



West Virginia Purchasing Division

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The following documentation is an electronically-submitted vendor response to an advertised solicitation from the *West Virginia Purchasing Bulletin* within the Vendor Self-Service portal at wvOASIS.gov. As part of the State of West Virginia's procurement process, and to maintain the transparency of the bid-opening process, this documentation submitted online is publicly posted by the West Virginia Purchasing Division at WVPurchasing.gov with any other vendor responses to this solicitation submitted to the Purchasing Division in hard copy format.

Header 4

List View

General Information | [Contact](#) | [Default Values](#) | [Discount](#) | [Document Information](#) | [Clarification Request](#)

Procurement Folder: 1124314

Procurement Type: Central Master Agreement

Vendor ID: 000000189175 

Legal Name: QUALTRICS LLC

Alias/DBA:

Total Bid: \$708,750.00

Response Date: 12/07/2022 

Response Time: 16:47

Responded By User ID: ShiAnn Scheu 

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SO Doc Code: CRFQ

SO Dept: 0506

SO Doc ID: MIS2300000001

Published Date: 11/15/22

Close Date: 12/8/22

Close Time: 13:30

Status: Closed

Solicitation Description: SURVEY MANAGEMENT PLATFORM

Total of Header Attachments: 4

Total of All Attachments: 4

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Survey Management Platform	1.00000	EA	167000.000000	167000.00

Comm Code	Manufacturer	Specification	Model #
43232314			

Commodity Line Comments: Please reference RFQ attachment for further details regarding pricing and implementation timeline specifics

Extended Description:

3.1.1 Survey Management Platform- up to a minimum of ten users

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Survey Management Platform- Year One Renewal- License Fee	1.00000	EA	167000.000000	167000.00

Comm Code	Manufacturer	Specification	Model #
43232314			

Commodity Line Comments: Please reference RFQ attachment for further details regarding pricing and implementation timeline specifics

Extended Description:

3.1.1 Survey Management Platform
Year One Renewal- up to a minimum of ten users

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
3	Survey Management Platform- Year Two Renewal- License Fee	1.00000	EA	167000.000000	167000.00

Comm Code	Manufacturer	Specification	Model #
43232314			

Commodity Line Comments: Please reference RFQ attachment for further details regarding pricing and implementation timeline specifics

Extended Description:

3.1.1 Survey Management Platform
Year Two Renewal- up to a minimum of ten users

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
4	Survey Management Platform- Year Three Renewal- License Fee	1.00000	EA	167000.000000	167000.00

Comm Code	Manufacturer	Specification	Model #
43232314			

Commodity Line Comments: Please reference RFQ attachment for further details regarding pricing and implementation timeline specifics

Extended Description:

3.1.1 Survey Management Platform
Year Three Renewal- up to a minimum of ten users

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
5	Additional Users/Licenses	10.00000	EA	0.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43230000			

Commodity Line Comments: Please reference RFQ attachment for further details regarding pricing and implementation timeline specifics

Extended Description:

3.1.1.9 Additional Users/Licenses - each add on user/license
 (10 used for bidding scenario only, quantity could increase or decrease during life of contract)

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
6	Service and Support- monthly fee	12.00000	EA	0.000000	0.00

Comm Code	Manufacturer	Specification	Model #
81112200			

Commodity Line Comments: Please reference RFQ attachment for further details regarding pricing and implementation timeline specifics

Extended Description:

3.1.2.1 Service and Support - monthly fee

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
7	Service and Support- monthly fee- Year One Renewal	12.00000	EA	0.000000	0.00

Comm Code	Manufacturer	Specification	Model #
81112200			

Commodity Line Comments: Please reference RFQ attachment for further details regarding pricing and implementation timeline specifics

Extended Description:

3.1.2.1 Service and Support - monthly fee
Year One Renewal

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
8	Service and Support- monthly fee- Year Two Renewal	12.00000	EA	0.000000	0.00

Comm Code	Manufacturer	Specification	Model #
81112200			

Commodity Line Comments: Please reference RFQ attachment for further details regarding pricing and implementation timeline specifics

Extended Description:

3.1.2.1 Service and Support - monthly fee
Year Two Renewal

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
9	Service and Support- monthly fee- Year Three Renewal	12.00000	EA	0.000000	0.00

Comm Code	Manufacturer	Specification	Model #
81112200			

Commodity Line Comments: Please reference RFQ attachment for further details regarding pricing and implementation timeline specifics

Extended Description:

3.1.2.1 Service and Support - monthly fee
Year Three Renewal

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
10	Training	1.00000	EA	40750.000000	40750.00

Comm Code	Manufacturer	Specification	Model #
86132201			

Commodity Line Comments: Please reference RFQ attachment for further details regarding pricing and implementation timeline specifics

Extended Description:

3.1.2.2 Training

5 December 2022

To Whom It May Concern:

Thank you for considering Qualtrics as a solution for your current business needs. We are happy to provide the necessary information to help the State of West Virginia see the value Qualtrics' services can bring to your organization. The information contained in our submission is provided in good faith and is true and correct to the best of our knowledge as of the date of submission. The proposal documents themselves will not be included in the final agreement. With this in mind, we are writing in response to your proposal documentation.

Many customers require acceptance of lengthy contracts or terms and conditions during this early evaluation stage. Here at Qualtrics, our position is to engage in legal, security and insurance discussions after our customers have chosen us as a vendor. We are writing in response to your proposal documentation, including but not limited to the General Terms and Conditions (pages 13-25), Specifications (pages 27-32, including Sections 5.2, 6, 7, and 8.3), Software as a Service Addendum (pages 33-42), Federal Funds Addendum (pages 44-50) and Exhibit A to Required Contract Provisions for Non-Federal Entity Contracts Under Federal Awards (pages 51-57).

We invite your organization to review our General Terms and Conditions at <https://qualtrics.com/terms-of-service>, which provide insight into how our services work and the corresponding mutual terms we feel are necessary to create a great relationship. Upon request, a Word version of these terms may be provided for your review. Additionally, Qualtrics is covered under the insurance policies of our parent company, SAP. Current Certificates of Insurance (COIs) detailing Qualtrics' coverage are available for your review, as applicable, at <https://sap.com/ecoi>. Further, with thousands of customers, we are not able to commit to any individual customer's code of business conduct, but we maintain our own industry-standard Code of Ethics & Business Conduct, which is available at <https://qualtrics.gcs-web.com/static-files/0a47eba5-0554-40f5-b532-6740c5c860c2>.

Upon award to Qualtrics, our legal and security teams will be quick to respond and reasonable in our discussions. We understand the constraints that you may be facing and will work to a successful resolution that is agreeable for both parties.

We look forward to working with your organization.

Sincerely,



Mark Creer
Director

Employee Experience
Management for



Qualtrics RFQ Response
December 2022

Michael Sarmiento
Qualtrics Public Sector AE
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304.685.3415

Table of Contents

EXECUTIVE SUMMARY	3
QUALTRICS EXPERIENCE MANAGEMENT	6
OUR BEST-IN-CLASS PLATFORM	7
EMPLOYEEXM.....	10
CLIENT EXAMPLES.....	14
IMPLEMENTATION AND SERVICES	16
ADDITIONAL RESOURCES.....	17
ABOUT QUALTRICS.....	19
PRICING PROPOSAL.....	20

Executive Summary

For decades, leaders have focused on a range of factors to optimize employees' engagement and intent to stay. The best organizations have built a strong foundation of organizational practices over time. But in the wake of the disruption of the past few years, some of these practices have become expectations and new norms, resulting in a drastic shift in the demands of current and potential employees. Across all industries, but particularly in the public sector where employees have been asked to go above and beyond typical expectations, employees have started to re-visit and re-evaluate the extent to which the organization that they work for fulfills their fundamental needs around well-being, development, values, interpersonal relationships, team interactions, pay and benefits. The reality is that organizations can no longer perform at a high level without taking a holistic approach to understanding and optimizing the employee experience and linking the data from employee listening to the key metrics and outcomes that matter both internally and externally.

Understanding the “why” contributing to the success or failure of critical employee experiences in order to foster the most dynamic work environment possible requires implementing a world-class employee experience program. A program that powers data-driven workplace decision making positively impacts all facets of your organization. The ability to collect and connect data across the entire employee lifecycle—from recruitment to exit—you can effectively achieve key outcomes, including:



By identifying ways to attract, develop, engage, and retain talented employees, The West Virginia Department of Health and Human Services will achieve its goals while fostering a happy and committed workforce.

But running an optimized agency can go beyond simply working well with your employees. Experience Management (XM) empowers governments to create the stakeholder experiences that build public trust and improve public outcomes. XM goes beyond listening—it's about taking action on experience data to improve those experiences proactively and predictably.

XM FOR GOVERNMENT

Government XM drives the key outcomes you care about

Experience Design

Design inclusive policies, programs, and services.



Experience Improvement

Continuously improve constituent, employee, and partner experiences.

