementation include:

- Implement a governance approach and process that will ensure successful implementation and sustainability of recommendations
- Ensure a smooth handoff of recommendations, implementation plans, lessons learned and best advice from Technology Acceleration Teams to implementation teams
- Share tools that will be of benefit to the implementation teams
- Establish implementation team operating mechanisms and reporting expectations

We will serve as advisors to the WVOT PMO to help them internalize or tailor our **Strategy-to-Execution Teams** process (see next page) that helps achieves these goals, accelerates and sustains implementation of critical transformation solutions, and continues to maintain alignment across the organization through the implementation process. Cross-functional project teams, each composed of solution "owners", are tasked with implementing solutions (that the leadership team has approved in the previous step) and are supported by process coaches. The process involves three workshops attended by leadership team, Technology Acceleration Team representatives, and implementation team members, with interim work between workshops. The entire leadership team serves as a sponsor of these teams.

Strategy-to-Execution Teams Process



DEVELOP LONG-TERM STRATEGY

Goals

For this step of our proposed process, we will work with CIO Spence and the WVOT leadership team to efficiently develop and operationalize a technology roadmap that will accelerate the transformation of WVOT into a strategic technology management service. This step will produce the following deliverable detailed in the RFP:

- Five-Year Strategic Technology Roadmap (Deliverable 4.2.2.1.3.1.4)

In addition, as throughout the engagement, our proposed solution has activities in this step that will help ensure the leadership team continues to be aligned around the transformation journey and future state, as well as engages the rest of the organization in the work required.

Proposed Solution

This portion of work begins with the Brimstone team, working in collaboration with CIO Spence and selected others, drafting a “straw model” technology roadmap using other state technology roadmaps as starting points. We then propose 2 workshops with the WVOT Leadership Team designed (in conjunction with the CIO) and facilitated by Brimstone to refine a Case for Change, a Strategic Technology Roadmap, and key measures for assessing progress and impact. Our consultants will help guide and build the key tenets of the roadmap hand-in-hand with your leadership team. In these sessions, our team will bring their experience from other companies and industries to not only build

the Roadmap, but also ensure the roadmap is actionable and sustainable. This sustainability process will help install an agile mindset and a culture of continuous improvement within the organization.

Between Workshop 1 and Workshop 2, we propose that WVOT Leadership Team members engage their own teams around the draft technology roadmap, soliciting input and feedback for refining both. Brimstone will provide preparation, all materials, and appropriate support to help Leadership Team members with this assignment. This step is designed to ensure that employees across the organization have an interactive, dialogue-based experience when learning about the transformation – not a “sit and get” experience.

The key output of this process, a Strategic Technology Roadmap, may be patterned after the Strategic Business Framework we work with many of our clients to develop (see example on next page). This framework is:

- The organization’s response to the external and internal realities facing the organization and requiring a strategic response
- Part of a process to help create shared accountability and ownership for the success of the organization
- Part of a process to help align the leadership team and the rest of the organization around key priorities
- A mechanism for driving strategic choices, prioritization, and execution
- A vehicle for articulating, teaching, and communicating the organization’s strategic focus
- An opportunity to establish a common language that helps drive understanding and alignment

SAMPLE STRATEGIC BUSINESS FRAMEWORK

Who We Serve	Patients	Associates	Shareholders
Our Objective	To be recognized as the thought leader in industry, and our customers preferred and trusted partner	To attract, develop and retain high-performing employees who live our values	To deliver consistently successful, top-quartile financial performance
Key Measures	<ul style="list-style-type: none"> 90% "excellent" on customer satisfaction by 2011 #1 in market share in each of our core verticals by 2011 	<ul style="list-style-type: none"> Employee satisfaction of 85% by 2011 95% retention of key leaders each year 	<ul style="list-style-type: none"> 5% top-line growth each year 15% gross margin each year \$10 million cash flow each quarter

