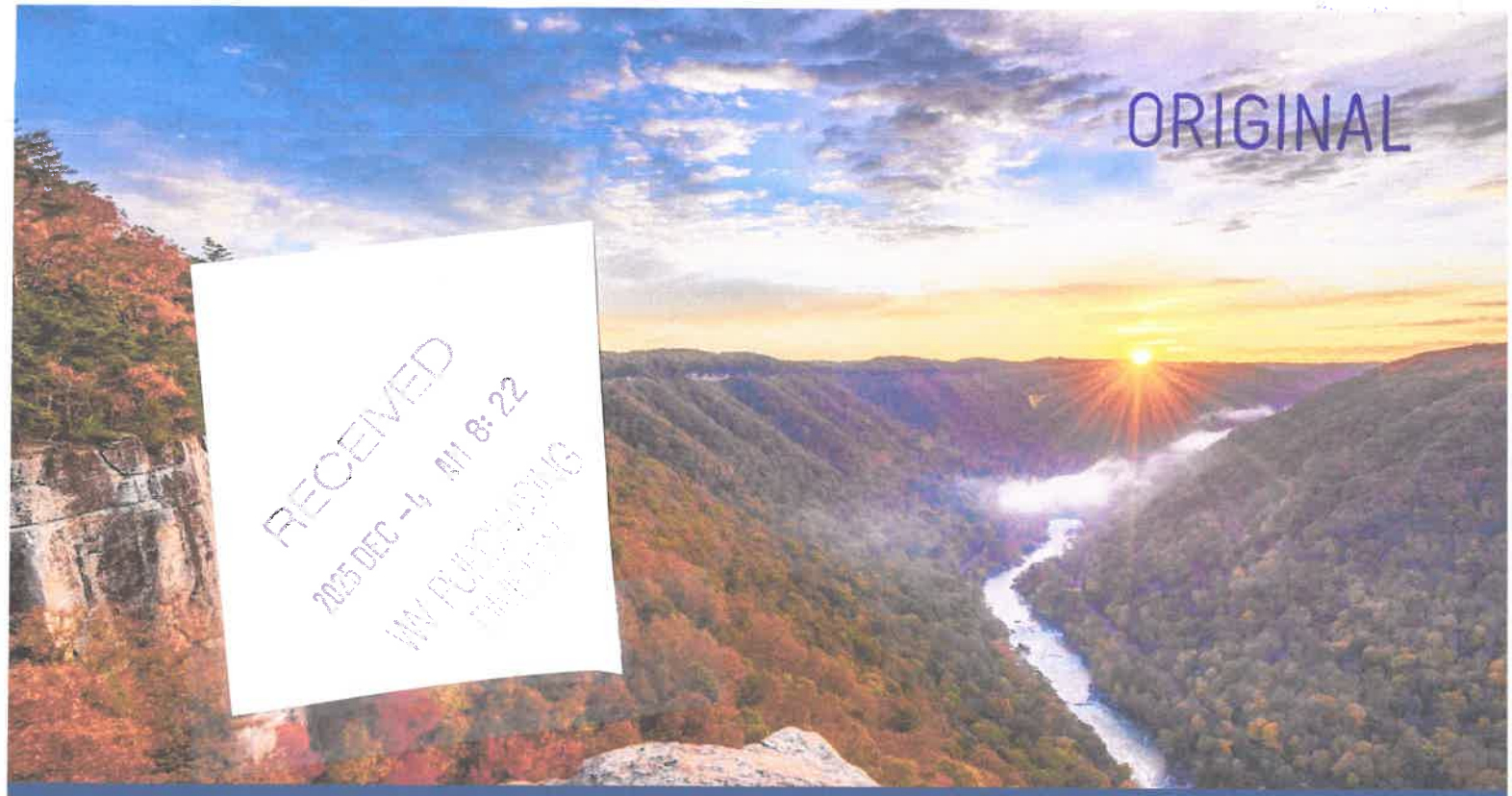


State of West Virginia
Centralized Request for Proposals Info Technology
One-Stop-Shop Permitting Portal
Volume I - Technical Proposal Response

December 4, 2025, 1:30pm

BUYER: Tara Lyle, Buyer Supervisor
SOLICITATION NO.: CRFP SEC2600000001
BID OPENING DATE: December 4, 2025
BID OPENING TIME: 1:30 p.m.
Department of Administration
Purchasing Division
2019 Washington Street E
Charleston, WV 25305

Submitted by:
Team CoreSphere
CoreSphere, LLC and Cloud SynApps
6700A Rockledge Drive
Suite 220
Bethesda, MD 20817
Phone: 301-830-4035
Fax: 301-825-8990

coresphere

ORIGINAL

coresphere

Title Page

Prepared For

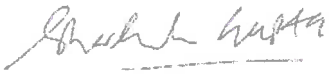
- State of West Virginia
- SOLICITATION NO.: CRFP SEC2600000001 6700A Rockledge Drive
- Centralized Request for Proposals Info Technology
- One-Stop-Shop Permitting Portal

Prepared By

- Team CoreSphere (CoreSphere, LLC and Cloud SynApps)
- 6700A Rockledge Drive
  Suite 220
  Bethesda MD 20817
- Phone: 301-830-4035
- Fax: 301-947-9648
- www.CoreSphere.com

CoreSphere Authorized Negotiator

- Mr. Shailesh Gupta, Managing Partner
- SGupta@coresphere.com
- Office: 301-637-3216
- Mobile: 202-421-8284
- Fax: 301-825-8990

- Authorized Signature: 
- Date: 12-1-25
- CoreSphere acknowledges and accepts the evaluation criteria and scoring methodology as published in Section 6 of the RFP.
- CoreSphere takes no exceptions to the terms and conditions.

CoreSphere Corporate Information

- DUNS: 18-476-8583
- UEI: U7QGJ84HBNA7
- CAGE Code: 37GU1
- TIN: 20-0926452

CoreSphere Contract Vehicles:

- GSA MAS IT Schedule
- GSA 8(a) STARS III
- SBA Small Disadvantaged Business (SDB)
- NASPO

Table of Contents

Table of Contents

Table of Exhibits

RFP Requirements Crosswalk Table – CoreSphere Response RFP Requirement	Proposal Section Addressing Requirement
4.2.1.20 – High Availability & Maintenance Transparency	Section 3.1.20
4.2.1.21 – Project Management Approach & Tools	Section 3.1.21
4.2.1.22 – Integration with State SSO Solution	Section 3.1.22
4.2.1.23 – Complete Implementation Pricing & Milestones	Section 3.1.23
4.2.1.24 – All Work Performed in the United States	Section 3.1.24
4.2.1.25 – Digital Wallet for State Payments & Renewals	Section 3.1.25
4.2.2.1 – One-Stop-Shop Permitting Portal Solution	Section 3.2.1
4.2.2.2 – Structured, Transparent, Collaborative Methodology with QA	Section 3.2.2 and 3.2.2.2
4.2.2.3 – Compliance with WV OT Data Security Requirements	Section 3.2.3
4.2.2.4 – FedRAMP-Compliant Cloud Solution	Section 3.2.4
4.2.2.5 – Encryption (FIPS 140-3; Data in Transit & At Rest)	Section 3.2.5
4.2.2.6 – Subcontractor Management & Compliance Requirements	Section 3.2.6
4.2.2.7 – NIST 800-53 Aligned Security Controls	Section 3.2.7
4.2.2.8 – Vulnerability Management & Required Reports	Section 3.2.8
4.2.2.9 – Critical Vulnerability Resolution Timeframes	Section 3.2.9
4.2.2.10 – Business Continuity, Backups, and Disaster Recovery	Section 3.2.10
4.2.2.11 – Migration into WV Cloud Tenants	Section 3.2.11
4.2.2.12 – No-Cost Project Management Interface	Section 3.2.12
4.2.2.13 – Real-Time Data Exchange Requirements	Section 3.2.13
4.2.2.14 – ADA / Accessibility (WCAG 2.1, Section 508)	Section 3.2.14

RFP Requirements Crosswalk Table – CoreSphere Response RFP Requirement	Proposal Section Addressing Requirement
4.2.2.15 – Outage Reporting (3 Tiers)	Section 3.2.15
4.2.2.16 – Early Access to Sandbox & Production Environments	Section 3.2.16
4.2.2.17 – Disentanglement Plan within 6 Months	Section 3.2.17
4.2.2.18 – Ongoing Support & Maintenance Requirements	Section 3.2.18
4.3.1.2 – Integration with Legacy Systems & APIs	Section 3.3.2
4.3.1.3 – Experience with Cloud Platforms & DR	Section 3.3.3
4.3.1.4 – Handling Sensitive Data (Encryption & Audit Trails)	Section 3.3.4
4.3.1.5 – Team Trained in NIST, CIS, FedRAMP Standards	Section 3.3.5
4.3.1.6 – Project Management Tools (Jira, MS Project)	Section 3.3.6
4.3.1.7 – Training / Train-the-Trainer Capabilities	Section 3.3.7
4.3.1.8 – Uptime Guarantees, RTO/RPO, SLAs	Section 3.3.8
4.3.1.9 – Multi-Agency Experience & Change Management	Section 3.3.9
4.3.2.1 – Security Training for All Vendor Personnel	Section 3.4.1
4.3.2.2 – Accessibility (WCAG 2.1 / 508) Training	Section 3.4.2
4.3.2.3 – Alignment with State IT Policies & Privacy Laws	Section 3.4.3
4.3.2.4 – Vulnerability Scanning, AES-256, RBAC Experience	Section 3.4.4

1. Executive Summary

The landscape of government services is undergoing a profound digital transformation, driven by increasing citizen expectations for efficiency, transparency, and accessibility. In this context, the West Virginia One-Stop Licensing Portal initiative emerges as a strategic imperative, aiming to fundamentally reshape how residents and businesses interact with the state government for their licensing and permitting requirements. The current fragmented system, characterized by multiple agency-specific front-ends and Solution-based processes, often leads to confusion, delays, and inefficiencies. The RFP clearly articulates the critical focus areas for this initiative: pre-processing of applications, permit search and discovery, submission of new and renewal applications, and application status tracking. The West Virginia One-Stop Licensing Portal initiative represents a pivotal step towards modernizing and streamlining the state's approach to licensing and permitting is intentionally defined to encompass the initial, front-end engagement with the applicant. All subsequent, more complex stages—including technical reviews, detailed compliance checks, inspection scheduling, ongoing compliance monitoring, and enforcement actions—will continue to be managed by the respective state agencies utilizing their existing, specialized systems.

coresphere

Why CoreSphere + Cloud SynApps (CSA)
A Unified, High-Performance Team Delivering Salesforce Public Sector Solutions at Scale

Our Partnership at a Glance
- **Prime + Subcontractor team** delivering Salesforce Public Sector Solutions (PSS) and Licensing, Permitting & Inspections (LPI)
- Currently partnered on **State of New Hampshire OPLC** statewide LPI transformation
- Seamless collaboration across architecture, implementation, integrations, and accelerators

Public Sector Strength
CoreSphere (Prime)
- Salesforce **Summit Partner** with **20+ years** of digital modernization experience
- **40+ enterprise public sector implementations** including LPI, Case Management, Inspections, Grants, and Contact Centers
- **4.9/5 customer satisfaction** and recognized by CRN, Forrester, and the Washington Post
- **66+ certified team members** and **$160M+ in Salesforce services delivered**

Cloud SynApps (CSA)
- Specialists in **Salesforce PSS & OmniStudio (Vlocity)**
- **50+ public sector projects, 100% success rate**
- Designed the **ESRI GIS Geospatial Accelerator** for AppExchange
- Leadership directly advises Salesforce on **PSS certification and roadmap**
- Teams in **U.S., Canada, and India (125+ FTEs)** with **250+ certifications**

Deep Salesforce Expertise
Together, the team offers unmatched coverage across:
- Public Sector Solutions (PSS)
- Licensing, Permitting & Inspections (LPI)
- OmniStudio / Vlocity
- MuleSoft integration
- ESRI GIS integration
- Complex multi-agency data models
- Large-scale, statewide Salesforce transformations

Our proposed solution leverages Salesforce Public Sector Solutions (PSS) with its Licensing, Permitting & Inspection (LPI) capabilities, integrated with MuleSoft's Anypoint Platform. The core objective is to create a unified, user-centric digital frontend that simplifies application intake, permit discovery, and status tracking, while preserving the operational integrity of existing agency-specific backend systems. A key feature introduced is the concept of a secure "digital wallet" within the portal, serving as a centralized repository for all submitted applications, downloaded permits, payment records, and other relevant documentation. This digital wallet aims to provide citizens and businesses with a single point of access and management for all their licensing and permitting needs, significantly enhancing convenience and transparency. The Solution elaborates on the technical architecture, integration strategies, user experience

enhancements, reporting capabilities, and the strategic benefits this solution offers to the State of West Virginia, its agencies, and its residents.

Team CoreSphere consisting of CoreSphere as the prime and Cloud Synapps (CSA) as a subcontractor will implement the Salesforce PSS LPI solution for West Virginia. CoreSphere and CSA are currently partnered in State of New Hampshire to provide enterprise state wide LPI implementation for the Office of Permitting and Licensing (OPLC). Below is a highlight of both organizations.

CoreSphere

CoreSphere was founded in 2003 and has been delivering Salesforce Case Management solutions since 2010. We are one of only a few small businesses that earned Summit (the highest level) of Salesforce Partnership within the Salesforce consulting partner ecosystem. We were recognized by the CRN Tech Elite 250, a definitive list of solution providers with deep technical expertise and premier certifications; and we were the only small business recognized by Forrester as a "Go To" Federal systems integrator for Salesforce. We have a unified working environment and were selected by The Washington Post as one of the Top Workplaces in 2021, 2022, 2023, 2024 and 2025.

