One-stop-shop Permitting Portal for the State of West Virginia

Technical Proposal Response - Master

Buyer: Tara Lyle, Buyer Supervisor
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Fax Number: 304.558.3970

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December 4, 2025

Tara Lyle, Buyer Supervisor
State of West Virginia
Department of Administration – Purchasing Division
2019 Washington Street
East Charleston, West Virginia 25305

Dear Ms. Lyle:

Visionary Integration Professionals (VIP) is fully prepared to support the State in fulfilling the requirements for the One Stop Shop Permitting Portal. We invite you to review our strategic plan that outlines how we will bring each required State Agency live by the mandated date of January 1, 2027.

Vision for West Virginia One-Stop-Shop Permitting Program

The State of West Virginia is committed to modernizing and streamlining your permitting and licensing system. The goal is to establish a future-ready platform that improves customer service, enhances staff efficiency, and delivers transparency to citizens and contractors through a public facing dashboard as described in House Bill 2002 passed earlier this year.

TeamVIP brings proven expertise in government modernization, workflow automation, and citizen experience optimization specifically for permitting and licensing. Our mission is to provide the State not just with a technology replacement, but a sustainable, citizen-centric solution across multiple agencies while remaining flexible to accommodate the growing and changing needs of the State. Our approach is to partner with the State's team to implement a modern, easy-to-use permitting system. TeamVIP is a trusted partner of the State of West Virginia, having implemented a full case management system for the Office of the Insurer for appeals case management.

Recommended Solution: Salesforce Permitting and Licensing Framework

TeamVIP recommends adopting the Salesforce Public Sector Solutions (PSS) suite, anchored by the Licensing, Permitting, and Inspections (LPI) application as the foundation for modernization. This approach is the strongest response against competitors relying on custom builds or COTS solutions that lack CRM flexibility. This solution combines the strengths of commercial-off-the-shelf (COTS) efficiency with the flexibility of a configurable platform designed for the State's evolving needs. By providing a state-of-the-art platform, it future-proofs the State to be prepared for an ever-changing technical landscape.

Key advantages include:
- **Proven Stability & Security** – Salesforce's cloud-native architecture ensures compliance, scalability, and security, validated across government programs nationwide
- **Low-Code, High-Performance** – Minimal reliance on custom scripting means easier upgrades, faster deployments, and reduced long-term costs
- **Future-Ready Flexibility** – Adaptable to changing regulations, policies, and public expectations

Addressing Current Challenges

West Virginia has faced significant hurdles with departments utilizing many different legacy systems, or in some cases, no system at all – thus, making it difficult for staff and constituents alike to navigate the necessary channels to apply for, track, and communicate effectively regarding business activities at the State level.

To directly address these challenges, TeamVIP brings many years of deep domain expertise, specifically in the area of permitting and licensing. We understand the various pain points presented by the seven different Agencies represented in this effort and are skilled in architecting solutions to solve them on time & on budget.

TeamVIP's Approach

Our implementation strategy is to deploy a unified permitting portal across all seven departments named in the RFP and House Bill 2002, regardless of their current system status. By standardizing on a single platform rather than integrating with outdated legacy systems, this approach minimizes technical debt and maximizes project success, ensuring all agencies are live using the citizen portal by the mandated date of January 1, 2027, with all departments fully utilizing the One-Stop-Shop back office system and migrated from all legacy systems by January 1, 2029. TeamVIP will follow a three-phase Go-Live approach to reach this goal, with Year 1 (January 1, 2027) including the One-Stop-Shop Citizen Portal and Pilot Departments that are deemed critical/paper-based processing on the One-Stop-Shop back office. Phase 2 and Phase 3 will include the remaining departments migrating from their legacy systems to the One-Stop-Shop Backoffice system.

Our approach is guided by four central themes:
- Proven State Government Implementation Expertise
    - Deep specialization in licensing, inspections, and regulatory workflows
    - Disciplined, repeatable methodologies that reduce complexity and risk
    - Extensive experience in the permitting and licensing space, providing critical insight during migration

- Salesforce Solution Power and Flexibility
    - Secure, cloud-based land management framework that minimizes custom code
    - Scalable platform with built-in data management and data security foundations
    - Streamlined deployments that remain sustainable long-term

- Cross-Platform Expertise
    - Extensive experience migrating agencies from legacy systems to a single source of truth
    - Proven track record ensuring data integrity, transparent processes, and reliable operations
    - Decades of successful land management deployments nationwide

- Risk Reduction
    - Independent implementation partner committed to the State of West Virginia's priorities, not vendor sales goals
    - Transparent communication and deployment strategy aligned with State's objectives

By selecting Salesforce as the platform and TeamVIP as the implementation partner, the State will achieve:

- A sustainable solution that empowers staff and adapts to future needs and satisfies the requirements identified in House Bill 2002 by the required date of January 1, 2027
- Modernized, efficient permitting and licensing solution that reduces administrative overhead, siloed operations, and provides a consistent, easy-to-use portal for permit application by constituents
- Streamlined contractor interactions and enhanced citizen services
- Real-time transparency and reporting for leadership

With TeamVIP, the State of West Virginia can confidently advance beyond legacy challenges to a streamlined, citizen-focused program built to serve the State well into the future.

Based upon our understanding of the State's needs, TeamVIP is the right partner to implement this Salesforce-based permitting and licensing framework. Together, we will ensure all required agencies modernize permitting & licensing operations, strengthen customer service, and realize your vision of a more efficient, effective, and future-ready One Stop Shop Permitting program.

As the Chief Executive Officer at VIP, I am authorized to bind and enter into Agreements on behalf of VIP. If you have questions or need further information, please feel welcome to contact me at the telephone number or e-mail below. You may also contact Hope Robillard, Chief Growth Officer, with any questions you may have. She can be reached at hrobillard@trustvip.com or 813.841.1496.

Sincerely,

Jonna Ward

Jonna Ward, Chief Executive Officer
legal@trustvip.com
916.985.9625

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How Our Solution Meets Project Goals and Objectives

4.2.1.1 Vendors should provide a methodology and explain in detail how they would develop and create a user-friendly dashboard interface with public-facing, and internal agency components as a One-Stop-Shop Permitting Portal.
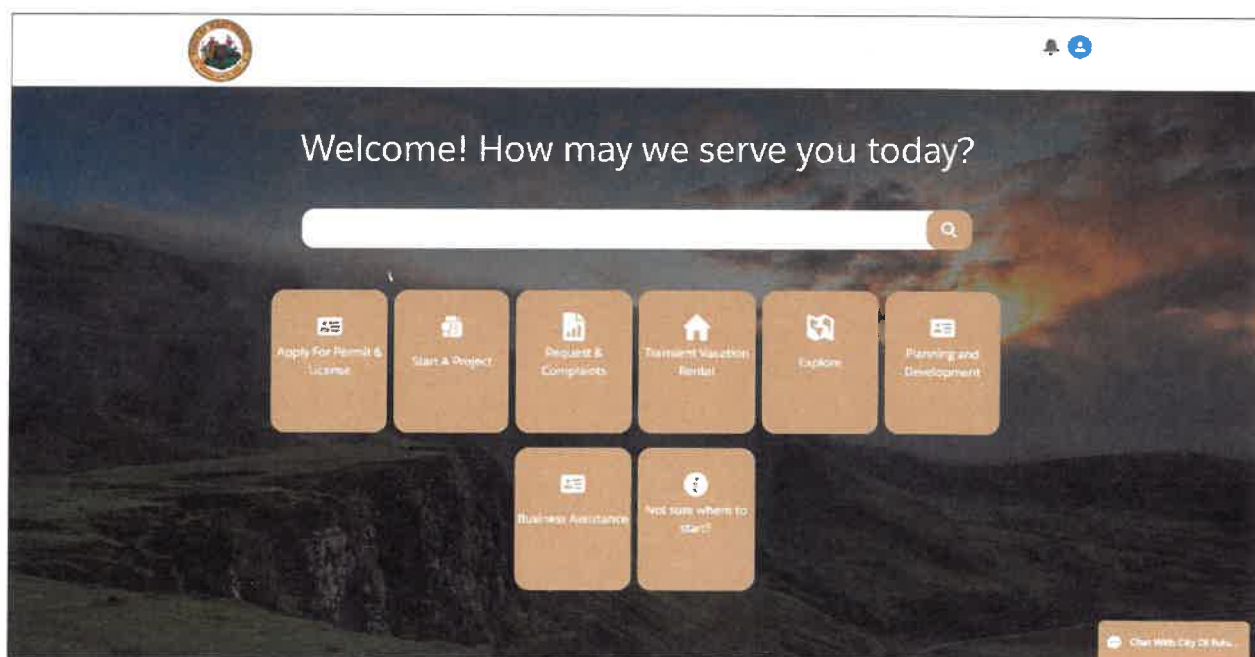
Figure 1: Sample Salesforce Portal

TeamVIP proposes a Salesforce Experience Cloud–based dashboard purpose-built for both citizens and agency personnel. The design emphasizes intuitive navigation, accessibility, and visual clarity, allowing users to track, manage, and submit permit applications seamlessly. We develop this through a structured Salesforce configuration methodology: we conduct requirements discovery workshops to understand citizen workflows and agency operational needs, then architect role-based dashboard layouts using Salesforce's Lightning App Builder, configuring the Experience Cloud org with custom objects and fields that model the state's permitting requirements. The system provides role-specific landing pages and configurable widgets to support multiple agency compliance workflows. We accomplish this by leveraging Salesforce's declarative tools Lightning Web Components for dynamic UI elements, Flow automation for intelligent guided workflows, and Lightning App Builder for modular dashboard assembly ensuring both citizens and agency personnel access only relevant information for their role. Technical highlights include:

- Built on Salesforce Public Sector Solutions (PSS) with modular dashboards configured through Lightning App Builder
- Drag-and-drop configuration enables rapid deployment and ongoing adaptability without code changes
- Uses Lightning Web Components (LWC) for dynamic, modern UI performance and responsive design across devices
- Fully mobile web and optimized for accessibility compliance (WV-MC 21.2)
- Role-specific landing pages and configurable widgets configured through Salesforce's declarative tools to support multiple agency compliance workflows
- Real-time data visualization of application queues, approval status, and service metrics through Salesforce's native reporting and dashboard capabilities
- User acceptance testing and Section 508 accessibility validation ensure the interface is intuitive and compliant

4.2.1.2 *Vendors should describe how they would implement a flexible and secure Role- Based Access Control system.*
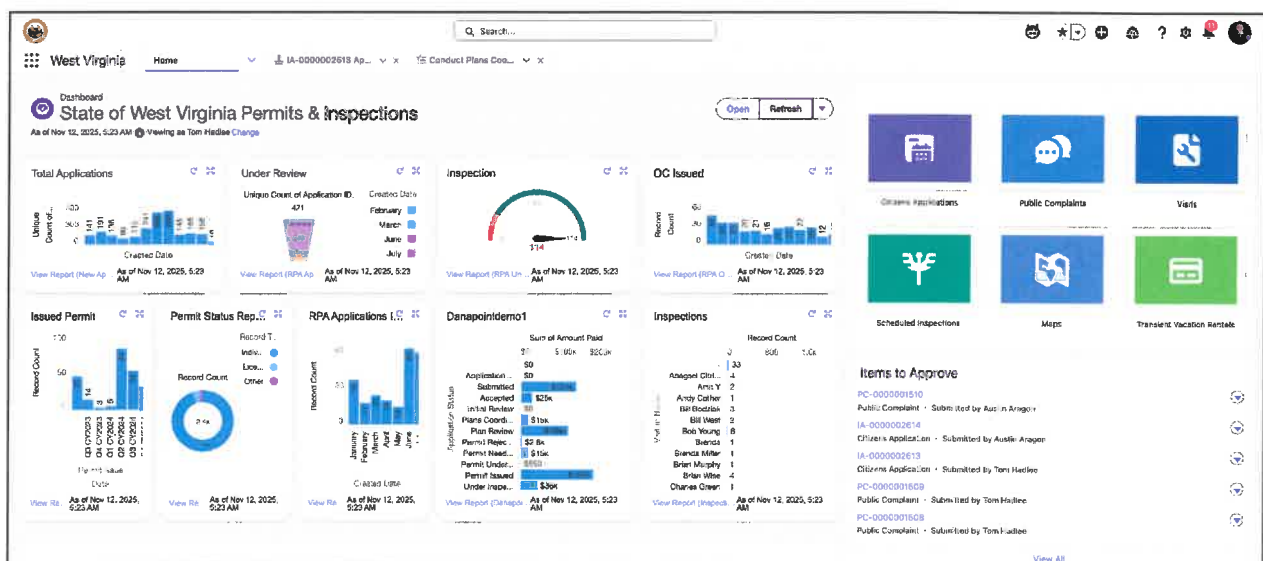

Figure 2: Role-based Access Control

Our solution employs Salesforce's native role-based permission model to ensure each user accesses only what's relevant to their responsibilities. We implement this through a structured approach: we conduct discovery workshops to identify distinct user roles and their data access requirements, then design a role hierarchy that reflects the state's organizational structure. VIP configures profiles, permission sets, and sharing rules that enforce data segregation across agencies while enabling collaboration. We validate the implementation through security testing to ensure users can only access data appropriate to their role and that no unauthorized cross-agency data exposure occurs. Included key features protect sensitive data, simplify onboarding, and ensure long-term scalability of user roles:

- Single Sign-On (SSO) integration with the State's identity provider
- Field-level and record-level security aligned with NIST 800-53 and FedRAMP controls
- Auditable access logs maintained through Salesforce Shield
- Dynamic access groups for multi-agency coordination without cross-data exposure

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4.2.1.3 Vendors should explain how they will design a user-friendly, and responsive interface that tracks applications through the approval process and the ability to apply for additional permits or other licenses as needed.

Built on Salesforce's responsive framework, the interface provides real-time application tracking across all devices. Automated workflow routing ensures that each submission moves through the proper review sequence without manual intervention. Users navigate to a permit catalog within their account, search or browse available permits across all departments, select the permits they need, add them to a shopping cart, review the combined requirements and associated fees for each permit, then proceed to checkout where they can submit all permits together or break them into separate submissions by department. Once submitted, each permit follows its respective department's approval workflow while users track all applications from a unified dashboard.

- Status indicators for "submitted," "under review," "approved," or "returned"
- Integration with MuleSoft APIs to synchronize agency updates in real time
- Color-coded workflow progress bars and estimated completion dates
- Role-based dashboards showing individual and departmental workload

4.2.1.4 Vendors should describe how the solution assists public users through the application process, the vendor should implement an intelligent, interactive assistant (AI) or automated tool embedded within the public dashboard.
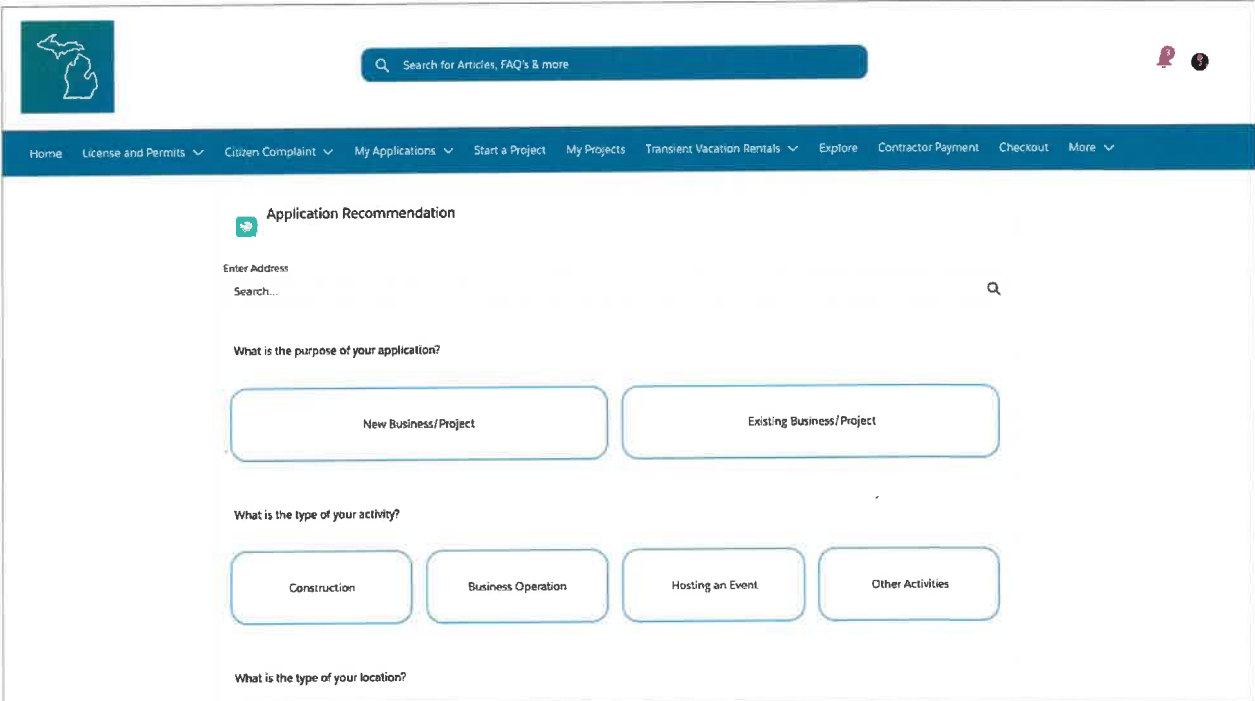

Figure 3: Sample Permit Wizard

The permitting portal includes an AI-driven guided assistant that helps citizens choose the correct permit, complete form submissions, and identify required attachments. Built on Salesforce Einstein Bots and Flow automation, the system reduces help-desk calls and increases first-submission success. We configure the assistant using Flow to create intelligent branching logic that guides users through permit type selection based on their responses. The system integrates contextual knowledge articles that display

dynamically based on user input, providing real-time guidance without requiring manual navigation. Key features include:

- Conversational guidance with branching logic based on our response intelligence to guide users through permit requirements
- Contextual tips and validation rules preventing incomplete submissions
- Integration with Salesforce knowledge base for relevant article delivery at point of need
- Optional escalation to live chat or callback for complex cases requiring agent assistance
- Real-time form validation that flags missing information before submission

4.2.1.5 Vendors should explain how the solution would implement a dynamic and transparent tracking system within the public dashboard that would provide public users with up-to-date visibility into the status and progress of their applications throughout the approval workflow.
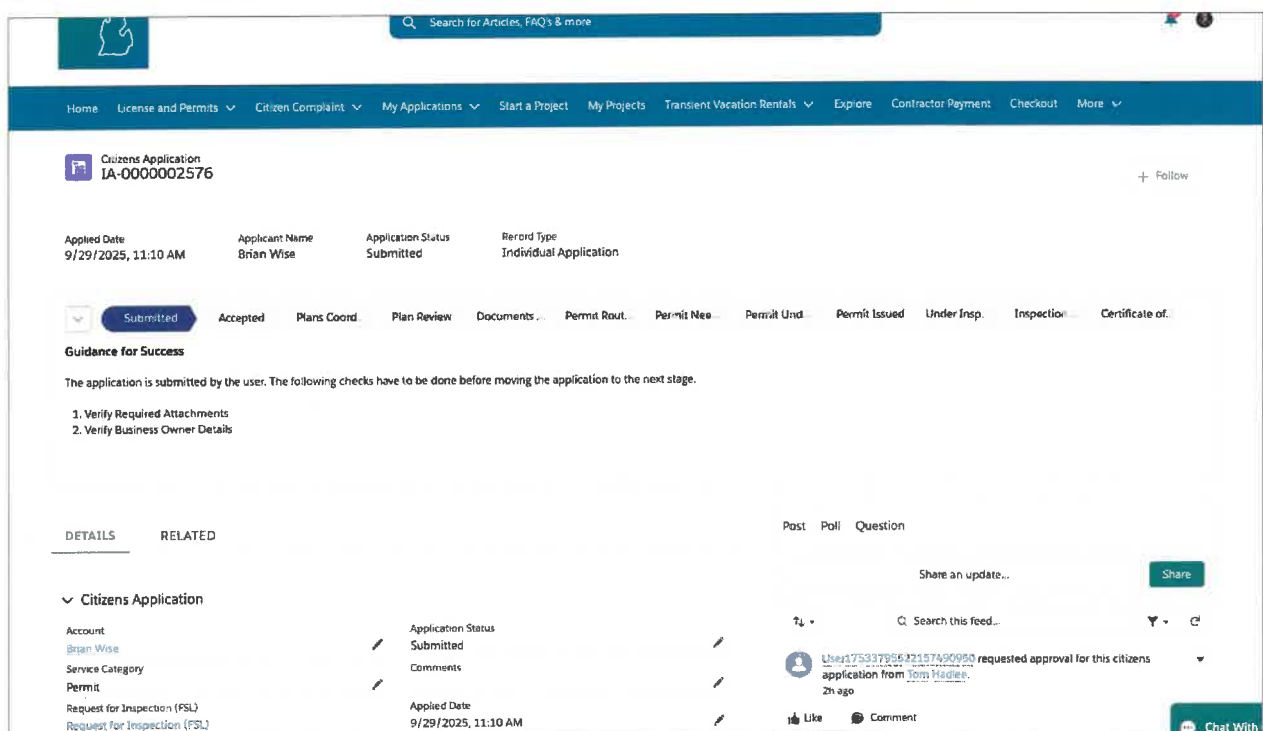

Figure 4: Application Tracking with Status

A public transparency module presents real-time tracking of each permit's journey through the approval pipeline. We implement this by configuring Salesforce Case History to automatically log every workflow stage and status change, then surfacing that data to the applicant's public dashboard within Experience Cloud. Every update—from initial submission through final issuance—is logged within Salesforce's Case History and automatically pushed to user dashboards and via email/SMS. Technical elements support the State's goal of open government accountability while reducing inquiry volume.