GovXM

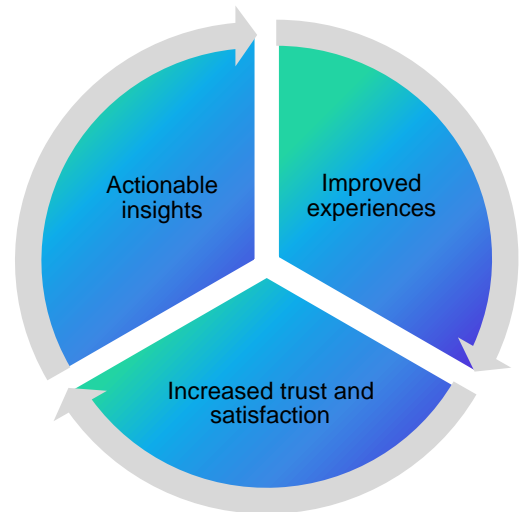


By partnering with Qualtrics, West Virginia DHHR will be enabled with real-time, impactful insights to drive improvement and positive outcomes across the agency.

Protect Your Assets — Among several other key certifications, we are FedRAMP authorized, considered the gold security standard, and one of the highest non-military accreditations.

Improve Efficiency — With data on all stakeholder touchpoints, actionable analysis, and a deep understanding of key drivers, Qualtrics helps you to identify and resolve the issues that matter most.

Future-Proof Your System — The West Virginia DHHR needs a solution to meet its future needs without time-consuming and costly engineering resources. Qualtrics' UI quickly adjusts to the changes you need, such as new surveys, programs, etc.



Our experienced industry experts have worked with 16,000+ clients globally to close experience gaps, including 800+ government agencies and organizations of similar size and scope to West Virginia DHHR. We look forward to discussing how we can customize our solution to your needs.

Sincerely,
Michael Sarmiento
Enterprise AE

Qualtrics Experience Management

Qualtrics created the Experience Management (XM) category and enables organizations to design and improve customer experiences, employee experiences, program/service experiences, and brand experiences—in a single, secure platform. Qualtrics is the only platform to measure every experience throughout citizen/resident and employee journeys and tie them all together to produce automated actions to close gaps.

Qualtrics is the Market's XM Thought Leader

Understanding and acting on stakeholder experiences enables governments to serve their communities better, optimize programs and services, and retain top talent. This is achieved by infusing pragmatic, scientific thinking into day-to-day operations and informing long-term planning. However, this creates several challenges for leaders, including determining how to 1) turn stakeholder feedback into evidence-based policy and decision-making, 2) measure and improve program efficiency and optimize tax dollars, and 3) address IT governance and data security issues.

Qualtrics provides a secure, out-of-the-box solution that fully addresses these challenges and integrates seamlessly with critical systems for a streamlined view of all data. Qualtrics empowers leaders and staff to drive meaningful improvements through better, data-driven decisions—and that's one of many reasons why Qualtrics is the trusted choice of 16,000+ organizations globally, including 88% of the Fortune 100, 99 of the top 100 US business schools, and 800+ government agencies.

Fastest Pace of Technological Innovation

We can scale to West Virginia's future XM programs at a pace unmatched by our competitors because of our single, agile technology platform and unparalleled operational infrastructure. Qualtrics owns and develops all leading-edge technology modules built into our XM stack. Our 800+ product engineers—the total size of some of our competitor's entire workforce—continually enhance and develop Qualtrics' proprietary solution capabilities and release new, user-friendly features.

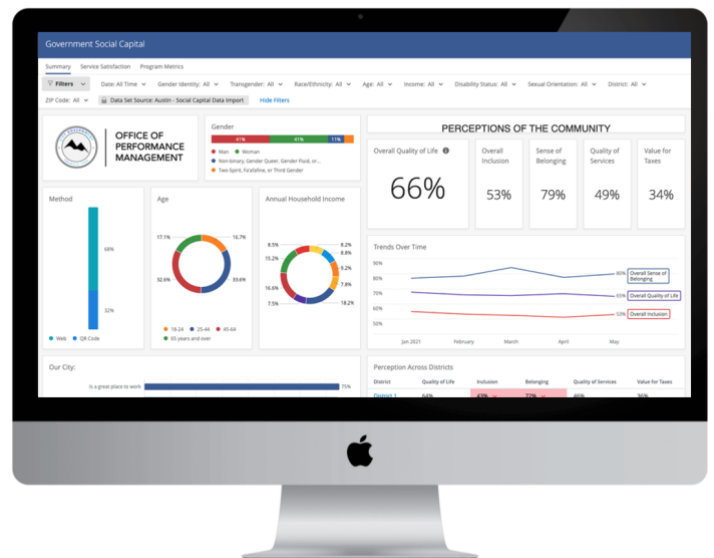
Our Best-in-Class Platform

Qualtrics XM connects and correlates operational data (complex numbers like cost, accounting, and sales) with experience data (human emotions, thoughts, sentiment) on a single interpretation system to understand, prioritize, and take action that drives your business toward crucial outcomes and goals.

With our platform, your organization can seamlessly:

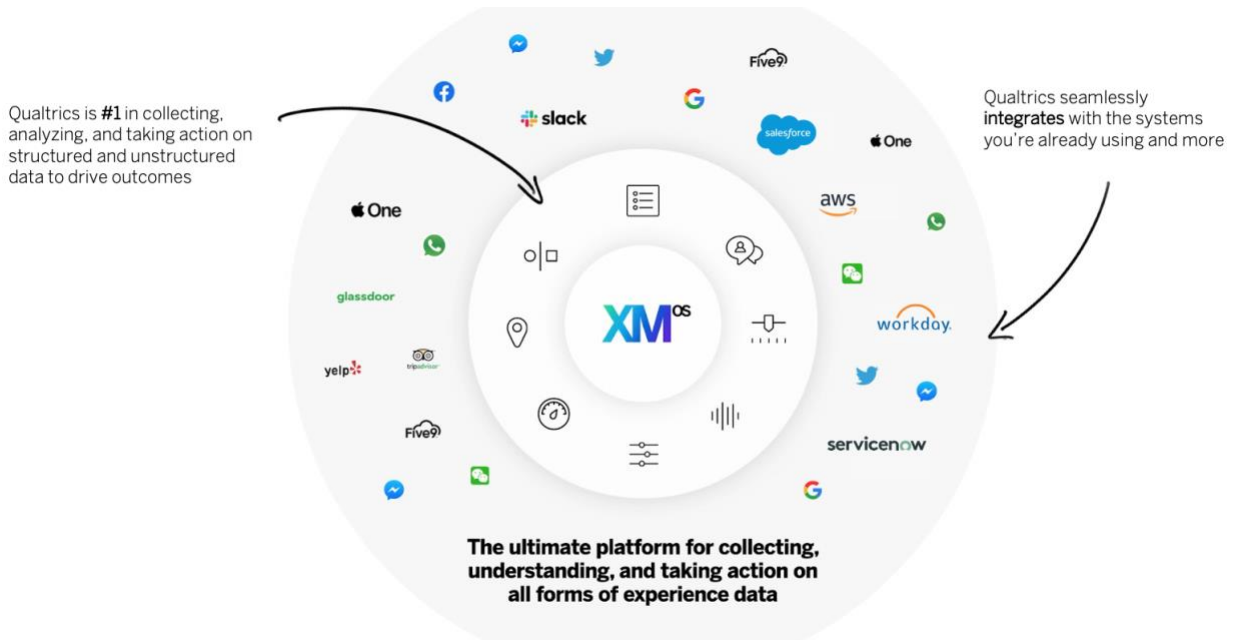
Enable a holistic feedback view

- Build a unified view of all stakeholder interactions with their feedback, channels, preferences, and profile records—all in one place.
- Manage stakeholder profiles, preferences, and identities across departments.
- Listen across all channels where people are leaving feedback—whether direct (surveys, chats), indirect (online reviews), or ambient (generated at the moment)—and build a view of journeys across all touchpoints and listening channels.
- Deliver personalized experiences at scale with insights around stakeholder behavior and preferences.



Integrate experience data in business workflows

- Drive action and improvement by integrating experience data with your operational systems and business workflows.
- Automate any task and workflow connecting experience data. Raise a ticket, share a result, create an event, send a follow-up, schedule an upload, and do any number of tasks.
- Develop custom apps, plugins, visualizations, and automations with a vast API surface.
- Leverage an extensive ecosystem of partners to extend your reach and integrate with existing systems.



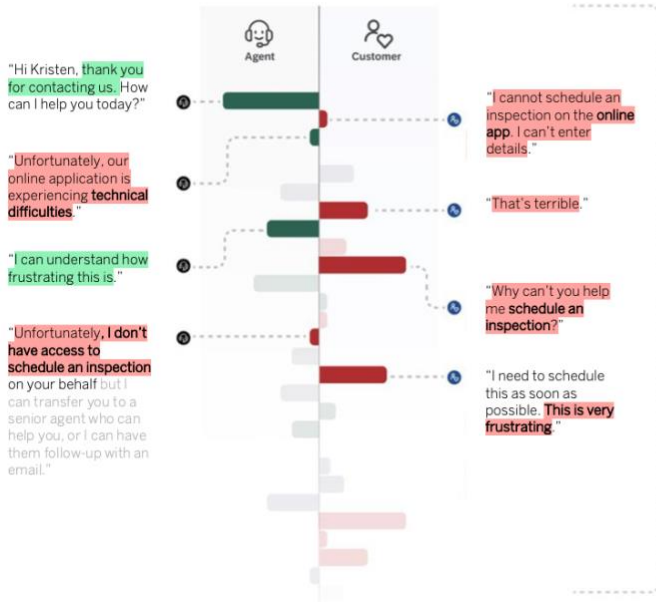
Ensure data security

- Ensure compliance with a platform that meets gold standard security standards, including FedRAMP, GDPR, HITRUST, ISO 27001/17/18, SOC 2 Type 2, and more.
- Implement controls on user and data access and sensitive data handling.
- Remove data silos with a single system of record.
- Reduce data entropy and ensure governance of data quality, reporting, and analytics.