Strategic Objectives Strategic Imperatives	Achieve Sustainable & Profitable Growth			Enhance the Organization		
	Go Deep & Wide in Global Accounts	Develop World-Class Partners	Deliver New Technology Solutions	Enhance Operational Efficiency	Be a Customer-Driven Organization	Build a High-Performance Team Culture
Long-Term Strategies (2020-2021)	<ol style="list-style-type: none"> Increase Global Accounts sales through expanded portfolio Enhance innovation/brand in Named Accounts Establish org structure, training, rewards to support Global Accounts 	<ol style="list-style-type: none"> Establish org structure, training, rewards to support new partner strategy Re-launch "Partner Rewards" program worldwide Implement global distributor strategy 	<ol style="list-style-type: none"> Develop & implement Horizon 3 technology solutions timeline Benchmark best-in-class technology development processes Implement customer-driven product development model 	<ol style="list-style-type: none"> Prioritize & deploy IT systems framework Invest in Supply Chain improvements Optimize organization structure (based on external benchmarks) for profitable growth 	<ol style="list-style-type: none"> Implement & track improved customer survey Enhance customer research effort Implement customer-driven product development model 	<ol style="list-style-type: none"> Instill a results-driven, accountable, collaborative culture Communicate a brand promise that attracts & retains key talent Communicate new strategy, expectations & values
Short-Term Actions (2021)	<ol style="list-style-type: none"> Create Global Account & strategic geography framework [Martin, Q1] Create strategy & resource plan per Global Account [RVPs, Q2] 	<ol style="list-style-type: none"> Enhance "Partner Rewards" program [Van Boven, Q2] Develop & implement partner loyalty survey [Johansson, Q3] Define global distributor strategy [Van Boven, Q4] 	<ol style="list-style-type: none"> Develop customer-driven product development model [Sparks, Q4] Develop go-to-market strategy for technology x [Singh, Q3] Deliver technology y solutions into new verticals [Quinn, Q4] 	<ol style="list-style-type: none"> Develop IT systems framework (gap analysis of processes & tools) [Minks, Q3] Automate reporting process [Cooper, Q4] Benchmark org structures built for profitable growth [Penny, Q4] 	<ol style="list-style-type: none"> Expand & simplify customer survey/feedback process [Nilsson, Q3] Create & fill customer champion role [Partridge, Q3] Develop customer-driven product development model [Sparks, Q4] 	<ol style="list-style-type: none"> Clarify roles & responsibilities across organization [Partridge, Q2] Define "career roadmaps" by profession [Partridge, Q4] Create a brand promise that attracts & retains key talent [Partridge, Q4]

ACTIVATE THE ORGANIZATION

Goals

The third step in our proposed process involves ensuring the broader WVOT organization and key internal customers (e.g., other state departments) understand and engage in the transformation strategy. While stakeholdering with these groups will occur in the previous steps, a focused effort on organizational alignment at this point in the process will set the stage for successful implementation of the changes to come. This step will further ensure that the following deliverables detailed in the RFP are produced:

- Executive Leadership Support
- Operational Leadership Support & Development
- Organizational Alignment Activities / Workshops

Proposed Solutions

Our **Organizational Alignment Process** will help the WVOT leadership team further communicate strategy and culture expectations through the organization, engaging a broad cohort of leaders in accelerating organizational transformation. Leaders from across the organization interact with the

leadership team to learn about the new direction and begin engaging in the change effort. Typically, this takes the form of a workshop or series of workshops led by the leadership team and facilitated by Brimstone, in which leadership team members demonstrate alignment and commitment to the new direction, teach others the implications of the new direction, and enlist the help of other leaders in the organization to drive change.

The messages and other information from these workshops are then cascaded through the organization by next-level leaders. Brimstone will provide a preparation, all materials, and appropriate support to help next-level leaders with this assignment. Again, this approach will ensure that employees across the organization have an interactive, dialogue-based experience when learning about the transformation – not a “sit and get” experience.