- Workflow milestones logged within Salesforce's Case History automatically update the public dashboard in real-time as permits progress through approval stages
- Status updates automatically pushed to user dashboards and via email/SMS notifications keep applicants informed at each workflow stage
- Agency supervisors view SLA adherence dashboards for workload monitoring

4.2.1.6 Vendors should explain how the solution will implement a robust session management and draft-saving system for mid-process applications.

The portal allows users to save drafts mid-application, preserving progress through secure session tokens. When users return, they can resume where they left off without data loss. During implementation, the these improve the user experience, especially for multi-page or document-heavy submissions:

- Auto-save functionality every 30 seconds or on field-exit
- Persistent storage via encrypted session objects
- User dashboard listing "In-Progress," "Submitted," and "Approved" applications

4.2.1.7 Vendors should describe how the solution implements a transparent and dynamic time-tracking module within the public dashboard.

VIP will implement a Service Level Timer within each workflow step, automatically calculating processing durations to comply with statutory limits (e.g., §5A-13-4). Functionality will include:

- Stopwatch-style visual timers visible to agency managers
- Automated notifications when thresholds approach or exceed targets
- Time-tracking data aggregated for SLA reporting

4.2.1.8 Vendors should explain how the proposed solution implements a mobile-friendly, offline-capable inspection module that allows field inspectors to work seamlessly without network connectivity, then queue those for automatic upload once connected to a network.
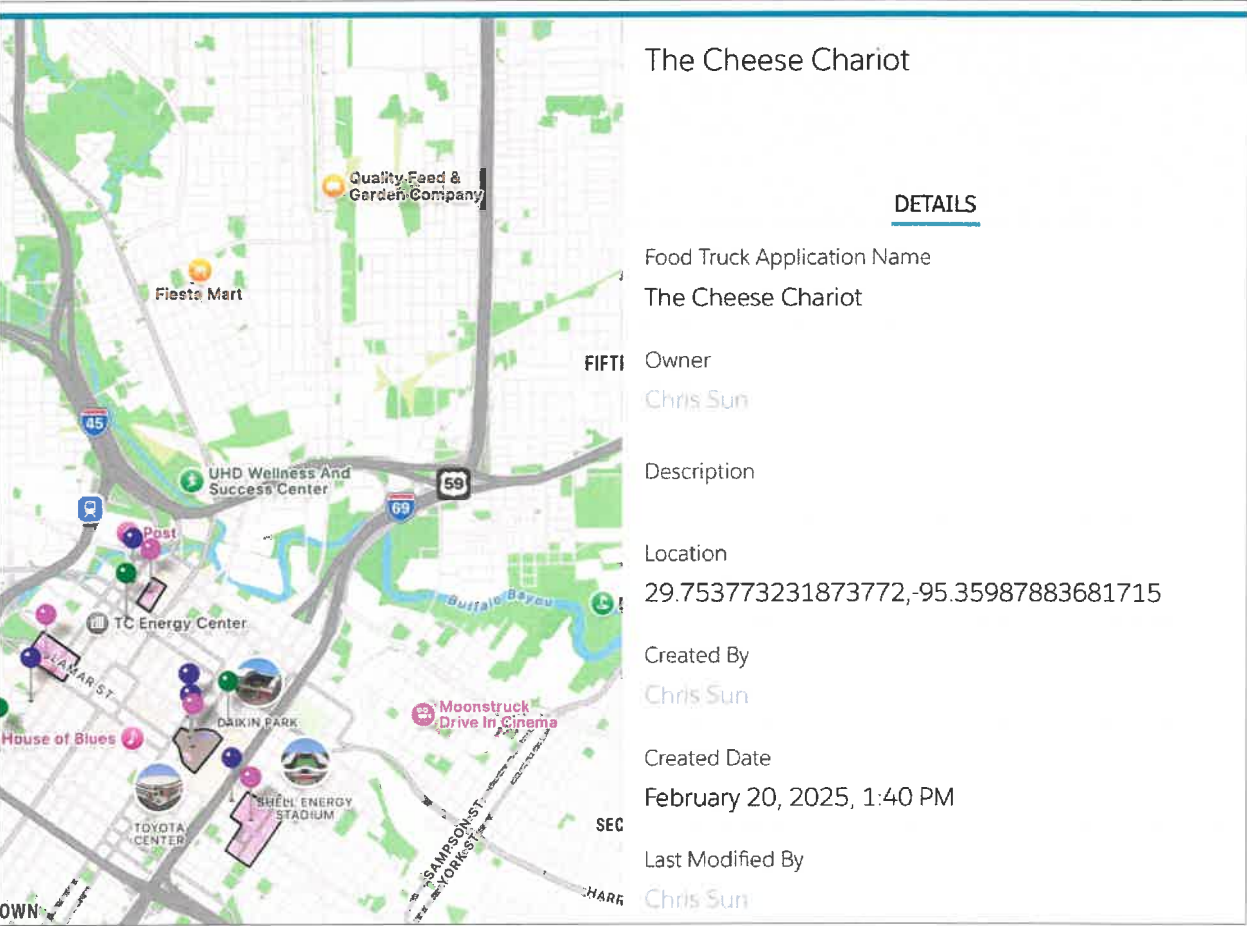

Figure 5: Interactive Offline Map

Through Axsy for Salesforce, inspectors can perform site visits without network connectivity using native mobile offline capability. The solution captures inspection data—including photos, comments, and geo-tagged location data—and securely caches this information locally on the device. Axsy's intelligent queuing mechanism monitors network connectivity in real-time; when the device reconnects to a network, queued inspection records automatically synchronize with the Salesforce backend in the order they were captured, ensuring data integrity and seamless handoff to agency personnel for review and processing without requiring manual intervention from the inspector. Axsy's inspection module provides comprehensive functionality for field operations:

- Native offline inspection capability for rural or low-signal areas, enabling inspectors to work continuously without network interruptions
- Geo-tagged photos and timestamped inspection results that automatically queue locally and sync once connectivity is restored, with automatic conflict resolution ensuring data accuracy
- Intelligent synchronization logic that prioritizes queued inspections and transmits them efficiently upon network reconnection
- Configurable inspection templates aligned with agency standards, allowing inspectors to conduct consistent, standardized inspections across multiple permit types
- Real-time synchronization with Salesforce ensures inspection data flows immediately into agency workflows upon reconnection, eliminating manual data entry and reducing processing delays
- Secure local caching with encryption ensures sensitive inspection data remains protected on the device until synced to Salesforce
- Complete inspection history and audit trails maintained throughout the entire process from field capture to agency review, with full visibility into offline capture timestamps and sync timestamps

4.2.1.9 Vendors should explain how the solution is accessible with mobile devices for both public and agency users, the system should be designed with an approach that ensures full functionality, usability, and performance across mobile devices such as smartphones and tablets.

VIP ensures responsive and adaptive design for all user interfaces through a mobile-first design approach. We architected the permitting portal using Salesforce Lightning Web Components, which are inherently responsive and automatically adapt to desktop, tablet, and smartphone screens. Our design methodology prioritizes mobile usability by optimizing form layouts for touch interaction, streamlining navigation for smaller screens, and ensuring all permitting windows—from application submission to status tracking—function seamlessly across all devices.

The portal delivers full feature parity across mobile devices, ensuring all permitting capabilities—application submission, document upload, status tracking, and notifications—function completely on both smartphones and tablets for public and agency users.

The permitting portal performs consistently across devices and browsers using modern front-end standards (HTML5, CSS3, LWC). Our approach ensures:
- Uniform experience across desktop, tablet, and smartphone through responsive design principles
- Touch-optimized form controls and interactive elements for mobile data entry
- Progressive Web App (PWA) capabilities for improved performance and offline functionality
- Optimized data loading and caching strategies to ensure fast performance on mobile networks
- Support for Android 10.0 or later via Google Chrome and iOS 16.0 or later via Apple Safari, meeting Salesforce's mobile platform requirements

We validate this design through comprehensive testing standards: device testing across iOS and Android platforms on various screen sizes, browser compatibility testing across Chrome and Safari, accessibility testing to ensure WCAG 2.1 AA compliance on mobile interfaces, performance testing measuring load times and responsiveness on mobile networks, and user acceptance testing with representative public and agency users to confirm full functionality and usability across all mobile devices.

4.2.1.10 Vendors should describe how the solution implements a flexible and user- controlled notification system. The system should allow users to be able to sign up for and receive workflow notifications throughout the process through email, mobile phone, or both as the individual chooses.

Our solution employs Salesforce's Omni-Channel and Notification Builder to deliver workflow alerts to users via their preferred channels. The solution's capabilities improve transparency, reduce missed deadlines, and enhance communication between applicants and agencies:

- Multi-channel options: email, SMS, in-app pop-ups
- Event-driven notifications triggered by workflow status changes
- User-controlled preferences allowing citizens and agency personnel to select notification channels (email, SMS, or both) based on individual needs and modify preferences anytime
- Standard message templates ensure consistent, clear communication across all notification types, with configurable content that reflects permit type and workflow stage
- Escalation policies automatically route unacknowledged notifications to supervisory staff when deadlines approach, ensuring critical permit applications receive appropriate attention
- Notification Builder configuration enables the state to customize notification logic, messaging, and escalation thresholds without requiring code changes

4.2.1.11 Vendors should explain how the solution includes a flexible, secure, and user- friendly form and document management module with the ability to upload documents or create fillable forms for certain permits as needed.

Figure 6: Sample Fillable Form Fields

TeamVIP integrates Box for Content Management, a FIPS-140-2-compliant platform, to handle all uploaded and generated documents. Box provides enterprise-grade security with end-to-end encryption, granular access controls, and comprehensive audit trails—ensuring documents are secure throughout their lifecycle. The platform's native integration with Salesforce enables seamless document management within the permitting workflow, allowing citizens and agency personnel to upload, retrieve, and track documents without leaving the portal. This offers a secure, centralized repository that simplifies compliance tracking and document retrieval:

- Version control and automated retention in compliance with State policies
- Dynamic fillable forms built using Salesforce Flow and Form Builder enable flexibility by allowing forms to be configured for different permit types as needed
- Box's encryption, access controls, and audit trails combined with Salesforce's guided workflow interface deliver a user-friendly experience for both document uploads and fillable form completion
- Role-based permissions ensure citizens and agency personnel access only relevant documents and forms for their permits

4.2.1.12 Vendors should demonstrate strategic implementation of the tool for both agencies and public users, vendors should showcase their ability to seamlessly integrate with existing portals and permitting systems while enhancing functionality, accessibility, and user experience.

Using MuleSoft Anypoint Platform, TeamVIP provides robust integration between Salesforce and existing State systems, ensuring continuity of operations. This design minimizes disruption, supports gradual migration, and preserves agency autonomy. MuleSoft enables seamless data exchange while maintaining system stability and enhancing functionality and accessibility for both agencies and public users. Our approach includes:

- REST and SOAP APIs for data exchange with legacy systems
- Secure OAuth 2.0 authentication for all connectors with MuleSoft's centralized credential management
- Real-time synchronization with configurable polling intervals to maintain data consistency
- Phased integration rollout that supports gradual adoption without disrupting existing workflows, improving user experience by allowing agencies and citizens to transition seamlessly
- MuleSoft's monitoring and analytics capabilities to track integration health and system performance, ensuring reliable access and consistent user experience
- Unified data access across systems so agencies and public users interact with a single portal rather than multiple legacy systems, streamlining workflows and improving overall user experience

4.2.1.13 Vendors should demonstrate how their solution would provide effective data security and protection, alongside ongoing support, maintenance, and adjustment of the program and dashboard to meet changing needs.

The entire platform is deployed within Salesforce CyberCloud (US), offering FedRAMP authorization and NIL (not in scope) alignment. VIP strengthens security using Salesforce Shield for encryption, role-based access controls, and comprehensive safeguards to ensure data confidentiality, integrity, and availability across all system layers:

- Encryption at rest and in transit using AES-256 and TLS 1.2
- Vulnerability scanning and patch management through Salesforce's SOC 2 and ISO 27001 certified infrastructure
- Role-based access and security controls with multi-factor authentication (MFA)

- Infrastructure protection through Amazon Web Services (AWS) with intrusion detection systems and 24/7 monitoring
- Salesforce Shield for ongoing encryption, threat detection, and real-time security monitoring

Beyond initial deployment, VIP's dedicated support team provides comprehensive ongoing support and maintenance to ensure the portal remains secure, performant, and aligned with evolving state requirements. We deliver quarterly security reviews and patch management monitoring through Salesforce's certified infrastructure, proactively identify and address vulnerabilities. Our dedicated support team monitors system performance, manages user access changes, and handles operational updates as a service workflow engine. When the state's permitting requirements change—whether due to new regulations, expanded permit types, or new integrations—we work collaboratively with the state to address configurations, modify workflows through Salesforce Flow, and update role-based access controls. This ensures the One-Stop-Shop Permitting Portal continuously adapts to meet changing operational needs without requiring full system reimplementation.

4.2.1.14 Vendors should demonstrate a comprehensive, flexible, and secure approach that supports interoperability, minimizes disruption, and enhances operational efficiency.

The platform's API-first design promotes interoperability with State systems, partner agencies, and future enhancements. Salesforce's integration capabilities streamline operations, reduce duplication, and enable data-driven decision-making. We leverage strategic partnerships, including ESRI for geospatial data and mapping capabilities, to enhance the permitting workflow. Our approach prioritizes security through OAuth authentication, encrypted data transmission, role-based access controls, and audit logging for all third-party integrations. Benefits include:

- Common data model shared across agencies and integrated third-party systems (ESRI mapping, analytics tools) with secure data governance policies
- Real-time analytics using Salesforce Reports and Dashboards integrated with third-party data sources with encrypted connections
- Phased, API-driven integration approach minimizes system disruption and allows agencies to connect systems at their own pace while maintaining security protocols
- Pre-built connectors and custom APIs with built-in security standards reduce implementation complexity and accelerate time-to-value
- Flexible architecture supports future integrations without platform redesign while maintaining consistent security and compliance posture
- Comprehensive audit trails and monitoring ensure accountability and compliance across all interoperable systems

4.2.1.15 Vendors should provide a clear, strategic recommendation regarding integration vs. replacement of existing agency systems, along with a realistic implementation timeline that aligns with the statutory deadline outlined in W.Va. Code §5A-13-I et seq., which mandates full implementation of the One-Stop-Shop Permitting Program by January 1, 2027.

VIP will conduct an Integration Assessment Workshop as one of the initial steps in the project to determine which legacy systems should be integrated or replaced. This structured assessment ensures informed decisions that balance continuity and modernization. Our methodology includes:

- Evaluating total cost of ownership, data integrity, and technical debt
- Providing comparative analysis of integration vs. modernization

Delivering a phased migration roadmap to meet the January 1, 2027 statutory deadline. All departments will be utilizing the One-Stop-Shop Citizen Portal by the mandated January 1, 2027 deadline. It is envisioned that some current systems will be replaced, while other record types will be incorporated into the One-Stop-Shop Permitting web portal with integration to the existing back-office system. VIP will work with the State of create a Roadmap of when each department will be fully migrated to the One-Stop-Shop system in the back office over the course of the 3 Year Roadmap. VIP has accounted for this variance in our scoping and pricing to allow for a flexible project schedule and pricing may be decreased potentially if some record types/departments are not fully integrated in back-office processing (all record types will be incorporated into the One-Stop-Shop Permitting web portal for customer application and permitting interactions with the State.
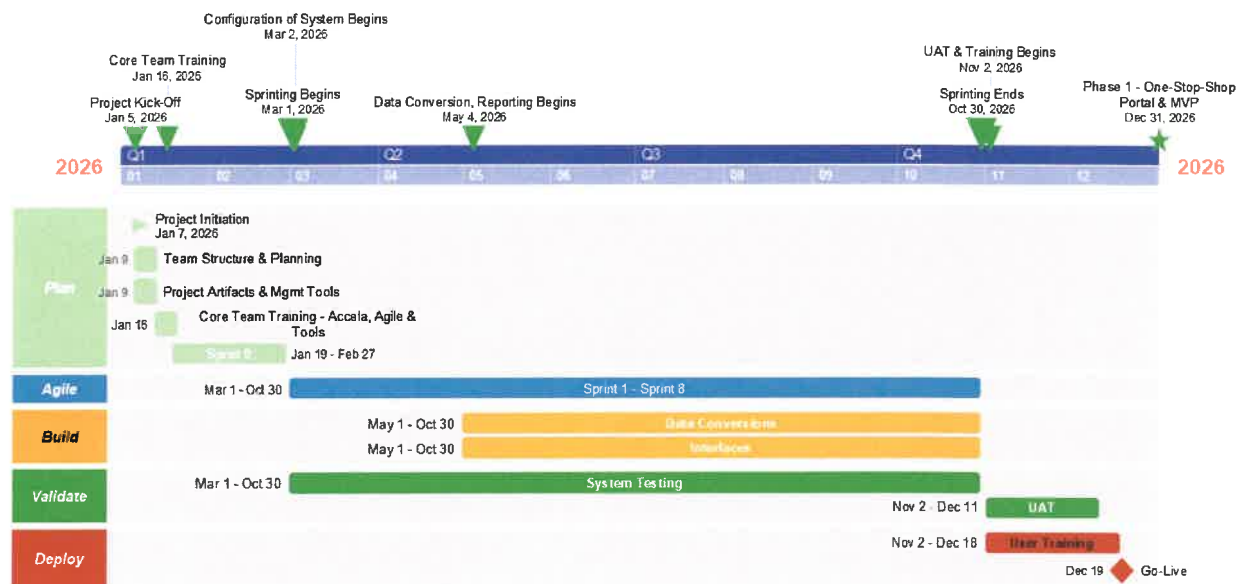
West Virginia One-Stop-Shop System - Phase 1 - Citizen Portal & MVP
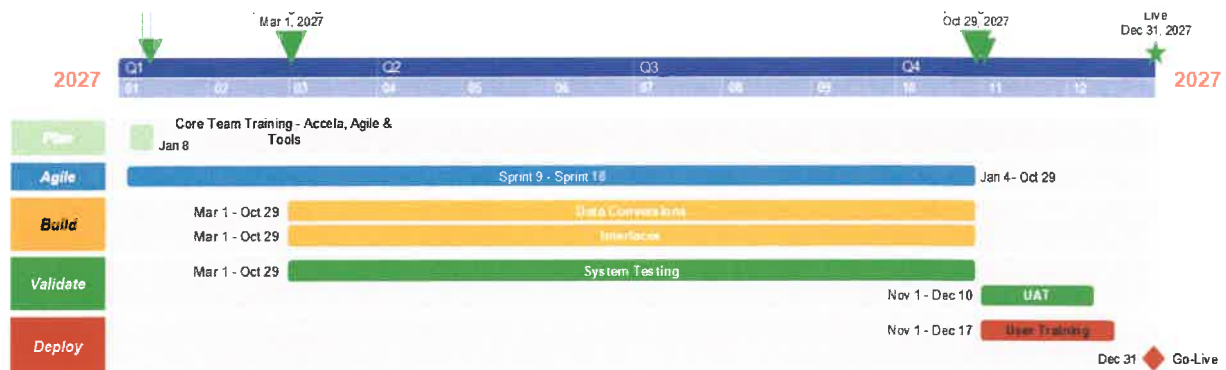
West Virginia One-Stop-Shop System - Phase 2
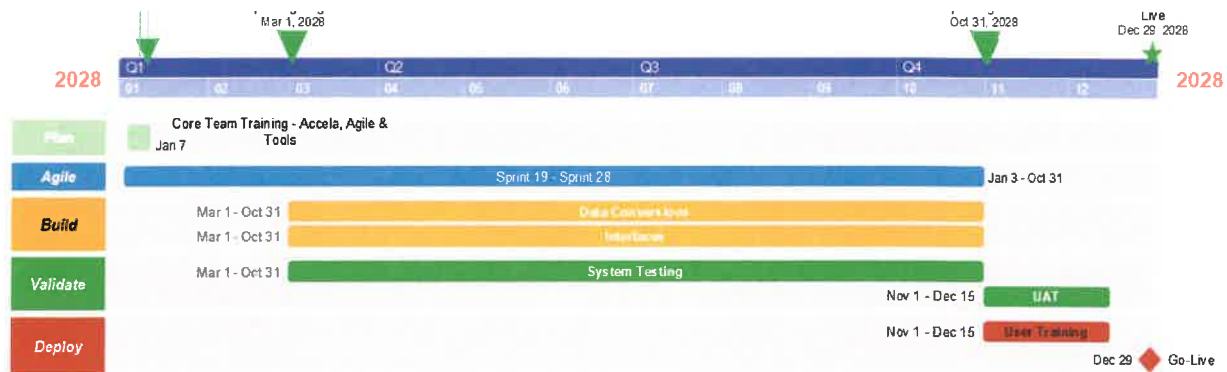
West Virginia One-Stop-Shop System - Phase 3 - All Departments Live