We currently have a presence in over 20 Public Sector agencies implementing Salesforce based solutions. Our Salesforce SaaS and PaaS based implementations have included Licensing and Permitting, Inspection Management, Case Management, Grants Management, Contact Centers, Home/Mortgage Counselling, Human Resources, Legacy Application Migrations, Complaints Management, Correspondence Management, Property Management.

Key Advantages of CoreSphere

- Salesforce Crest Partner with 11+ years of State, Federal, Nonprofit, and Commercial implementations
- 66+ certified individuals with over 210 certifications
- 40+ Public Sector enterprise implementations
- Delivered over $160M in Salesforce services as a Prime Contractor
- 4.9 out of 5 Customer Satisfaction score

Cloud SynApps

CoreSphere has partnered with Cloud SynApps, a leader in delivering Salesforce Licensing, Permitting and Inspection solutions. Cloud SynApps journey started in 2016, focusing 100% on Salesforce solutions for Public Sector clients. Cloud SynApps provides consulting and implementation services to Government Agencies, Cities, Counties, Municipalities, States/Provinces, and Federal Departments.

Revolutionizing Industry-Specific Salesforce Implementations with Unmatched Expertise

Cloud SynApps (CSA) has deep roots in Vlocity, an industry cloud pioneer acquired by Salesforce in 2020. Our early focus on industry-specific solutions, particularly in government, allowed us to develop a trusted relationship with Vlocity leadership. This led to opportunities to support large system integrators with challenging Vlocity implementations.

As Vlocity evolved into Salesforce Industries, with Vlocity Government becoming Public Sector Solutions (PSS), CSA relationship with Salesforce strengthened. CSA has contributed significantly to PSS development, including building an ESRI GIS Geospatial Accelerator available on Salesforce AppExchange. CSA CTO is an active advisor on the Salesforce advisory council, influencing PSS certification development.

CSA expertise in PSS sets us apart from other system integrators. We understand the unique technology foundations and data models of different Salesforce clouds, including PSS. This knowledge is crucial for successful architecture design, development, and deployment strategies.

CSA have delivered many Salesforce projects (50+) for various cities, regions, crown corporations, non-profit organizations, and federal governments across Canada and the USA with a 100% success record. Currently, we are actively engaged and delivering multiple projects with various public sector clients in Canada such as Shared Services Canada (SSC), Invest in Canada (IIC), Innovation, Science & Economic Development Canada (ISED), Canada Deposit Insurance Corporation (CDIC), Natural Resources Canada (NRCan), Ontario Govt's Ministry of Health, Region of Peel to name a few.

Cloud SynApps has ~65+ FTEs working in North America (US & Canada), ~60+ FTEs in India, and it continues to grow rapidly. We have offices in Canada, the United States, and India. As the 43rd fastest-growing company in Canada and we will continue to grow. Cloud SynApps is a proud Salesforce certified partner with 250+ Salesforce certifications distributed across our associates in 2020, we were listed among the top 25 fastest-growing companies in Canada by Canadian Business along with MacLean's magazine. In 2021 and 2022, we are certified as one of the Great Places to Work by Great Place to Work Institute Inc. and amongst the top 50 (Ranked 43rd) fastest-growing companies in Canada as per The Globe and Mail.

Cloud SynApps invests heavily in building solutions that we know are required by our Public Sector clients repeatedly, incorporating leading practices, as well as innovative approaches. We understand the Digital and IT solution needs of governments with our experienced Subject Matter Experts. We have pre-built assets and accelerators that help expedite the implementation with minimal customization and maximum cost benefit.

Team CoreSphere will deliver the required functionality to West Virginia on time with high quality. Below is our high level timeline to implement statewide license and permits.

Year	Functionalities	Release Number	Release Date	No. Of Forms/Flows
1	LPI Setup	R1	Jan-27	N/A
	Community			N/A
	Integrations			N/A
	Onboard Dept of Commerce			66
	Onboard Dept of Env Protection			118
2	Onboard Dept of Revenue	R2	Sep-27	115
	Onboard Dept of Transportation	R3	Jan-28	36
	Onboard Dept of Tourism			1
3	Onboard Dept of Health	R4	Dec-28	93

Release 1 consists of implementing the Salesforce Platform and the Integration Engine along with the MVP pilot agencies. Release additional agencies 2, 3 and 4 onboard. Team CoreSphere is flexible in reorganizing Release 2,3 and 4 if West Virginia wishes to change the order of agencies that go live.

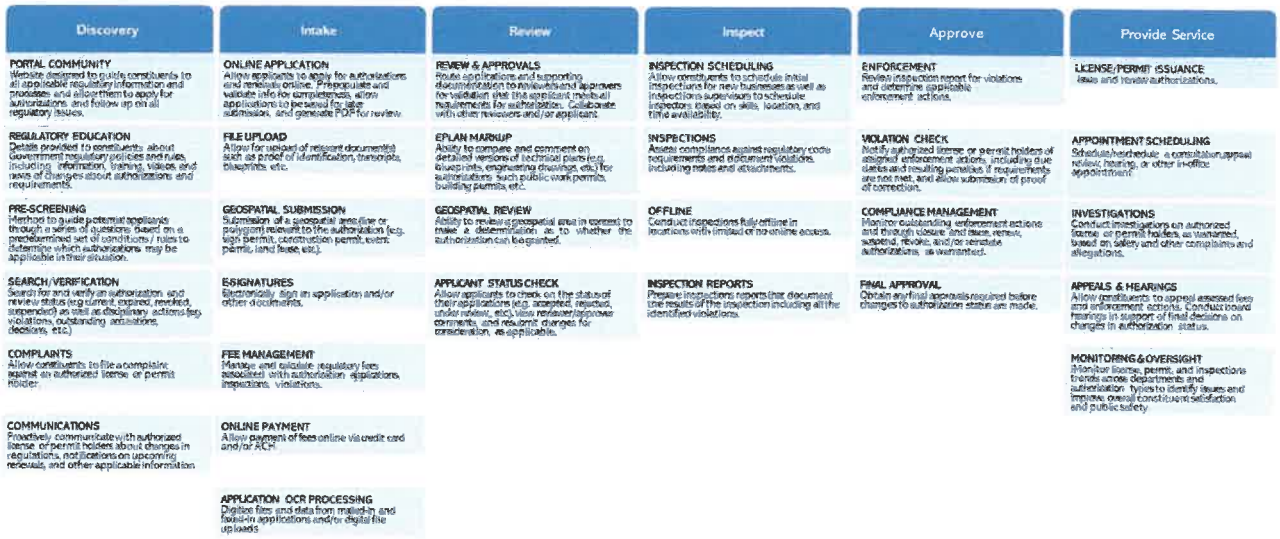
coresphere Cloud SymApps

Why This Team for West Virginia

- **Experienced statewide implementers** of PSS LPI
- Seamless coordination between architecture, DevOps, integrations, and UX
- Strong focus on **user-centric portals**, including digital wallets & applicant dashboards
- Proven playbook for **modernizing multi-agency licensing environments** while respecting agency systems
- Ability to deliver a **high-quality front-end portal** integrated with existing back-end systems
- Committed to **scalability, transparency, and long-term sustainability**

1.1 Salesforce PSS Licensing, Permitting & Inspection (LPI) Solution for the West Virginia One-Stop Licensing Portal

Salesforce Public Sector Solutions (PSS) stands as a leading platform designed to address these public sector challenges. Its robust Licensing, Permitting & Inspection (LPI) capabilities are specifically tailored to manage the lifecycle of regulated activities from an applicant's perspective. When synergistically combined with MuleSoft's powerful integration and orchestration capabilities, the proposed solution promises to deliver a modern, scalable, and cohesive digital experience. This partnership enables a seamless environment where applicants engage with a single, intuitive portal, while state agencies can continue to leverage their existing licensing systems and workflows without the need for disruptive and costly overhauls. The overarching goal is to elevate the user experience, drive operational efficiencies through standardized intake processes, and ensure a consistent and transparent journey for all applicants across the state.



Core capabilities of our Proposed LPI Solution

This Solution will delve into the detailed architecture and implementation of this transformative solution, highlighting how Salesforce PSS and MuleSoft can address the specific requirements of the West Virginia One-Stop Licensing Portal. Furthermore, it will introduce and elaborate on the

innovative concept of a "digital wallet" integrated into the portal's frontend, providing a tangible and user-centric benefit that centralizes all licensing and permitting interactions.

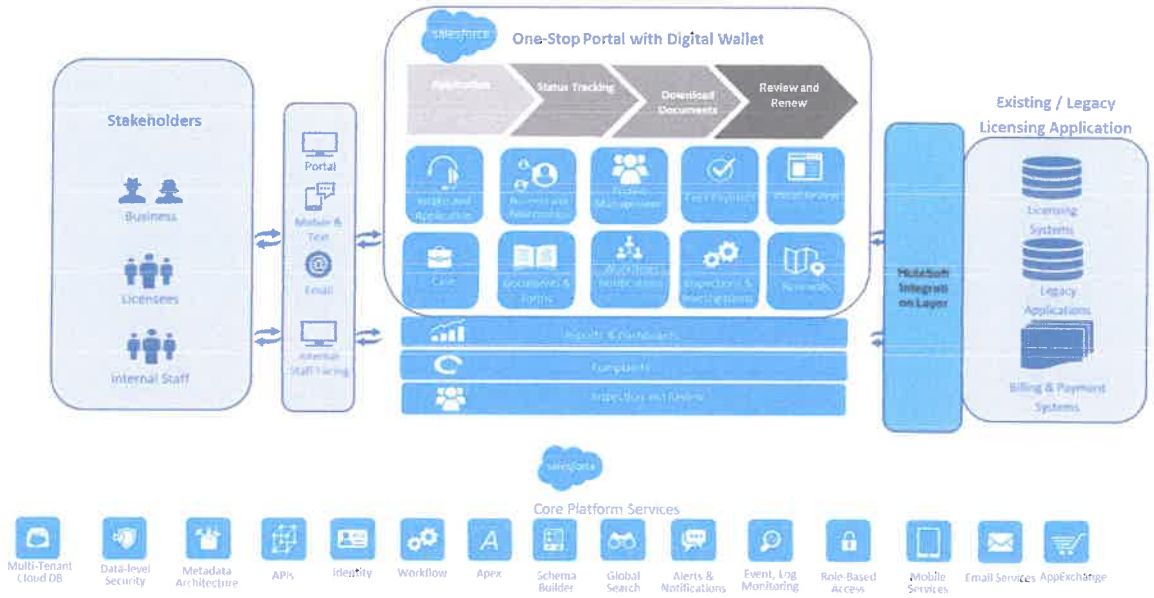


Exhibit 1 Envisioned Business Solution Architecture for One-Stop Licensing Portal

1.2 The Unified Digital Frontend: Application Intake, Permit Discovery, and the Centralized Digital Wallet

The cornerstone of the West Virginia One-Stop Licensing Portal, powered by Salesforce PSS, lies in its ability to provide a unified and intuitive digital frontend for citizens and businesses. This section will detail how the portal revolutionizes the initial stages of the licensing process, culminating in the introduction and detailed exploration of the "digital wallet" concept.

1.2.1 Streamlined Application Intake and Pre-processing

The applicant's journey begins with an intelligent and adaptive application intake process. Unlike traditional forms that often present a daunting and overwhelming array of irrelevant questions, Salesforce LPI utilizes dynamic and conditional logic to guide users through a personalized experience.

Dynamic and Adaptive Forms: Upon initiating an application, users are presented with a series of questions designed to ascertain their specific needs based on their declared business activities, industry sector, or proposed business. For example, a business applying for a retail license will be presented with a different set of questions than a contractor applying for a construction permit. This adaptive nature means users only encounter and answer questions that directly pertain to their unique situation, significantly reducing cognitive load, minimizing the likelihood of errors, and ensuring the completeness of submitted information. The underlying Salesforce platform can leverage pre-defined business rules and metadata to drive this dynamic form generation, making it adaptable to new licensing requirements with relative ease.

Guided Workflows: The system can implement guided workflows that walk applicants through the entire application process step-by-step. These workflows can incorporate contextual help, tooltips, and links to relevant resources, further demystifying the process. For complex applications that might involve multiple stages or agency approvals (even if the backend processing is agency-specific), the front-end can provide a clear roadmap of the expected journey.

Data Validation and Error Prevention: Real-time data validation is embedded within the forms. As users enter information, the system can immediately flag inconsistencies or errors (e.g., incorrect formatting for a business identification number, invalid date entries), allowing for immediate correction. This proactive approach drastically reduces the number of incomplete or error-ridden applications that would otherwise be rejected later in the process, saving both applicant and agency time and resources.

Document Upload Management: The portal will facilitate the secure and organized upload of supporting documentation. Applicants can upload required documents (e.g., identification, proof of insurance, business registration) directly through the portal. The system will manage these uploads, associating them with the specific application and ensuring they are delivered to the appropriate agency backend via MuleSoft.

1.2.2 Intuitive Permit Search and Discovery

Navigating the multitude of permits and licenses required across different state agencies can be a significant challenge. The One-Stop Licensing Portal addresses this through a powerful and user-friendly permit discovery tool.

Activity-Based Search: Applicants can input keywords related to their intended business activities, industry, or profession. The system, powered by a comprehensive and searchable database of all available permits and licenses, will return a list of relevant requirements.

Location-Based Discovery: The portal can also leverage location data to inform users about permits that might be specific to a particular county, municipality, or zoning area, even if those are managed by separate agencies or lower levels of government (integration permitting).

Industry-Specific Guidance: Pre-defined industry profiles can be created, allowing users to select their industry and be presented with a tailored list of common licensing and permitting requirements.