Uncover patterns and trends

- Capture signals across channels—such as chat, phone calls, and Outlook—and view visualizations of emotion, effort, and intensity of both the agent and the citizen/resident.
- Arrive at insights faster with automatic topic categorization, including surfacing trending topics to the people that need to see them and recommended focus areas.
- Use 150+ out-of-the-box models to automatically interpret and categorize issues, making it easier to close the loop and resolve pain points proactively.
- Track and streamline each individual's interactions with your agency in one directory (xID)

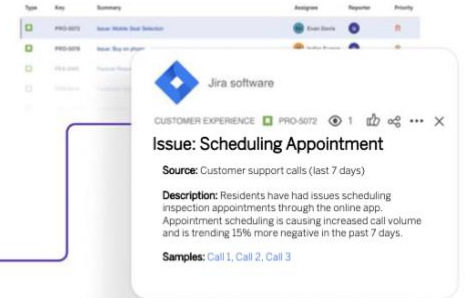


Qualtrics visualizes emotion, effort, and intensity of both the agent and citizen/resident across all conversations

Analyze conversations using government-specific topic libraries



Automatically interpret and categorize issues using Qualtrics' 150+ out-of-the-box models



Continually prioritize the highest impact work for teams

EmployeeXM

Employee Experience (EX) monitors the experiences you provide to employees from start to finish and identifies and analyzes trends to create accountability for leaders to achieve organizational objectives.

1. Ultimate Listening Engine — Continuously listen and improve experiences for every employee. Whether in the office, on job sites, or remote, hear every voice in your organization with a listening engine that ensures you can take action when and where it matters most. From relational census and pulse to multi-rater and always-on feedback, you'll have the listening tools to understand and design the unique employee experiences your diverse workforce requires.

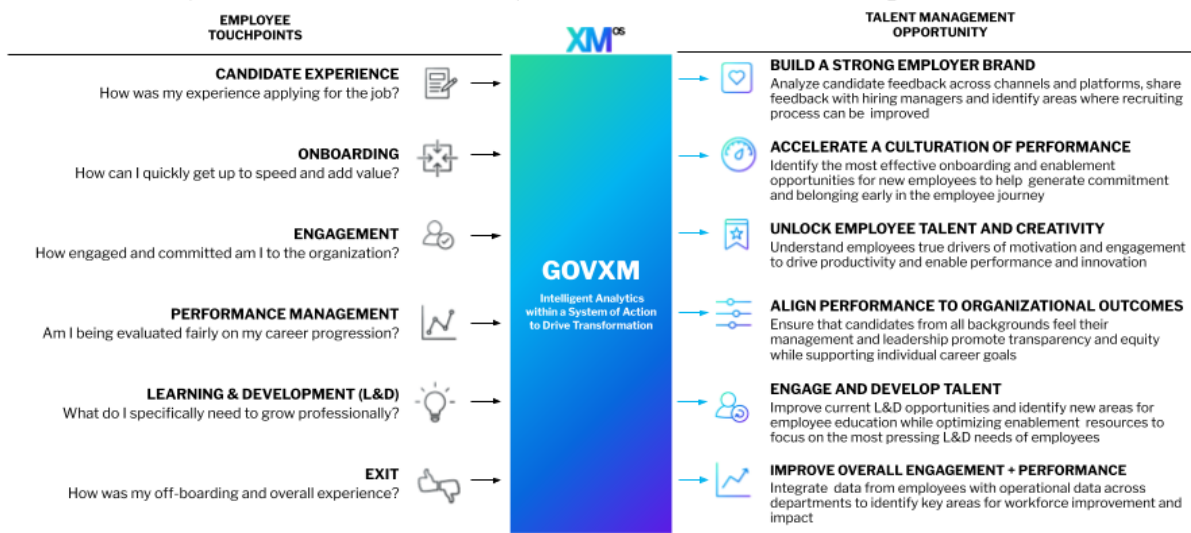
2. Intelligence & Analytics — Take action before problems become widespread with advanced statistical and human language tools that automatically model your experience and operational data 24/7 to surface key areas to focus on. AI-driven analytics and IO psychology-based decision tools equip managers, business leaders, operations, and IT teams with the tools they need to drive both frontline action and strategic transformation.

3. Actions & Workflows — From guided manager action planning to real-time automated workflows using third-party app integrations, no experience goes neglected. Automate real-time actions for frontline managers with feedback-to-action loops for every employee experience. Our EX platform seamlessly integrates into leading HR technology including talent development tools, applicant tracking solutions, and ticketing tools.

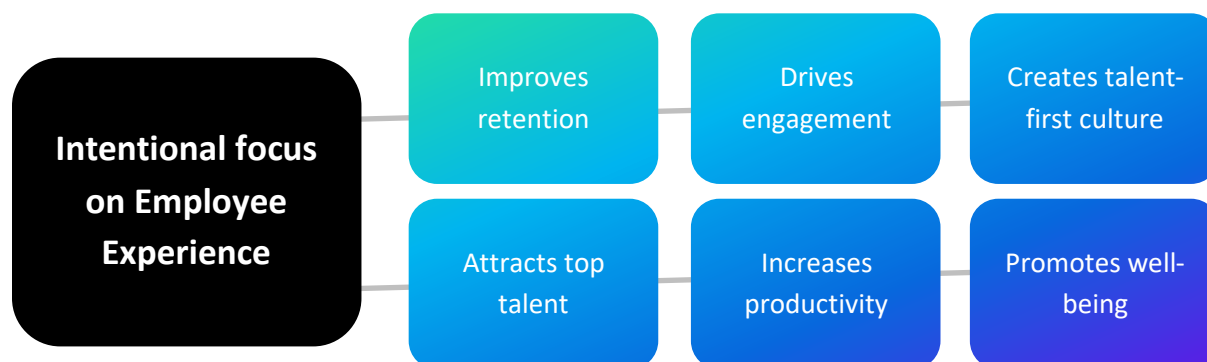
GOV XM VISION

Optimizing your mission-driven Workforce

Provide organizational wide visibility to government and HR leaders, develop and grow top talent, and create a shared mission across departments and divisions with the public at the center of decision making.



Workforce management is fundamentally an experience management (XM) challenge. Global human capital research conducted by the XM Institute and Qualtrics consistently demonstrates that the experiences employees go through at work drive long-term attitudes about their organization. The experience organizations create for their workforce shapes employees' behaviors, such as choosing to stay, performance levels, and whether they will seek innovative solutions.



Since workforce management is an XM problem, it requires XM solutions. An effective EX program continuously designs for the human experience, as the needs and expectations of that experience evolve amidst long-term trends and sudden disruptions. Modern EX management leverages the power of digital ecosystems to bring work to the employee instead of sending the employee to work; engage employees in always-on listening to uncover their unmet needs as they evolve; co-create with employees the experiences they crave; and measure the impact of these investments on productivity, retention and skills gap closure. EX is strategically focused, simple to execute, and measurable in terms that matter to organizational leaders. Human capital leaders can create high performing organizational cultures, close skills gaps, and recruit and retain the best talent by applying the principles and practices of EX.



There are various applications for EX across an organization. Some EX use cases include:

Employee Engagement

Leveraging years of client research and multiple global validation studies, Qualtrics has developed the EX25, an industry-leading holistic approach to measuring and optimizing employee experience. Engagement, as a single metric, is no longer sufficient. We have created a new set of KPIs that simplifies the engagement metric and adds new measurements on inclusion and well-being.

Our in-house team of organizational psychologists also identified 25 of the most impactful drivers for these KPIs, which include trust, safety, respect, and work-life balance. With EX25, organizations can holistically understand employee experience and where to focus to drive impact, without adding more burden to their employee listening program.

1

Measure the employee experience with a validated framework (EX25) to make more informed decisions

2

Collect employee feedback and insights to pinpoint key drivers of engagement and productivity

3

Identify at-risk employee populations with low engagement and attrition issues in a single glance

Employee Lifecycle

Understanding the employee experience in specific moments of their employee journey is vital to agency success. Our solution enables you to eliminate organizational blind spots with a holistic view of all data across the entire employee journey—from recruitment to exit.