Figure 7: Proposed Project Timeline

4.2.1.16 Vendors should describe their approach on how to implement a "train-the-trainer" model, the vendor should deliver a structured, scalable training program that equips key agency users with the knowledge, tools, and confidence to train others effectively.

VIP will implement a structured train-the-trainer program under our VIPAcademy initiative. Key agency personnel will receive hands-on instruction to become internal champions. The program is designed to incorporate:

- Instructor-led and virtual classroom sessions
- Scenario-based exercises and knowledge checks
- Certification of trainers for ongoing in-house training
- Access to learning management system (LMS) for progress tracking

End User Training

End-user training is especially important for a project of this scope, where State staff must transition to a new permitting system while maintaining compliance with West Virginia statutes and Agency regulations. Effective training is essential to support staff through this change and to ensure the system is used as intended from day one.

VIP's approach to end-user training is designed to give State personnel the knowledge and confidence to perform their daily permitting, planning, zoning, inspection, and code enforcement tasks in the new Salesforce environment immediately at go-live. Training content will be based on the State's current and future-state process maps and approved user stories, so staff clearly understands how the configured system supports re-engineered workflows, regulatory requirements, and defined business outcomes. This focus on real State processes will drive faster adoption, higher user satisfaction, and measurable productivity gains.

Our approach to end user training is built around the following objectives:

- State personnel have sufficient skill and knowledge to begin using the new system to perform their usual jobs. Their training will prepare them to handle the most frequently occurring situations.
- Trained staff will be confident about using the new system
- Staff will have positive expectations regarding the implementation of the new system

Train-the-Trainer

VIP proposes a train-the-trainer approach to meet the State requirements for end-user readiness, regulatory compliance, and long-term self-sufficiency. Under this model, VIP will train a select group of State staff who will serve as internal trainers and subject matter experts. These State trainers will then deliver role-based instruction to all end users across all divisions.

This approach directly supports the State's emphasis on knowledge transfer and sustainable operations by:

- **Cost Effectiveness** – Training a small group of State/Agency experts reduces project costs while still ensuring full coverage across all departments
- **Higher User Acceptance** – Staff are more receptive to training delivered by trusted colleagues who understand the State's workflows and regulatory requirements
- **Development of Internal Expertise** – As State trainers teach and answer questions, they gain deeper insight into Salesforce's configuration, future-state business processes, and State statutory requirements, strengthening the ability to manage the system after go-live
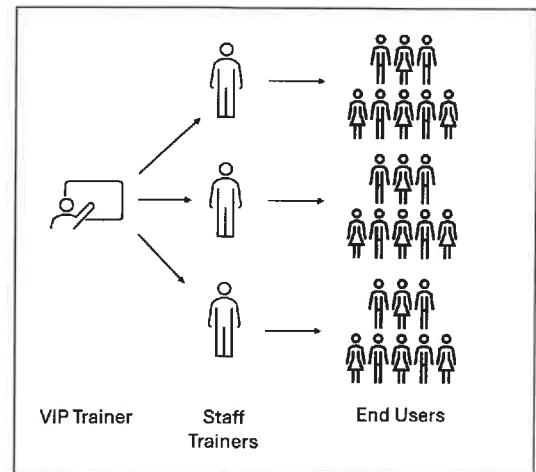
VIP trainers will teach by example using interactive discussions, system demonstrations, and hands-on exercises based on the State's current and future-state process maps. We will equip State trainers with proven training methods, curriculum templates, and customized materials drawn from the configured Salesforce environment so they can deliver consistent, compliant training across all departments.

In addition to teaching the new system, VIP will work with the State trainers to develop training curriculum, presentations, and hands-on exercises in preparation for their training sessions. The State trainers will be ultimately responsible for preparing for and delivering their assigned training sessions, but VIP will provide templates and examples from other projects, and will support the State trainers with steps, documentation, or anything else they need to be successful. VIP will also provide support during the training sessions as needed.

High-level activities of our end user training approach are outlined below.

- **Create Training Plan.** The Training Plan lays out the approach to training, including:
  - Identify trainers and trainees
  - Determine on the format—presentation versus hands-on
  - Identify required sessions, including topics for each session and number of sessions needed
  - Prepare the training schedule, including date/time and staff names that should attend each session
- **Develop Training Materials.** To develop job-specific training materials, our project team employs a "Train-the-Trainer" approach. As part of this approach, State trainers learn how to develop training materials that facilitate knowledge transfer. We provide an initial set of training materials; agency trainers use their business process knowledge to refine these materials so that they provide targeted instruction to agency staff.
- **Schedule Staff.** Staff are assigned to their training sessions and calendar invites are sent out.

- **Train Users.** Users are trained under the train-the-trainer approach. Our consultants and agency project staff support the State's trainers with training delivery by providing technical assistance and specialized instruction.

Salesforce Admin Training

Salesforce Admin training is designed for business users who will maintain and update basic system configurations post Go-live. The training participants are expected to have a basic understanding of how Salesforce was configured for the State. This training is typically given during or after user acceptance testing and prior to go-live.

The Salesforce Admin Training will be provided by VIP and will include user roles/access, reference data, and Salesforce configuration. The Salesforce Admin training is the formal training for your future system admins, but the VIP team provides knowledge transfer throughout the project to all project staff so they are learning the system over the course of months, and not all at once in a training session. We believe in empowering your staff to learn and maintain as much of the system as they can so you can rely minimally on vendor support in the future.

4.2.1.17 Vendors should describe how the solution provides a comprehensive, accessible, and self-paced learning platform like on-demand that supports both agency users and constituents after implementation.

To ensure sustainability, TeamVIP will provide a self-paced digital learning portal containing on-demand tutorials, FAQs, and user guides. Resources include step-by-step video demonstrations, a searchable knowledge base integrated with Salesforce Help, and a built-in feedback tool to request enhancements.

Salesforce provides an intuitive help and training portal that brings together a rich set of resources that would give your organization a centralized way to help solve problems quickly and easily. Salesforce also provides context-sensitive help icons throughout the application screens to make it easier for users to get unique help without searching. Solution help is online, so we assure online help is extremely thorough and effective for usability. The Help site:

- Is fully customizable - You can personalize Help to meet your specific needs, customizing the gadget layout to show what is important to you
- Allows users to get the right answers, fast - Knowledgebase is more intelligent and comprehensive than ever (Auto Suggestion of Search Terms, Expanded Knowledge Repository [Help Docs, Solutions, FAQs, Training, Best Practices], and Refinement by Dimension)
- Provides chat - New engagement Channel gives customers the ability to chat with the Salesforce support team in real time
- Has easy case management - Opening and reviewing cases is easier than ever

The Salesforce Help and Training portal serves as a central repository for user and technical documentation and includes step-by-step instructions, best practices, and troubleshooting guides.

Trailhead, Salesforce's interactive learning platform, provides hands-on modules and projects to help users and administrators understand and apply Salesforce features effectively. Users can pick specific trails, modules or projects based on role (admin, user, etc.), experience level (beginner, intermediate, advanced) to learn new skills and absorb the information they need quickly.

4.2.1.18 The State currently uses Google and Microsoft products for core functions like email, calendar, and meetings, vendors should ensure their solution is compatible and interoperable with these platforms to streamline adoption and maximize productivity.

The Salesforce ecosystem offers native integration with both Google Workspace and Microsoft 365, facilitating unified collaboration and calendar management. Capabilities include:
- Two-way calendar synchronization (Outlook/Gmail)
- Seamless file linking from Google Drive and OneDrive
- Integrated Teams and Meet meeting scheduling

TeamVIP's implementation ensures the permitting portal integrates directly with the State's existing Google Workspace and Microsoft 365 infrastructure, enabling single sign-on capabilities and reducing duplicate data entry while maintaining compliance with state security policies.

4.2.1.19 Vendors should explain how the solution can be adjusted to meet the growing and changing needs of the State. The State anticipates additional agencies may desire to participate in the solution in the future, the platform should be able to evolve alongside the State's operational, technical, and organizational growth, flexible and scalable to adapt to increased requirements in future years.

TeamVIP's low-code/no-code configuration model allows for rapid scaling as more agencies join the platform. This scalability advantage ensures the State's investment remains flexible and future-proof.
- Modular architecture supporting new permit types and workflows
- Cloud elasticity—automatic scaling under heavy transaction loads
- Configurable data partitions for new agency onboarding

4.2.1.20 Vendors should demonstrate commitment to high system availability, transparent maintenance practices, and rapid recovery protocols with downtime and planned maintenance windows being outside of business hours.

TeamVIP guarantees high system availability through Salesforce GovCloud's redundant infrastructure. Our maintenance approach includes:
- 24/7 system monitoring and automated alerting with incident response within 15 minutes
- Planned maintenance windows scheduled outside of business hours, aligned with Salesforce's standard release schedule occurring on the second Tuesday of each month, with advance notification to state stakeholders
- Defined RPO of 4 hours and RTO of one hour, aligned with State-approved SLA parameters to be negotiated at contract execution
- Dedicated support team available for all critical issues with escalation procedures to senior engineers
- Comprehensive disaster recovery protocols supported by Salesforce's dedicated disaster recovery team and infrastructure, including automated failover to backup systems, regular backup validation, and quarterly disaster recovery drills to ensure rapid recovery capability
- Transparent availability monitoring accessible through Salesforce's trust status page, providing real-time visibility into system health and maintenance activities

4.2.1.21 Vendors' solution must include a description of the project management approach and relevant tools to be utilized.

VIP's project governance is anchored in our VIPManage and VIPDeliver methodologies. These frameworks combine PMI best practices with Agile/Scrum principles for iterative delivery. Our structured yet flexible approach ensures transparency and accountability throughout implementation.
- Clear project charter and scope baseline
- Work Breakdown Structure (WBS) and milestone tracking via Jira
- Weekly progress dashboards and risk mitigation logs
- Stakeholder workshops at each phase for validation and alignment

Our team of implementation consultants and functional experts will not only participate in configuration of a fully functional system but will provide in-depth consultations regarding process efficiencies and best practices. VIPManage and VIPDeliver were developed based upon our adherence to industry standards including the Project Management Institute, Software Engineering Institute, Institute of Electrical and Electronics Engineers, Information Technology Infrastructure Library, International Institute of Business Analysis, and Prosci Change Management. We refined these methodologies through hands-on experience with state, local, and federal clients. We have established ourselves as trusted advisors to our clients, as evidenced by our project references. Our focus isn't on showcasing our own achievements, but on delivering our clients' success through solutions that not only exceed requirements but also align with industry standards and best practices.

Our approach mitigates risk through a project's lifecycle by employing a combination of industry experience, specialized expertise, and methodology tailored to satisfy project-specific requirements. Our verified and repeatable Agile/Scrum system integration process has been used on all of our implementation projects and results in successful implementations and satisfied customers. VIP's approach is client-focused, meaning we work together with you throughout the entire project. This gives your staff the opportunity to use the system as it is being configured, which leads you to a better product at go-live because there are no surprises about how your end-to-end process will work.

Our approach allows us to focus on knowledge transfer throughout the entire project. This continuous process empowers your staff to have a deeper understanding of how the system works, which leads to more internal self-sufficiency and less reliance on vendors.

Project Management Approach

VIP will provide comprehensive project management services covering the full life cycle of the permitting solution implementation, including project initiation, planning, execution, monitoring, and closure. A dedicated project manager will be assigned to lead all phases and serve as the primary point of contact for State stakeholders. As part of this responsibility, VIP will deliver a detailed project schedule, work breakdown structure, resource allocation plan, and risk management framework, along with regular project meetings and progress updates.

Project governance will begin with a lead kickoff meeting with key stakeholders and continue through weekly status meetings with designated State staff to track milestones, manage risks, and ensure transparent communication. This structured approach will also include change control procedures, quality assurance, and user acceptance testing management to meet the State's requirements for a well-managed, on-time, and on-budget implementation.

Our project management service approach, VIPManage, is based upon four fundamental objectives to support effective control methods, procedures, and project management best practices:
- Address objectives and requirements by delivering high quality end products
- Complete deliverables within the defined schedule and budget
- Adhere to a timely communication plan throughout the project lifecycle
- Identify and mitigate potential challenges through corrective action

While VIPManage conforms to industry-standard project management processes, our approach can easily accommodate and adapt to iterative design, delivery, and implementation. We focus on utilizing repeatable and consistent iterative processes, procedures, tools, and templates to maximize efficiencies, ensure proper planning, guide successful execution, and provide tracking and reporting of all tasks.

VIPManage includes processes for initiating, planning, executing, controlling, and closing for all phases of an engagement as shown in the figure below.
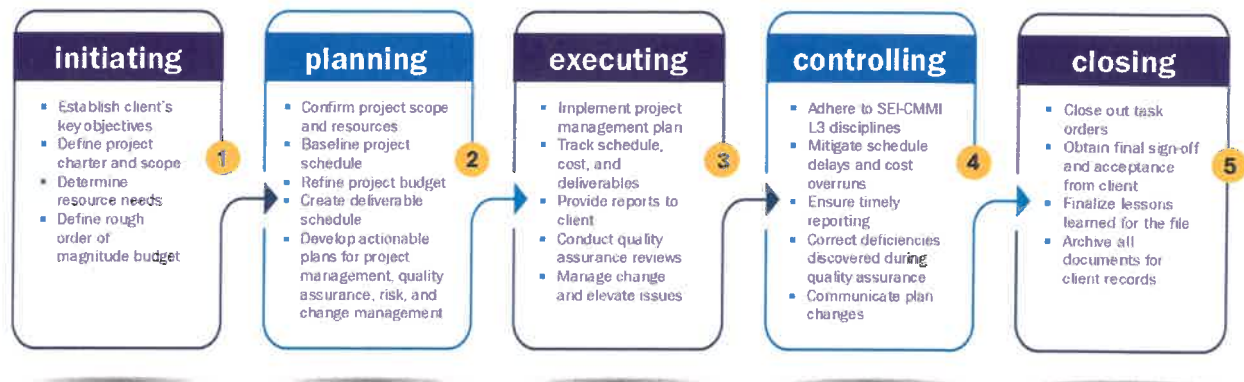

initiating
- Establish client's key objectives
- Define project charter and scope
- Determine resource needs
- Define rough order of magnitude budget

planning
- Confirm project scope and resources
- Baseline project schedule
- Refine project budget
- Create deliverable schedule
- Develop actionable plans for project management, quality assurance, risk, and change management

executing
- Implement project management plan
- Track schedule, cost, and deliverables
- Provide reports to client
- Conduct quality assurance reviews
- Manage change and elevate issues

controlling
- Adhere to SEI-CMMI L3 disciplines
- Mitigate schedule delays and cost overruns
- Ensure timely reporting
- Correct deficiencies discovered during quality assurance
- Communicate plan changes

closing
- Close out task orders
- Obtain final sign-off and acceptance from client
- Finalize lessons learned for the file
- Archive all documents for client records

Figure 8: VIPManage Processes

VIPManage is comprised of the following key features, used by our project manager while providing day-to-day oversight throughout the term of the contract:
- Spans all phases of a project lifecycle
- Provides unique guidelines based upon best practices and the project team's collective expertise
- Offers measures to gauge project status and identify and mitigate deficiencies as early as possible
- Provides the framework for early team involvement to deliver maximum value
- Offers guidelines for timely issue and risk escalation

VIP will actively support the State's organizational change management efforts by providing clear communication, training resources, and knowledge-transfer activities aligned with the State's OCM plan.