PHASE 2

BUILD MORE MOMENTUM

Goals

This step in our proposed process involves accelerating progress on the Phase 2 Deliverables, as well as additional initiatives that may surface during the initial steps of work. These include producing the following deliverables:

- IT Governance Implementation Recommendations (Deliverable 4.2.2.2.2.1)
- Enterprise Architecture Recommendations (Deliverable 4.2.2.2.2.2)
- IT and Investment Portfolio System Recommendations (Deliverable 4.2.2.2.2.3)

Proposed Solution

We propose a second wave of **Technology Acceleration Teams** to accomplish these goals. Identical to the process described in Phase 1, a second wave of these teams (with different WVOT participants on each team) will produce the desired deliverables, build upon the momentum established in Phase 1, and broaden engagement in the transformation process throughout the organization. Brimstone will support and facilitate this second wave just as we proposed for Phase 1.

CONTINUE IMPLEMENTING CHANGES

Goals

This step in our proposed process involves implementing approved recommendations made by Technology Acceleration Teams in the previous step. Again, we propose working in an advisory capacity with the WVOT Project Management Office (PMO) as described in Phase 1.

ALIGN THE DEPARTMENTS

Goals

In this step of our proposed process, we will work with CIO Spence and selected WVOT leaders team to prepare those leaders to collaborate with state departments on aligning departmental roadmaps to the state technology strategy. This step will produce the following deliverable detailed in the RFP:

- State Technology Strategic Plan (Deliverable 4.2.2.2.4)

Proposed Solution

We will leverage our **Strategy-to-Execution** solution, described previously, to deliver train-the-facilitator sessions involving WVOT leaders who will work with state departments on aligning their roadmaps to the overall state roadmap. These sessions will include helping participants learn to a simple process and materials (provided by Brimstone) to facilitate the work. We will develop a standard and replicable set of processes, templates, and tools to ensure consistency across departments in terms of process and outputs.

This approach will not only ensure the roadmap alignment work gets done, but will continue to re-position WVOT leaders as strategic partners to the state departments. We have found that partnering with the “council” of department representatives (i.e., internal customers) proposed in Phase 1 on this effort is also a powerful option, further demonstrating WVOT’s “new way” of working with its internal customers. Sustaining this alignment with these representatives over the long-term is critical and involving them in any work relevant to their respective departments is one way of doing this.

EMBEDDED SERVICES

In all the work that we do, we embed foundational services designed to ensure success of the work and engage broad groups stakeholders – and will do this in our work with WVOT. These include:

Stakeholder Management

- We build deep *relationships* with the client, other key leaders, and support staff throughout the organization, providing them with advice, counsel, and the ability to “look around corners” as the change progresses. We identify and engage both internal and external stakeholders actively and listen to their thoughts, concerns, and recommendations to ensure we build a plan that generates the maximum buy-in and support to enable and accelerate execution.
- We help the leader (whom we consider the client) explicitly identify where his or her personal goals and leadership agenda align with the organization’s needs.

- To impact the system, we must understand the system’s structure and politics—and we must engage and impact numerous actors in the system. This means developing multiple relationships through constant inquiry and enrolling key stakeholders in the change effort.
- We seek to build trusting relationships with key leaders across the organization—not just the primary client.
- In contrast to traditional consultants, we work to pull staff (admin assistants, chiefs of staff, functions such as Strategy, HR, and Finance) onto the team to support the change leaders, building a true partnership between us and them.
- We offer counsel and assistance to key actors across the system (including, but not limited to, the leadership team); we listen, ask great questions, seek to understand; we don’t pretend to be the smartest people in the room.

Change Leadership Consulting

We partner with the client to devise and constantly adjust the change strategy, enabling the client to *lead the change*. Here are the steps we take:

- Work with the client to define what success looks like—and then guide them through a process of developing an explicit step-by-step strategy that identifies the changes that will deliver those outcomes.
- Develop a change strategy (a series of interventions, leveraged opportunities, and communication efforts) that drives the organization toward the desired outcomes.
- Iterate the change strategy with the client—to improve it, create a sense of co-ownership, and develop internal capability.
- Publish the strategy and other deliverables in a format that works for the leader and the organization.
- Identify high-value leverage points that create movement and build momentum for change.
- Remain vigilant about monitoring the action/reaction cycle of change efforts and constantly adjust the change strategy as appropriate.