1

Gain real-time insight into employee experience based on critical events or phases in the employee journey

2

Embed feedback across all elements of the employee lifecycle to optimize training and efficiency

3

Drive the right actions to ensure successful onboarding and identify key drivers of attrition

Lifecycle Surveys

Lifecycle feedback allows you to gain insight into your employees' experience based on critical events or phases in the employee journey such as onboarding, role transitions, or exit. The Qualtrics platform allows users to embed employee feedback across all elements of the employee lifecycle and automate triggers to launch a lifecycle feedback mechanism. Having this critical data housed in one secure location that provides analytics capabilities to mesh input from all sources allows organizations to make strong, insightful, data-driven decisions. Qualtrics does have a standard tool for employee lifecycle surveys and supports numerous clients with a variety of lifecycle programs. Our platform can flex to a number of use cases that require event-triggered listening mechanisms/ surveys. The most common use cases around lifecycle surveying that we support include candidate reaction surveys, onboarding surveys (which can differ in timing, cadence, etc.) and exit. However, we also have a number of clients that also conduct lifecycle surveys at other discrete events within the employee journey such as job change, post-training assessments, post-leave assessments, organizational change surveys, alumni surveys, among many others. In addition to our technological capabilities to adapt to a variety of lifecycle use cases, we also offer pre-packaged solutions for a number of these common lifecycle use cases.

Client Examples

Notable client examples that we are able to mention include:

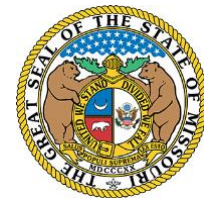
State of Colorado Dept of Human Services

- Improved statewide employee engagement metric for DHS by influencing leadership communication and transparency
- Provided key stakeholders easy insights into key drivers of engagement and intent to stay



State of Missouri

- 4 large-scale initiatives/programs such as ENGAGE 2.0, The Missouri Way, Missouri Leadership Academy, and MOLearning have been implemented since 2017
- 550 Change Champions across all levels of the state government
- 2020 NASCA Award Recipient in the “Personnel Best Practices” category for their professional development transformation



We also work with several large banking and financial services firms (each over 100,000 employees) headquartered in the U.S. (but operate globally) that measure employee feedback through lifecycle surveys. Additionally, we are currently working with one of the world's largest retailers to expand their existing employee experience program to include more employee-driven, event-based listening mechanisms.

From our extensive experience with lifecycle measurement, we can distill our key learnings/ best practices into a few key points:

- Any lifecycle surveys should be driven by the goal(s) they are intended to impact. Beyond improving employee experience, we work with our clients to define specific, measurable outcomes that can potentially be driven by these lifecycle measures. All of the decisions about population, timing, length, content depend on this first critical step.
- Lifecycle measures must be personal - this means that employee lifecycle measures must meet employees where they are in their journey and be as seamless as possible. We support many different survey distribution methods through our technology and work with our clients to determine the right times and distribution methods to reach employees where they are.
- Balance between timing, cadences, and length - we have included several very specific recommendations for the 3 most common lifecycle measures below.

Onboarding Surveys

The frequency and timing of onboarding or new hire surveys depend greatly on the specific onboarding processes of certain jobs within the organization. For example, in call center environments, we recommend multiple, short surveys after each major phase of the onboarding process (e.g., classroom training, transition

period, etc.) whereas for other types of jobs where the onboarding process is less nuanced, a single survey is sufficient. It is common for our large clients with diverse populations to have a global onboarding survey and more specific onboarding surveys built-in for specific populations that have unique onboarding processes.

Exit Surveys

Ideally, we recommend that exit surveys be sent to employees after their notice has been given but before they actually leave the organization. Oftentimes, this is not possible. In such cases, we recommend surveying exiting employees as soon after exit as possible.

Implementation and Services

We start by assessing where you are now and help set out the strategy and vision for your program alongside key stakeholders in your organization. We then work together to set specific objectives and design the program and project plan to get you there. During the implementation phase, we configure the program, including integrations, training, and deployment. After your program is deployed, we focus on maturing the program—actioning on insights to realize business value and identifying new opportunities for improvements and expansion.

With Qualtrics, West Virginia DHHR is enabled with world-class technology and purpose-built products. Qualtrics aided by our world class implementation partner network will work hand-in-hand to provide the culture and competency required to operationalize your programs. Our XM Services team has deep expertise across industries and the full spectrum of core experiences. We have the largest ecosystem of accredited delivery and strategic consulting partners, and a successful delivery track record with more than 16,000 customers, spanning advisory consulting to technical execution.

We pair our unmatched XM technology platform with a robust global ecosystem of XM Services experts to ensure delivery success.

Proposed Maturity Model:

qualtrics^{XM} | Government

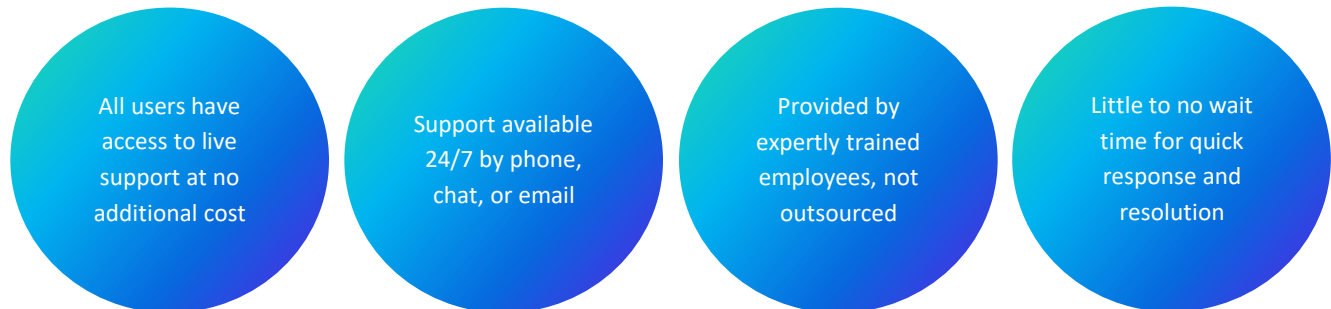
Recommended Qualtrics EX Maturity Model



Additional Resources

24/7 Support

Our live support is one of our key differentiators as a company, and clients often comment on how this is one of the most valuable aspects of the Qualtrics relationship. In an industry where the standard customer satisfaction is 95%, we have always excelled, generally averaging 97% satisfaction.



- Our target response time for an email is less than 24 hours, although we typically respond much faster. During a recent quarter, our email response time averaged less than an hour.
- Our target wait time for phone calls is less than 5 minutes, but in actuality, our wait times average far less than even half that. Most support requests made over the phone are resolved within the first call.
- People chatting in can expect their first response in an average of 13 seconds.
- We provide support in English and 8 other languages. Our additional languages are primarily available during regular business hours of the language region and are not guaranteed to be available 24/7.

Chat, email, and phone support can be accessed through the Support Site by clicking Contact Us. A list of localized numbers can be found at <https://www.qualtrics.com/contact/>.

Qualtrics Support Site

We offer an extensive digital support environment with carefully curated FAQs, guides, step-by-step instructions, and recorded webinars. Every software we offer currently has support pages, with additional pages being posted as soon as new features are added to the platform itself. The Support Site can be accessed any time by going to [qualtrics.com/support](https://www.qualtrics.com/support).

Qualtrics Community

Users also have the opportunity to talk to other Qualtrics users on the Qualtrics Community. Here, they can discuss best practices, custom coding, share perspectives on issues they're experiencing, and more. This community can be accessed at [qualtrics.com/community](https://www.qualtrics.com/community). Anyone can read posts on the community, but to log in and join the conversation, users will only need their Qualtrics account login information.

XM Institute

The Qualtrics XM Institute, is led by Bruce Temkin, a globally recognized XM visionary who is often referred to as the “Godfather of Customer Experience.” Visit www.XMInstitute.com for a one-stop-shop of the best thought leadership, content, and training in XM, including:

- **XM Library** — Search the library via filters to find the content most appropriate for your use case. Subscribe to the XM Journal for regular content delivery to your inbox.
- **Experience Matters Blog** — Stay up to date with expert opinions and guidance from Bruce Temkin and others.
- **Training** — Our training empowers XM professionals to design and accelerate their programs. Our highly engaging training offerings combine essential XM content with activities specifically designed to help you reflect on your existing efforts, apply key learnings to your program, and create plans for driving action.
- **XM Professionals Network** — Our mission is to create a thriving community of XM professionals. Together, we can better the human experience. That’s why we created the XM Professionals Network (XMPN)—a global, free community for XM professionals who want to learn, connect, and advance.

About Qualtrics

Qualtrics was founded in 2002 with the belief that we could revolutionize how people did research. In March 2017, we declared our vision for how future industry leaders will measure the strength of their organization: experience management. We unveiled Qualtrics Experience Management (XM), a revolutionary software that allows organizations to tie all of their customer, employee, brand, and product experience research together with operational data to direct their trajectory.

Today, our platform collects over 3 billion responses annually in support of customer, employee, product, brand, and every other kind of research. Over 16,000 enterprises worldwide, including 88% of the Fortune 100, 800+ government organizations, and 99 of the top 100 U.S. business schools, rely on Qualtrics. They partner with us not only because of our industry-leading technology, but because of the innovations our 800+ software engineers are adding to the platform daily to save organizations time, money, and help them do research and analysis to understand experiences scale.