"Do I Need a Permit?" Wizard: A conversational wizard interface can ask a series of simple questions to help individuals and businesses determine their licensing and permitting obligations, providing clear and actionable guidance. This eliminates the need for applicants to visit multiple agency websites or make numerous phone calls to ascertain their requirements.

Clear Eligibility Criteria and Requirements Display: Once a specific permit or license is identified, the portal will clearly display its associated eligibility criteria, required documentation, fees, and the estimated processing time (where available from backend systems).

1.2.3 The Centralized "Digital Wallet" for Applicants

A significant feature to the user experience is the introduction of a secure and comprehensive "digital wallet" integrated directly into the frontend portal. This digital wallet acts as a personal, centralized hub for all licensing and permitting-related information and activities for an individual or business.

Unified Application Repository: All applications submitted through the One-Stop Portal, whether new, renewal, or amendment, will be automatically stored within the applicant's digital wallet. This provides a single, easily accessible history of all licensing interactions with the state. Users can view the status of each application, access submitted forms, and review any communications related to it.

Digital Permit and License Repository: Upon successful approval and issuance by an agency, the digital permit or license will be securely stored in the applicant's digital wallet. This includes the official digital document, often in PDF format, which can be downloaded, printed, or digitally presented as needed. This eliminates the need for physical permits and provides instant access to proof of compliance.

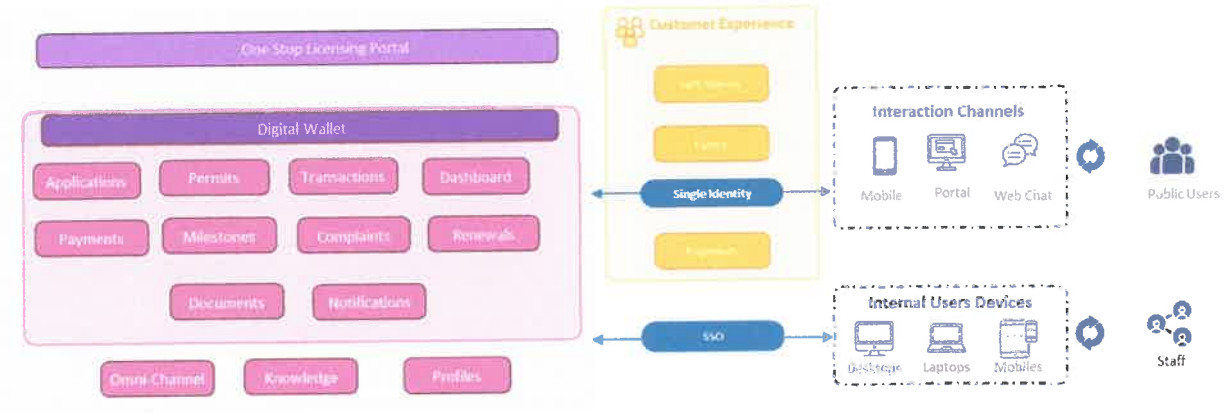


Exhibit 2. Digital Wallet - One-Stop Portal

Payment and Transaction History: The digital wallet will also serve as a record of all payments made for licenses and permits. This includes transaction dates, amounts, payment methods, and confirmation numbers. This provides applicants with a clear financial overview of their licensing obligations and simplifies record-keeping for accounting and auditing purposes.

Renewal Reminders and Management: The digital wallet will proactively display upcoming renewal deadlines for all active permits and licenses. Users can initiate renewal processes directly from the wallet, leveraging pre-populated application data from previous submissions. This feature is crucial for ensuring ongoing compliance and avoiding lapses in authorization.

Document Management Hub: Beyond submitted applications and issued permits, the digital wallet can serve as a general repository for essential licensing-related documents. Applicants can store and manage documents that are frequently required for licensing applications, such as proof of insurance, professional certifications, or business registration details, making future applications even more efficient.

Secure Access and Authentication: Access to the digital wallet will be protected by robust security measures, including multi-factor authentication, ensuring that only authorized individuals can access sensitive personal and business information. The portal will adhere to stringent data privacy and security standards.

This digital wallet transforms the user experience from a transactional interaction to a relationship-based one, empowering citizens and businesses with greater control and convenience over their regulatory compliance.

1.2.4 Real-Time Application Status Tracking (Frontend Perspective)

While the core review and approval processes remain within agency systems, the Salesforce LPI solution, augmented by MuleSoft, provides applicants with unparalleled visibility into the progress of their applications.

Unified Status Dashboard: The digital wallet will feature a clear and concise dashboard displaying the current status of every submitted application. This status is not merely a generic "In Progress" but can be updated with more granular information pulled from backend systems via MuleSoft.

Milestone Tracking: Applicants can track key milestones such as:

- Application Submitted
- Received by Agency
- Under Initial Review
- Additional Information Requested (with links to provide it)
- Technical Review Complete (if visible externally)
- Inspection Scheduled (if relevant and communicated)
- Approved
- Denied
- Issued (with a link to download the permit from the wallet)

Proactive Alerts and Notifications: Users can opt-in to receive automated notifications via email or SMS at critical stages of their application's lifecycle. This includes alerts for requests for additional information, approval, or denial. This proactive communication reduces applicant anxiety and the need for them to manually check status.

Communication Log: Any communication initiated by an agency regarding an application (e.g., requests for clarification) can be logged and made visible within the application's record in the digital wallet. Similarly, any additional information or responses provided by the applicant through the portal will be clearly tracked.

This comprehensive approach to application intake, permit discovery, and the innovative digital wallet ensures that the frontend experience is not just a data entry point, but a valuable tool for citizens and businesses to manage their regulatory obligations efficiently and transparently.

1.3 Integration and Workflow Orchestration Through MuleSoft: The Invisible Backbone

The success of the One-Stop Licensing Portal hinges on its ability to seamlessly connect the modern Salesforce frontend with a diverse array of existing, and potentially disparate, agency backend systems. MuleSoft's Anypoint Platform serves as the critical integration and orchestration layer, ensuring secure, reliable, and scalable communication without demanding immediate overhauls of established agency infrastructure.

1.3.1 An API-Led Connectivity Architecture

MuleSoft advocates for an API-led connectivity approach, which organizes integrations into three distinct layers:

System APIs: These APIs provide an isolated and secure interface to the core systems of record, such as the legacy licensing databases of individual agencies. They abstract the complexity and proprietary nature of these backend systems, presenting their data and functionality in a standardized, reusable format. For instance, a System API might expose endpoints for retrieving applicant data, submitting new license applications, or querying permit status from a specific agency's database. This layer ensures that the core backend systems remain largely untouched, preserving existing investments.

Process APIs: These APIs orchestrate and combine data from multiple System APIs to fulfill specific business processes. They define the workflow logic, data transformation, and integration patterns required to execute a particular business function across different systems. In the context of the One-Stop Portal, a Process API might be responsible for taking a completed application submitted in Salesforce, retrieving additional contextual data from another agency's system (e.g., business registration details), and then orchestrating the submission of this consolidated data to the relevant licensing agency's System API. This layer is crucial for managing multi-agency workflows and complex data exchanges.

Experience APIs: These APIs are designed to expose data and functionality to different user experiences or applications, such as the Salesforce frontend portal, mobile applications, or third-party partner integrations. They present data in a format optimized for the consuming application, ensuring a tailored and efficient user interface. The Salesforce portal will interact with Experience APIs to fetch data for permit discovery, display application statuses, and push new application submissions. This layer ensures that the frontend is decoupled from the complexities of the backend systems, allowing for independent evolution.

1.3.2 Data Transformation and Standardization

A significant challenge in integrating disparate systems is the variation in data formats, structures, and definitions. MuleSoft's robust data transformation capabilities address this directly:

Data Mapping: MuleSoft allows for the creation of detailed data maps between the formats used by Salesforce, the standardized formats defined in Process and Experience APIs, and the proprietary formats of the legacy agency systems. This ensures that data entered into Salesforce is

correctly translated into the format understood by a particular agency's backend, and vice-versa for status updates.

Data Enrichment: MuleSoft can enrich data during transit. For example, when an application is submitted, it might be necessary to cross-reference certain information with a master data source to ensure accuracy or to add standard identifiers before it's sent to an agency.

Handling Data Model Differences: Legacy systems often have unique data models. MuleSoft acts as a universal translator, bridging these differences without requiring each system to be re-architected to a common model.

1.3.3 Workflow Orchestration and Business Process Management

Beyond simple data exchange, MuleSoft provides sophisticated capabilities for orchestrating complex business processes that may span multiple agencies and timelines.

Sequencing and Parallel Processing: MuleSoft can define the exact sequence in which tasks must be performed. For example, a business license might require approval from both the Department of Revenue and the Secretary of State. MuleSoft can orchestrate these approvals, either sequentially or in parallel, based on predefined business rules.

Error Handling and Compensation: In any integration, errors are inevitable. MuleSoft includes comprehensive error handling mechanisms, allowing for configurable retry logic, automated notifications to IT support, and even compensation transactions to undo partial operations if a process fails midway. This ensures data integrity and service continuity.

State Management: For long-running processes (though the portal's direct involvement is limited to the initial stages), MuleSoft's capabilities can manage the state of a transaction across multiple steps and systems, ensuring that progress is maintained even if systems are temporarily unavailable.

1.3.4 Security, Governance, and Monitoring

MuleSoft's platform incorporates robust features for security, governance, and operational visibility, which are paramount in a public sector context.

Secure API Management: MuleSoft provides a comprehensive API gateway that enforces security policies, manages authentication and authorization (e.g., OAuth, API keys), and can protect backend systems from malicious attacks.

Auditing and Logging: Every transaction processed through MuleSoft is logged, creating a detailed audit trail. This is essential for compliance, troubleshooting, and performance analysis. IT teams can monitor the flow of data, identify bottlenecks, and diagnose issues with high precision.

Scalability: MuleSoft's architecture is designed for scalability, allowing the integration layer to handle increasing volumes of transactions as the adoption of the One-Stop Portal grows. It can be deployed in cloud, on-premises, or hybrid environments to meet the State's infrastructure requirements.

Through this robust API-led architecture, MuleSoft acts as the invisible yet indispensable backbone of the One-Stop Licensing Portal, enabling the Salesforce frontend to deliver superior applicant experience while respecting and leveraging the existing investments in agency backend systems.

1.4 Reporting, Dashboards, and Operational Insights for Improved Governance

While the Salesforce PSS solution focuses on the frontend engagement and initial processing, its inherent reporting and analytics capabilities provide invaluable insights to state agencies and leadership. These insights are crucial for effective operational management, strategic planning, and continuous improvement of the licensing and permitting ecosystem. These capabilities are further enhanced by data points flowing back from agency systems via MuleSoft.

1.4.1 Empowering Agency Supervisors and Administrators

Salesforce's reporting engine allows for the creation of dynamic dashboards that offer real-time visibility into key operational metrics.

Application Volume and Trends: Supervisors can monitor the daily, weekly, and monthly volume of applications submitted for different license types and across various agencies. This data is essential for understanding demand, identifying seasonal fluctuations, and predicting future workloads.

Turnaround Times and Processing Bottlenecks: By tracking the time taken from application submission to initial agency receipt (as communicated back by agencies), and potentially subsequent internal milestones, agencies can identify areas where processing is taking longer than expected. This highlights potential bottlenecks, staff shortages, or process inefficiencies that require attention.

Renewal Cycle Management: Dashboards can provide a clear overview of upcoming permit and license renewals. This proactive visibility allows agencies to manage their renewal workload effectively, send timely reminders (potentially triggering automated workflows within Salesforce for users with upcoming renewals in their digital wallet), and ensure continuous compliance for businesses.

Geographic and Demographic Analysis: If location data is captured, reports can analyze application distributions by region, helping agencies understand where economic activity is concentrated and where licensing needs are highest. Demographic data, where ethically and legally permissible, can also offer insights into the types of businesses being licensed.

Resource Allocation and Staffing: The insights derived from these reports directly inform staffing decisions and resource allocation. By understanding the volume and complexity of applications, agencies can better plan for staffing needs, training requirements, and the equitable distribution of work among staff members.

1.4.2 Enhanced Visibility into Compliance and Enforcement (Indirectly)

While Salesforce PSS and the One-Stop Portal do not directly manage the technical reviews, or enforcement actions, they can still surface relevant high-level information provided by the backend agency systems.

Status of Compliance Actions: Similarly, if agencies flag an application as being on hold due to a compliance issue or nearing a critical compliance deadline, this high-level status can be communicated to the portal. This keeps the applicant informed of any factors impacting their license status.

Upcoming Expirations and Renewal Requirements: As mentioned, renewal management is a key reporting area. This indirectly supports compliance by ensuring that license holders are aware of and can act upon upcoming expiration dates.

1.4.3 Strategic Decision-Making and Policy Guidance

The aggregated data and analytics capabilities extend beyond day-to-day operations to inform strategic decision-making at a higher level.

Identifying Trends for Policy Adjustment: By analyzing patterns in application types, geographic distribution, and industry growth, state leadership can gain insights that may inform policy adjustments, economic development strategies, or the need for new regulatory frameworks. For instance, a surge in applications for a specific emerging industry might indicate a need for streamlined licensing processes or new guidance.

Measuring Digital Transformation Success: The portal's adoption rates, user satisfaction metrics, and processing efficiency improvements (as evidenced by reduced application errors and faster initial intake) serve as key performance indicators (KPIs) for the state's digital transformation efforts.

Resource Justification: Robust data and reporting provide a strong evidence base for justifying budget requests, advocating for technology investments, or demonstrating the value of consolidated service delivery.

Continuous Improvement Cycle: The analytics generated provide a feedback loop for continuous improvement. Identified pain points or inefficiencies can be addressed through system enhancements, process modifications, or additional training, leading to a perpetually evolving and more effective service delivery model.