Change Management Consulting

We also partner with the client to *manage the change*, which entails designing and delivering interventions and processes; providing and customizing tools and models; and establishing operating mechanisms that bring structure and consistency. We collaborate with the client and other key leaders to actively manage the change process:

- Establish a Transformation Team that jointly owns the change process.
- Enroll the Executive Team in the change effort and build them into the Guiding Coalition.

- Allocate the necessary time and focus to the change effort and serve as a force multiplier when the client can't engage.
- Engage in a regular cadence of status reporting, progress updates, and other appropriate operating mechanisms to ensure issues are resolved and progress is maintained.
- Monitor progress against the various streams of work and adjust as needed. We must have independent eyes and ears to provide a unique and broad perspective on what's happening across the organization.
- Identify areas of the organization that want or need assistance in driving change. This isn't about selling: it's about helping the client identify key leverage points for change.

QUALIFICATIONS AND EXPERIENCE

ABOUT BRIMSTONE

Brimstone Consulting Group (www.brimstoneconsulting.com), a division of ZRG Partners, is a global strategy, organizational, and operational improvement consulting firm based in Camden, Maine. Our team works with organizations of all types to implement large-scale change that delivers breakthrough results, develops leaders, aligns the organization, and energizes people.

Brimstone was founded in 2001 with a belief that an organization's ongoing success depends on its ability to change—to adapt to new external realities, out-maneuver its competition, and develop strong leaders. The foundations of our approach come from three sources. One was the University of Michigan's Ross School of Business, where Brimstone associates worked closely with leadership expert Noel Tichy to build leading-edge executive development initiatives in the acclaimed Global Leadership Program. Another was Outward Bound, where a number of Brimstone associates worked at the Hurricane Island School, using action learning to help leaders and teams improve their performance. A third foundation was organizational transformation work at a variety of process-focused organizations, where Brimstone associates learned and used process improvement discipline, change management practices, and leadership development methods that these organizations gain and maintain market-leading positions. Along with lengthy experience as consultants to world-class organizations, these influences continue to guide our firm today as we help our clients deliver breakthrough results. Brimstone has not engaged in any mergers or acquisitions in the past five years.

Brimstone employs 20 full-time employees and has a network of over 40 independent Senior Partners. Our team is made up of highly skilled, senior-level consultants from a wide range of backgrounds—former C-suite executives, former functional experts, seasoned management consulting experts, and educators at top universities. Every consultant at Brimstone has lengthy experience working in large complex organizations—as an internal resource, an external consultant, or both— helping to drive transformation. We most often are involved in strategy to execution, organizational and cultural

transformation, but our network of consultants also brings experience in a broad set of technical / functional types of transformation.

While our headquarters are in Camden, Maine, our team members are located across the US and England. Brimstone has deployed team members around the globe to help some of the world's most highly regarded organizations accelerate strategy and results. We have partnered with clients in 30 countries on six continents and developed expertise on how to drive large-scale change in a variety of cultures. Our consultants bring a broad base of subject matter expertise and experience to our work with clients. Many have led or been involved in strategy facilitation and deployment at numerous organizations.

Some of the organizations we've worked with include:

- Albemarle Corporation
- Arrow Electronics
- Biogen
- Cigna / Evernorth
- Corning
- Epsilon Data Management
- Evolv Technology
- General Dynamics
- General Motors
- Motorola Solutions
- State of Maine Operations and IT
- Tellabs
- University of Maine IT
- U.S. Cellular
- Waste Management
- Zebra Technologies

THE TEAM WE HAVE ASSEMBLED FOR WVOT

The team we have assembled for the State of West Virginia Office of Technology (OT) opportunity includes resources who have worked internally as leaders in large technology organizations, as well as consultants who have worked extensively with technology organizations. We believe we have the credentials, qualifications, and experience needed to help the Office of Technology accomplish the goals detailed in the scope of work. We will also involve additional resources from the Brimstone community and externally as needed for this work.