Our enterprise platform has enabled our customers to deploy projects that survey millions of respondents and deliver thousands of analytical reports. Qualtrics highly values the privacy of its customers. As such, it is Qualtrics policy to share client contact information only upon further selection. We appreciate your understanding. Some of our government clients include:

Hennepin County	Milwaukee County
The Chickasaw Nation	City of Miami
City of Houston	Virginia Dept. of Social Services
LA County Public Health	State of Utah
Ventura County	California Dept. of General Services
Dallas County Health and Human Services	Sacramento County
Florida Dept. of Children and Families	State of Missouri
Seattle Dept. of Education and Early Learning	Winnebago County
Oakland County	State of Nebraska
State of Iowa	Colorado Dept. of Transportation
Maricopa County	Ottawa County
Kent County	...and many more

Among various awards, Qualtrics is recognized as the leader in experience management by Forrester and Gartner:

- In 2020, [Qualtrics was ranked #1 in Forrester’s New Wave Report](#) for Employee Experience Management Platforms. Qualtrics was the only Leader to receive a “differentiated” rating, earning the maximum rating in more categories (7 out of 10) than any other vendor.
- Qualtrics was named a [Leader in Gartner’s 2021 Magic Quadrant for the Voice of the Customer](#). Qualtrics was the highest positioned vendor for Ability to Execute, and one of the highest placed vendors in Completeness of Vision.

Pricing Proposal

	Year 1	Year 2	Year 3	Year 4
Qualtrics EX Foundational (Engagement+) & Qualtrics EX Lifecycle (Onboarding/Exit)	\$167,00	\$167,000	\$167,000	\$167,000
*- 35% discount applied				
Ongoing Support				
Client Success Manager	Included	Included	Included	Included
24/7 Support Desk	Included	Included	Included	Included
Implementation and Training				
(Workforce Science Associates)	\$40,750	N/A	N/A	N/A
Annual Total Cost	\$207,750	\$167,000	\$167,000	\$167,000

EX Solutions Overview

EX Foundational (Engagement)

Key Features

- EX 25 Methodology and Program Design
- Employee Well-Being Methodology and Program Design
- Employee DEIB Methodology and Program Design
- Employee Benefits Optimizer Program
- Unlimited Pulse Surveys
- Action Planning
- Benchmarking (requires mapping and delivery charges)
- Hierarchical Dashboards
- Text iQ
- XM Solutions: expert content and pre-configured questions & reporting:Engagement
- HR Tech: SFTP + API integrations
- Employee Directory Import Auto
- Communication Guides

Common features across all EmployeeXM

- Advanced Security Management
- All Languages
- All EX Question Types (side-by-side, multiple choice, text entry, matrix)
- E-mail / Anonymous Distribution
- Expert Review Survey Methodology

EX Lifecycle (Onboarding/Exit)

Key Features

- Onboarding & Exit Methodology and Program Design
- Employee Directory Import Automation
- Flat Dashboards
- Automated Actions
- XM Solutions: expert content and pre-configured questions & reporting:
- Workplace Safety content
- Text iQ
- HR Tech: SFTP + API integrations
- Always-on Feedback Integration

Common features across all EmployeeXM

- Advanced Security Management
- All Languages
- All EX Question Types (side-by-side, multiple choice, text entry, matrix)
- E-mail / Anonymous Distribution
- Expert Review Survey Methodology

Employee Experience
Management for



Qualtrics Response to
Scoping Questions

Michael Sarmiento
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304.685.3415

Scope of Work Requirements & Responses

3.1.1. Survey Management Platform (Qualtrics XM Survey Management Platform or Equal)

Qualtrics' XM and Qualtrics' EX platforms will be provided as part of this contract agreement.

3.1.1.1. The Survey Management Platform must apply artificial intelligence, machine learning, and apply topics through sentiment analysis to open ended comments.

Qualtrics Text iQ is Qualtrics' text analysis tool, which allows for automatic tagging and categorization of responses. As part of Qualtrics' text analytics capabilities, both a frequency and probabilistic model are run against open-ended responses to identify not only the most commonly used terms, but also terms that are used in a similar manner (e.g., "complaint", and "escalate"). Responses are then flagged with these topics. Topics can then be used as filters, not only when viewing the opened-ended text responses but when viewing any data within the dashboard, allowing for a rich exploration of all qualitative and quantitative data by topic.

Automatic Topic Analysis

- Topic analysis allows for automatic tagging and categorization of responses, making it easy to understand the topics (a.k.a. themes) that customers are talking about without any manual coding required. Discovered topics are fully integrated into all Qualtrics reporting and visualization functions so they can be filtered, analyzed, and shared with ease. Powerful machine learning and native language processing let Qualtrics text analytics (Text iQ) discover patterns and trends in open text from your own data and do not rely on static, inflexible, one-size-fits-all, or predefined models.
- Both a frequency and probabilistic model are run against open-ended responses to identify not only the most commonly used terms, but also terms that are used in a similar manner. For example, "bug", "issue", and "defect" might all be grouped into a single topic for "Bugs". Responses are then flagged with these topic labels, and each topic can receive multiple labels if applicable. Any changes made as the model updates over time will affect both historical and future topic tagging.

Automatic Sentiment Analysis

- Qualtrics Text iQ performs automatic sentiment analysis of each topic mention detected (topic-level sentiment) and also aggregates the topic-level sentiment ratings to present a whole-comment sentiment (comment-level sentiment). Sentiment analysis will apply both simplified labels (positive, negative, neutral, mixed) and a more detailed score (from -10 to +10), all of which can be used to filter, compare/breakout, and trend data in the Qualtrics dashboards.
- To accomplish this, Qualtrics uses a VADER (Valence Aware Dictionary and Sentiment Reasoner) lexical approach with over 10,000 words. This enables Text iQ to distinguish the following:
 - Lexicon - "Great, "Terrible", "OK"
 - Intensifiers - "Extremely good", "Marginally good"
 - Negation - "Not good", "Isn't really all that great"
 - Exclamation - "TERRIBLE!" "It's totally AMAZING!"
 - But - "It's a great product, but..."

- In conjunction, Qualtrics uses a machine-learning based overlay to improve accuracy and catch difficult items more accurately, like slang or sarcasm. This overlay can boost sentiment detection accuracy up to 25%, which positions Qualtrics as the industry leader in this space and approaches human levels of understanding. Qualtrics' sentiment analysis is also constantly improving further. It analyzes any manual corrections made by users to improve the accuracy of the model, assess improvements, and correct mistakes that Text iQ is making in sentiment identification.

Trends in Topics and/or Sentiment

- All topic and sentiment detections can be visualized in trend charts in the Qualtrics dashboards. Some examples include trending the frequency of topic mentions, percent of mentions of a topic vs. all topics, frequency of negative sentiment mentions of a certain topic or all topics, and changes in sentiment over time for a single or multiple topics. Beyond standard trendline charts like these, Qualtrics also has dedicated visualization widgets for analyzing trends in topics and sentiment, shown below:

Providing Model Feedback

Providing topic model feedback

- **Import Topics:** Import topics used in your other analyses, or use topics from the Qualtrics industry topic library.
- **Recommended Topics:** Qualtrics will recommend topics to you based on frequently discussed terms and recent emerging trends. You can accept these recommendations as-is, or use them as a starting place for further enhancement.
- **Related Terms and Constellation Widget:** Inside the topic model editor, Qualtrics users (with the correct user permissions) can click on any keyword in an existing topic definition to see related terms detected by Text iQ. These can be added to the selected query by clicking each related term presented. Furthermore, these related terms can be visualized in the Constellation Widget to understand via proximity how closely related the terms are to each other, which may indicate similar syntactic usage and deserve inclusion in the topic query.
- **Searching Text Responses:** Build out topics by searching for complex, related terms. This can be useful for tagging many responses at a time. Modifiers include "AND", "OR", "NOT", groupings via parentheses, proximity to keywords, and exact-phrase matching.
- **Manually for a single comment:** Click the green plus sign (+) on a comment and type the topic name. Once you've defined your topic, press the **Enter** key on your keyboard. This adds the topic to the selected response only.

Providing sentiment model feedback

- If a Qualtrics user (with the correct user permissions) wishes to reclassify and/or rescore the sentiment detection for a single comment, this can be done in the Text iQ editing menu. All manual changes are used to improve model accuracy overtime via the previously mentioned machine learning layer.

Multi-language Support

- Text analysis can occur natively in the following languages:
- English, Chinese (Simplified), Chinese (Traditional), French, German, Italian, Japanese, Korean, Portuguese, Dutch, Thai, Indonesian, and Spanish
- All other languages can be automatically translated to one or more of these base languages (selected by West Virginia DHHR, usually English) before text analysis is performed.
- All comments can be translated into one or multiple languages for viewing in dashboards.

3.1.1.2. The Survey Management Platform must be compatible with the WVOasis Platform

Qualtrics supports both SOAP and REST APIs. Web Service (SOAP) calls can be made from within a survey to access third-party systems to bring in additional data, and occur over HTTPS with multiple format options (e.g. CSV, XML, JSON, SPSS).