Our team will collaborate with State leadership to share project updates, deliver comprehensive user training, and supply documentation that helps staff understand new processes and system functions, ensuring a smooth transition to the new permitting solution.

plan
Project preparation, hold kickoff meetings, and facilitate collaborative design sessions

agile
Leverage Agile Scrum methodology to conduct JAD sessions, producing configuration and product increments during each iteration

build
Configuration and customization of the solution, interface design, and data conversion

validate
Incremental testing and validation of the solution, final acceptance testing prior to launch, and knowledge transfer

deploy
Execution of Go-Live activities, final cutover, client sign-off, hand off for maintenance and support tasks
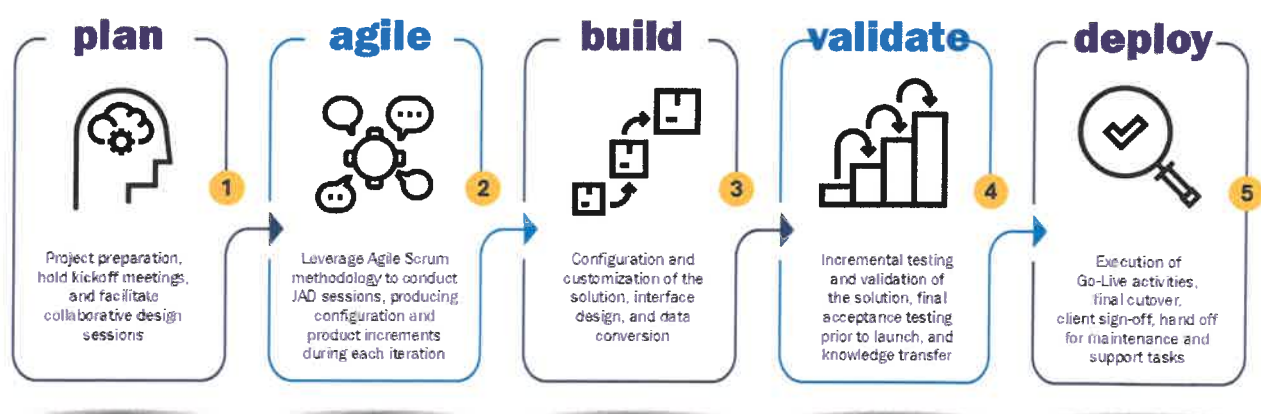
Figure 9: VIPDeliver Process

VIPDeliver is the framework guiding our service approach that aligns with modern implementation best practices to reliably deliver projects on-time and within budget. This methodology fosters collaboration between VIP and project stakeholders to identify and mitigate project risks and support timely and

accurate communication and decision-making throughout the engagement. VIPDeliver is a proven, robust, and flexible methodology tailored for government projects, whether a full system upgrade/replacement or a module add-on, to help maximize project success and deliver measurable results. VIPDeliver includes five stages for iterative development:

- **Stage 1 - Plan.** The Plan stage is comprised of project planning activities, creation of core project management documents and templates, and the project kickoff meeting held between VIP and project stakeholders to ensure the project begins in a well-organized, structured fashion while confirming expectations. At the start of the Plan stage, the baseline project plan will be updated and refined based upon discussions and collaboration with project stakeholders. The project team will also receive Core Team training during this stage, which is an initial overview of the Salesforce system. Core Team training will walk through different areas of the system with project team members and will highlight best practices and configuration options.

  Once Core Team Training is complete, initial requirements gathering/verification can commence. Using Agile terminology, this initial requirements gathering/verification is called Sprint 0. Sprint 0 normally starts with high level verification, such as record types and interfaces, and then dives deeper into applications, fees, workflows processes, etc. Each requirement will be broken down into different units of work and documented in a work package called a user story. While the process of turning requirements into user stories continues throughout the next stage of the project (the Agile stage), the goal of Sprint 0 is to get enough user stories documented so the development team has at least a month of work defined and ready to configure in the system.

- **Stage 2 - Agile.** The Agile stage is comprised of a series of Sprints. A sprint is a defined timeframe (usually four weeks), where the requirements in user stories are configured, tested, and the requirement is signed off as complete. Prior to the start of each sprint, the project team will hold a Sprint Planning meeting and decide which stories they will commit to completing during the sprint. Once the sprint starts, the project team collaborates to complete the work before the sprint ends.

  During the Agile stage, the project team has a quick (15 minute or less) Daily Scrum Stand-up meeting to review progress. This daily stand-up meeting holds the project team accountable and helps to remove roadblocks so that work can continue. VIP will also hold joint application development (JAD) sessions with State SMEs during the Agile stage. The goal of these JAD sessions is to continue to review and define requirements and turn them into user stories for future sprints.

  As the Agile stage progresses, the State will see your new system being built in real-time. This gives staff the opportunity to see how each requirement is translated into Salesforce and allows for changes if needed.

- **Stage 3 - Build.** The Build stage typically occurs concurrently with the Agile stage and will include the development of interfaces and the progression of data conversion/migration. Interface requirements will be identified for approval before interfaces will be developed, tested, and approved.

  Data conversion will typically occur after several sprints have been completed so data conversion mapping activities can begin with at least a minimal amount of converted data to work with. Data conversion analysis and mapping is a collaborative effort between VIP and State SMEs and requires stakeholder approval. Once approved, data conversion development will commence and will include review of each of the conversion runs to refine any data conversion mapping. At the end of the Build

stage, the complete end-to-end solution will have been developed, unit tested, and will be ready for formal user acceptance testing (UAT).

Stage 4 - Validate. The Validate stage is comprised of UAT and training. UAT includes formal testing and sign-off from the State that the system is complete and ready to move to production. While the testing that occurs during the Agile stage is testing each user story individually, UAT is end-to-end process testing. This gives the State the opportunity to test business processes start-to-finish to ensure all the parts work together. UAT also typically includes full sets of converted data so that process can be tested with converted data as well as data that is natively created in the new system.

End user training also occurs during the Validate stage. A training needs assessment is completed that will identify who needs to be trained on what functionality and processes. Training curriculum is developed, and training is conducted for staff. System administration training is also provided during this stage.

- **Stage 5 - Deploy.** The final stage of a project is marked by the transition to the Production environment. Deployment will include development of the go-live checklist, migration of configuration to production, set up of interfaces/adapters, and data conversion cutover as defined in the go-live checklist. All necessary Go-Live activities will be identified, documented, reviewed, and executed. This stage also provides limited post-go-live support.

VIPDeliver utilizes an iterative Agile/Scrum methodology throughout our project implementation. The following section contains additional information about the specific Agile/Scrum processes VIP adheres to during system implementation projects.

Agile/Scrum-based Implementation Process

Scrum is the most widely used lightweight process framework for system configuration and development. A limited set of defined overhead practices must be followed to maximize the amount of productive time available for getting useful work done. Characteristics of a successful Agile implementation include:
- Disciplined project management process
- Frequent inspection and adaptation
- Leadership philosophy that encourages teamwork, self-organization and accountability
- Defined set of engineering best practices intended to allow for rapid delivery of high-quality functionality

Requirements and solutions will evolve through collaboration between self-organizing cross-functional teams. During the project lifecycle, user involvement will be integral to provide visibility and transparency, offering a clear view of the actual progress of projects. Working functionality will be the subject of each Sprint, offering your project team early access to workflows and configurations developed within a given Sprint. Communication will be key; VIP's approach recognizes an effective plan for both the present organizational change, as well as strategic positioning for a future operating model, is required. Our processes development approach will be based upon ongoing reviews and feedback to support the Agile/Scrum development process, with the goal the solution is building an effective foundation for future maintenance and operations hand-off.

Table 1: Scrum Team Roles and Responsibilities

Scrum Team Roles	Responsibilities	Scrum Artifacts
Product Owner – decision maker	The Product Owner is responsible for the product backlog. The product backlog contains the list of all desired outcome users expect from the product and is our to-do list of goals. The backlog represents the "what" that will be built, prioritized by importance.	■ Product Backlog – a collection of user stories (requirements) that represent a feature of the product to be developed
Scrum Master – team leader	The Scrum Master is the facilitator for the team, helping the team follow the ceremonies and effectively use the artifacts. The Scrum Master removes impediments that prevent the team from making progress during the Sprints.	■ Sprint Backlog – user stories chosen by the team to design, develop and test during a Sprint
Development Team – product builders	The Development Team is responsible for determining "how" the product will meet the expectations of the Product Owner. They are responsible for designing, developing and testing the product based on collaborative effort with stakeholders and ultimately the Product Owner.	■ Burn Down Chart – a chart that depicts the status of stories being worked on in a Sprint

Scrum Framework

Beginning with facilitated JAD sessions for analysis, VIP will develop user stories based upon system requirements. Those user stories make up the product backlog. VIP will conduct a Fit-Gap Analysis with best practices compared to business needs and subsequently conduct additional JAD sessions to refine the user stories in the Product Backlog with detailed Acceptance Criteria.
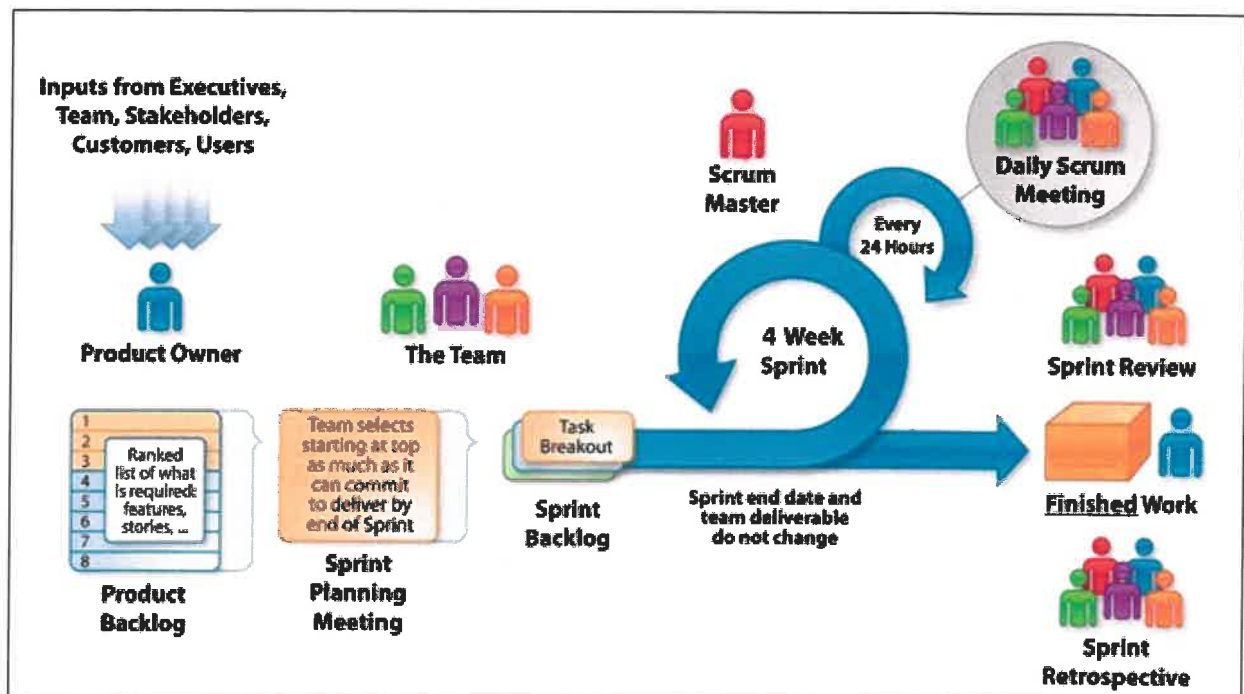

Figure 10: Scrum Framework

Scrum Activities

- Sprint Planning
- Daily Scrum Stand-up
- Sprint Review and Retrospective

Sprint Planning

During Sprint Planning, the team will assign user stories from the Product Backlog to a Sprint. Sprint Planning will focus on what needs to be built in the next iteration of the product. During the Sprint, the team will work on tasks required to complete user stories.

Daily Scrum Meetings

The team will facilitate a Daily Scrum Stand-up meeting targeted for 15 minutes or less that includes a discussion on progress, as well as risks/issues and quality. Breakout sessions will be held for detailed topics or new risks that require further discussion. During the Sprint, the status of all user stories will evolve from To-Do to In-Progress to Done. By the end of the Sprint all user stories should be completed and reflected in a Burn-down Chart.

Sprint Reviews and Retrospectives

During the Sprint Review, the team will review work that is completed during the sprint. This often includes a demonstration of the working software. The team will also facilitate a Retrospective to discuss what did/did not go well and adjust the process to make future Sprints more effective. Finally, as part of overall quality management, our team will prepare a Sprint Package. Each of the work products included in the Sprint Package will be submitted for approval.
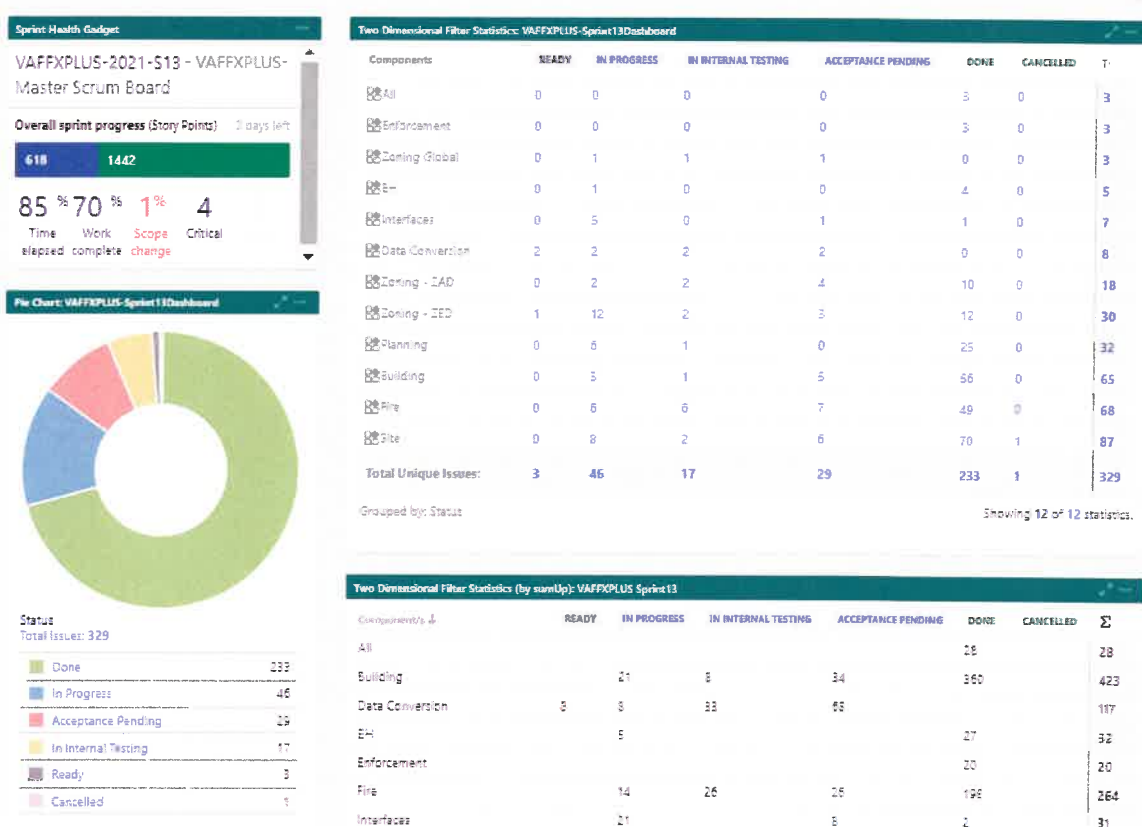
Project Tools

Figure 11: Sprint Summary Dashboard

To support our methodology, we utilize Jira/Confluence software. Jira is an award-winning project management tool specifically designed for Agile development. This powerful platform allows us to create and manage user stories, plan and execute sprint cycles, track team performance and velocity, and generate real-time status dashboards.

Jira's built-in functionality directly supports test management, defect management, and release management processes, providing instant status and transparency throughout the project lifecycle. Workflows created in Jira support strategies that help govern the steps taken to ensure a quality product is developed and deployed. Examples of some of the basic reports VIP uses to support project activities are illustrated below. This comprehensive approach mitigates risk while maximizing efficiency and quality through our proven, repeatable methodology tailored specifically for government clients.
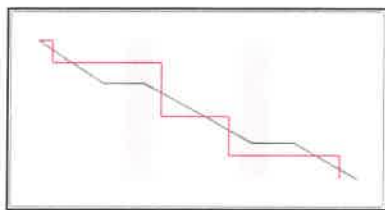
Burndown Chart

Track the total remaining work and project the likelihood of achieving the sprint goal. This chart helps your team manage its progress and respond accordingly.

Burnup Chart

Track the total scope independently from the total work done. This chart helps your team manage its progress and better understand the effect of scope change.
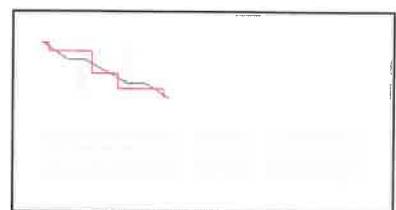
Sprint Report

Understand the work completed or pushed back to the backlog in each sprint. This chart helps you determine if your team is overcommitting or if there is excessive scope creep.
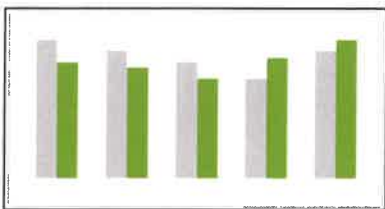
Velocity Chart

Track the amount of work completed from sprint to sprint. This chart helps you determine your team's velocity and estimate the work your team can realistically achieve in future sprints.
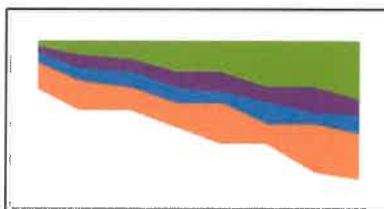
Cumulative Flow Diagram

View the status of issues over time. This diagram helps you identify potential bottlenecks that need to be investigated.
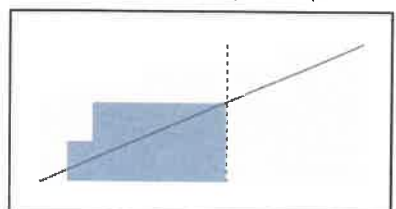
Version Report

Track the projected release date for a version. This report helps you monitor whether the version will release on time, so you can take action if work is falling behind.
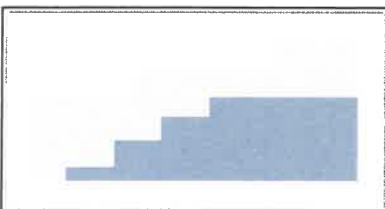
Epic Report

Understand the progress towards completing an epic over time. This report helps you manage your team's progress by tracking the remaining incomplete work.
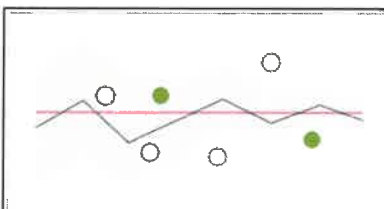
Control Chart

View the cycle time for your product, version, or sprint. This chart helps you identify whether data from the current process can be used to determine future performance.
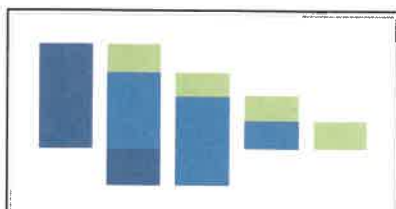
Release Burndown

Track the projected release date for a version to help you monitor whether the version will release on time, so you can take action if work is falling behind.

Figure 12: Agile Reports in Jira

While Jira serves as the engine for backlog management, sprint tracking, and daily Agile execution, Confluence complements Jira as the project's central knowledge base and collaboration hub.

VIP configures a dedicated Confluence site at project kickoff and links it directly to the Jira environment to create a seamless, end-to-end project repository. This integrated workspace houses the project documents, sprint artifacts, design specifications, meeting notes, risk and issue logs, and decision registers. County staff are granted access so they can track progress and reference documentation in real time, ensuring transparency and traceability from initial requirements through final acceptance.

VIP uses pre-built Agile templates within Confluence to accelerate setup and provide consistent formatting for sprint documentation, status reporting, and deliverable sign-offs. Each sprint's outputs— user stories, configuration notes, testing results, and retrospectives—are captured in Confluence to support continuous knowledge transfer. By combining Jira's task management with Confluence's documentation and collaboration features, VIP provides the State with a single, integrated platform for project governance, communication, and long-term reference.

4.2.1.22 Vendor should be able to integrate with the State's Single Sign-On Solution.

The system will integrate seamlessly with the State's Single Sign-On (SSO) solution to centralize authentication. The benefits of this integration include:

- Simplified login experience using State credentials through federated authentication via Security Assertion Markup Language (SAML), which enables secure authentication and authorization data exchange between the permitting portal and the State's identity provider
- Enforcement of multifactor authentication (MFA) through delegated authentication, allowing you to integrate Salesforce with the State's authentication method of choice while maintaining Salesforce-managed password policies
- Centralized user lifecycle management through identity provider provisioning, enabling just-in-time user provisioning initiated by the State's identity provider to streamline user onboarding and access control

4.2.1.23 Vendor's pricing page should provide a total and complete implementation and build out cost, and should identify any milestone payment expectations. Vendor's pricing page should also provide proposed annual licensing costs, hosting costs, maintenance costs, and other cost breakdowns.