TECHNOLOGY CONSULTING TEAM

Jon Joplin – Technology Team Lead, SME Architecture, Service Catalog, Business Applications
Senior Partner, Brimstone Consulting, and President, Socorro Technologies

Jon has over three decades of experience in the engineering and technology industry, including most recently as the CIO of Express Scripts, a fortune 25 health care company. At Express Scripts, Jon helped transform their IT team into a high performing agile organization and led them through very large integration and implementation efforts that redefined health care. Prior to Express Scripts, Jon led the Manufacturing Systems Technology organization for Anheuser Busch. Jon has deep technical and operational experience across all areas of IT and has been helping companies transform their teams,

strategies as a Senior Consultant across multiple industries. Jon brings a focus to IT of being a trusted partner, driving technology excellence and a culture of continuous improvement.

Jon has a Bachelor's degree in Electrical Engineering from the Missouri University of Science & Technology, has graduated from the Navy Nuclear Power School, and currently serves on the advisory board for the non-profit NPOWER.

Sean Rezendes, SME Infrastructure, Operations, End-User Experience, Change Management
Senior Partner, Brimstone Consulting

Sean has been in leadership roles for over 30 years within the U.S. Army and some of the country's largest financial services and healthcare companies. Over 20 of these years have been spent in technology roles leading teams through technology turnarounds and building world class resiliency. Sean's technical experience has focused on mainframes, data center management and new builds, high-capacity storage, cloud infrastructure, and networks. His focus has been on helping his team operate in a commercial way that brings value to their business partners that is transparent and cost effective. Sean has led his infrastructure teams through the transition to operating with an agile mindset, which has allowed for a more collaborative alignment with application development teams.

Sean holds an MBA from Oklahoma City University and a BBA from Cameron University.

Dana Duncan – SME, IT Finance and Portfolio Management
Sr. Partner, Brimstone Consulting

Dana brings a 30-year background in operational excellence and project management in technology organizations. In his most recent role as Director of Operational Excellence & Metrics at Express Scripts, a fortune 25 health care company, his agile team focused on identifying and prioritizing process improvement opportunities within the Technology Organization. As a result, they improved day-to-day data-driven processes, eliminated bureaucracy, streamlined the workflows, and established new best practices and frameworks while demonstrating fiscal discipline. Prior to working at Express Scripts, Dana led engineering, project management, and operations teams at Medco Health Solutions and Unilever. Throughout his career, Dana has been extensively involved in IT financial management and making large-scale value-driven technology investments for organizations. He has also held leadership roles in Strategic, Financial and Portfolio planning.

Dana holds an MS in Electrical and Electronics Engineering from the University of Rhode Island. Dana is also Agile certified and holds over 5 US and International Patents. Dana lives in Hardeeville, South Carolina.

Jeremy Seligman – SME, Technology Transformation

Senior Partner, Brimstone Consulting

Jeremy has over three decades of diverse experience, including roles as CIO of a Fortune 500 telecom and Director of Global Strategy and Organizational Development for Ford Motor Company IT. As an executive, and organizational design and development strategist, he brings a wealth of knowledge, perspective, and proven methods for achieving transformational change. Jeremy has led change efforts that have focused on long-term worldwide strategy, global competency models, integration of multiple sites and cultures, and assimilation of diverse and initially oppositional culture in both corporate and university settings. He partners with senior leaders to identify and implement the conditions that create growth, more effective and ultimately more sustainable organizations.

Jeremy holds both a BS in Education and an MBA from the University of Rochester in New York. He has served as Council Chair of the Society of Organizational Learning and a board member for Pegasus Communications, as well as its successor organization, Systems Thinking in Action (STIA). Jeremy lives in Ann Arbor, Michigan.

TRANSFORMATION AND CHANGE CONSULTING TEAM

Dave Roberts – Client Lead

Managing Director, Brimstone Consulting Group

Dave brings a 30-year background in organizational and talent effectiveness to his work with Brimstone in helping organizations improve business results. He works with leaders to align and improve the full set of levers that organizations can use to deliver results for their customers and stakeholders. Dave has lengthy experience working inside organizations to translate strategy into action and remove obstacles to successful execution.