The Qualtrics REST API enables the automated flow of data between Qualtrics and virtually any other authorized platform. The most common use cases are to pull data stored in Qualtrics into another system, such as West Virginia DHHR's database, upload files to an SFTP site, add/update contacts, schedule emails/ reminders, trigger surveys, update survey content, export completed survey data, and more.

Customers have the ability to indicate if they want to use PGP encryption as part of the integration process for SFTP-based file transfers.

Full API documentation can be found at <https://api.qualtrics.com/>

3.1.1.3. The Survey Management Platform must help collect and analyze employee feedback to address and prevent employee disengagement

The starting point in any employee research exercise is to determine what you need to know from employees. That is, what are the business and talent issues which need to be informed by employee feedback. Once you have precisely defined what you need to understand from employees, decisions around who to survey, the content of the survey, timing and cadence, etc. start to fall into place.

Below is a high-level overview of the types of surveys that can be conducted, each suited to collecting different information to provide insights to your culture, policies, and programs. They are categorized by length, as the more frequent survey mechanisms are used, the shorter you want them to be.

- **Ad Hoc Surveys** - Just-in-time employee feedback. For example, feedback on customer-facing initiatives, organizational changes, or internal programs. Should be shorter surveys, only a few questions.
- **Pulse Surveys** - Regular, structured, quantitative measure of employee feedback. Effective for predictive modeling. Typically a moderate length, not too long and not too short.
- **Employee Lifecycle Surveys** - Event-based, standardized measures of the employee experience at critical points in the employee lifecycle. These should be thorough, though length depends on the lifecycle stage.
- **Census Engagement Survey** - Traditional, robust measure of employee engagement and the organizational practices that drive engagement. Rigorous length, high emphasis on results that produce company changes and initiatives.

3.1.1.4. The Survey Management Platform must analyze employee data to assist leadership in making decisions to lower employee attrition and increase recruitment

We want to help West Virginia DHHR achieve HR results that will increase effectiveness throughout your company. Qualtrics EX lets you track employee experience in real-time, providing you with a comprehensive perspective of the health of company culture. In addition to engagement, pulse, and lifecycle, Qualtrics lets you perform ad hoc surveys to discover specific ways to optimize company culture and quantifiably increase your revenue.

Improve Engagement and Experience

Our platform is tailored to your concerns, allowing you to prioritize and predict experience, engagement, and productivity drivers. Every leader with access to our dashboards is provided real-time insights about their teams' specific results. Key drivers and engagement are easily identified and prioritized at each leader's discretion, resulting in a strategic action plan to drive and monitor progress and accountability.

Reduce Unwanted and Costly Attrition

Qualtrics empowers you to immediately identify and address the root causes of attrition before they take effect. You can quickly identify at-risk departments and employees through lifecycle and engagement surveys, seamlessly deliver visibility to managers, and build action plans to mitigate and reduce attrition among your at-risk populations. Follow-up and pulse surveys will monitor employee experience to ensure improvement and thriving company morale.

Identify, Retain, and Develop Top Performers

We believe you should never let a good thing go—including top-performing employees. Qualtrics allows you to streamline the gathering of multi-rater feedback for your employees and use customized reports to pinpoint leaders and high-potential employees. You will gain deeper insights by combining development and performance data with experience data. We will provide you with the data to drive individual employee development and workforce planning in order to retain your top performers. By gathering 360 feedback, West Virginia DHHR will be provided the means to immediately optimize your workforce and improve revenue.

Increase the Overall Lifetime Value of your Employees

As a whole, Qualtrics connects employee, customer experience, and operational data for you, allowing you to allocate your HR function's valuable time in lengthening the employee lifecycle. Stay up-to-date with employee needs by continually innovating, measuring, and improving experiences at every key touchpoint of the employee lifecycle. Identify and close experience gaps to reduce hiring and ramp time and increase individual employee trajectory and longevity. By identifying value drivers, you will demonstrate the ROI of your human capital initiatives and optimize the value of HR functions, leading to a cycle of improving culture.

3.1.1.5. Vendor must create required fields to recreate the organization hierarchy including First Name, Last Name, Email, and Employee ID. Vendor must also create the external platforms and systems, CRM platforms, analytics platforms, and reporting platforms.

Hierarchies provide a way for you to upload your organization's employee structure into Qualtrics. They are a key feature in Employee Engagement projects, and setting one up correctly ensures the dashboard will display data by manager or unit. Hierarchies use metadata fields including Email, ID, manager identity, office, and other fields.

Qualtrics Dashboards are organizationally aware, allowing each dashboard user to access the data that is relevant to them. For example, HR Administrators and the Executive Team might be given access to all organization data, while each manager only has access to those employees and business units that roll up to them. Our role-based reporting allows you to easily determine these levels of access for various user groups while maintaining the established anonymity threshold. Administrators can also leverage the hierarchy to determine who should have access to sensitive fields, specified dashboard pages, and targeted filters. Our response engine is currently supporting clients with hundreds of thousands and even millions of employees without difficulty. Qualtrics projects also support the use of multiple employee hierarchies.

3.1.1.6. Vendor must establish an integration with HRIS ERP/Payroll platform and configure auto-triggers to distribute invitations to surveys to the right employees at the right time.

Qualtrics allows hierarchies to be managed with ease via integration tools, either via pre-built configurations we have with systems like Workday, through automation (e.g., SFTP) we can set up for you, or through our platform's SFTP automation setup tool. This tool allows you to configure and map your automation of employee information into Qualtrics, including testing files, setting the frequency of distribution for specific employees, and mapping out the different fields provided in the employee data.

Qualtrics' employee surveys can be automated to distribute at a set frequency. Qualtrics EX Lifecycle projects support automation that trigger a survey whenever a person is added to the project. Most users simply link their HRIS system to Qualtrics, and employees are sent invites whenever they are added to the HRIS system (and therefore pushed into Qualtrics).

Qualtrics also offers an API that allows users to add participants to the project via this API. Users will need to configure logic in their system to call the Qualtrics API to add a particular employee to the Lifecycle project whenever a condition is fulfilled (e.g. they are onboarded or returned from a leave of absence).

3.1.1.7. Survey Management Platform must be compatible with all current software systems deployed by the Department of Health Human Resources, Human Resource Management Department. (West Virginia Oasis)

Qualtrics supports both SOAP and REST APIs. Web Service (SOAP) calls can be made from within a survey to access third-party systems to bring in additional data, and occur over HTTPS with multiple format options (e.g. CSV, XML, JSON, SPSS).

The Qualtrics REST API enables the automated flow of data between Qualtrics and virtually any other authorized platform. The most common use cases are to pull data stored in Qualtrics into another system, such as West Virginia DHHR's database, upload files to an SFTP site, add/update contacts, schedule emails/ reminders, trigger surveys, update survey content, export completed survey data, and more.

Customers have the ability to indicate if they want to use PGP encryption as part of the integration process for SFTP-based file transfers.

Full API documentation can be found at <https://api.qualtrics.com/>

3.1.1.8. Survey Management Platform must configure automations and log into secure file transfer protocol to pull recent files.

All Qualtrics customers own their data. Users have access to the data at all times and can export data manually via the web interface to a variety of formats, including CSV, SPSS, XML, and more.

In addition, Qualtrics offers a REST API for automating pushing and pulling data to/from the Qualtrics platform. The most common use cases are to pull data stored in Qualtrics into another system such as a West Virginia DHHR's database, or upload a file to an SFTP site and automate distribution to respondent contacts, emails, and reminders through Qualtrics. API documentation can be found at api.qualtrics.com.

Qualtrics also has an experienced professional services team and experienced partners who are available to assist clients in building out any integrations or data passes with various systems. Qualtrics has done many integrations with HRIS, HCM, CRM, PMS, Marketing Automation, LMS, TM, and other systems.

3.1.1.9. Vendor must provide additional licenses as needed over the course of the recurring contract.

Qualtrics offers annual or multi-year licenses. Licensing fee will include:

- Implementation cost
- Full support and training
- Ongoing support
- Full access to the platform
- Multiple user accounts
- Dashboard report users
- Specified survey volumes.

West Virginia DHHR can have as many admin users as needed. There is no additional cost for adding admin users.

Specific details regarding additional licensing can be discussed in the contract.

3.1.2. Survey Management Platform Service & Support

All users have access to live support from our world-class support team, at no additional cost. In an industry where the standard customer satisfaction is 95%, we have always excelled, generally averaging 97% satisfaction. Additionally, in 2021 Qualtrics won both the *Best Use of Technology* (for our innovative support portal) and the *Innovation in Customer Service* (with the XM Community) Stevie Awards for our customer support.

Our live support is one of our key differentiators as a company, and clients often comment on how this is one of the most valuable aspects of the Qualtrics relationship. Users can reach our support team 24/7, through phone, chat, or email. We keep logs to give context for any recurring issues and immediate help. We provide support in English and 8 other languages, including French, German, Spanish, and Portuguese. Our additional languages are primarily available during the regular business hours of the language region, and are not guaranteed to be available 24/7.

Chat, email, and phone support can be accessed through the Support Site by clicking **Contact Us**. All support is authenticated so only legitimate users receive assistance. This ensures data security for your company. A list of localized numbers can be found at the following URL.