In essence, the reporting and dashboard capabilities transform raw operational data into actionable intelligence. This empowers state agencies to manage their current operations effectively, anticipate future needs, and make informed strategic decisions that benefit citizens and the economy of West Virginia.

1.5 Benefits and Strategic Value to the State of West Virginia

The implementation of the One-Stop Licensing Portal, powered by Salesforce PSS and MuleSoft, and enhanced by the digital wallet concept, offers a multitude of tangible benefits and substantial

strategic value to the State of West Virginia, its agencies, and its citizens and businesses. This solution represents a forward-thinking approach to digital governance, balancing modernization with fiscal responsibility.

1.5.1 Enhanced Citizen and Business Experience

Unified and Intuitive Interface: Applicants no longer need to navigate multiple, often confusing, agency websites. The single portal provides consistent and user-friendly experience for all their licensing and permitting needs.

Reduced Administrative Burden: Dynamic forms, guided workflows, and the digital wallet significantly reduce the time and effort required for applicants to identify needs, prepare applications, and manage their compliance documentation.

Increased Transparency and Predictability: Real-time status tracking, clear communication of requirements, and proactive notifications demystify the process, reducing anxiety and allowing applicants to plan more effectively. The digital wallet provides immediate access to all relevant documents and transaction history.

Convenience and Accessibility: The 24/7 availability of the portal and the digital wallet ensures that citizens and businesses can access services and manage their compliance on their own schedule, from anywhere.

1.5.2 Operational Efficiencies for State Agencies

Reduction in Incomplete Applications: Proactive data validation and guided workflows lead to a significant decrease in the number of incomplete or erroneous applications received, reducing manual correction efforts and downstream processing delays.

Improved Data Quality: Standardized data capture at the front end ensures higher quality data is passed to agency systems, improving the reliability of agency records.

Streamlined Intake and Pre-processing: The Salesforce LPI solution automates many of the initial intake tasks, freeing up agency staff to focus on more complex review and compliance activities.

Enhanced Coordination: While agencies maintain their systems, the integration layer provides a standardized channel for information exchange, improving coordination where multiple agencies are involved in a licensing process.

Valuable Operational Insights: The reporting and dashboard capabilities provide agencies with the data needed to optimize workflows, manage resources effectively, and identify areas for improvement.

1.5.3 Strategic Value to the State

Modernized Digital Infrastructure: The solution provides a modern, cloud-based frontend that enhances the state's digital footprint without necessitating immediate, large-scale replacements of existing backend systems. This approach respects and leverages prior investments.

Scalability and Futureproofing: The Salesforce and MuleSoft platforms are inherently scalable and adaptable. The State can easily onboard additional agencies, introduce new licensing programs, and expand functionality as its needs evolve, providing a flexible foundation for future growth.

Cost-Effectiveness: By focusing on the frontend and leveraging an API-led integration strategy, the State avoids the extremely high costs and risks associated with a "big bang" approach to replacing all legacy systems. MuleSoft's reusable APIs further reduce development costs for future integrations.

Improved Economic Development: A streamlined and transparent licensing process can attract new businesses and encourage existing ones to expand, contributing to the economic vitality of West Virginia. Reducing regulatory friction is a key factor in business investment decisions.

Enhanced Government Reputation: Delivering efficient, citizen-centric digital services improves public trust and enhances the perception of government effectiveness and responsiveness.

Foundation for Broader Digital Governance: The principles and technology implemented in this initiative can serve as a blueprint for modernizing other citizen-facing services across state government, fostering a consistent digital experience.

Data-Driven Governance: The robust reporting and analytics capabilities empower data-driven decision-making, enabling the state to better understand its regulatory landscape, identify emerging trends, and proactively shape policies.

The West Virginia One-Stop Licensing Portal, powered by Salesforce Public Sector Solutions and integrated via MuleSoft, stands as a transformative initiative poised to redefine the state's engagement with its citizens and businesses. By focusing on a unified digital frontend, the solution addresses the long-standing challenges of fragmented application processes, opaque permit discovery, and opaque status tracking. The introduction of a secure "digital wallet" within this frontend further elevates the user experience by providing a centralized, secure, and readily accessible repository for all application history, issued permits, and payment records, empowering users with unprecedented control and convenience.

The strategic use of MuleSoft's API-led connectivity ensures that this modern frontend can seamlessly interface with the existing infrastructure of state agencies, preserving valuable legacy investments while enabling interoperability and efficient data exchange. This approach mitigates the risk and cost associated with a complete system overhaul, offering a pragmatic and scalable path to digital modernization. The robust reporting and analytics capabilities embedded within Salesforce provide invaluable operational insights, enabling agencies to optimize resource allocation, identify process bottlenecks, and inform strategic decision-making.

In conclusion, the proposed Salesforce PSS Licensing, Permitting & Inspection solution, integrated with MuleSoft and featuring a comprehensive digital wallet, represents a strategic investment for West Virginia. It delivers immediate improvements in user experience and operational efficiency while building a scalable, adaptable, and modern digital foundation for the future of state service delivery. This initiative aligns perfectly with the State's vision of providing efficient, transparent, and citizen-focused digital services across all departments, ultimately fostering a more business-friendly and accessible environment for all West Virginians.

2. Team CoreSphere Experience

CoreSphere has over 15 years of Salesforce implementation experience in the Public Sector delivering solutions that enable state residents to receive services based on need.

CoreSphere was founded in 2003 and has been delivering CRM related solutions on the Salesforce platform since 2010. We are an innovative and fast-growing company helping public and private sector customers transform highly performing cloud-enabled enterprises. Utilizing an agile approach, we deliver modular, mission critical solutions that transform the enterprise through digital modernization.

Focusing on the public sector, we have a presence in over 20 public sector agencies and are leading as Prime on 95% of our projects. Our solutions span today's leading commercial applications and development tools. Our mission is to help our clients transform their future through innovation. Among our partners in the industry, we have a stellar reputation as a reliable, capable firm that is easy to do business with. We were recognized by the CRN Tech Elite 250, a definitive list of solution providers with deep technical expertise and premier certifications; and we were also recognized by Forrester as a "Go To" Federal systems integrator. We have a unified and diverse working environment and were selected by The Washington Post as one of the **Top Workplaces from 2021-2025**.

Logos of some of our relevant State and Local municipality customers (**State of Maryland, Commonwealth of Pennsylvania, State of Texas, District of Columbia, State of North Dakota, State of Washington, State of Montana, and Commonwealth of Massachusetts**) are shown below. These customers represent partnerships that CoreSphere has participated in within the last 5 years and encompassing multiple applications. These customers all involve the deployment of mission critical applications with high visibility and were completed either on schedule or ahead of schedule and budget.

Exhibit 3. Representative CoreSphere State and Local Customers

Team CoreSphere has direct experience related to delivering services to West Virginia. Three examples of our projects are listed below.

Ministry of Labor, Immigration, Training and Skills Development (MLITSD) - Digital Licensing Application and Processing System

In response to amendments to the Employment Standards Act, the Ontario Ministry of Labor, Immigration, Training, and Skills Development (MLITSD) faced the challenge of implementing a licensing system for Temporary Help Agencies (THAs) and recruiters. This new requirement necessitated a comprehensive online solution to manage the entire licensing process—from application to approval. To address this complexity, we developed a digital licensing platform that would transform outdated manual processes into an efficient, user-friendly service channel. Leveraging our expertise on Salesforce Public Sector Solutions (PSS), we delivered a tailored SaaS solution through a multi-phase project.

The system featured an intuitive self-service portal for THAs and recruiters, a robust case management system for MLITSD staff, and secure digital collaboration channels. By focusing on user-centered design, the platform not only met regulatory requirements but also enhanced the overall user experience. This implementation has revolutionized MLITSD's operations, significantly reducing processing times and improving transparency for applicants while ensuring compliance with the new legislation. As MLITSD continues to refine this innovative system t is well-positioned to adapt to the evolving landscape of temporary employment regulation. This successful project serves as a model for other government agencies looking to modernize their licensing processes and enhance service delivery to constituents, ultimately leading to better outcomes for both the ministry and the agencies it regulates.

Key achievements

- **Automation:** Automated the entire licensing process, significantly reducing application processing time and boosting operational efficiency.
- **Transparency and Compliance:** Provided a publicly accessible list of licensed entities, enhancing transparency and promoting compliance.
- **Salesforce PSS Implementation:** CSA utilized Salesforce Public Sector Solutions, including Licensing and Permitting Modules, Service Cloud, and Experience Cloud, to streamline the entire licensing process.
- **Data Management and Security:** Integrated secure payment systems and robust record management capabilities, ensuring data security and ease of access.
- **End-to-End Licensing Workflow:** The solution supported the full lifecycle of the licensing process, from application submission to final issuance, including fee payment, electronic agreement signing, and publication of license holders.
- **Enhanced Functionalities:** The system featured a public directory of licensed entities, secure online payment acceptance, case management, appeals tracking, role-based access, workflow management, document management, and activity tracking.

Ministry of Environment, Conservation and Parks (MECP) Endangered Species Act Portal

Enforcement of ESA is one of the key responsibilities of MECP – this act protects over 200 endangered species. The ESA provides authorizations (Information Gathering Form (IGF) and permits) and conditional exemptions, allowing certain activities to proceed if they follow certain protective

requirements. However, these forms and permits have been paper-based and complex, which is not user-friendly and results in higher application processing times. We implemented a user-friendly web portal and a complex, multi-level branched IGF form on the Salesforce platform. It helped create an intuitive and efficient user interface to enhance the overall user experience and allowed for a comprehensive collection of project-specific data.

Phase 2 of the project demanded AODA (Accessibility for Ontarians with Disabilities Act) and ODS (Ontario Design System) compliant user portal and the creation of a Permit Application Form (PAF) that is intended to assist both proponents and consultants. We are creating a sophisticated PAF using Salesforce Omniscript, tailored to comply with the AODA and ODS standards and French translations. The implementation will lead to a solid foundation, enhancing the efficiency, transparency, and sustainability of MECP's operations – with a strong digital platform for permit application and a streamlined project auditing process.

Key Achievements:

- **Salesforce PSS Implementation:** CSA utilized Salesforce Public Sector Foundations powered by OmniStudio to manage the IGF applications submitted by the proponents. The portal was designed in adherence to Ontario Design Standards, ensuring a user-friendly and accessible interface.
- **End-to-End Digital Transformation:** The solution encompassed a highly complex IGF form built using OmniScript, incorporating robust user management features, validation mechanisms, and error handling to ensure data integrity and adherence to the Accessibility for Ontarians with Disabilities Act (AODA) compliance.
- **Secure Access and Data Protection:** Configured Single Sign-On (SSO) with Azure AD for internal employees and SSO with Public Secure powered by Okta for external users. Salesforce Shield was implemented to encrypt data both at rest and in transit, ensuring high standards of security and privacy.
- **Complex Form Management:** Designed a multi-level branched IGF form using OmniStudio, enabling comprehensive data collection and efficient navigation for both Proponents and Consultants.
- **Streamlined Project Auditing:** Enhanced transparency and reduced administrative burdens by digitizing project auditing and providing clear guidance to Proponents.

State of New Hampshire, Office of Professional Licensing and Certification (OPLC)

CoreSphere has been engaged by the State of New Hampshire's Office of Professional Licensing and Certification (OPLC) to modernize and streamline the licensing lifecycle for over 200 license types across 60+ professions. This initiative impacts approximately 200,000 constituents statewide, simplifying how individuals and organizations apply for, renew, and manage professional licenses.

Objectives

- Replace legacy processes with a modern, user-friendly digital platform.
- Provide self-service capabilities for applicants, licensees, and staff.
- Improve efficiency, transparency, and compliance for licensing operations.
- Enable faster processing times and reduce manual administrative overhead.

Technology Solution

The solution leverages **Salesforce Public Sector Solutions (Public Service Cloud)** combined with **OmniStudio** to deliver a modern, scalable, and secure licensing system. Key features include:

- **Digital License Applications & Renewals** – Intuitive forms, guided workflows, and dynamic rules for different license types.
- **Constituent Portal** – A unified online portal enabling applicants to manage licenses, submit documents, and track status in real time.
- **Case Management** – Automated case routing and approvals for staff efficiency.
- **OmniStudio Flexibility** – Configurable workflows that adapt to evolving licensing policies and requirements.
- **Analytics & Reporting** – Dashboards to track licensing trends, processing times, and compliance metrics.

Expected Outcomes

- A modernized, constituent-friendly licensing platform that reduces processing times and improves user satisfaction.
- Enhanced transparency and accountability in licensing operations.
- Streamlined staff workflows, allowing employees to focus on higher-value activities.
- A scalable solution that can expand with future state needs.

3. Meeting SOW Requirements

3.1 Approach & Methodology to Goals and Objectives – 25 points

3.1.1 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.

Our proposed solution, built on Salesforce Public Sector Solutions (PSS) with the Licensing, Permitting & Inspections (LPI) module and Experience Cloud, delivers a unified One-Stop-Shop Permitting Portal designed to provide both public users and internal agency staff with intuitive, data-rich, and role-specific dashboard experience. Leveraging Salesforce's highly configurable UX framework, the dashboard will centralize all permitting activities applications, renewals, payments, inspections, compliance, and communication into a single, modern, responsive interface accessible across devices. Public users will experience a clean, simplified, self-service portal to apply for permits, upload documentation, track status, and manage renewals, while agencies receive a powerful internal console that surfaces workload metrics, pending reviews, inspection assignments, alerts, and cross-department insights. The methodology relies on user-centered design, iterative prototyping, and configuration-first development to ensure accessibility, ease of use, and alignment with the diverse workflows across more than 20 State agencies participating in the permitting transformation. By combining Experience Cloud for public-facing dashboards and Salesforce's App Builder, Dynamic Lightning Pages, and CRM Analytics for internal dashboards, we ensure a seamless, scalable, and personalized experience grounded in performance and compliance needs.