At Brimstone, Dave's clients have included General Motors, Corning Incorporated, One Source Virtual, Centene Corporation, Epsilon, FMC Corporation, Cubist Pharmaceuticals, and Express Scripts. Previously, as part of Western Union's Integration and Talent Management teams, Dave was responsible for improving the effectiveness of newly acquired, under-performing business units and functions. He worked closely with company executives to establish the type of operating mechanisms, organizational structures, and work environments that would drive breakthrough business performance. Dave also implemented global talent management strategies and initiatives for Western Union, including culture change, succession planning, leadership development, performance management, training, and staffing programs. He was part of a CEO-sponsored leadership team that established a process and productivity improvement function, focused on improving the organization's operating discipline. These efforts resulted in significant improvements in productivity and profitability.

Dave joined Western Union from Waste Management, where he was Vice President, Leadership and Organizational Effectiveness. He helped build the staffing, training, organizational effectiveness, and

leadership development functions for Waste Management. Dave also worked at Personnel Decisions International (PDI) as a management consultant to Fortune 500 organizations in industries including telecommunications, technology, banking, manufacturing, retail, hospitality, aerospace, and defense systems.

Dave earned a Ph.D. in social psychology from the University of Texas at Austin and a BS in psychology from Oklahoma State University. He lives in Glenwood Springs, Colorado.

Bob Gordon – SME, Transformation and Change
Managing Director, Brimstone Consulting Group

Bob brings over thirty years of experience in strategy development, leadership and team development to Brimstone. He has designed and delivered programs for CEOs and senior managers at Xerox Corporation, Albemarle, The Global Leadership Program of the University of Michigan, Biogen, Jackson Laboratory, Motorola Cellular, and State of Maine Operations and IT. He provides operational leadership for the Brimstone team, supports client relationships, and leads workshop design and facilitation—with a focus on delivering results and providing powerful lessons and insights into the behavior of leaders and teams in challenging situations.

Prior to joining Brimstone, Bob was President of Outward Bound Professional and a member of the senior management team for Outward Bound USA. Under his leadership, Outward Bound Professional became a leader in the professional development space by delivering results-focused programs for Outward Bound's clients in the areas of team building, leadership development, cultural change, communication, and trust building.

Bob attended Oregon State University on a National Student exchange program and holds a BS in Business Administration from the University of Southern Maine. He has completed leadership programs with The Center for Creative Leadership, NTL, General Electric, Interaction Associates and The Harvard Business School. Bob also co-authored the book, *Leadership The Outward Bound Way*. He lives in Camden, Maine.

Savannah Augunas – Program Management and Support
Associate, Brimstone Consulting Group

Savannah provides logistics and overall project support for our client engagements for both on and offsite delivery. She also assists the administrative team as needed. Savannah brings to Brimstone a wealth of valuable skills acquired from her unique background working in hospitality and fashion. Prior to joining Brimstone, she worked as a recruiting coordinator, accounting assistant, and office manager for Luke's Lobster. She also spent time working as an executive assistant in the fashion industry.

Savannah earned a BA in Public Health from Beloit College in Beloit, Wisconsin. She lives in Portland, Maine.

ILLUSTRATIVE EXPERIENCE AND REFERENCES

4.3.1.1 Experience in strategic technology investment portfolio management and enterprise project management across mid to large enterprises

Fortune 100 Healthcare Company, Global Operations

Contact: Will be provided upon request

This executive leader has partnered with Brimstone in a number of engagements, including when he led the Enterprise Value Office for a Fortune 20 company. In that role, he and his team managed the investment and project management portfolio of transformation projects across the enterprise. He has experienced a number of the solutions described in this proposal as part of his transformation work at two companies, including Strategy and Leadership Team Alignment, Technology Acceleration Teams, and executive advisory and coaching. He continues to drive transformation efforts in his current role and we continue to work with him on aspects of this.

4.3.1.2 Experience in government cost recovery for services funding models

State of Maine, Information Technology

Contact: Fred Brittain, CIO

Fred partnered with Brimstone to help him lead the transformation of the Information Technology function at the State of Maine. We delivered a number of the solutions described in this proposal as part of our work with Fred and his team, including organizational diagnosis, Strategy and Leadership Team Alignment, Technology Acceleration Teams, and executive advisory and coaching. Fred's team has made significant progress on their transformation journey, and we continue to provide coaching and other services as needed.