In a separate, sealed envelope TeamVIP has provided a comprehensive cost visibility through detailed pricing matrices covering development, configuration, licensing, hosting, and support. Our cost elements include:

- One-time implementation and configuration fees
- Annual Salesforce licensing costs
- Annual maintenance and support subscriptions
- Optional managed services and enhancement packages

4.2.1.24 Vendor should guarantee that all work on this project will be performed in the United States. Use of technology to communicate with countries banned by the Federal Government is prohibited.

All project work, hosting, and support are performed exclusively within the United States by VIP and its U.S.-based partners. The platform resides in U.S.-only data centers meeting FedRAMP and FIPS standards.

4.2.1.25 Vendor should provide constituents access to a digital wallet for payment, refund, and license/permit management.

The citizen portal will include a secure digital wallet for payment processing, refunds, and license renewals. Key features of the digital wallet include:

- Integration with PCI-compliant payment gateways supporting State-required payment methods (electronic funds transfer and P-Card)
- Secure credit card, ACH, and digital wallet transaction processing
- Real-time payment confirmation and receipt generation
- Automated refund workflows triggered by approval outcomes
- Transaction history and payment tracking accessible to constituents
- Compliance with state security and data encryption requirements for all financial transactions

How Our Solution Meets or Exceeds Mandatory Project Requirements

4.2.2.1 Vendors must provide a solution for the development and creation of a one-stop shop permitting portal.
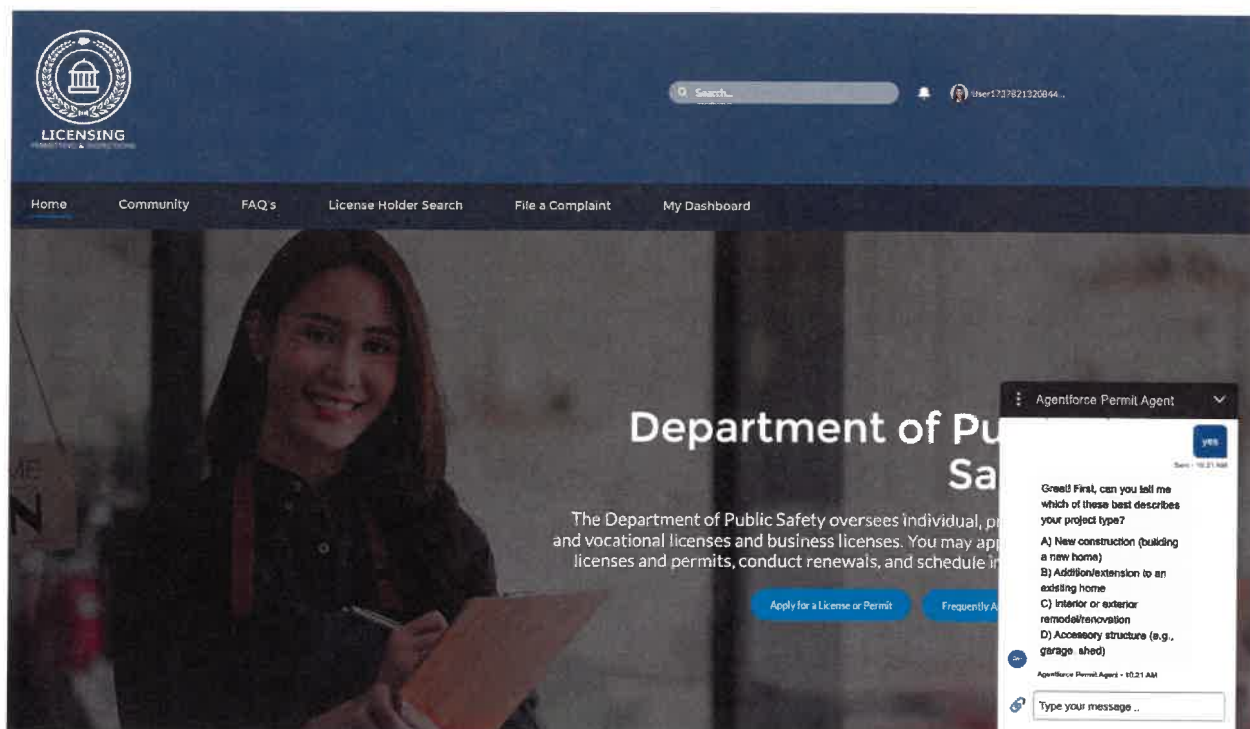
Figure 13: Sample Salesforce Welcome Portal Page

TeamVIP proposes a centralized One-Stop-Shop permitting portal built on Salesforce Public Sector Solutions (PSS) that consolidates permitting, licensing, and approval processes from multiple state agencies into a single unified platform. Our solution enables constituents to access all required permits, licenses, and approvals through one integrated portal rather than navigating separate agency systems. Our approach leverages a proven Agile program plan (VIPManage + VIPDeliver) to configure role-based application processes designed for multi-agency coordination. Highlights of our solution include:

- Applicant self-service, status tracking, and inter-agency workflow views providing transparency across all permitting stages
- A delivery approach that keeps stakeholders engaged and validates functionality in sprints
- Integration of all required agency permitting requirements into unified workflows and processes

- Centralized document management, payment processing, and approval tracking accessible from a single dashboard

4.2.2.2 Vendors' solution must outline a structured, transparent, and collaborative methodology that ensures timely delivery, stakeholder alignment, and quality assurance throughout the implementation lifecycle.

Our delivery uses VIPManage (project governance) + VIPDeliver (Agile implementation), with iterative configuration, continuous validation, and formal UAT—supported by a transparent toolset (Jira/Confluence) that the State can access for real-time status, artifacts, and audit trails. Our approach includes:
- Full SUITE/SEM-style project artifacts (Project Charter, RTM, Design, Test & Implementation Plans)
- Milestone-based WBS, testing, and acceptance cadence with monthly reporting

4.2.2.3 Vendor must agree to and meet all data security requirements identified by the Office of Technology, for the entirety of the project, including initial meetings, information gathering, development, and other preliminary stages.

Security and risk management are embedded in our methodology and tracked through project governance and QA checkpoints. Team VIP agrees to and commits to meeting all data security requirements identified by the Office of Technology for the entirety of the project, including initial meetings, information gathering, development, and other preliminary stages. We will meet Salesforce requirements in protecting Customer Data by implementing administrative, physical, and technical safeguards that prevent unauthorized access, use, modification, or disclosure of Customer Data, as permitted by written customer consent and in accordance with applicable Salesforce Services documentation.

Our approach ensures data security protocols are implemented and maintained from project inception through implementation, with regular audits to demonstrate ongoing compliance with Office of Technology standards and expectations throughout the contract term.

4.2.2.4 Vendor's proposed solution must meet FedRAMP requirements.

TeamVIP's permitting portal solution is built on Salesforce, deployed on FedRAMP Moderate authorized infrastructure with a P-ATO from the JAB. This ensures the permitting portal meets all federal FedRAMP security requirements for data protection, system controls, and compliance standards. The solution inherits FedRAMP Moderate authorization through the authorized infrastructure, providing:
- Compliance with FedRAMP security control requirements across all system layers
- Federal security baselines and continuous monitoring aligned with NIST 800-53 standards
- Encryption of data at rest and in transit meeting federal requirements
- Role-based access controls and audit logging for all system activities
- Regular security assessments and vulnerability scanning to maintain FedRAMP authorization
- Data encryption, role-based controls, and audit logging maintained throughout the contract term to demonstrate ongoing FedRAMP compliance

This ensures the State's data and operations meet government-mandated security and compliance benchmarks throughout the project lifecycle.

To maintain compliance with FedRAMP, continuous monitoring includes ongoing technical vulnerability detection, remediation of open compliance findings, and at least annual independent assessment of security controls by a 3PAO (Third Party Assessment Organization).

TeamVIP will provide detailed compliance mappings, penetration test results, and risk assessments specific to the permitting portal's multi-agency data flows, along with a security roadmap aligned with the implementation timeline.

4.2.2.5 Vendor must ensure all state Data is encrypted at rest and during transit. Encryption must meet FIPS 140-3 standard.

TeamVIP will ensure all State Data is encrypted at rest and during transit through Salesforce Government Cloud Plus encryption infrastructure, which meets FIPS 140-3 standards. Our approach will include:

- Data at rest encrypted using FIPS 140-3 validated encryption modules with approved cryptographic algorithms and key lengths within Salesforce Government Cloud Plus
- Data in transit encrypted using TLS 1.2 or higher with FIPS 140-3 compliant algorithms and approved key lengths between the State's network and Salesforce Government Cloud Plus
- Encryption key management performed by Salesforce Government Cloud Plus certified services
- All audit data including application, personal information, and payment data protected under FIPS 140-3 encryption standards
- Regular encryption validation and compliance verification to ensure ongoing adherence to FIPS 140-3 standards through CMVP conformance validation

4.2.2.6 Vendor is responsible for ensuring any subcontractors utilized in this project are identified and reported to the WV Office of Technology and that such subcontractors (if applicable) always maintain compliance with the State's data security requirements. The Contractor may not assign, transfer, or subcontract any portion of the contract without the State's prior written consent.

We will identify any subcontractors and manage them under the same project controls and security expectations, with visibility via Jira/Confluence and formal change control. Any and all subcontractors will be approved by the State prior to beginning active project work.

4.2.2.7 Vendor's security controls must be in accordance with the NIST 800-53 standard. Vendor must provide evidence of this upon request

TeamVIP's solution implements security controls in full accordance with NIST 800-53 standards to protect the State's data and systems. Built on Salesforce GovCloud's FedRAMP Moderate authorized infrastructure, our solution inherits a comprehensive security control framework aligned with NIST 800-53 requirements across all control families including access control, identification and authentication, system and communications protection, audit and accountability, and security assessment and authorization.

TeamVIP establishes role-based access controls (RBAC) that restrict user access based on specific job functions and responsibilities, ensuring constituents and agency personnel only access information relevant to their roles. All sensitive data is encrypted at rest using AES-256 encryption and in transit using TLS 1.2 or higher, meeting FIPS 140-3 standards. Our comprehensive logging and monitoring infrastructure captures all system activities, security events, and user actions, maintaining complete audit trails for forensic analysis and compliance verification.

To maintain ongoing NIST 800-53 compliance, TeamVIP will conduct regular security assessments and control testing throughout the contract term. We will document all security control implementations, maintain detailed evidence of compliance, and provide the State with security assessment reports, control documentation, and audit results upon request. This transparent approach ensures the State can verify

our adherence to NIST 800-53 standards at any time and demonstrates our commitment to maintaining the highest security standards for government data.

4.2.2.8 Vendor must demonstrate how the solution implements a proactive, transparent, and standards-based security program that ensures system integrity and compliance with state cybersecurity expectations. Solution must provide security vulnerability scanning and routine reports of such testing of the system to the Office of Technology at routine intervals and upon request.

TeamVIP's permitting portal solution implements a proactive, transparent, and standards-based security program built on Salesforce's multi-layered approach to information security and availability. Our solution ensures system integrity and compliance with state cybersecurity expectations through independent audits and third-party validation, including SOC 1, SOC 2, and SOC 3 certifications performed by third-party auditors in accordance with NIST 800-53 standards.

The solution provides continuous automated vulnerability assessments and security testing aligned with industry best practices. Security testing includes vulnerability scanning and security assessments aligned with NIST 800-53 standards to identify and remediate vulnerabilities before they impact system operations. The portal maintains transparent security controls through real-time audit trails. All identified vulnerabilities are tracked, prioritized by severity, and remediated according to defined timelines, with the Office of Technology maintaining visibility into the security posture throughout the contract term.

Our multi-layered security approach encompasses:
- **Application Level Protection:** Role-based access controls and encryption of all data at rest and in transit, with all access governed by customer-defined authentication policies and data security rules.
- **Facility Level Protection:** Infrastructure provided by Amazon Web Services (AWS), including NAWS to host customer data, with data centers executing security programs and providing 24/7 global support for managing and monitoring data center operations.
- **Network Level Protection:** Firewall security vendors and proven security practices ensure network security, with firewalls allowing only HTTP and HTTPS traffic on ports 80 and 443, along with RFC 1118 standard and address translation technologies for further network security. IDS/intrusion detection systems are protected by host-based endpoint detection and response platforms, and all network access points are certified through third-party vulnerability assessment programs.

Security vulnerability scanning and routine reports of testing will be provided to the Office of Technology monthly, supplemented by ad-hoc reports upon State request, ensuring continuous visibility and rapid response to any identified security concerns.

4.2.2.9 Vendor must commit to a clearly defined time period for addressing critical vulnerabilities, aligned with industry standards and state cybersecurity expectations.

TeamVIP commits to addressing critical vulnerabilities through a clearly defined process aligned with industry standards and state cybersecurity expectations. Our commitment is supported by:
- Continuous vulnerability scanning and assessment of the portal and underlying infrastructure using commercial and proprietary vulnerability scanning tools
- Immediate escalation in the event any critical vulnerability is identified
- Integrated vulnerability remediation process aligned with Salesforce's configuration management and change management procedures

- Detailed remediation plans and deployment timelines for critical vulnerabilities, with changes tested and approved before rollout across all systems
- Regular coordination with the State's Office of Technology on patching schedules and vulnerability remediation status
- Compliance with FedRAMP requirements from NIST SP 800-53, including RA-5, Vulnerability Monitoring and Scanning, and NIST SP 800-40, Guide to Enterprise Patch Management Planning
- Version management system to track all vulnerability updates and configuration changes
- Security personnel receiving security alerts, advisories, and directives from vendors, external security organizations, and US-CERT on an ongoing basis to ensure rapid identification and response to emerging threats

4.2.2.10 The vendor must implement a resilient, secure, and verifiable strategy that ensures business continuity and data integrity in alignment with the State's expectations and the Service Level Agreement (SLA) and implement and maintain a comprehensive backup and disaster recovery plan.

Our plan includes defined achievement, testing, defined incident transitions, and ongoing SLA reporting. The RFP response does secure backup handling; the RFP response does secure warranty, production assurance and monthly performance reporting. These controls, audit trails, and secure backup handling maintain integrity throughout the contract term, with quarterly business reviews ensuring the plan evolves to meet State requirements and SLA obligations.

TeamVIP will implement a comprehensive backup and disaster recovery strategy utilizing Salesforce's built-in capabilities. Our approach will leverage Salesforce's enterprise-grade disaster recovery infrastructure, that Salesforce secures backup handling; the RFP response does secure warranty, production assurance and monthly performance reporting. The RFP response uses Salesforce's disaster recovery with a dedicated team and a four-hour Recovery Point Objective (RPO) and 12-hour Recovery Time Objective (RTO).

Salesforce maintains multiple layers of redundancy utilizing geographically dispersed Salesforce CoveCloud data centers with PFDN governance and verification. TeamVIP implements a comprehensive backup and disaster recovery strategy ensuring business continuity and data integrity with both SLA assurance. Our backup recovery plan with valid backup investigation, recovery procedures, and defined Recovery Time Objective (RTO) of 12 hours and Recovery Point Objective (RPO) of four hours. Monthly verification reports document backup integrity and recovery test results. These controls, audit trails, and secure backup handling maintain integrity throughout the contract term, with quarterly business reviews ensuring the plan evolves to meet State requirements and SLA obligations.

4.2.2.11 Vendor's solution must be able to be migrated into one of the State's existing cloud tenants after full development.
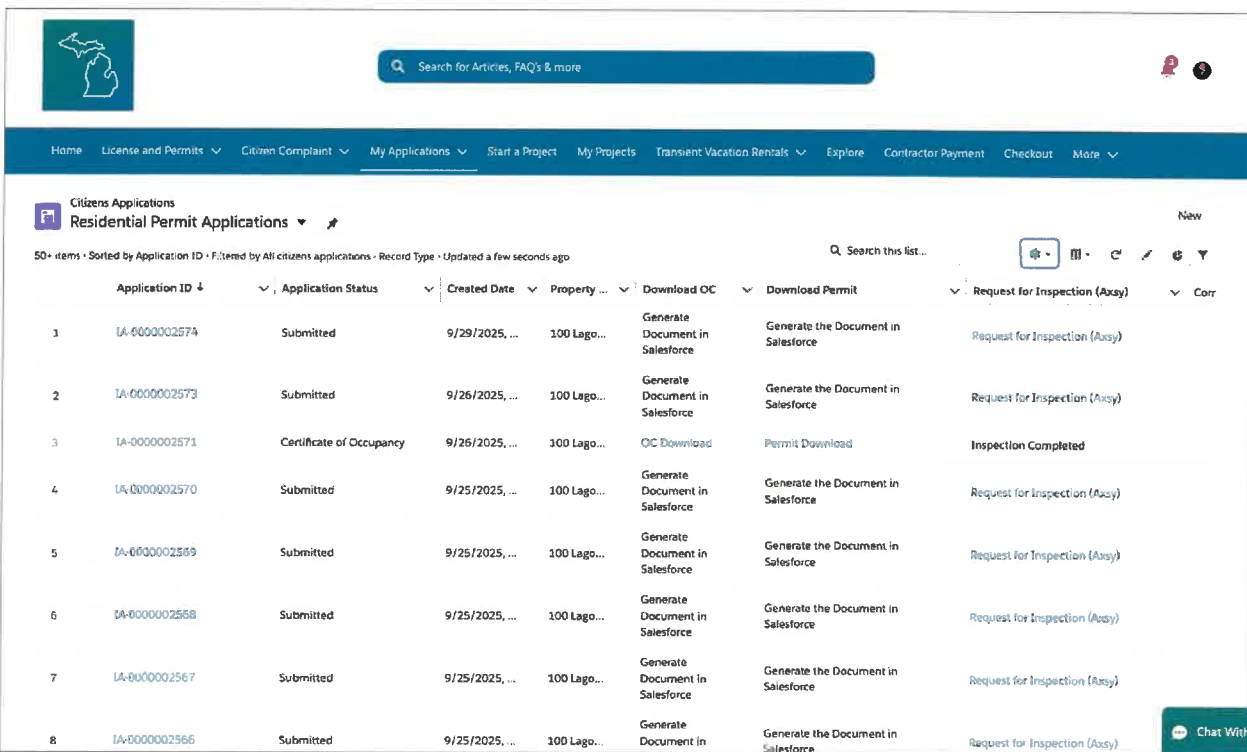
Per Question 37 of Addendum #1, our proposed solution is exempt from this requirement.

The proposed Salesforce solution for the One-Stop-Shop Permitting Portal cannot be migrated into one of the State's existing cloud tenants after development. The Salesforce permitting portal must remain hosted within Salesforce GovCloud (US), which is deployed in AWS. This approach ensures the State benefits from the highest levels of security, compliance, and operational support, while aligning with industry best practices for government SaaS solutions.

4.2.2.12 Vendor must make the project management interface available and accessible to the State's implementation team at no additional cost

TeamVIP will provide secure, role-based access for designated State users to Jira (status, tasks, CRs, KPIs) and Confluence (artifacts, schedules, versioned approvals), ensuring continuous visibility without relying on emailed documents at no additional cost.

4.2.2.13 Vendor's solution must provide a real-time data exchange.

Figure 14: View of All Submitted Applications

The solution architecture supports API-based real-time data exchange between the portal and participating agency systems, enabling instantaneous synchronization of permit applications, approvals, and status updates across all connected agencies. Our implementation leverages Salesforce's platform capabilities including REST APIs, change data capture, and event-driven architecture to ensure data flows in real-time without delays.