<https://www.qualtrics.com/contact/>

Our support team has divisions located in our Provo, Dublin, Buenos Aires, and Sydney offices, meaning clients can call in and get a trained technical specialist on the phone to immediately troubleshoot issues or learn aspects of the tool, at any time of the day or night. Most support requests made over the phone are resolved within the first call.

We also offer an extensive digital support environment with support pages, walk-throughs, and even a section containing recorded webinars. We also have an active community where users can collaborate on tough problems, answer each other's questions, network, and share best practices.

<https://www.qualtrics.com/support/>

<https://www.qualtrics.com/community/>

3.1.2.1. Vendor must provide a recurring service & support contract over a four-year period. Vendor must provide onsite service & support Monday through Friday between the hours of 8:00am to 5:00pm eastern standard time. Qualtrics provides 24/7 support. Chat, email, and phone support can be accessed through the Support Site by clicking **Contact Us**. All support is authenticated so only legitimate users receive assistance. This ensures data security for your company. A list of localized numbers can be found at the following URL.

<https://www.qualtrics.com/contact/>

Our support team has divisions located in our Provo, Dublin, Buenos Aires, and Sydney offices, meaning clients can call in and get a trained technical specialist on the phone to immediately troubleshoot issues or learn aspects of the tool, at any time of the day or night. Most support requests made over the phone are resolved within the first call.

3.1.2.2. Vendor must also provide training hours of instruction recurring over a four-year period. Vendor must provide onsite training hours of instruction Monday through Friday between the hours of 8:00am to 5:00pm eastern standard time. (Minimum of ten hours)

Training Overview

Qualtrics offers robust training services throughout the lifecycle of the license. Upon selection, West Virginia DHHR will be assigned an account team, including a Customer Success Consultant and Implementation Consultant. Live trainings will take place to successfully train users on Qualtrics functionality for creating, distributing, and analyzing actionable data. The implementation occurs in a phased approach, and each phase will include training opportunity as West Virginia DHHR users work with the Qualtrics account team to build survey questions, dashboards, etc.

Pre-Launch Training

Prior to organizing live training sessions, Qualtrics asks that all participants watch pre-recorded training webinars which cover the following topics:

- Getting Started
- Basic Building and Distributing
- Advanced Survey Building
- Responses and Results

The Qualtrics Customer Success Consultant and Implementation Consultant will work with West Virginia DHHR to co-create a training plan relevant to the program that West Virginia DHHR will establish.

"Train the Trainer" Model

Qualtrics will provide training based on a "Train the Trainer" model. Under this model, Qualtrics would provide high-quality training directly to the lead administrators and trainers at West Virginia DHHR. These leaders would then provide training for additional West Virginia DHHR personnel and external clients. The training program content will be determined by Qualtrics and West Virginia DHHR upon selection as final vendor, as it will be dependent on the unique needs of the organization.

On-Demand Training

In addition to live trainings, users will have access to Qualtrics University. This site is designed to give best practices, step-by-step tutorials, recorded web trainings, and free webinars. The Qualtrics University site is available on-demand 24/7/365. Qualtrics University is available to all users at no additional cost.

Additional live training sessions can be arranged for an additional fee.

Post Implementation Training

The Qualtrics platform is extremely user-friendly, and users quickly become competent and confident using the many features and functionality the system offers. To fast track this process and ensure the system is optimized for usage soon after launch, online post-implementation training will take place.

Qualtrics trainers who have specific experience in dealing with Customer Experience programs will deliver the training. The training will be adjusted around the needs of each client so that the time is spent wisely.

The goals of the training are to:

- Offer practical advice on how to apply Qualtrics best around the needs of each business unit
- Answer all questions which arise after the new users have had time to explore the system
- Identify additional training and learning opportunities for the future and highlight what West Virginia DHHR needs to be focusing on next.
- Inform a training roadmap

Best Practice Sharing

Qualtrics are at the leading edge of Customer Experience design and development and can make available to West Virginia DHHR a host of resources and knowledge around best practice. Not only is Qualtrics exposed to the latest thinking and techniques while working with our clients around the world, but also we invest heavily in best practice research and thought leadership. This best practice knowledge extends beyond Customer Experience and includes advanced research/survey techniques and employee engagement.

1. Service Description

WSA will provide overall Services for an employee engagement survey, and for the one-time implementation of two lifecycle surveys (one onboarding survey and one exit survey). The Services will include overall project management, survey design, survey administration, reporting of results, a post-survey executive summary presentation based upon survey results that includes recommendations for organizational improvement, and manager action-planning.

For each project, WSA Services will be performed for up to three (3) months following the kickoff meeting based on the scope of services outlined in this Statement of Work. Customer and WSA both agree to make reasonable efforts to carry out our respective responsibilities to achieve this timeframe. Should Customer request that the project extend beyond this timeframe, additional fees may apply.

2. Project Management

WSA will provide project management for the WSA activities and tasks in this SOW. The purpose is to provide technical direction and control of WSA project personnel and to provide a framework for project planning, communications, reporting, procedural and contractual activity. This activity is composed of the following tasks:

WSA will:

- a. conduct a kickoff meeting or teleconference to introduce the project team members from both parties and to review and confirm the project scope and Customer's requirements ("Kickoff Meeting").
- b. maintain project communications through Customer's Project Manager.
- c. establish documentation and procedural standards for any deliverable Materials.
- d. work with Customer's Project Manager to prepare and maintain a detailed project plan and schedule for the performance of this SOW which will include the activities, tasks, assignments, milestones and estimated task durations.
- e. review project tasks, schedules and make changes or additions, as appropriate, and measure and evaluate progress against the project plan with Customer's Project Manager.
- f. work with Customer's Project Manager to address and resolve deviations from the project plan.
- g. schedule and conduct a post-project review meeting with the Customer's Project Manager.

3. Project Scope

Under this project WSA will provide the Services for an employee experience program of 6,000 Customer participants. Except for scheduled meetings, reviews, interviews and similar activities requested by Customer, all work for Services included under this SOW will be performed remotely by WSA at WSA's facilities.

WSA's charges and schedule are based on performance of the activities and tasks listed in this SOW. Deviations that arise during the project will be managed through the Change Control process described below and may result in adjustments to the Project Scope, Estimated Schedule, Charges and other terms.

4. Employee Experience Survey Services

Survey Design and Content

For each survey project, WSA will:

- a. create a new survey instrument for Customer OR modify Customer's existing survey instrument:

- a. conduct one (1), one-hour call to understand customer needs;
- b. review existing survey content, any relevant historical information as input, and other secondary data provided in the context of the company;
- c. propose an initial item draft;
- d. conduct up to two (2) rounds of revisions (if necessary) to finalize each item set;
- e. identify potential limitations to benchmark comparisons and/or visual representations in reporting for custom client items.

Internet Survey Configuration

WSA will:

- a. configure one (1) engagement survey project (including branching logic), created in U.S. English;
- b. configure one (1) onboarding survey project (including branching logic), created in U.S. English;
- c. configure one (1) exit survey project (including branching logic), created in U.S. English.

NOTE: A survey project is defined as any unique set of items and demographics in a particular order and includes up to fifty (50) survey questions and up to twenty (20) unique demographics.

Translation services are not included as part of this project. The cost of such translation services will be invoiced at the rates specified in the Optional Services section below.

Historical Data Management

Historical data is not included in the administration of the survey. If Customer requires historical data to be included, it may be added for an additional fee.

Employee Data File and Pre-Populated Demographics

For the engagement survey project, WSA will:

- a. provide Customer a template for an employee data file with employee demographics;
- b. work with Customer to define employee demographics for reporting;
- c. conduct up to three (3) rounds of revisions (if necessary) to finalize the employee data file;

Customer will:

- a. provide up to two (2) consolidated preliminary data files in CSV, fixed width or single tab spreadsheets for review and one (1) final consolidated data file in the same format to upload to the survey solution.

NOTE: There will be no changes or updates after Customer approval of the data file. If data file changes are necessary after designated signoff milestones, such services will be handled in accordance with the Change Control process.

Customer will:

- a. verify the accuracy of the data file.

Contact Import & Distribution Automation for Lifecycle Surveys

For the onboarding survey project and the exit survey project, WSA will:

- a. provide assistance to Customer covering the configuration and setup of (1) Employee Directory File Import using either Qualtrics File Service (QFS) or SFTP connector with customer-hosted SFTP server;
- b. provide documentation related to Qualtrics File Service (QFS) and SFTP Connector;
- c. provide guidance and assistance in configuration, testing and troubleshooting of:
 1. file processing rules;
 2. scheduling (hourly, daily, weekly);
 3. PGP encryption.

NOTE: WSA-hosted SFTP service must be scoped and purchased separately.

Customer will:

- a. provide their own SFTP server (if using SFTP connector);
- b. acquire any necessary login credentials before import is scheduled;
- c. provide a properly structured CSV file for import;
- d. set up additional imports if more than one is required.

Communications

For each survey, WSA will:

- a. provide a communications strategy guide;
- b. provide electronic invitations to the survey solution;
- c. provide all electronic communications in U.S. English only.