4.3.1.3 Experience working with State government IT organizations

University of Maine System IT

Richard Thompson, CIO (retired)

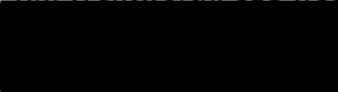
As the newly appointed CIO for the seven (7) campus University of Maine System, Dick had a mandate from the Chancellor to integrate separate campus IT operations into a unified service organization. Cultural and structural barriers within IT and between the campuses and the system

office were making progress slow. Beginning in 2014, we facilitated an organizational redesign process engaging incumbent and emerging leaders across the organization. Teams developed charters for three new structures designed to build capability in operational excellence, portfolio management and strategy development. Brimstone consultants Jeremy Seligman and Charles Pfeffer coached the CIO, his leaders and teams to apply these new capabilities to streamline operations and improve service. One result of this work was dramatically improved service levels across the entire University of Maine System, with cost reductions of 10%

4.3.1.4 Experience in organizational change management in technology support units.

Evernorth / Express Scripts

Tim Wentworth, CEO (retired)



Brimstone worked closely with Tim and the Express Scripts organization from 2014 until his retirement in 2022 (and we continue to work with the organization, which is now Cigna / Evernorth). We delivered the solutions described in this proposal in multiple business units and functions, including extensive strategy development, alignment, strategy execution, and leadership development work inside the Technology function. Our work across the organization and in the Technology function was focused on multiple aspects of transformation, helping the business pivot to a new growth and operating model.

WHY BRIMSTONE?

Our services typically focus on strategy to execution, a market space between the large consulting firms (e.g., McKinsey, Bain, Boston Consulting Group) and smaller boutique consultancies (e.g., Clarion Group, FMG, Clerestory). We often help clients develop and focus their strategy and then operationalize that strategy. We provide a broader range of services than most boutique consultancies (who focus in one area such as change management, advisory services, or high-performing teams). Our approach to strategy, transformation, and addressing the most critical issues facing an organization simultaneously leverages four forces that drive business results: developing leaders, aligning teams, changing the way people work, and energizing the organization.

We also see the way we work with our clients as added value, above and beyond what our competitors do. It's often the *way* we work with our clients as much as *what* we work on with them that differentiates us:

WE KNOW OUR STUFF

For more than 40 years, we have helped leaders accelerate change that produces improved and sustainable results. Our team is comprised of entrepreneurs, former C-suite executives, educators, and seasoned process consulting experts. We have life experiences, business expertise, and "I'll take

on any challenge” mentality that helps us quickly understand what leaders are facing and identify ways to help those leaders accomplish what they want to accomplish. We bring maturity, candor, partnership, and a bottom-line focus to every engagement.

WE PARTNER

We work side-by-side with leaders who are committed to making a significant difference. We work with these extraordinary leaders to help them spur big changes in their organizations and to drive transformation.

WE HAVE A BIAS FOR ACTION

Our methodology, processes, and tools help leaders simultaneously drive results, accelerate leadership development, improve team effectiveness, achieve organizational alignment, and energize the organization. Our partnership not only changes the way work gets done but also transforms the organization.

Our approach is results-oriented, practical, flexible, and hands-on. Our advice is neither theoretical nor academic – we help you get real work done, achieve real results, solve real problems. And we know you need to move quickly and inspire others to do the same. We listen, we assess, we advise, we help you plan, we intervene, we help you take action.

WE CARE

Our team cares about you and your business. Our North Star value is “to be of service,” and helping our clients is at the heart of everything we do. We build meaningful relationships, and we deeply value the individuals and teams we serve.

WE SWEAT THE SMALL STUFF (SO YOU DON'T HAVE TO)

One of the biggest differences about us is the degree to which we orchestrate the details that make interventions successful — working on several levels to ensure the success of the leader, their people, and the solution. We deliver all the “scaffolding” necessary to make the intervention successful and have the impact desired by the leader. We have learned that it takes a relentless focus on the details to make transformation successful.