Our approach implements API-led connectivity with connector support for live systems commonly integrated with permitting workflows, including content management, geospatial systems, and agency-specific platforms. We utilize real-time communication protocols (REST and GraphQL) for low-latency, request-response interactions with reliability and security. Our team brings deep integration experience with platforms commonly paired with permitting (e.g., content and geospatial systems), ensuring seamless real-time connectivity.

Our implementation supports both synchronous and asynchronous data exchange patterns with built-in reliability mechanisms including timeouts, retries, and circuit breakers to handle transactional updates during synchronous operations. We provide data transformation and orchestration capabilities to enable real-time enrichment, lookups, and routing decisions within the same logical flow.

Real-time data exchange enables constituents to see immediate permit status updates, allows agencies to access current application information, and supports automated workflows triggered by real-time status changes. Security and enforcement protocols ensure authorized, secure, and scalable synchronous transactions. Comprehensive monitoring and observability—including distributed tracing and latency detection—enables identification of bottlenecks and ensures system responsiveness. As an optional enhancement, the State may license MuleSoft Anypoint Platform to expand integration capabilities and advanced orchestration features. This eliminates data silos and ensures all stakeholders access current information simultaneously.

4.2.2.14 Vendor's solution must be ADA compliant and meet the updated federal requirements.

Accessibility compliance is integrated into delivery and formal acceptance, with digital standards reviews embedded in the solution plan and testing sequence. The permitting portal is designed to meet Web Content Accessibility Guidelines (WCAG) 2.1 Level AA standards, EN 301 549 standards, and Section 508 compliance requirements for federal accessibility mandates. The permitting portal includes keyboard navigation, screen reader compatibility, alt text for all images, sufficient color contrast ratios, and accessible form controls enabling users with disabilities to navigate and complete permit applications independently. Accessibility testing is conducted throughout development using automated and manual testing tools, with formal audits completed prior to State acceptance. Our approach ensures the portal is accessible to all constituents regardless of disability, meeting both ADA requirements and updated federal accessibility standards including WCAG 2.1 and EN 301 549.

4.2.2.15 Vendor must provide 3-tier outage reporting.

TeamVIP will provide 4-tier outage reporting to ensure State stakeholders receive timely visibility into system performance and incident status. We will leverage Trust.salesforce.com as the primary platform for real-time information on system performance, security, and availability status. This includes both planned (i.e., up to one year) and past (i.e., prior month) maintenance information, current and past availability status, and security events and threats.

The Trust platform includes APIs that the State organization can use to directly integrate Salesforce availability information into existing monitoring tools and processes. We will provide clear incident notification paths, severity-based response definitions, and reporting timelines that will be formally defined in the SLA and reflected in monthly performance reports documenting incident frequency, severity, and resolution times.

4.2.2.16 Vendor must provide the State's team with access to a sandbox and production environment early on in the development stage.

TeamVIP will provision sandbox and production environments early in the development stage to enable State team participation in configuration and validation. Our milestone plan includes environment provisioning, which will include phases allowing State Subject Matter Experts (SMEs) to access Developer Sandboxes for configuration and testing, Developer Pro Sandboxes for integrating customizations and code deployments, and Partial Data Sandboxes for full integration testing and user acceptance testing with production data. Both Test and Production environments will be available for hands-on validation, configuration review, and functionality testing. State team participation will be active throughout development and we will provide feedback before full implementation.

4.2.2.17 Vendor must provide a disentanglement plan to the State within 6 months of contract award and maintain compliance with the requirements of ATTACHMENT A.

We will deliver a disentanglement plan that documents data export formats, IP ownership, license disposition, and knowledge-transfer steps—aligned to the same artifact and change-control framework used across the project.

4.2.2.18 Vendor's solution must include and provide ongoing support and maintenance of the proposed solution for the duration of this contract including updates, bug fixes, etc.

TeamVIP will provide a post-production warranty (90 days) followed by ongoing production support under State-approved SLAs, with monthly reporting for transparency. This covers updates, fixes, and operational monitoring aligned to service goals. Salesforce publishes maintenance windows and release schedules on trust.salesforce.com. We will support System Maintenance and Release Maintenance activities, including minor releases, patch releases, and emergency releases as needed. Release Maintenance occurs three times per year with dates and times posted on trust.salesforce.com. Customers are typically notified at least one week in advance of planned maintenance. We will ensure State team awareness of all maintenance activities and coordinate support during these windows to minimize disruption.

Vendor Qualifications and Experience

Vendor should describe in its proposal how it meets the desirable qualification and experience requirements listed below.

4.3.1.1. Vendors should highlight a proven track record designing, deploying, or supporting permitting platforms for state or local agencies.

VIP brings almost three decades of successful public-sector modernization experience, with extensive project history implementing large-scale permitting, licensing, inspection, and regulatory platforms for state and local agencies. Our delivery record includes modernization initiatives across land management, licensing, and case management systems—transforming legacy workflows into efficient, cloud-enabled digital solutions. The company's success stems from our ability to apply proven methodologies, such as VIPManage for governance and VIPDeliver for iterative Agile execution, ensuring consistent delivery of complex enterprise systems on time and within budget. Our technical strengths include:

- More than 1,300 government system implementations, including multiple COTS permitting systems
- Deep experience modernizing legacy processes for environmental, construction, and licensing agencies
- Application of scalable Salesforce-based solutions, delivering tailored results for public agencies

This combination of domain expertise and repeatable methodology ensures the West Virginia permitting platform will be grounded in operational excellence and sustainable innovation. Relevant successful project experience includes:

Reference 1

Client	West Virginia Office of the Insurance Commissioner (WVOIC)
Project Name	Workers' Compensation Protest Case Management System
Client Contact	Kimberly Carr, State Project Manager 304.444.3148 | Kimberly.d.carr@wv.gov
Project Description	VIP modernized the State's protest case management operations by implementing a digital solution supporting the Workers' Compensation Board of Review. The system replaced a legacy application that lacked modern workflow, document intake, and public accessibility capabilities. The new platform manages the complete protest lifecycle, enabling citizens and attorneys to submit protests electronically, upload documents, and monitor case progress, while ensuring that agency staff can process cases efficiently through automated review and decision workflows.
Project Scope	VIP delivered end-to-end implementation services including business analysis, Joint Application Development sessions, configuration, automated onboarding of documents received by fax, email, and mail, workflow design, automated correspondence, milestone and due-date calculation logic, user acceptance testing, staff and external-

	user training, go-live support, and post-implementation change request management. Role-based dashboards, queue management, and electronic notifications were developed to support timely case handling and communication.
Project Goals and Objectives	■ Replace the legacy adjudication system with a modern, digital, workflow-driven solution ■ Increase transparency for citizens and attorneys through online filing and real-time status tracking ■ Reduce paper intake, manual processing, and inconsistent case handling practices ■ Ensure accuracy and timeliness through automated due-date calculations and standardized templates ■ Strengthen auditability, documentation management, and communication with all parties involved ■ Support long-term operational efficiency through scalable, flexible system design
VIP's Value Add	VIP delivered measurable improvements in the first month, including an 85 percent reduction in hardcopy document submissions and 98% online registration among active attorneys. Automated correspondence and workflow controls significantly reduced staff workload, improved case throughput, and enhanced communication. VIP's structured delivery approach ensured accuracy, transparency, and predictability—demonstrating readiness to support the State of West Virginia's desire for integrated, user-friendly, workflow-centric permitting environments.

Reference 2

Client	California Department of Cannabis Control (DCC)
Project Name	Cannabis Licensing Enforcement and Regulation (CLEaR) and CalCannabis Licensing Systems
Client Contact	Sean O'Connor, Chief Information Officer 916.282.0384 Sean.o'connor@cannabis.ca.gov
Project Description	VIP led the statewide modernization of California's cannabis licensing and regulatory operations by delivering two enterprise-scale systems that manage the full lifecycle of commercial cannabis activities. These solutions support application intake, license issuance and renewal, payment processing, inspections, enforcement case management, and compliance monitoring for tens of thousands of businesses. The systems established a unified regulatory environment capable of handling high-volume transactions, complex licensing structures, and strict statutory requirements while providing transparent, predictable, and user-friendly services to businesses and regulators.
Project Scope	VIP's scope included business process discovery, requirements documentation, workflow design, configuration of all licensing and enforcement processes, and development of public and internal user portals. VIP implemented robust data validation rules, automated correspondence, fee processing, inspection scheduling, and investigation workflows. The team also built and maintained numerous interfaces with State mapping, address verification, financial, and zoning systems. Additional scope included project management, quality assurance, training, deployment support, and ongoing maintenance and operational enhancements.
Project Goals and Objectives	■ Establish a single statewide regulatory environment that supports all commercial cannabis activities across cultivation, distribution, retail, manufacturing, testing, and events ■ Meet an aggressive legislative deadline that required full operational capability in under ten months ■ Provide timely, accurate, and transparent processing for businesses, applicants, and regulators ■ Enable electronic document submission, guided workflows, real-time status tracking, and standardized enforcement practices ■ Support high-volume application and renewal activity with scalable infrastructure and automated decision-support tools

	▪ Improve program oversight, data consistency, compliance monitoring, and cross-agency coordination
VIP's Value Add	VIP delivered the solution ahead of schedule and under budget, ensuring full compliance with statutory requirements by the mandated launch date. VIP's disciplined delivery approach enabled rapid design of complex licensing workflows and high-volume processing capabilities that now support over fifteen thousand unique licensees and more than twenty-seven thousand license types. VIP coordinated a large, multi-agency team of more than 130 combined personnel and provided continuous enhancements, operational support, and expert regulatory guidance. The systems have become foundational components of California's statewide regulatory framework, demonstrating VIP's ability to deliver large, mission-critical licensing and permitting environments that are scalable, transparent, and reliable.

Reference 3

Client	Fairfax County, Virginia
Project Name	Planning and Land Use System (PLUS)
Client Contact	Randhir Singh, Land Planning and Development Systems Branch Director 571.595.2135 | Randhir.singh@fairfaxcounty.gov
Project Description	VIP led the transformation of Fairfax County's land development and permitting operations by consolidating eight fragmented legacy systems into a single enterprise solution serving more than one million residents. PLUS supports building, zoning, environmental health, fire, site development, code enforcement, and proffer management functions through a unified public and internal platform that enables online application submission, fee payments, tracking, and communication.
Project Scope	VIP delivered a multi-year program across four major releases, configuring more than 300 record types and developing twenty-two inbound and outbound interfaces with systems used for geographic information, financial processing, document management, professional licensing, and reporting. The scope included data conversion from 54 legacy sources, configuration of online application, review, and inspection workflows, fee and financial reconciliation processes, reporting dashboards, user acceptance testing, training, deployment support, and ongoing maintenance and operations.
Project Goals and Objectives	▪ Implement an enterprise-wide permitting and land management environment ▪ Increase transparency, consistency, and accountability across nine County departments ▪ Provide a unified portal for customers and staff to submit, review, track, and manage applications in one place ▪ Automate financial reconciliation and ensure accurate, auditable fee processing ▪ Improve processing times, eliminate redundancy, and streamline communication between departments ▪ Modernize the County's land development infrastructure to support long-term growth
VIP's Value Add	VIP rescued a previously failing implementation and delivered an award-winning system recognized nationally for excellence in digital governance and the top permitting process in the United States. VIP's automation of daily financial uploads, integrated data environment, and streamlined workflows resulted in substantial efficiency gains and improved accuracy. The system now provides staff and applicants with full visibility across the entire development lifecycle, demonstrating VIP's ability to deliver highly integrated, high-volume, multi-agency permitting environments that mirror the scale and objectives of West Virginia's One-Stop Permitting Portal.

Reference 4

Client	Oregon Department of State Lands (DSL)
Project Name	Land Administration System (LAS) Replacement

Client Contact	Sean McMullen, Chief Information Officer 971.707.2622 | Sean.mcmullen@dsl.oregon.gov
Project Description	VIP replaced DSL's more than 20-year-old legacy land administration system with a modern digital environment supporting waterway leasing, removal-fill permitting, mitigation banking, wetland planning, real property management, and education programs. The new system modernized core land management services, providing a seamless experience for public users and enabling staff to work more efficiently through automated workflows, consolidated data, and transparent processing.
Project Scope	VIP delivered business analysis, solution configuration, workflow development, integration design, data migration from aging client-server systems, testing, training, and deployment support. The implementation included a public self-service portal for application submission and status tracking, automated document and form handling, and integrations for geographic information, inspection, cash-receipting, payment processing, and document storage. VIP also provided extensive knowledge transfer, technical documentation, and long-term maintenance and support.
Project Goals and Objectives	- Modernize a critical statewide land administration system that had reached end-of-life - Improve customer experience with online access, transparency, and status visibility - Reduce manual data entry, eliminate duplicate information, and improve overall data accuracy - Increase operational efficiency across land leasing, permitting, and monitoring programs - Support mobile field operations and enable consistent work processes across offices - Provide real-time access to historical and current information while ensuring compliance with State requirements
VIP's Value Add	VIP provided DSL with a proven delivery approach and solution design that reduced risk, increased transparency, and strengthened operational continuity. The delivered system significantly reduced records requests, enabled twenty-four-hour public access to key information, provided measurable improvements in processing time and data accuracy, and established a mobile-enabled, workflow-driven operational model. VIP's expertise in modernizing complex licensing and land management environments directly aligns with West Virginia's vision for a scalable and adaptable One-Stop Permitting Portal.

In addition to the highlighted, referenced projects above, TeamVIP proposes a seasoned staff whose qualifications and experience will add value to the project's implementation.
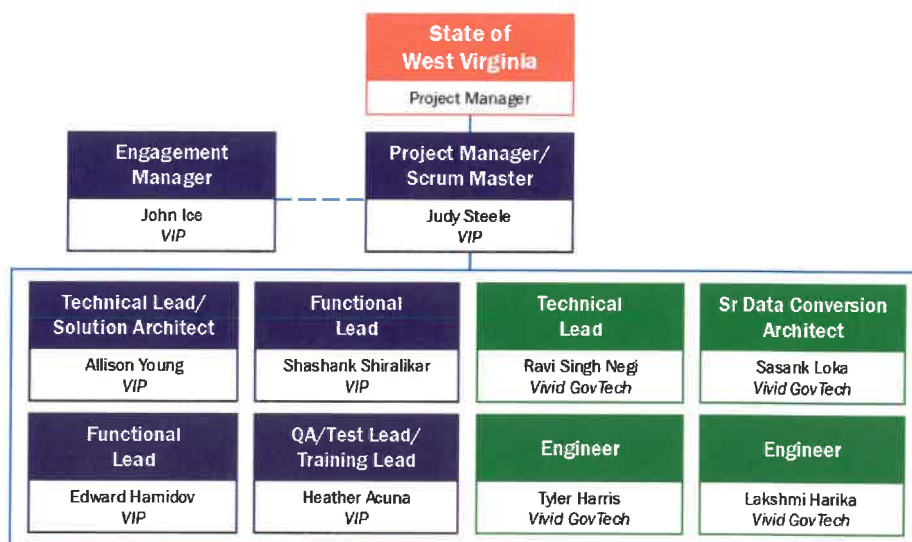
Figure 15: Proposed Team Organizational Chart

Role	Engagement Manager
Resource	John Ice – VIP
Qualifications	30+ years of IT and public-sector project leadership experience - Led more than 20 permitting and licensing modernization projects across large counties and state agencies - Extensive experience overseeing multi-department program delivery, stakeholder coordination, requirements management, testing oversight, and implementation quality control
Degree/Certifications	Bachelor of Science in Computer Science, Ohio University
Relevant Experience	- Senior Project Manager for major permitting and licensing programs including Fairfax County's Planning and Land Use System (PLUS), Oakland County Environmental Health Foods Project, and City of San Leandro Land Management Licensing System - Experience across numerous enterprise implementations through GovMethods, including projects in Atlanta, Seattle, Charlotte, Tampa, Cleveland, Columbus, Butler County, Hillsborough County, and Milwaukee - Led large-scale public-facing implementations involving application intake, fee processing, inspection workflows, electronic document routing, and customer dashboards - Demonstrated success aligning multiple departments around unified workflows and consistent user experience, supporting statewide permitting standardization - Directed risk management, communication, and governance for major multi-year implementations, ensuring strong oversight and effective stakeholder engagement

Role	Project Manager/Scrum Master
Resource	Judy Steele – VIP
Qualifications	13+ years of IT project management and Scrum leadership experience - Expertise delivering permitting, licensing, enforcement, and regulatory modernization projects - Skilled in Agile, Kanban, testing oversight, training coordination, and cross-team leadership
Degree/Certifications	- Bachelor of Business Administration, University of Denver - Project Management Professional (PMP) - Certified ScrumMaster and Professional Scrum Master
Relevant Experience	- Project Manager and Scrum Master for the California Department of Cannabis Control Consolidation Project (Phases 1 & 2) - Project Manager for City of North Port Land Management System Modernization - Test Manager and Training Lead for Fairfax County Planning and Land Use System (PLUS) - Experience coordinating project plans, managing multi-agency requirements, leading UAT, and implementing training programs for large user groups - Strong background in risk management, status reporting, and governance across statewide and countywide initiatives

Role	Technical Lead/Solution Architect
Resource	Allison Young – VIP
Qualifications	6+ years of engineering and solution architecture experience building scalable, secure enterprise systems - Skilled in Apex, Lightning Web Components, Visualforce, REST/SOAP integrations, and metadata-driven automation - Experience leading offshore teams, directing technical design, and enforcing CI/CD, coding standards, and quality controls - Strong background implementing complex workflow logic, security models, and public-facing portal solutions
Degree/Certifications	Associate of Arts, Business – Toccoa Falls College

VISIONARY
INTEGRATION
PROFESSIONALS

	■ Salesforce Platform Developer I ■ Salesforce Administrator ■ Salesforce Platform App Builder
Relevant Experience	■ Technical Lead and Team Lead at Citizens Disability, directing multi-team Agile delivery and architecting enterprise-grade Salesforce applications for high-volume case and intake processing ■ Designed and implemented large-scale integration frameworks using REST APIs and secure messaging systems with compliance requirements ■ Engineered metadata-driven workflow automation and role-based processes supporting legal, medical, and intake operations—parallel to permitting review and approval cycles ■ Led a 500-user Lightning migration, optimizing UI, workflows, and performance for broad end-user adoption ■ Implemented an Experience Cloud portal supporting large external user groups, improving intake, communication, and customer engagement ■ Business process and systems experience spanning configuration, data intelligence, reporting, and workflow optimization across multiple departments

Role	**Functional Lead**
Resource	**Edward Hamidov – VIP**
Qualifications	■ 5+ years of functional analysis and government permitting system implementation experience ■ Skilled in requirements gathering, JAD facilitation, workflow configuration, and functional testing ■ Experience supporting multiple departments across land management and environmental health programs
Degree/Certifications	Bachelor of Arts in Finance, Ohio University
Relevant Experience	■ Functional Analyst for City of North Port Land Management and Licensing Implementation ■ Senior Functional Analyst for Oakland County Environmental Health Foods Project ■ Functional Lead for Mendocino County Cannabis Licensing/Permitting Implementation ■ Supported Fairfax County PLUS implementation across multiple regulatory departments ■ Strong background in configuring workflows, inspections, fees, and department-specific business rules

Role	**Functional Lead**
Resource	**Shashank Shiralikar – VIP**
Qualifications	■ 10+ years of experience implementing and enhancing government permitting, licensing, and enforcement solutions ■ Skilled in requirements analysis, workflows, scripting, system configuration, and cross-department functional leadership ■ Expertise working with multi-module regulatory environments
Degree/Certifications	■ Master of Science in Computer Science, University of Southern California ■ Accela Certified System Configuration Specialist ■ Oracle Certified DBA
Relevant Experience	■ Solutions Architect and Functional Lead on Fairfax County PLUS Program ■ Technical Lead for City of North Port Land Management System Modernization ■ Solutions Architect for County of Monterey Cannabis Permitting Enhancements ■ Consultant for City of San Leandro multiple permitting modernization projects ■ Experience aligning workflows across Building, Planning, Fire, Code Enforcement, and Environmental Health