Below given are the key components of our dashboard development methodology, each explained in detail.

- **Human-Centered UX Research and Persona-Based Design**
  We begin by conducting structured workshops with agency staff, field inspectors, administrators, and public stakeholders to understand needs and usage patterns. Personas such as homeowner applicants, contractors, reviewers, and supervisors are mapped to required dashboard experiences. This informs the visual hierarchy ensuring dashboards show relevant information first, reducing clutter and cognitive load. Accessibility standards (WCAG 2.1) are embedded from the start, so dashboards meet color contrast, keyboard navigation, and screen-reader requirements.

- **Experience Cloud Public Dashboard Design & Configuration**
  The public dashboard will provide a simple, clean interface showing permit status, required actions, payment due indicators, and document upload prompts. Using Experience Cloud's customizable templates and LWC-based components, we tailor the interface for easy navigation and mobile responsiveness. Applicants can view timelines, track review steps, receive alerts, and initiate renewals directly from the dashboard. Self-service features like knowledge articles, FAQs, chatbot, and guided application prompts reduce agency workload and improve citizen satisfaction.

- **Internal Agency Dashboard Using App Builder & Dynamic Lightning Pages**
  Internal dashboards consolidate tasks, assignments, pending reviews, escalations, and inspection schedules in a single pane. Supervisors receive workload distribution charts, SLA compliance indicators, and permit backlog analytics. Using conditional visibility and role-based rendering, each user sees only the components relevant to their responsibilities. Dashboards will also integrate with OnBase, GIS, and OASIS data via API to surface documents and geospatial insights in context.

- **Workflow-Driven Data Visualization Using LPI & CRM Analytics**
  Permit lifecycle stages like submission, review, inspection, correction, approval, are visualized through real-time pipeline components. CRM Analytics dashboards display trends across agencies, permit types, locations, and processing times. Widgets highlight bottlenecks, expired permits, pending payments, and inspection load balancing. Supervisors can drill into data to identify operational inefficiencies and resource allocation needs. This ensures dashboards serve not only as interfaces but as operational intelligence tools.

- **Iterative Prototyping, User Testing & Refinement**
  Clickable prototypes are developed early using Salesforce Experience Builder and Lightning App Builder. User groups from agencies and the public review layouts, navigation patterns, and usability flows before development is finalized. Feedback cycles are conducted weekly, incorporating adjustments to ensure dashboards meet real-world expectations. This eliminates rework and results in a polished, user-approved interface by the time of deployment. Iterative testing ensures high adoption rates and intuitive user experiences across all demographics.

- **Security, Role-Based Access, and Data Segmentation**
  Salesforce's native security model ensures data is only visible to authorized users. Public users see only their own applications; internal staff see data scoped by agency and role. Dashboards hide or show components dynamically based on permissions and state policies. All access is logged, monitored, and auditable to meet compliance requirements. This ensures the dashboard remains secure across a multi-agency ecosystem.

- **Performance Optimization & Monitoring**
  Dashboards are optimized to load quickly even with high user concurrency across hundreds of permit types. We configure caching, limit heavy queries, and optimize data flows to keep dashboard rendering fast. Monitoring tools track usage, errors, and load times to ensure ongoing performance. Improvements are applied iteratively based on analytics insights. A high-performance dashboard experience is crucial for adoption and trust.

Grounded in our understanding of the functional requirements, this solution directly supports the modernization of your operations with a focus on service delivery, transparency and automation. We understand that you are looking to streamline how permits, licenses, inspections, and

enforcement are handled while making these services more accessible to citizens and partners. Our approach is using Salesforce as the foundation and extending it with native Salesforce tools, integration with external systems, and using our proprietary accelerators allows you to benefit from a solution that is both tailored to its needs and maintainable without extensive custom development. It provides flexibility to evolve as requirements grow, while maintaining the stability, security and supportability of a leading enterprise platform.

Public Sector Solutions (PSS) License, Permit and Inspection (LPI) Module

PSS serves as the foundation of our solution, offering a robust and scalable environment that will underpins all your core functionalities. It is a centralized platform for managing service requests, case handling, workflow automation, email communication and service level agreements (SLAs) across your departments. Through a unified console, staff can efficiently track, assign and resolve case requests with full visibility into their status, history and related interactions. Workflow automations streamline key processes such as case routing, approvals, and escalations, enabling timely and consistent handling of inquiries. SLA tracking is built into the system, enabling you to define response and resolution timeframes, monitor performance in real time and prioritize cases based on urgency and impact. Integrated email functionality allows for direct communication with residents and stakeholders from within each case, using templated responses and maintaining a full communication history. Together, these capabilities support improved accountability, faster resolution times and a consistent, high-quality service experience for you.

The LPI module is a purpose-built component tailored to meet the complex regulatory and operational needs of government entities. Designed specifically for municipalities and public sector agencies, the LPI module enables streamlined management of licenses, permits, inspections and code enforcement. It provides a flexible data model that supports a wide range of permit types and workflows, along with integrated service resource management, fee management and mobile inspection capabilities.

For the solution, the following are PSS's capabilities to achieve a highly scalable and configurable framework that accelerates deployment, reduces administrative effort and enhances the overall efficiency and transparency of regulatory services:

- **OmniStudio**
  Enables guided digital intake and citizen workflows using drag-and-drop configuration for smooth form experiences.
  This reduces complexity in building licensing and permitting forms, enabling accessibility and consistency across digital services.
- **Prebuilt LPI Flows**
  Streamlines application routing, reviews, approvals and renewals with preconfigured process flows tailored for licensing.
  These flows accelerate processing, eliminate unnecessary manual intervention, and help maintain service consistency across departments.
- **Dynamic Assessments**
  Automatically adjusts questions and logic based on licence type or applicant inputs, for relevant data capture during inspections. This supports inspectors by providing adaptive, scenario-specific forms that reduce errors and speed up on-site workflows.

- **Action Plans**
  Automates multi-step tasks and assignments, such as scheduling inspections or sending follow-up notifications. With structured execution, the staff can efficiently manage complex tasks while staying on top of SLAs and compliance workflows.
- **Business Rules Engine**
  Provides real-time validation, eligibility logic, and fee calculation based on configurable criteria. This enables the you to apply by-laws consistently and accurately, without reliance on manual review or overrides.
- **Intelligent Document Automation**
  Extracts and auto-fills document fields using AI, reducing clerical errors and improving processing speeds. This means faster reviews and reduced administrative overhead especially during peak licensing cycles.
- **OmniStudio Document Generation**
  Generates professional, print-ready documents like licences, renewal letters or compliance notices. This improves transparency and service turnaround by enabling automated, standardized communication with applicants.
- **Life Events**
  Triggers relevant licensing workflows based on events such as new business registration or address changes. This allows you to proactively engage with businesses and residents by offering the right services at the right time.
- **Document Checklist Items**
  Tracks and assesses required documents based on license or permit type using configurable templates. This enables applicants to submit complete, compliant applications upfront reducing follow-ups and processing delays.

In summary, PSS LPI module will meet the following requirements

- Case management
- Workflow management
- Business rule management
- Contact profile management
- Report generation and distribution
- Information discovery and access
- E-mail channel
- Identity and access management
- Forms management
- Inspection/enforcement management
- Mobile application
- License and permit renewal
- Permit and license application intake
- Permit and license issuance/renewals
- Accounting transaction management
- Identity and access management
- Authentication
- Authorization

- Data management
- Customization and custom development

Experience Cloud
Experience Cloud enables the development of secure, scalable digital sites tailored for public engagement and partner collaboration. For the solution, we will leverage Experience Cloud to build an unauthenticated citizen and partner sites that allows the intake of permit or license applications, renewals, status-checker, as well as provide map-based views to information related investigations. To further support residents and stakeholders, the site will utilize Salesforce Knowledge to deliver searchable, structured articles, so that users can easily find accurate information about permit types, application processes, and regulatory requirements. This self-service capability enhances transparency, empowers residents with real-time information and reduces the burden on staff by deflecting routine inquiries. The sites will be fully responsive, enabling accessible use across devices, and will be designed with a strong focus on user experience, privacy, and accessibility compliance.

In summary, Experience Cloud will meet the following requirements

- Citizen web channel
- Service knowledge management

Salesforce Shield
Salesforce Shield offers a robust suite of security and compliance tools critical for protecting sensitive data within the solution. It provides enhanced data encryption, thorough audit trails and real-time event monitoring, so that all user interactions and data changes are tracked and secure. Internal staff can leverage these features to maintain regulatory compliance and safeguard resident and business information. With Shield's capabilities, the system supports transparency and accountability, enabling proactive risk management and reinforcing trust in your digital services.

Our capabilities and prebuilt accelerators for Salesforce-based LPI solutions: Our prebuilt LPI accelerators include ready-made templates, workflows, and configuration assets that significantly reduce implementation time and complexity for the City of Toronto. By leveraging these accelerators, the City can avoid unnecessary customization and achieve faster deployment of licensing, permitting, and inspection processes. These assets are designed around real-world public sector use cases and aligned with regulatory requirements, enabling compliance and operational consistency from day one. This approach not only accelerates time-to-value but also reduces delivery risk, enabling City teams to focus on service excellence rather than system buildouts.

- We invest heavily in building solution components that we know are frequently needed by public sector clients implementing LPI programs. Drawing from leading practices and real-world experience, our subject matter specialists have developed a suite of prebuilt assets

and accelerators that reduce development time, reduce customization and deliver cost efficiencies throughout the implementation lifecycle

- Our accelerators cover the full spectrum of LPI processes—from intake and application to inspections, renewals and final issuance—using automation and intelligent workflows to streamline operations. Built on the Salesforce platform, these assets improve transparency, enable data integrity and support compliance tracking with minimal manual intervention

Our prebuilt accelerators enhance Salesforce's standard LPI functionality with ready-made templates, inspection scheduling tools, configurable business rules, and automated communications. Designed through years of field experience, they allow public sector organizations to rapidly deploy user-friendly, regulation-compliant licensing and permitting solutions that drive measurable impact from day one.

Below are screenshots of our Salesforce-based LPI Solution, showcasing the user interface and experience for both citizens and staff members. These features are made possible through the integration of our pre-built accelerators and solutions onto a single, unified platform.

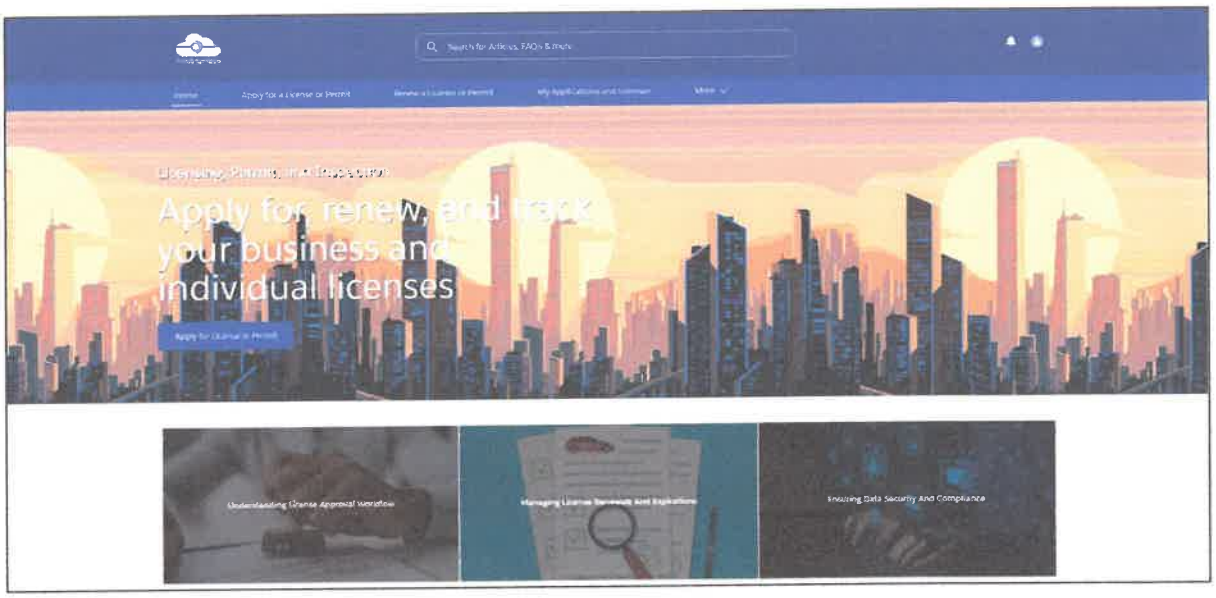


Exhibit 4:External users (applicant interface)

Start application via self-service portal

The diagram above illustrates the applicant user interface, where individuals begin their licensing or permitting journey through a branded, intuitive self-service portal. By clicking "Apply for License or Permit", users are guided through a smart, low-code configurable application form. Conditional logic and integrations enable a tailored experience per license type. This reduces confusion and increases submission accuracy.