Survey Administration

WSA will:

- a. administer one (1) point-in-time engagement survey for 6,000 Customer employees;
- b. launch one (1) onboarding lifecycle survey project;
- c. launch one (1) exit lifecycle survey project;

NOTE: WSA and Customer will mutually agree on the schedule for survey administration after the Kickoff Meeting(s).

Benchmarks

For the engagement survey project, WSA will:

- a. implement one (1) standard (i.e. non-custom) external benchmark for the items included on Customer's survey.

Individual Project Dashboard Configuration

For each survey project, WSA will:

- a. conduct a scoping and design call with Customer upon commencement of license to determine dashboard content and layout;
- b. create one (1) dashboard and connect it to one (1) survey, after survey has been configured;
- c. map up to fifty (50) survey questions and up to twenty (20) embedded data fields to the dashboard;
- d. configure dashboard with up to eight (8) pages, including up to forty (40) widgets per page;
- e. build dashboard in English using standard features;
- f. create up to five (5) separate roles and up to twenty (20) dashboard access permissions and roles and send dashboard invites as part of a one-time initial setup of roles based on documentation provided by Customer;
- g. conduct a pre-launch review to confirm configurations and distribution setup;
- h. complete up to two (2) reviews per dashboard;
- i. send one (1) round of dashboard invites.

NOTE: Any delays in completing the design and configuration of the survey may result in a delay of the survey mapping in the dashboard.

Customer will:

- a. confirm setup of all survey(s) that are to be mapped to dashboards;
- b. approve key metrics to be used in the dashboard;
- c. validate that the correct data has been mapped, widgets and filters work as expected, and user permissions are set accurately;

- d. provide documentation on desired role configurations to WSA;
- e. verify that WSA setup of roles and permissions are correct to ensure that any users who require data restrictions or role-based access have appropriate attributes saved in the Qualtrics platform;
- f. compose and provide all messages for dashboard invites, reminders, etc. and share them with WSA.

Consolidated EX Dashboard Configuration

WSA will:

- a. conduct a scoping and design call with Customer upon commencement of license to determine dashboard content and layout;
- b. create one (1) dashboard and connect it to three (3) surveys (engagement, onboarding, and exit), after surveys have been configured;
- c. map up to fifty (50) survey questions and up to twenty (20) embedded data fields to the dashboard;
- d. configure dashboard with up to eight (8) pages, including up to forty (40) widgets per page;
- e. build dashboard in English using standard features;
- f. create up to five (5) separate roles and up to twenty (20) dashboard access permissions and roles and send dashboard invites as part of a one-time initial setup of roles based on documentation provided by Customer;
- g. conduct a pre-launch review to confirm configurations and distribution setup;
- h. complete up to two (2) reviews per dashboard;
- i. send one (1) round of dashboard invites.

NOTE: Any delays in completing the design and configuration of the survey may result in a delay of the survey mapping in the dashboard.

Customer will:

- a. confirm setup of all surveys that are to be mapped to dashboards;
- b. approve key metrics to be used in the dashboard;
- c. validate that the correct data has been mapped, widgets and filters work as expected, and user permissions are set accurately;
- d. provide documentation on desired role configurations to WSA;
- e. verify that WSA setup of roles and permissions are correct to ensure that any users who require data restrictions or role-based access have appropriate attributes saved in the Qualtrics platform;
- f. compose and provide all messages for dashboard invites, reminders, etc. and share them with WSA.

Action Planning Tools

For the engagement survey project, WSA will:

- a. implement the action planning module;
- b. import focused listening questions (FLQs) to support post survey feedback meetings;
- c. import sample action steps to assist Customer with action planning.

Executive Presentation of Overall Results/Key Findings

For the engagement survey project, WSA will:

- a. deliver one (1) executive summary presentation of overall results, including WorldNorm(s), key findings, priorities analysis, and recommendations for organizational improvement;
- b. create presentation in the form of a PowerPoint;
- c. facilitate one (1) pre-read for Customer;
- d. conduct up to three (3) rounds of revisions (if necessary) to finalize the presentation;

- e. deliver the executive presentation onsite or remotely, based on Customer's preference.

Dashboard Readout Session

WSA will:

- a. facilitate one (1) dashboard readout session highlighting overall results, benchmark(s), key findings, priorities analysis, and guidance on using the action planning tool;
- b. deliver a 60-minute session remotely, using Customer's consolidated EX dashboard.

Qualtrics System Training

WSA will:

- a. include up to six (6) total web-based EX platform training sessions;
- b. record sessions lasting up to one (1) hour each and provide Customer access to recordings.

5. Customer Responsibilities

The completion of this project depends on the full commitment and participation of Customer's management and personnel. Delays in performance of these responsibilities may result in additional cost and/or delay of the completion of the project and will be handled in accordance with the Change Control procedure.

Customer Program Manager

Prior to the start of this project, Customer will designate a person called Customer Program Manager who will be the focal point for WSA communications relative to this project and will have the authority to act on behalf of Customer in all matters regarding this project.

Customer's Program Manager's responsibilities include the following:

- a. obtaining and providing information, data, and decisions within three working days of WSA's request unless an alternative timeframe is agreed to by the parties in writing.
- b. manage Customer personnel and responsibilities for this project;
- c. serve as the interface between WSA and all Customer departments participating in the project;
- d. administer the Change Control procedure with the WSA Project Manager;
- e. participate in the Kickoff Meeting/call;
- f. resolve deviations from the project plan and schedule, which may be caused by Customer; and
- g. help resolve project issues and escalate issues within Customer's organization, as necessary.

Additional Customer Responsibilities

- a. Customer will ensure that Customer's staff is available to provide such assistance as WSA reasonably requires and that WSA is given reasonable access to Customer's senior management, as well as any members of Customer's staff to enable WSA to provide the Services. Customer will ensure that its staff has the appropriate skills and experience. If any of Customer's staff fails to perform as required, Customer will make suitable additional or alternative staff available;
- b. provide all information and materials reasonably required to enable WSA to provide the Services; and
- c. be responsible for the identification of, interpretation of, and compliance with, any applicable laws, regulations, and statutes that affect your existing systems, applications, programs, or data to which WSA will have access during the Services.



6. Change Control

The following Change Control process will be followed if a change to this SOW is required:

- a. A Project Change Request (PCR) will be documented in an email and be the vehicle for communicating change. The PCR must describe the change, the rationale for the change and the effect the change will have on the project.
- b. Both the Customer and the WSA Project Manager will review the proposed change and agree to implement it, recommend it for further investigation, or reject it.
- c. A PCR must be accepted by authorized representatives from both parties to authorize implementation of any agreed changes to the SOW and the Agreement. Until a change is agreed to, both parties will continue to act in accordance with the latest agreed version of the SOW.
- d. A PCR that has been approved by authorized representatives from both parties constitutes a change authorization for purposes of this SOW and the Agreement.

7. License to Use Marks

Customer hereby grants WSA a limited, nonexclusive license to use and display Customer’s Marks and any Customer-provided survey items to create the website utilized by WSA for providing the Services under this SOW. This grant will terminate upon the termination of the Agreement or this SOW. Title to and ownership of the Marks will remain with Customer. Customer shall provide hard copy and electronic files of the Marks in such forms and formats as WSA may reasonably specify. WSA will not take any action inconsistent with Customer’s ownership of the Marks and the Customer-provided survey items. Customer warrants and represents that Customer owns and has the right to license the Marks and the survey items and that the use and presentation thereof in accordance with this SOW will not infringe or constitute unfair competition with respect to, or otherwise violate the rights of, any third party.

8. Charges and Fees

The charges and fees below for the Services are based on a fixed price basis. The fixed price for performing the Services defined in this SOW are outlined below:

	Charge in \$USD	Invoice Date
Year One Services Fees	\$40,750	Upon Contract Execution

Customer will be invoiced for any travel related expenses (including actual transportation, lodging, and meal expenses) incurred during the term of this SOW. Any Optional Services listed below that are ordered by Customer will be invoiced as incurred. The charges and fees do not include applicable taxes. Applicable taxes, if any, will be added upon invoicing.

9. Optional Services

The following optional services are available to Customer:

Optional Service	Amount
Implementation Services	
Additional System Training	\$1,875 per webinar
Additional Languages - Per each group of five (5) additional language added to survey administration	\$3,375
Per additional language added to dashboard version	\$4,375

WORKFORCE SCIENCE ASSOCIATES STATEMENT OF WORK



Translation services	Direct Cost
Additional Languages survey communications	\$3,125
Historical data import (3 rd Party)	\$2,250 per project
Qualtrics PowerPoint Exports (Design & Formatting)	\$3,125
Qualtrics PowerPoint Additional Languages	\$3,125
Qualtrics PDF Additional Languages	\$3,125
SFTP Site Hosting by WSA	\$1,875/year
Consulting Services	
Additional Standard Benchmarks	\$1,875 each
Custom Benchmarks	\$3,125 each
Executive Review (dashboard read-out, 1-hour session)	\$2,500 each
Executive Summary Presentation (PPT only)	\$4,375 each
Additional Executive Presentations	\$9,375 each
Engagement Champions Training	\$2,625 each
Spotlight Insights Training	\$625