Role	QA/Test Lead/Training Lead
Resource	**Heather Acuna – VIP**
Qualifications	■ 15+ years of experience in testing, training, project management, and Agile delivery ■ Extensive background developing training plans, conducting UAT, creating testing frameworks, and supporting organizational change management ■ Strong leadership in preparing agencies for go-live and ongoing operations
Degree/Certifications	■ Bachelor of Science in IT Management, Western Governors University ■ Project Management Professional (PMP)
Relevant Experience	■ Training and Testing Lead for City of North Port Land Management and Licensing Implementation ■ Training Manager for Mendocino County Cannabis Licensing Implementation ■ Tester for California Department of Cannabis Control Consolidation ■ Project Manager for City of San Leandro Land Management Remediation ■ Test Manager for State of California $279M Integrated Tax Processing System

Role	Technical Lead
Resource	**Ravi Singh Negi – Vivid GovTech**
Qualifications	■ 10+ years of technical architecture, system integration, and large-scale data migration experience ■ Expertise in cloud system design, API development, security frameworks, and regulatory workflow automation ■ Deep experience supporting multi-department modernization programs
Degree/Certifications	■ Master's Degree in Computer Engineering, Fairleigh Dickinson University ■ Multiple Salesforce, Microsoft, and architectural certifications
Relevant Experience	■ Technical Lead for City of Garland modernization of zoning, permitting, licensing, and inspection systems ■ Technical Lead for California DMV modernization and migration efforts ■ Senior Technical Architect for Skience regulatory and compliance projects ■ Architect for public-facing portals and secure data integrations across government agencies ■ Strong background in API connectivity, role-based models, and multi-system interoperability

Role	Senior Data Conversion Architect
Resource	**Sasank Loka – Vivid GovTech**
Qualifications	■ 20 years of data migration, data architecture, and system integration experience ■ Expertise in designing migration strategies, data models, and multi-system integration workflows ■ Skilled in regulatory data structures, data governance, and complex transformation logic
Degree/Certifications	■ Bachelor's Degree in Computer Science ■ Salesforce Application Architect, Salesforce Administrator ■ PMP, AWS Cloud Practitioner, SAFe Agile Practitioner
Relevant Experience	■ Senior Data Conversion Architect for California DMV licensing, registration, and cashiering migrations ■ Led data conversion for multiple HHS case management, financial reporting, and inspection systems ■ Architected integrations and data pipelines for State of Hawaii KOLEA system and USPTO UCCMS ■ Directed multi-phase data migration approaches supporting regulatory compliance and statewide operations

Role	Engineer
Resource	**Tyler Harris – Vivid GovTech**
Qualifications	■ Experienced engineer specializing in API integrations, data transformation, and system connectivity across government programs ■ Skilled in designing scalable integration flows, automated routing, and secure data exchange frameworks ■ Background in Agile development and multi-system coordination
Degree/Certifications	■ Bachelor of Science in Computer Engineering, California State University, Chico ■ Salesforce Certified AI Associate
Relevant Experience	■ Engineer supporting Salesforce/MuleSoft integrations for Covered California eligibility and enrollment programs ■ Integration engineer for State of Ohio Department of Health citizen engagement platform ■ Developed routing rules, API contracts, data transformation logic, and interface documentation for public-sector platforms ■ Experience configuring record types, workflows, and system automations supporting permitting-style operations

Role	Engineer
Resource	**Lakshmi Harika – Vivid GovTech**
Qualifications	■ 8+ years of engineering experience specializing in enterprise system automation, CI/CD pipelines, and environment management ■ Skilled in system design, DevOps automation, and implementation of secure, scalable public-sector systems ■ Strong background in integrations, version control, and release governance
Degree/Certifications	■ Master of Science in Computer Science, Wichita State University ■ Multiple Salesforce platform and developer certifications
Relevant Experience	■ Senior Engineer for California Air Resources Board, designing permit intake, inspection workflows, and role-based security models ■ Senior Engineer for California DMV modernization program ■ Engineer for Caltrans contract and document automation platform ■ Extensive experience in API integrations, automated deployments, and security architecture supporting government operations

4.3.1.2. Vendors should present experience integrating with legacy systems, portals, and third-party tools using APIs, middleware, and secure data exchange protocols.

TeamVIP's technical delivery capability includes extensive experience integrating new digital systems with existing State IT ecosystems through secure and standardized methods. Our approach prioritizes API-first interoperability and data protection while enabling incremental modernization rather than disruptive replacement.

Using MuleSoft's Anypoint Platform, TeamVIP will establish secure, bi-directional connections between Salesforce PSS and third-party data sources, such as licensing databases, GIS systems, or enterprise content repositories. These integrations rely on authenticated and encrypted protocols (REST, SOAP, OAuth 2.0), ensuring data integrity and traceability across all transactions.

Our integration expertise includes:
■ Implemented MuleSoft-based API layers for system-to-system data exchange across state agencies
■ Supported integration with Box Content Cloud for secure FIPS 140-2–compliant document storage
■ Enabled real-time data synchronization across permitting, inspection, and reporting systems

- Experience coordinating middleware for both legacy mainframe data sources and modern SaaS applications

While it was not specifically identified as a requirement for the One Stop Shop Permitting Portal, TeamVIP also recommends the consideration of adopting an Electronic Plan Review solution. An EPR solution will transform permitting and inspection processes by eliminating paper-based inefficiencies and accelerating approvals. Agencies will gain real-time transparency, workflow automation, and secure digital collaboration, while improving customer service. We would also recommend the inclusion of a solution such as eBlitz, an AI powered solution layer that is designed to serve as the first review point for plan reviewers. It functions as an automated pre-review and compliance assistant within the Municipal's existing review process. Plan reviewers can use Blitz as part of their toolbox to complete a first pass on submittals, including site plans and construction drawings, before staff begin a more detailed review.

Our solution integrates with all industry-standard electronic plan review tools, including eBlitz – through native Salesforce connectors and APIs, enabling seamless two-way data flow between plan review activities and permit records. Reviewers can markup plans, add comments, and track revisions within their preferred EPR tool, with all review data, approvals, and comments automatically syncing to the permit record in Salesforce. This native integration eliminates manual data entry, reduces review cycle times, and provides applicants with real-time visibility into review status.

Our approach supports multiple file formats and integrates easily with existing portals and permitting systems, allowing the State to adopt EPR capabilities at its own pace without disrupting current workflows.

4.3.1.3. Vendors should describe familiarity with scalable, secure cloud platforms (e.g., Azure, AWS, Google Cloud) and disaster recovery best practices.

TeamVIP's architecture strategy is grounded in cloud-native, FedRAMP-authorized environments and secure service delivery principles. For West Virginia's permitting program, the proposed solution leverages Salesforce Government Cloud Plus, which is cloud-hosted on AWS' GovCloud and compliant with NIST 800-53 and FedRAMP moderate standards.

The company's approach extends beyond Salesforce to include private Salesforce integrations and deployments hosted on AWS GovCloud environments for other public-sector clients. TeamVIP designs implementations with redundancy, backups, and recovery to meet:
- Infrastructure and data hosting within U.S.-only, FedRAMP-authorized environments
- RTO/RPO objectives consistent with mission-critical state workloads ($\leq$4 hours / $\leq$15 minutes)
- Tiered disaster recovery and failover architecture validated through testing
- Continuous monitoring and disaster recovery planning aligned with Salesforce's Business Continuity and Disaster Recovery Program

4.3.1.4. Vendors should explain their experience managing sensitive data with encryption, access controls, and audit trails.

TeamVIP's security posture aligns to state, federal, and industry-recognized standards for data protection. We incorporate encryption at rest and in transit, least-privilege access models, and immutable audit logs across all projects. The Salesforce Shield security suite will provide field-level encryption, audit trails, and event monitoring, enabling administrators to detect anomalies and verify compliance. In addition, all

connections to and from external systems are secured via TLS 1.2+, with encryption modules meeting or exceeding FIPS 140-2 compliance.

Security highlights include:
- Integrated RBAC and MFA (Multi-Factor Authentication) for identity assurance
- Encrypted data storage, access tracking, and audit report generation
- Security vulnerability scanning and patch compliance reporting
- Access and activity logs stored within Salesforce's Event Monitoring framework

Salesforce's Information Security Management System (ISMS) and information security policies are based on the ISO 27002 framework of best practices and are ISO 27001-certified. Salesforce has comprehensive privacy and security assessments and certifications performed by multiple third parties, including the following Global Audit and Compliance programs:
- ISO 27001
- ISO 27017/27018
- CSA STAR
- SOC 1 Type II (SSAE 18 Report, equivalent to CSAE 3416)
- SOC 2 Type II (Trust Principles Report)
- SOC 3 (formerly SysTrust)
- PCI-DSS
- TRUSTe Certified Privacy Seal

Geographical recognitions include:
- Government of Canada Protected B (PBMM)
- U.S. Department of Defense IL2/IL4
- U.S. FedRAMP (NIST 800-53)
- U.S. HIPAA
- U.S. IRS 1075
- U.S. Criminal Justice Information System (CJIS)
- Australia IRAP
- EU-US Privacy Shield
- France ASIP Santé HDS
- Germany C5 (ISAE 3000)
- Germany TÜV Rheinland Certified Cloud Service
- Japan JIPDEC PrivacyMark
- Japan JASA CS Gold Mark
- Netherlands NEN 7510
- UK Cyber Essentials Plus

4.3.1.5. Vendors should highlight experience in training in NIST, CIS, FedRAMP, and state-specific security standards, including vulnerability scanning and incident response.

TeamVIP staff is routinely trained and certified in federal and state cybersecurity frameworks, with documented experience ensuring projects in NIST, CIS, and FedRAMP baselines. Our approach leverages Salesforce Government Cloud Plus, which has achieved a Provisional Authority to Operate (P-ATO) from the FedRAMP Joint Authorization Board (JAB) for both SaaS and PaaS, aligned with the FedRAMP High control baseline. Salesforce's security assessment followed NIST SP 800-37 guidance and included a

System Security Plan (SSP) developed per NIST SP 800-18, with security controls verified by an independent third-party assessment organization (3PAO) per FedRAMP High requirements.

Internal teams complete annual security awareness and compliance training, ensuring readiness to operate within controlled environments. Our personnel undergo training in NIST 800-53 Rev. 5 control families, FedRAMP security operations, and state-specific security standards. Experience implementing systems that conform to NIST 800-53 Rev. 5 control families, use of automated tools for vulnerability scanning, and penetration testing ensures compliance with evolving security requirements, meeting West Virginia's security requirements.

4.3.1.6. Vendors should explain their Ability to tailor project management approach to agency needs, with tools like Jira, Smartsheet, or Microsoft Project for example.

TeamVIP's project management ecosystem combines Agile tooling and PMI best practices to ensure precise control and transparent communication. The company standardizes on Jira and Confluence for Agile delivery management, issue tracking, and documentation, while Microsoft Project supports high-level schedule and dependency tracking.

These tools are configured for State access, providing live insight into progress, risks, and deliverables. Dashboards display burn-down rates, sprint velocity, and issue resolution trends to validate project health and keep stakeholders aligned.

- Jira: Sprint planning, task tracking, velocity metrics, and dashboards
- Confluence: Document management, meeting minutes, and action item tracking
- Microsoft Project: Master scheduling, resource allocation, and milestone tracking
- Smartsheet (optional): High-level reporting and cross-agency coordination

This suite ensures data-driven project visibility and enables the State to monitor progress in real time.

4.3.1.7. Vendors should show a history of successful "train-the-trainer" programs and on- demand training portals for public and internal users.

TeamVIP's VIPAcademy training framework equips agency personnel and system champions with the skills to independently support, train, and extend their systems post-implementation. Training will emphasize hands-on experience, role-based exercises, and knowledge transfer to promote internal self-sufficiency. Our approach includes an interactive Learning Management System (LMS) hosting video tutorials, simulations, and reference guides for continued learning after go-live. Core components of training include:

- Role-specific classroom and virtual instruction for administrators and end users
- Certification of "Super Users" through structured train-the-trainer sessions
- On-demand e-learning with searchable training library and knowledge base
- Post-deployment helpdesk escalation integrated with the LMS for feedback tracking

4.3.1.8. Vendors should demonstrate familiarity with uptime guarantees, RTO/RPO metrics, and service-level reporting.

TeamVIP designs and manages solutions leveraging Salesforce GovCloud's high availability architecture to meet stringent availability and continuity requirements for mission-critical government systems. Salesforce maintains high levels of availability across all instances through best redundant data protection, complete data recovery capabilities, and multiple layers of redundancy ensuring failures are recovered in seconds or minutes.

Our approach to uptime guarantees and service-level metrics includes:

- RTO/RPO Metrics: Salesforce supports disaster recovery with a dedicated team and 4-hour recovery point objective (RPO). Specific RTO/RPO targets will be negotiated and defined in a custom Service Level Agreement with the State.
- Redundancy Architecture: Salesforce configures services with N+1 redundancy at minimum, utilizing multiple world-class data centers with carrier-class components. Data is replicated between data centers to ensure continuous availability.
- Service-Level Reporting: We will provide monthly service-level reporting documenting actual uptime, incident frequency, severity, resolution times, and recovery metrics aligned with the negotiated SLA.
- Tiered Support Model: Incident response with defined response times and severity levels, supported by monitoring tools for predictive alerts and performance analytics.

4.3.1.9. Vendors should explain experience working with multi-agency teams, gathering requirements, and managing change.

Organizational Change Management Integration

VIP's approach to Organizational Change Management (OCM) is a proactive, structured methodology fully integrated into the One-Stop-Shop Permitting Portal project. In alignment with Section 4 of the RFP (requirements 4.2.1.6 through 4.2.1.18), we treat OCM as a critical success factor – not a standalone activity, but a thread woven through every phase of the project. VIP brings a proven OCM methodology honed over decades of public-sector IT implementations. Our team has refined a set of tools and templates through successful delivery of over 20 large projects, capturing end-user needs, operational timing, and change impacts. We employ unique interviewing and survey techniques to plan and manage change, with formal processes to govern changes and audits to reinforce new behaviors. This depth of experience ensures we can meet West Virginia's requirements with minimal risk and maximum user adoption.

- **Foundation – Prosci® ADKAR® Model:** VIP's core OCM approach is the Prosci ADKAR model – a renowned framework that guides individuals through five stages of change: Awareness, Desire, Knowledge, Ability, and Reinforcement. We have successfully applied Prosci's three-phase methodology and the ADKAR model on past projects to ensure the organization and its strategy fully support the implemented solution. The ADKAR model provides a step-by-step roadmap for managing the people side of change. It builds sequential milestones that ensure adoption sticks, resistance is minimized, and stakeholders stay aligned with project outcomes. VIP leverages ADKAR to drive every aspect of our change plan, as summarized below:
- **Awareness:** We begin by building awareness of the upcoming permitting portal changes across all stakeholders. VIP will execute a robust communication plan so that agency staff, permitting officers, and other end users understand *why* the new one-stop system is needed and the benefits it brings. Early and frequent communications address the current pain points and convey the vision for the future, creating a sense of urgency and rationale for change.
- **Desire:** Beyond knowing about the change, users must *want* to support it. VIP fosters desire by actively engaging stakeholders at all levels. We will identify change champions within West Virginia agencies and involve them in planning and decision-making. By highlighting "what's in it for me" for different groups (such as faster permit approvals for staff and simpler application processes for citizens) and listening to concerns, we cultivate buy-in. Incentives such as leadership recognition,

stakeholder workshops, and visible executive sponsorship will be used to reinforce the personal and organizational benefits of the new portal.

- **Knowledge:** We will deliver a comprehensive training program to ensure every user knows how to perform their tasks in the new system. This includes role-based training sessions, hands-on workshops, and easy-to-follow documentation. Users will learn not only *how* to use the One-Stop-Shop system, but also new business processes and policies introduced alongside the portal. Our training materials will be customized to West Virginia's permitting workflows and delivered well in advance of go-live, so users gain confidence in their knowledge of the new solution.
- **Ability:** Knowledge alone is not enough – users must have the ability to apply it in real scenarios. VIP will provide practical application, removing obstacles to change. We involve end users in User Acceptance Testing and pilot runs of the portal, giving them hands-on experience prior to full launch. This practice builds user proficiency and comfort with the system. Our team will be on-site during rollout to coach users through initial transactions, answer questions, and ensure that staff can perform their jobs using the new portal. We will work closely with agency management to adjust workloads or provide additional resources during the transition period, so employees have the capacity (time and tools) to develop the ability to use the new system effectively.
- **Reinforcement:** To sustain the change, VIP implements reinforcement mechanisms long after the initial go-live. We will put in place ongoing support and continuous improvement activities to ensure the new behaviors stick. This includes post-implementation check-ins, refresher trainings, helpdesk support, and performance metrics tracking portal usage. We will collaborate with West Virginia leadership to recognize and celebrate successes in order to reinforce the change so that the permitting portal remains the "new normal." Over time, this reinforcement helps the change take root in the organizational culture, preventing regression to old processes.

Including organizational change management into the project scope is vital and VIP ensures *technology, people, and processes* are all aligned towards the success of West Virginia's One-Stop-Shop Permitting Portal. Government procurement stakeholders can be confident that VIP's OCM strategy will drive full utilization of the new portal, protect the state's investment, and enable a faster, smoother realization of the project's benefits.

By addressing the human factors of change in a structured and thoughtful way, VIP's methodology positions the project for successful user adoption and long-term success.

How Our Solution Meets Mandatory Qualifications and Experience Requirements

Vendor should describe how it meets the mandatory requirements and include any areas where it exceeds the mandatory requirements.

VIP satisfies or exceeds the mandatory qualifications and experience requirements for this project by combining (details provided in Section 4.2.2.x of this response):

- Certified and continuously trained personnel
- Demonstrated accessibility and policy compliance expertise
- Proven methodologies for privacy alignment and operational governance
- Mature technical controls for scanning, encryption, RBAC, and recovery

4.3.2.1. Vendor's employees must have security training and Vendor must provide records of such training upon request.

VIP maintains a comprehensive corporate security-awareness and compliance-training program for all employees and subcontractors engaged in State projects. The curriculum aligns to NIST 800-53, CIS Critical Security Controls, and FedRAMP Moderate operational standards.

Salesforce's security team presents security awareness information to Salesforce personnel through email and in-person instruction throughout the year. New employees have a written job description that includes the responsibility to communicate significant issues and exceptions in a timely manner with the appropriate higher level of authority.

Every project participant—delivery consultants, developers, administrators, and project managers—must complete onboarding security modules that address data-handling and privacy requirements for State and federal systems, secure application development practices and vulnerability awareness, incident-reporting and escalation procedures within VIP's governance model, and annual recertification verifying understanding of updates to security policy.

VIP tracks all certifications in a centralized compliance system and can furnish documentation to the State upon request. Evidence of Salesforce's security processes and training can be obtained at trust.salesforce.com.

4.3.2.2. Vendor must highlight training in WCAG 2.1 and Section 508 compliance for public-facing digital services.

VIP's user-experience (UX) and application-development teams include professionals trained in accessibility engineering and assistive-technology validation. As documented in the Licensing Inspections

and Public Portal response, all public-facing components are designed and tested against WCAG 2.1 Level AA and Section 508 standards to ensure equitable access for citizens using screen readers, magnifiers, or alternative input devices. Our accessibility practices include:

- Use of semantic HTML and ARIA labeling to support assistive technologies
- Color-contrast and font-scaling checks embedded in automated test suites
- Manual validation using keyboard-only navigation and screen-reader tools
- Inclusion of accessibility acceptance criteria in each Agile sprint review

All team members receive orientation on State and federal accessibility regulations during project kickoff. TeamVIP will provide the State with accessibility-testing artifacts and remediation logs during UAT.