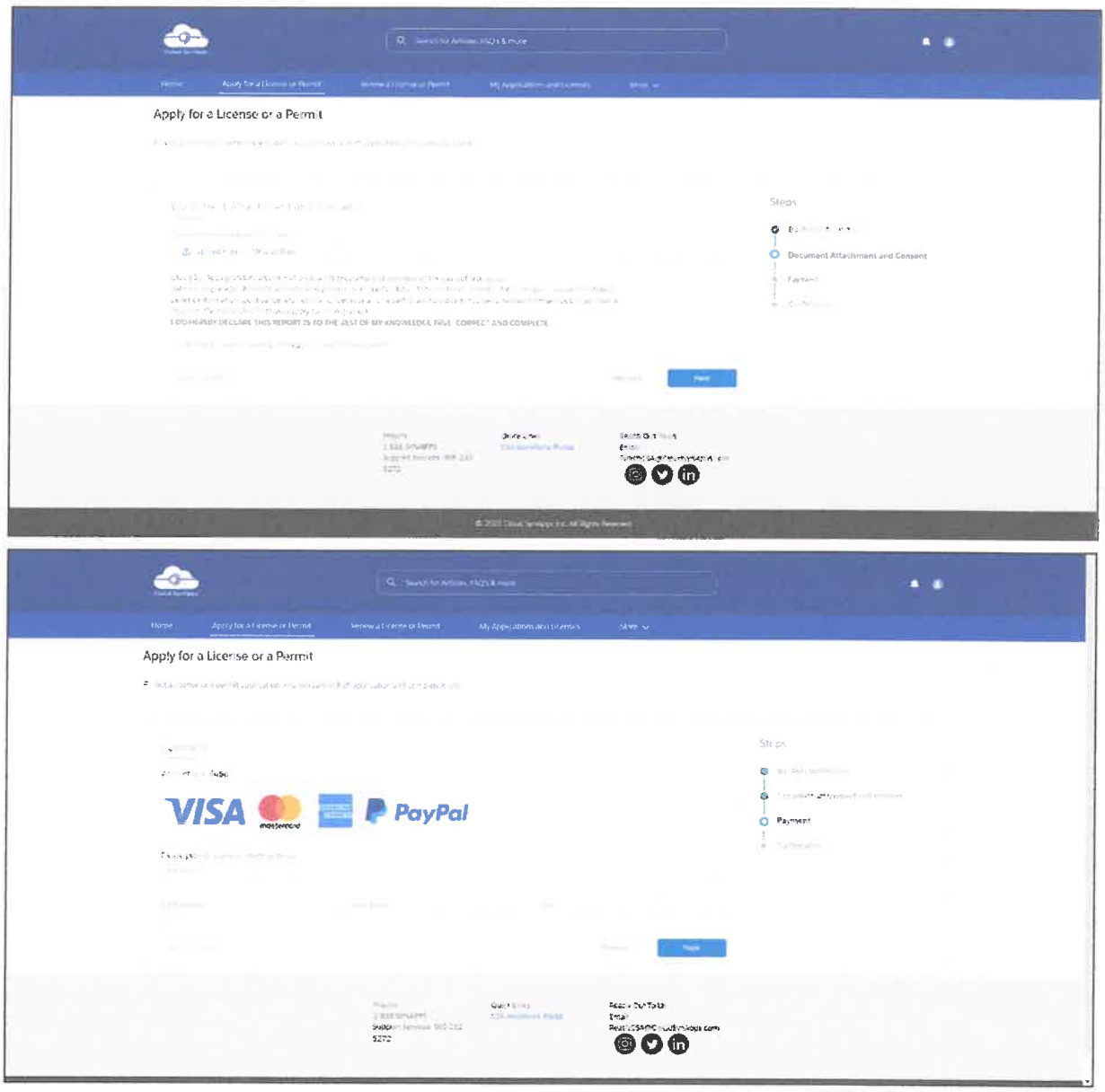


Exhibit 5: Document upload and payment interface

Upload documents and make payment

Once the form is completed, applicants upload supporting documents like insurance, certifications or site plans. Out-of-the-box upload functionality enables ease of use and compliance. Integrated payment options allow secure fee collection in one smooth flow. A confirmation is then displayed upon successful submission.

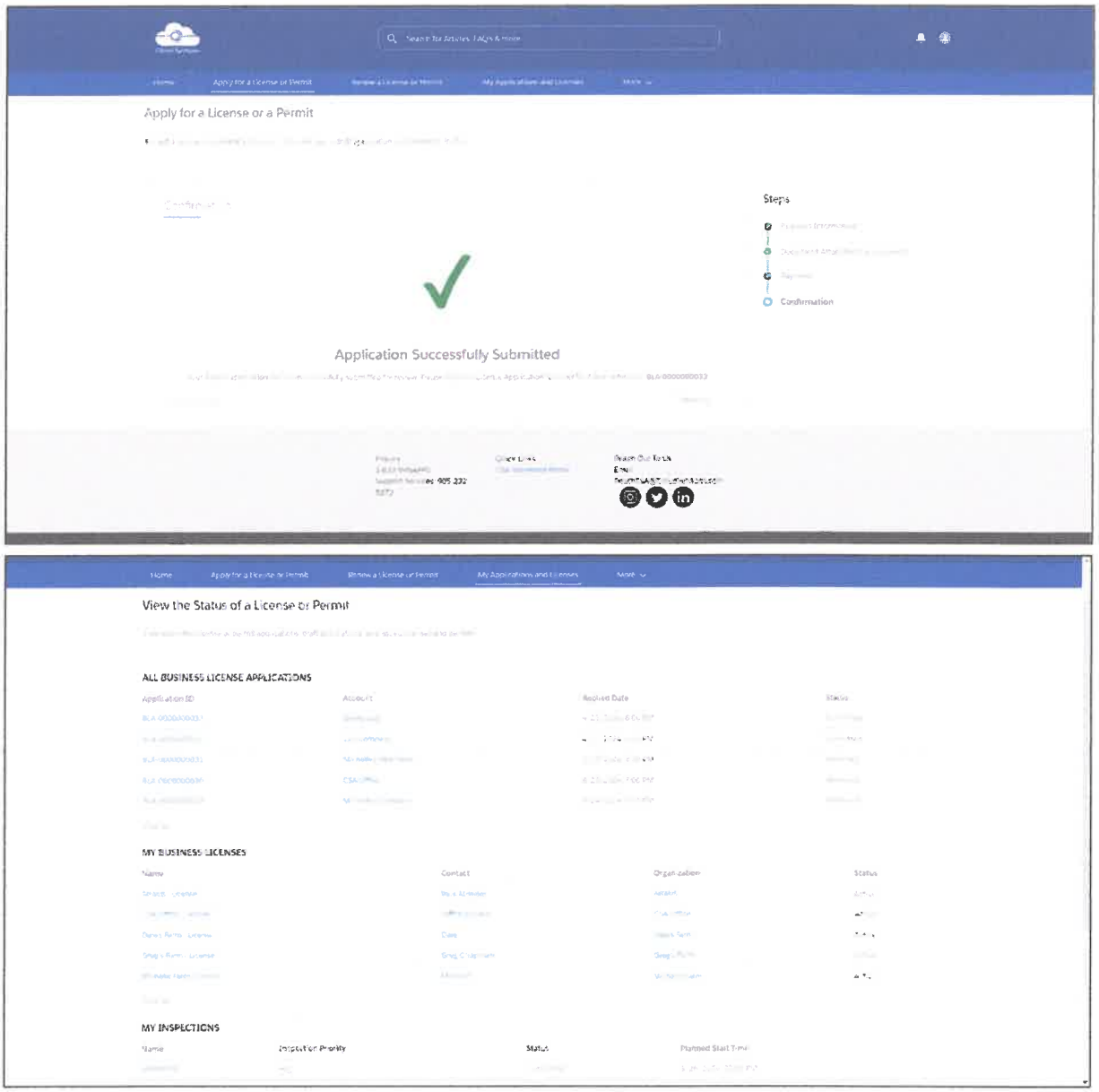


Exhibit 6: Email confirmation and application status view

Track application & receive confirmation

After submission, applicants can monitor the real-time status of their applications, licenses and inspections directly on the portal. Automatic email notifications include license IDs, application numbers and next steps. This transparency reduces support inquiries and builds citizen trust through proactive communication.

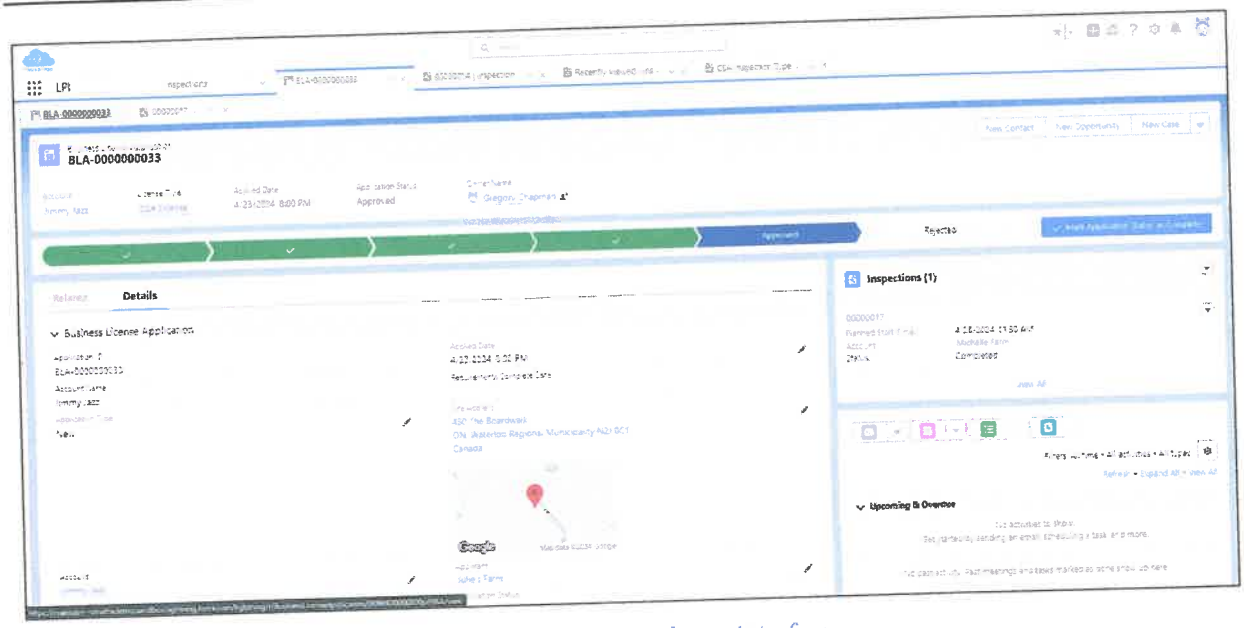


Exhibit 7: Internal user interface

Internal staff interface:

This screen showcases the internal Salesforce view of a submitted license application. Staff can view critical details such as license type, applicant information, status, applied date and location with ESRI integration. The record also shows the linked inspection with real-time status, allowing full traceability between applications and compliance steps. This unified interface supports faster approvals, informed decision-making and smooth coordination between licensing and inspection teams.

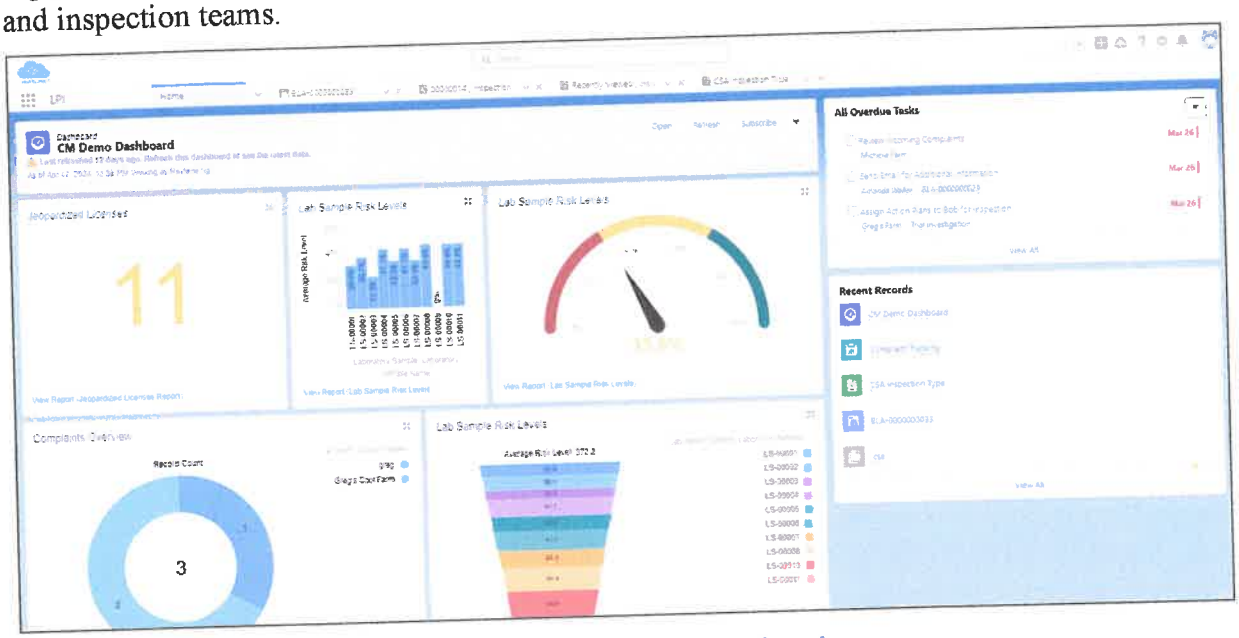


Exhibit 8:Reports and dashboards

Reports and dashboards:

This centralized dashboard provides internal staff with a real-time view of key operational metrics across licensing and compliance workflows. From tracking jeopardized licenses and sample risk levels to managing overdue tasks and complaints, the interface consolidates all essential data into one actionable workspace. Staff can prioritize efforts, assign tasks and monitor performance trends using intuitive visual components. This supports data-driven decision-making, proactive compliance enforcement and efficient task execution across departments.

3.1.2 4.2.1.2 Vendors should describe how they would implement a flexible and secure Role-Based Access Control system.