4.3.2.3. Vendor must show experience aligning solutions with state IT policies, privacy laws, and accessibility mandates.

TeamVIP has implemented solutions across numerous states that require strict adherence to state IT governance, privacy protection statutes, and open-data mandates. Our governance framework (VIPManage) embeds compliance checkpoints within each project phase—requirements, design, testing, deployment, and support—to confirm alignment with all applicable policy directives. Our alignment mechanisms include:

- Early mapping of State IT policy controls to system design and configuration
- Privacy-by-design methodology incorporating data-minimization and consent workflows
- Security and accessibility audits performed before every release cycle
- Documented traceability between State policy clauses and system features in the Requirements Traceability Matrix (RTM)

4.3.2.4. Vendor must demonstrate experience with vulnerability scanning and reporting, disaster recovery planning and drills, encryption standards (e.g., AES-256), role-based access control (RBAC).

TeamVIP demonstrates experience implementing multi-layered security and resilience programs across government permitting solutions. Our work on the City of Garland Licensing and Inspections solution built on Salesforce exemplifies this approach:

- **Vulnerability Scanning and Reporting:** Integration of automated scanning tools into CI/CD pipelines with periodic production scans; reporting aligned with severity classifications and remediation SLAs. At Garland, we leveraged Salesforce Shield to provide field-level encryption and audit trails, enabling continuous vulnerability identification and remediation tracking across the permitting system.
- **Disaster Recovery Planning and Drills:** Our solutions support defined recovery objectives with comprehensive backup and disaster recovery procedures. For the Garland solution, we configured automated daily backups with geographically dispersed storage and failover capabilities to ensure rapid system recovery during critical incidents. Our team is trained on disaster recovery protocols to respond effectively.
- **Encryption Standards:** Data encryption in transit via TLS 1.2+ and at rest using AES-256 compliant modules within Salesforce GovCloud. For the Garland implementation, we configured encryption key management through Salesforce's native capabilities integrated with hardware security modules and single sign-on integration.
- **Role-Based Access Control (RBAC):** The platform enforces least-privilege access through role-based profiles and permission sets, supplemented by multi-factor authentication and SSO integration.

At Garland, we aligned role-based controls with inspection agency functions, ensuring inspectors, applicants, and administrators accessed only necessary information and workflows.

This proven experience ensures West Virginia's One-Stop-Shop Permitting Portal will maintain data integrity, business continuity, and compliance with federal and State cybersecurity expectations.

Required Forms

The following forms are included in this section:

- Addenda Acknowledgement Form
- Designated Contact and Signature Page
- Final CRFP 0201 SEC 26000000001 1 WV CRFP Form
- Final CRFP 0201 SEC 26000000001 2 WV CRFP Form
- Final CRFP 0201 SEC 26000000001 3 WV CRFP Form
- Final CRFP 0201 SEC 26000000001 4 WV CRFP Form
- Final CRFP 0201 SEC 26000000001 5 WV CRFP Form
- Subcontractor Listing

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP SEC2600000001

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

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

Addendum Numbers Received:
(Check the box next to each addendum received)

[X] Addendum No. 1	[ ] Addendum No. 6	
[X] Addendum No. 2	[ ] Addendum No. 7	
[x] Addendum No. 3	[ ] Addendum No. 8	
[X] Addendum No. 4	[ ] Addendum No. 9	
[ ] Addendum No. 5	[ ] Addendum No. 10	

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

Visionary Integration Professionals, LLC (VIP)
_____
Company

DocuSigned by:
Jonna Ward
FE0B211682654A8...
_____
Authorized Signature

12/1/2025
_____
Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.

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.

(Printed Name and Title) Audrey Zuro, Senior Director of Strategic Sales

(Address) 10940 White Rock Road, Suite 210, Rancho Cordova, California 95670

(Phone Number) / (Fax Number) 925.788.4456 | 926.985.9632

(email address) azuro@trustvip.com

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through *wv*OASIS, 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 a binding 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 this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; 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.

Visionary Integration Professionals, LLC (VIP)

(Company)

Jonna Ward

(Signature of Authorized Representative)

Jonna Ward, Chief Executive Officer

(Printed Name and Title of Authorized Representative) (Date)

916.985.9625 | 916.985.9632

(Phone Number) (Fax Number)

legal@trustvip.com

(Email Address)

Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130	**State of West Virginia** **Centralized Request for Proposals** **Info Technology**

Proc Folder:	1818626	**Reason for Modification:**
Doc Description:	One-Stop-Shop Permitting Portal -State of West Virginia	

Proc Type:	Central Master Agreement			
Date Issued	**Solicitation Closes**	**Solicitation No**		**Version**
2025-10-24	2025-11-20 13:30	CRFP 0201 SEC2600000001		1

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code: VS0000008657

Vendor Name :   Visionary Integration Professionals, LLC (VIP)

Address :   10940

Street :   White Rock Road, Suite 210

City :   Rancho Cordova

State : California	**Country :** United States	**Zip :** 95670

Principal Contact :   Audrey Zuro, Senior Director of Strategic Sales, Government Solutions

Vendor Contact Phone: 925.788.4456   **Extension:**

FOR INFORMATION CONTACT THE BUYER
Tara Lyle
(304) 558-2544
tara.l.lyle@wv.gov

Vendor Signature X _Jonna Ward_ DocuSigned by: FE6B211082054A0...	**FEIN#** 20-2969301	11/12/2025	1:04:50 PM PST **DATE** 11/20/2025

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

ADDITIONAL INFORMATION

REQUEST FOR PROPOSAL

The West Virginia Department of Administration, Purchasing Division (hereinafter referred to as the "Purchasing Division") is issuing this solicitation as a request for proposal ("RFP"), as authorized by W. Va. Code 5A-3-10b, for the West Virginia Department of Administration, Office of the Cabinet Secretary, (hereinafter referred to as the "Agency") to provide a One-Stop-Shop Permitting Portal for the State of West Virginia, per the attached documentation.

For Request for Proposal ("RFP") Responses Only: Submission of a response to a Request for Proposal is not permitted in wOASIS. In the event that Vendor is responding to a request for proposal, the Vendor shall submit one original technical and one original cost proposal prior to the bid opening date and time plus three (3) convenience copies of each to the Purchasing Division. Additionally, the Vendor should clearly identify and segregate the cost proposal from the technical proposal in a separately sealed envelope.

INVOICE TO	SHIP TO
SECRETARYS OFFICE	DEPARTMENT OF ADMINISTRATION
BLDG 1 RM E119	OFFICE OF THE SECRETARY
1900 KANAWHA BLVD E	1900 KANAWHA BLVD E, BLDG 1 RM E119
CHARLESTON WV 25305	CHARLESTON WV 25305-0120
US	US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	One-Stop-Shop Permitting Portal -State of West Virginia				

Comm Code	Manufacturer	Specification	Model #
43232408			

Extended Description:

See attached Cost Sheet - Attachment A.

Vendor should clearly identify and segregate the cost proposal from the technical proposal in a separately sealed envelope.

*** Online responses have been prohibited for this solicitation. See Section 6, BID SUBMISSION in the CRFP for more information. ********

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Technical questions due by 3:00 pm	2025-11-03

	Document Phase	Document Description	Page 3
EC2600000001	Final	One-Stop-Shop Permitting Portal - State of West Virginia	

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130	State of West Virginia Centralized Request for Proposals Info Technology	

Proc Folder:	1818626		Reason for Modification:
Doc Description:	Addendum No.1- One-Stop-Shop Permitting Portal -State of WV		Addendum No 1 is issued to modify the technical opening date and to publish Questions and answers
Proc Type:	Central Master Agreement		

Date Issued	Solicitation Closes	Solicitation No	Version
2025-11-14	2025-12-04 13:30	CRFP 0201 SEC2600000001	2

BID RECEIVING LOCATION

BID CLERK

DEPARTMENT OF ADMINISTRATION

PURCHASING DIVISION

2019 WASHINGTON ST E

CHARLESTON   WV   25305

US

VENDOR

Vendor Customer Code: VS0000008657

Vendor Name :   Visionary Integration Professionals, LLC (VIP)

Address :   10940

Street :   White Rock Road, Suite 210

City :   Rancho Cordova

State :   California   Country :   United States   Zip :   95670

Principal Contact :   Audrey Zuro, Senior Director of Strategic Sales, Government Solutions

Vendor Contact Phone: 925.788.4456   Extension:

FOR INFORMATION CONTACT THE BUYER
Tara Lyle
(304) 558-2544
tara.l.lyle@wv.gov

Vendor
Signature X *Jonna Ward*   FEIN# 20-2969301   DATE 11/20/2025

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

ADDITIONAL INFORMATION

Addendum No 1 is issued for the following reasons:

1) To modify the bid opening date from 11/20/25 to 12/04/25

2) To publish a copy of vendor questions with the agency's response.

-no other changes---

For Request for Proposal ("RFP") Responses Only: Submission of a response to a Request for Proposal is not permitted in wOASIS. In the event that Vendor is responding to a request for proposal, the Vendor shall submit one original technical and one original cost proposal prior to the bid opening date and time plus three (3) convenience copies of each to the Purchasing Division. Additionally, the Vendor should clearly identify and segregate the cost proposal from the technical proposal in a separately sealed envelope.

INVOICE TO	SHIP TO
SECRETARYS OFFICE BLDG 1 RM E119 1900 KANAWHA BLVD E CHARLESTON WV 25305 US	DEPARTMENT OF ADMINISTRATION OFFICE OF THE SECRETARY 1900 KANAWHA BLVD E, BLDG 1 RM E119 CHARLESTON WV 25305-0120 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
	One-Stop-Shop Permitting Portal -State of West Virginia				

Comm Code	Manufacturer	Specification	Model #
3232408			

Extended Description:
See attached Cost Sheet - Attachment A.

Vendor should clearly identify and segregate the cost proposal from the technical proposal in a separately sealed envelope.

*** Online responses have been prohibited for this solicitation. See Section 6, BID SUBMISSION in the CRFP for more information. ********

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Technical questions due by 3:00 pm	2025-11-03

	Document Phase	Document Description	Page 3
SEC2600000001	Final	Addendum No.1- One-Stop-Shop Permitting Portal -State of WV	

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

Department of Administration **Purchasing Division** **2019 Washington Street East** **Post Office Box 50130** **Charleston, WV 25305-0130**	**State of West Virginia** **Centralized Request for Proposals** **Info Technology**

Proc Folder:	1818626	**Reason for Modification:**
Doc Description:	One-Stop-Shop Permitting Portal -State of WV	Addendum No. 2

Proc Type: Central Master Agreement

Date Issued	Solicitation Closes	Solicitation No	Version
2025-11-21	2025-12-04 13:30	CRFP 0201 SEC2600000001	3

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code: VS0000008657

Vendor Name : Visionary Integration Professionals, LLC (VIP)

Address : 10940

Street : White Rock Road, Suite 210

City : Rancho Cordova

State : California   **Country :** United States   **Zip :** 95670

Principal Contact : Audrey Zuro, Senior Director of Strategic Sales, Government Solutions

Vendor Contact Phone: 925.788.4456   **Extension:**

FOR INFORMATION CONTACT THE BUYER
Tara Lyle
(304) 558-2544
tara.l.lyle@wv.gov

Vendor Signature X _Jenna Ward_ DocuSigned by: FE0B211882854A8...	**FEIN#** 20-2969301	11/25/2025	1:27:43 PM PST **DATE** 11/25/2025

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

ADDITIONAL INFORMATION

Addendum No. 2 is issued for the following reasons:

1. To publish additional information regarding requirements to interface with the E-gov system - Attachment A (1 page) and provide an updated list of permit types and systems - Attachment B (10 pages). Attachment B is also attached in PDF format on wvOASIS.

2. The bid opening remains 12/04/2025 at 1:30 pm EST.

3. Reminder - For Request for Proposal ("RFP") Responses Only: Submission of a response to a Request for Proposal is not permitted in wvOASIS. In the event that Vendor is responding to a request for proposal, the Vendor shall submit one original technical and one original cost proposal prior to the bid opening date and time plus three (3) convenience copies of each to the Purchasing Division. Additionally, the Vendor should clearly identify and segregate the cost proposal from the technical proposal in separately sealed envelope.

4. The address for delivery of the proposals (technical and cost proposals (cost proposals in a separate envelope)) is the WV Purchasing Division 2019 Washington Street, East Charleston, WV 25305. Please be sure to put the CRFP solicitation on the boxes/envelopes.

No other changes.

INVOICE TO	SHIP TO
SECRETARYS OFFICE	DEPARTMENT OF ADMINISTRATION
BLDG 1 RM E119	OFFICE OF THE SECRETARY
1900 KANAWHA BLVD E	1900 KANAWHA BLVD E, BLDG 1 RM E119
CHARLESTON WV 25305	CHARLESTON WV 25305-0120
US	US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
	One-Stop-Shop Permitting Portal -State of West Virginia				

Comm Code	Manufacturer	Specification	Model #
43232408			

Extended Description:

See attached Cost Sheet - Attachment A.

Vendor should clearly identify and segregate the cost proposal from the technical proposal in a separately sealed envelope.

*** Online responses have been prohibited for this solicitation. See Section 6, BID SUBMISSION in the CRFP for more information. ********

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Technical questions due by 3:00 pm	2025-11-03

	Document Phase	Document Description	Page 3
SEC2600000001	Final	One-Stop-Shop Permitting Portal - State of WV	

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

Department of Administration **Purchasing Division** **2019 Washington Street East** **Post Office Box 50130** **Charleston, WV 25305-0130**	**State of West Virginia** **Centralized Request for Proposals** **Info Technology**	

Proc Folder:	1818626	**Reason for Modification:**
Doc Description:	One-Stop-Shop Permitting Portal -State of WV	Addendum No. 3

Proc Type:	Central Master Agreement			
Date Issued	**Solicitation Closes**	**Solicitation No**		**Version**
2025-11-25	2025-12-04 13:30	CRFP 0201 SEC2600000001		4

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code: VS0000008657

Vendor Name :   Visionary Integration Professionals, LLC (VIP)

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State :   California   **Country :**   United States   **Zip :**   95670

Principal Contact :   Audrey Zuro, Senior Director of Strategic Sales, Government Solutions

Vendor Contact Phone: 925.788.4456   **Extension:**

FOR INFORMATION CONTACT THE BUYER
Tara Lyle
(304) 558-2544
tara.l.lyle@wv.gov

Vendor **Signature X** *Jenna Ward*	**FEIN#** 20-2969301	11/25/2025 | 1:27:43 PM PST **DATE** 11/25/2025

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

ADDITIONAL INFORMATION

Addendum No. 3 is issued for the following reasons:

1. To change the amount for the Department of Revenue – Tax Division for Business Registrations on Attachment B (as issued on Addendum No. 2) from 3 to 29,000. See attachment.

2. Reminder - For Request for Proposal ("RFP") Responses Only: Submission of a response to a Request for Proposal is not permitted in wvOASIS. In the event that Vendor is responding to a request for proposal, the Vendor shall submit one original technical and one original cost proposal prior to the bid opening date and time plus three (3) convenience copies of each to the Purchasing Division. Additionally, the Vendor should clearly identify and segregate the cost proposal from the technical proposal in a separately sealed envelope.

No other changes.

INVOICE TO	SHIP TO
SECRETARYS OFFICE	DEPARTMENT OF ADMINISTRATION
BLDG 1 RM E119	OFFICE OF THE SECRETARY
1900 KANAWHA BLVD E	1900 KANAWHA BLVD E, BLDG 1 RM E119
CHARLESTON WV 25305	CHARLESTON WV 25305-0120
US	US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	One-Stop-Shop Permitting Portal -State of West Virginia				

Comm Code	Manufacturer	Specification	Model #
43232408			

Extended Description:
See attached Cost Sheet - Attachment A.

Vendor should clearly identify and segregate the cost proposal from the technical proposal in a separately sealed envelope.

*** Online responses have been prohibited for this solicitation. See Section 6, BID SUBMISSION in the CRFP for more information. ********

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Technical questions due by 3:00 pm	2025-11-03

	Document Phase	Document Description	Page 3
SEC2600000001	Final	One-Stop-Shop Permitting Portal - State of WV	

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

Department of Administration **Purchasing Division** 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130	**State of West Virginia** **Centralized Request for Proposals** **Info Technology**	

Proc Folder:	1818626	**Reason for Modification:**
Doc Description:	One-Stop-Shop Permitting Portal -State of WV	Addendum No. 4

Proc Type:	Central Master Agreement		

Date Issued	Solicitation Closes	Solicitation No	Version
2025-12-01	2025-12-04 13:30	CRFP 0201 SEC2600000001	5

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code: VS0000008657

Vendor Name :   Visionary Integration Professionals, LLC (VIP)

Address :   10940

Street :   White Rock Road, Suite 210

City :   Rancho Cordova

State :   California   Country :   United States   Zip :   95670

Principal Contact :   Audrey Zuro, Senior Director of Strategic Sales, Government Solutions

Vendor Contact Phone: 925.788.4456   Extension:

FOR INFORMATION CONTACT THE BUYER
Tara Lyle
(304) 558-2544
tara.l.lyle@wv.gov

Vendor Signature X _Jenna Ward_ (DocuSigned by)	FEIN# 20-2969301	12/1/2025	9:01:26 AM PST **DATE** 12/1/2025

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

ADDITIONAL INFORMATION

Addendum No. 4 is issued for the following reasons:

1. Govramp certification is an acceptable substitution for FedRamp certification requirement.

2. Reminder - For Request for Proposal ("RFP") Responses Only: Submission of a response to a Request for Proposal is not permitted in wvOASIS. In the event that Vendor is responding to a request for proposal, the Vendor shall submit one original technical and one original cost proposal prior to the bid opening date and time plus three (3) convenience copies of each to the Purchasing Division. Additionally, the Vendor should clearly identify and segregate the cost proposal from the technical proposal in a separately sealed envelope.

No other changes.

INVOICE TO				SHIP TO		
SECRETARYS OFFICE				DEPARTMENT OF ADMINISTRATION		
BLDG 1 RM E119				OFFICE OF THE SECRETARY		
1900 KANAWHA BLVD E				1900 KANAWHA BLVD E, BLDG 1 RM E119		
CHARLESTON	WV	25305		CHARLESTON	WV	25305-0120
US				US		

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	One-Stop-Shop Permitting Portal -State of West Virginia				

Comm Code	Manufacturer	Specification	Model #
43232408			

Extended Description:
See attached Cost Sheet - Attachment A.

Vendor should clearly identify and segregate the cost proposal from the technical proposal in a separately sealed envelope.

**** Online responses have been prohibited for this solicitation. See Section 6, BID SUBMISSION in the CRFP for more information. ********

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Technical questions due by 3:00 pm	2025-11-03

	Document Phase	Document Description	Page 3
SEC2600000001	Final	One-Stop-Shop Permitting Portal - State of WV	

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

Subcontractor List Submission (Information Technology)

Bidder's Name: Visionary Integration Professionals, LLC (VIP)

☐   Check this box if no subcontractors will be provided access to State data, State information, or access to the State Network during the performance of this Contract.

Subcontractor Name	Work to be performed/Access to be granted	Additional Information for CIO Evaluation
Vivid GovTech	Access is required to the legacy data to support the implementation work. During the planning phase, if additional access requirements are identified as we work through the technical details, Vivid GovTech will coordinate with VIP and the WV stakeholders to discuss what additionally might be needed.	Vivid GovTech is a certified Salesforce implementation consulting partner specializing in government technology solutions, with extensive experience in permitting, licensing, and inspections systems for state and municipal agencies.

Attach additional pages if necessary

Request for Proposal

Revised10/20/2025