Built upon the Salesforce platform, our proposed solution aims to provide secure, granular, and adaptable access to digital government services for both citizens and internal agency personnel. The Role Based Access Control (RBAC) strategy is foundational to the portal's security posture, encompassing external-facing citizen portals, digital wallet experience, internal back-office operations via Salesforce Public Sector Solutions (PSS) Licensing, Permitting & Inspection (LPI), and the integration layer connecting to existing state systems. By eschewing hard-coded access rules in favor of Salesforce's declarative configuration tools, the State can maintain agility and evolve its security framework without extensive custom development. The model is underpinned by core security principles of least privilege, separation of duties, defense in depth, and auditability, ensuring a secure and efficient digital government ecosystem.

Our approach delivers a configurable, secure, and future-ready Role-Based Access Control (RBAC) model that covers:

- External users (citizens, businesses, and their delegates) accessing the One-Stop Portal and digital wallet, and
- Internal users (agency and central staff) working in Salesforce PSS Licensing, Permitting & Inspection (LPI) and related back-office support.

3.1.2.1 Foundational Security Principles

The entire RBAC architecture is anchored in four fundamental security principles, which guide all design and implementation decisions:

- Least Privilege: Users and systems are granted only the minimum level of access and permissions necessary to perform their assigned tasks. This minimizes the potential damage from compromised accounts or unintentional errors.
- Separation of Duties: Critical or sensitive functions are divided among different roles or individuals, ensuring that no single entity has complete control over a process. This acts as a safeguard against fraud and unauthorized actions.
- Defense in Depth: Security is implemented in multiple layers. If one security control fails, others are in place to prevent unauthorized access or data breaches. This applies to identity management, access controls, data encryption, and system monitoring.
- Auditability: All access events, data modifications, and critical transactions are logged and retained. This provides a clear trail for security monitoring, incident investigation, and compliance reporting.

These principles are consistently applied across all components of the One-Stop Licensing ecosystem, including the external portal, the digital wallet, the internal Salesforce PSS LPI application, and the MuleSoft integration layer.

3.1.2.2 Identity Management and Authentication

Secure access begins with robust identity management. The One-Stop Portal integrates with the State's established Identity Provider (IdP) Quest utilizing industry-standard protocols such as SAML 2.0 or OpenID Connect. This enables:

- Single Sign-On (SSO): Users authenticate once to access the portal and potentially other state digital services, providing a seamless user experience.
- Consistent Identity Assurance: The IdP ensures a verifiable and consistent identity for all users, regardless of the specific service they are accessing.

External User Provisioning: Citizens, sole proprietors, and authorized representatives of businesses authenticate via the State IdP. Upon successful authentication, they are provisioned as *Contacts* within Salesforce and as *Experience Cloud users*. Crucially, relationships are established to accurately represent their affiliation with businesses they represent.

Internal User Provisioning: State agency employees and contractors authenticate through the State's enterprise identity service. This process provisions them as internal Salesforce users, assigned to specific *Roles* that align with their organizational structure and responsibilities.

Multi-Factor Authentication (MFA): To enhance security for high-sensitivity operations, MFA can be enforced. This includes actions such as submitting formal applications, approving licenses, or modifying system configuration settings. MFA provides an additional layer of identity verification, significantly reducing the risk of unauthorized access even if credentials are compromised.

3.1.2.3 Role-Based Access Control for External Users (Experience Cloud Portal and Digital Wallet)

The RBAC model for the external portal is designed to differentiate between individual citizens, business entities, and the various persons acting on behalf of these entities. Each registered user is assigned a clearly defined role within the system.

Individual Citizens: An individual applicant acting in their own name is granted access solely to their personal digital wallet. This wallet contains their personal applications, issued permits, relevant supporting documents, and payment records. Access is strictly limited to their own data.

Business Representatives: The model accounts for the complexities of business operations:

- **Business Primary Administrator:** This role is intrinsically linked to a specific legal entity (e.g., corporation, LLC). The primary administrator possesses extensive control over the organization's profile, business locations, and licensing relationships. They are empowered to manage and delegate access for other users within the business.

- **Authorized Representatives/Delegates:** The primary administrator can designate additional users as authorized representatives of the business. The level of access granted to these delegates is configurable, allowing them to:
    - Prepare and submit applications.
    - View issued permits.
    - Initiate renewals.
    - Access payment history only.

All these relationships and delegations are managed declaratively within Salesforce Experience Cloud. The underlying security model ensures that users cannot access or modify the data of any individual or business to which they are not explicitly linked.

The Digital Wallet as a Central RBAC Construct: The concept of the digital wallet serves as the primary interface and repository for all licensing-related information, and its access is intrinsically tied to RBAC:

- **Ownership and Relationship:** Every application, permit, license, and payment is a record owned by an individual or business. The sharing model ensures that only users with a legitimate, defined relationship to the owner can access these records.
- **Contextual Access:** When a business initiates a new application, the resulting record is automatically associated with that business and becomes part of its digital wallet. Access to this record is restricted to the primary administrator and explicitly authorized delegates; other users have no visibility.
- **Granular Permissions within the Wallet:** Issued permits and licenses are also attached to the digital wallet. Access can be further refined:
    - A business accountant might have read-only access to payment and invoice history but no permission to modify applications or submit renewals.
    - A regional operations manager might be granted access to manage permits only for specific locations. Salesforce sharing rules can enforce location-based restrictions, limiting visibility and actionability to relevant data.

The digital wallet thus acts as a secure, role-aware hub where access to sensitive information is strictly controlled by user roles and defined relationships.

Functional Access Control: Beyond data visibility, RBAC is enforced over user actions:

- **Action Permissions:** Through *Permission Sets* and user interface visibility rules, the portal controls which user categories can:
    - Initiate new applications.
    - Submit applications on behalf of a business.
    - Download official digital permits.
    - Initiate or cancel renewal transactions.
- **Privileged Roles:** The Business Primary Administrator role is intentionally privileged within a defined scope. They are the sole users permitted to manage delegations for their business, which is a critical security control that prevents the State from needing to mediate internal business relationships while maintaining strong external security boundaries.

This combination of record-level sharing and function-level permissions creates a granular and adaptable access model, capable of accommodating evolving requirements.

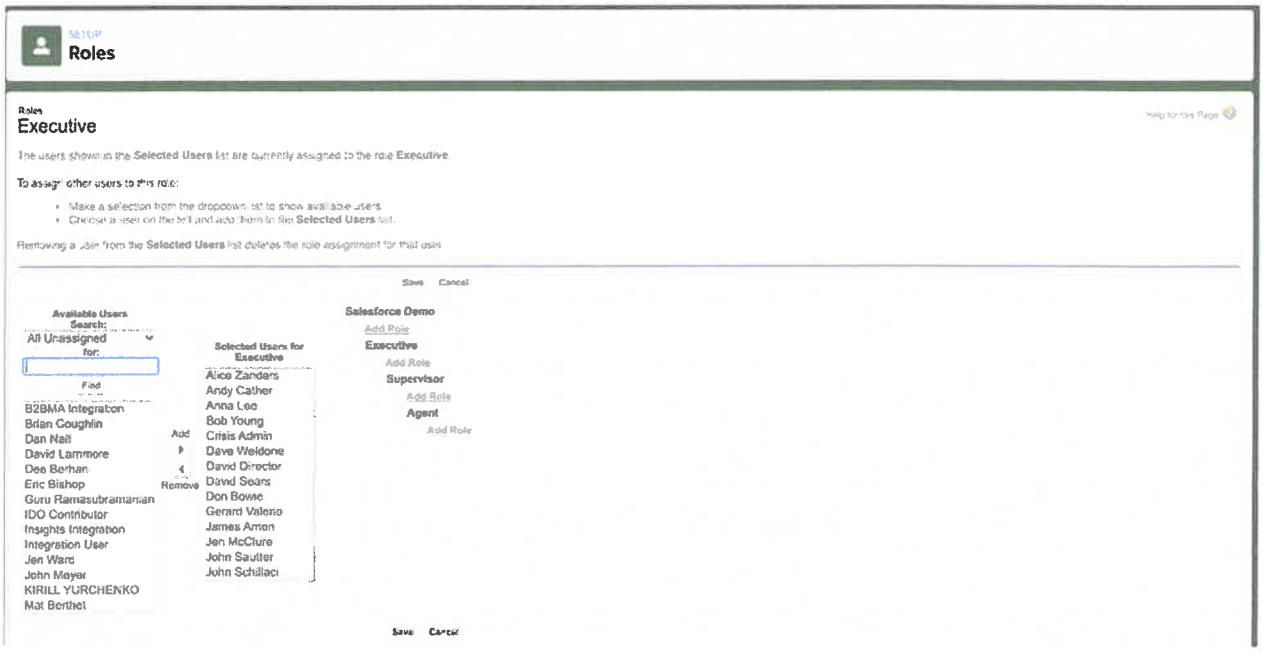


Exhibit 9. Set Up Roles View

3.1.2.4 Role-Based Access Control for Internal Users (Salesforce PSS LPI)

RBAC for the back-office Salesforce PSS LPI application focuses on segmenting access by agency, division, and role, ensuring that sensitive operations are restricted to authorized personnel.

Role Definition and Responsibility Alignment: Internal roles are defined based on specific job responsibilities:

- Intake and Customer Service Agents: Review incoming applications and communicate with applicants. They do not have authority to approve or deny licenses.
- Inspection Coordinators/Inspectors: View relevant application data for their assignments and update inspection status within Salesforce if surfaced.
- Supervisors/Managers: Possess broader visibility across their unit, can reassign work, and view performance dashboards.
- System Administrators: A limited group with the authority to manage configuration and security settings, operating under strict change-management protocols.

Technical Implementation of Internal Roles: Each internal role is implemented using Salesforce *Profiles* and *Permission Set Groups*. These dictate:

- Object Permissions: Which data objects (e.g., Applications, Permits, Accounts, Contacts) a user can access.
- Field-Level Security (FLS): Which specific fields on an object a user can view or edit.

- User Interface: The user's interface is dynamically configured to display only the information and actions relevant to their role.

Record-Level Access for Back-Office Users: Record-level access is governed by a combination of the Salesforce *Role Hierarchy* and *Sharing Rules*, aligned with the State's organizational structure.

- Organization-Wide Defaults (OWD): For sensitive records (applications, permits, digital documents), OWDs are set to 'Private'. This ensures that no internal user can access a record by default unless it is explicitly shared with them or owned by their team.
- Sharing Rules: These rules dynamically grant access based on defined criteria, such as:
    - All users within a specific agency.
    - A designated cross-agency program team. This design prevents staff in one agency from viewing confidential information belonging to another agency's licensing processes, unless deliberately configured for collaboration.

Field-Level Security (FLS) for Sensitive Data: FLS complements record-level sharing by restricting access to particularly sensitive data attributes (e.g., personal identifiers, financial details, internal risk ratings) to the smallest necessary set of roles. For instance, a licensing officer may see an entire application, while an inspector is restricted to viewing only fields pertinent to their site visit.

3.1.2.5 RBAC for the Integration Layer (MuleSoft)

Role-based access control extends to the integration layer, ensuring secure interactions between Salesforce and agency legacy systems via MuleSoft.

- Service Accounts and OAuth: MuleSoft utilizes dedicated technical identities, such as service accounts or OAuth client credentials, to interact with Salesforce and agency systems. These identities are provided with minimal permissions necessary for their specific tasks (e.g., submitting an application record, retrieving status updates, fetching a permit for the digital wallet).
- System API Access Policies: Each MuleSoft System API enforces its own access policies. A connector designed for, say, the Department of Environmental Protection cannot inadvertently execute operations within a Department of Revenue system.
- User Context Propagation: Where applicable, MuleSoft can securely propagate user context (e.g., the ID of the applicant or the internal user initiating an action) in secure headers or claims. This enables downstream systems to audit which human user triggered a transaction, preserving traceability without exposing back-office systems directly to external user accounts.

3.1.2.6 Security and Auditability

Reinforcing the RBAC model across all layers are comprehensive security hardening measures:

- Access Controls: The portal and back-office interfaces enforce modern password policies, granular session timeouts, and device/session controls.

- Data Encryption: All communication between the portal, Salesforce, MuleSoft, and agency systems are encrypted in transit using strong TLS protocols. Data at rest, including documents stored within the digital wallet, is encrypted according to State standards.
- MFA Enforcement: MFA can be mandated for privileged internal users (e.g., agency approvers, system administrators) and offered or required for external users engaging in high-risk activities, such as completing payments.

3.1.3 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.*

Our proposed One-Stop Licensing Portal, developed on Salesforce Experience Cloud and powered by Public Sector Solutions (PSS) Licensing, Permitting & Inspection (LPI), is designed to provide a modern, intuitive, and fully responsive user interface that enables citizens and businesses to seamlessly manage licensing interactions across multiple agencies. The portal utilizes a mobile-first, WCAG-compliant design approach, ensuring that users can easily access services from any device—including desktop browsers, tablets, or smartphones—while maintaining consistent functionality, usability, and performance. The interface is structured around clear navigation paths, guided workflows, intelligent wizards, contextual help, and dynamic forms that adapt to user input to simplify complex licensing processes and reduce user confusion or submission errors.

A central element of the interface is Digital Wallet, which acts as the personalized command center for each user. Through this dashboard-style experience, users can monitor all submitted applications, track real-time status updates, respond to agency requests, submit required documents, manage payments and refunds, and download issued permits or licenses. The dashboard provides visual milestone tracking, progress indicators, and timeline views that clearly communicate where each application stands within the approval process—for example: Application Submitted → Under Initial Review → Inspection Scheduled → Pending Documentation → Approved / Denied / Issued. These status updates are generated through real-time and near-real-time integration with agency licensing systems using MuleSoft Experience and Process APIs, ensuring transparency without requiring users or agency staff to manually request

updates.

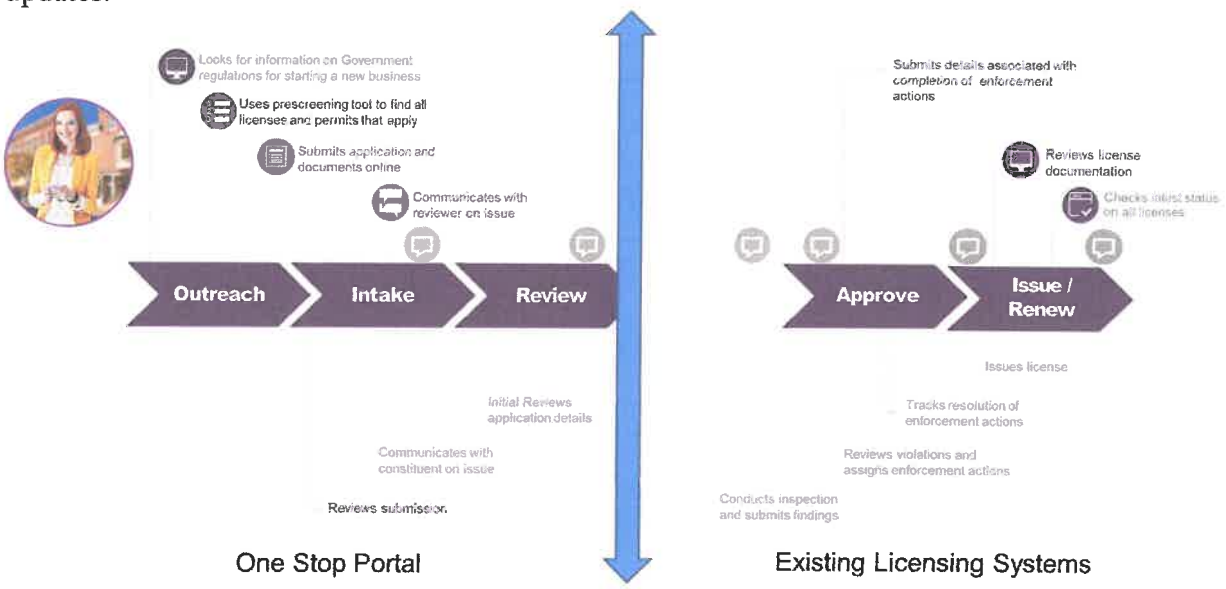


Exhibit 10. Application Process and UI Elements

The interface also supports the ability to apply for additional permits or licenses directly through the Digital Wallet via an intelligent permit discovery experience. Applicants can start a new application from a unified workflow that leverages activity-based search, industry-specific guidance, and location-based filters, efficiently matching them to the appropriate licensing requirements. Returning applicants benefit from saved profiles, reusable stored documents, and pre-populated data from previous submissions to significantly reduce completion time. This feature is particularly valuable for businesses with recurring permitting needs or multi-site operations that must manage multiple submissions simultaneously.

Consistent with user-centric service design principles, the interface includes personalization, multilingual content support, and accessibility accommodations such as screen-reader compatibility, text scaling, and keyboard navigation. Communication preferences allow users to choose their preferred notification channels (email, SMS, or both), ensuring proactive engagement with no missed deadlines. All functionality is also available within the responsive mobile interface, enabling field users, inspectors, and mobile-dependent small businesses to interact without limitation.

3.1.4 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.*

Solution based on Salesforce Platform/PSS enhanced with CARA CoreSphere Automated Response Agent, and ACE - Agent for Core Engagement —provides an intelligent, interactive,

AI-powered assistant fully embedded within the public-facing dashboard to guide constituents through every step of the application process.

CARA — CoreSphere Automated Response Agent

CARA supports residents by delivering fast, accurate, 24/7 self-service guidance:

- Helps residents find licensing and permitting programs and services based on their needs.
- Performs instant eligibility screenings using program rules and agency criteria.
- Provides real-time case and application updates, reducing call volume and improving transparency.
- Gives clear instructions about required documents, timelines, and next steps.
- Supports multiple languages and channels, improving accessibility and equity.

CARA serves as the front door for licensing and permitting programs, ensuring constituents receive correct answers and guidance whenever they need it.

Agent for Core Engagement ACE is the staff-facing copilot that enhances caseworker efficiency and accuracy across the full lifecycle of a licensing and permitting application - ACE automates document understanding and verification by detecting document types—including Driver Licenses, SSN Cards, Passports, Utility Bills, and Paystubs—extracting and standardizing critical data fields (name, DOB, address, identification numbers, utility account details), and comparing them against application or client records. ACE highlights mismatches or inconsistencies, greatly reducing manual review time while increasing accuracy, compliance, and overall licensing and permitting processing speed. Together, CARA and ACE create an intelligent, end-to-end ecosystem that improves public usability while strengthening internal caseworker productivity and decision-making

3.1.5 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.

Our proposed solution will implement a dynamic and transparent application tracking system within the One-Stop Licensing Portal's public dashboard, designed to provide applicants—both individuals and businesses—with real-time visibility into the status and progress of every application they have submitted. This capability is foundational to transforming the applicant's experience from one characterized by uncertainty and manual follow-up into one built on clarity, predictability, and trust. When users log into the One-Stop Portal and access their secure digital wallet, they will be presented with an intuitive dashboard displaying a consolidated view of all active and historical applications, renewals, and issued permits associated with their individual profile or business entity. Each application will surface a clear and current status indicator, along with a detailed timeline of milestone activities, enabling users to understand exactly where their submission stands within the broader approval workflow.

The dashboard will be powered by Salesforce Public Sector Solutions (PSS) Licensing, Permitting & Inspection (LPI), integrated with MuleSoft to synchronize status data from existing agency

licensing systems in real time. Although backend review and decision processes will continue to reside within agency-specific systems, MuleSoft will continuously retrieve relevant updates—such as "Received by Agency," "Under Review," "Inspection Scheduled," "Additional Information Required," "Approved," "Denied," or "Permit Issued"—and securely surface them back into Salesforce for display in the applicant's dashboard. This approach ensures transparency without altering or duplicating agency processing steps, preserving existing workflows while enabling the public interface to remain current and authoritative. The solution supports both real-time event-based updates and periodic polling, allowing the State to configure refresh frequency proportionate to each agency's system capabilities.

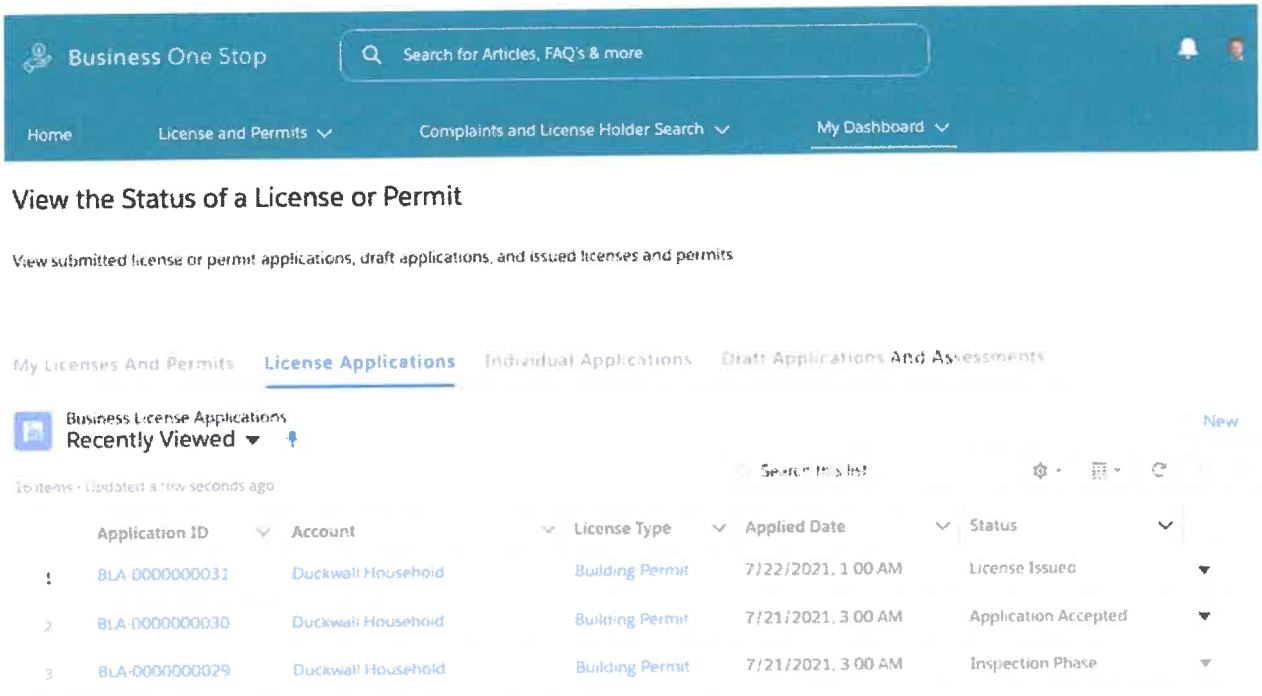


Exhibit 11. One Stop Portal Dashboard View

In addition to displaying the status, the dashboard will include a milestone-based visual timeline that reflects the full lifecycle of an application, showing completed steps and highlighting upcoming actions or dependencies. Where additional information is needed from the applicant, the dashboard will clearly identify the request, provide context and instructions, and allow the applicant to respond directly through the portal. Each interaction, update, or message exchange will be retained within the application's communication log, ensuring full transparency and eliminating the disconnect that often results from phone or email correspondence. Notifications and alerts will complement the dashboard, allowing users to opt-in to receive email and/or SMS reminders when an application changes status, when an inspection is scheduled, or when a renewal deadline approaches.

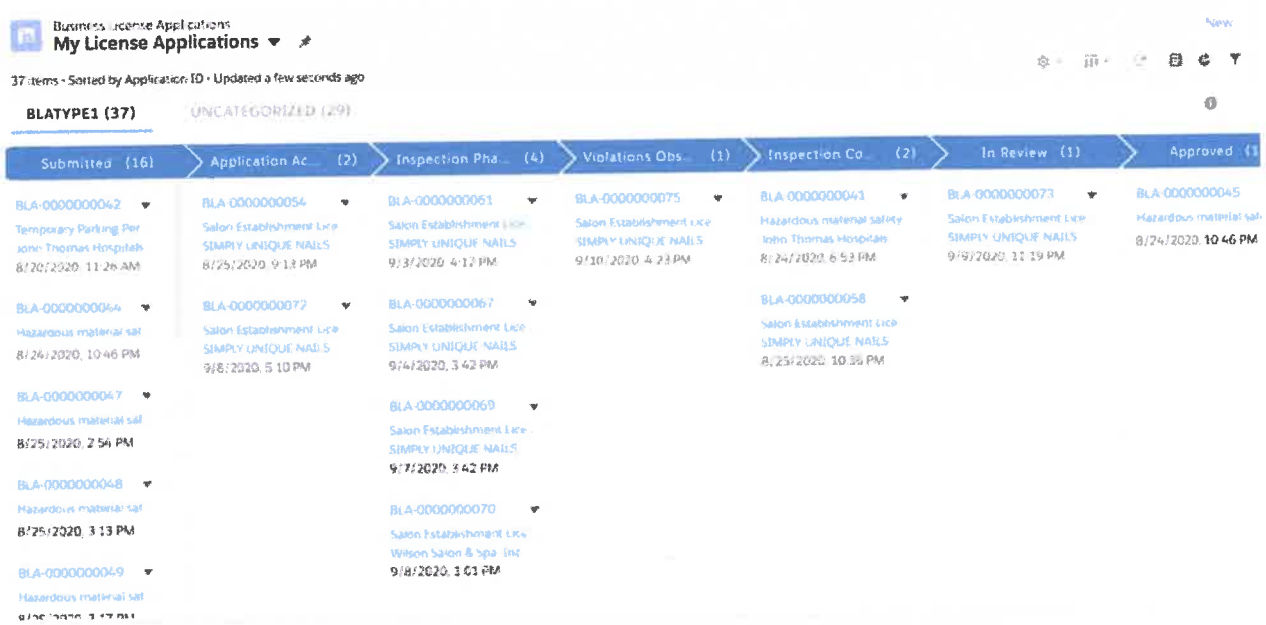


Exhibit 12. Timeline View

For applicants managing multiple licenses or acting on behalf of a business, the dashboard provides a filterable, sortable view to streamline tracking across large portfolios. Users may sort by status, agency, permit type, location, or submission date, ensuring that high-priority or time-sensitive items are easy to identify. The digital wallet further enhances the dashboard by providing immediate access to all documents associated with an application—including submitted forms, agency correspondence, and the official permit or license once approved.

Behind the scenes, Salesforce's flexible metadata framework ensures that the dashboard can evolve with changing regulatory processes or agency requirements without requiring custom code. The State will be able to configure new status values, milestone indicators, or additional workflow steps based on the evolving needs of programs or legislation. Meanwhile, auditing and logging capabilities ensure that agencies can trace every update to its source, supporting transparency and accountability.

By delivering this dynamic tracking capability, the State empowers applicants with real-time clarity over their regulatory journey, significantly reducing the need for phone or email inquiries, minimizing processing delays caused by incomplete information, and strengthening trust in government service delivery. The public dashboard becomes not just a status tool, but a transparent and collaborative interface that modernizes and simplifies how citizens and businesses engage with the licensing process.

3.1.6 4.2.1.6 Vendors should explain how the solution will implement a robust session management and draft-saving system for mid-process applications.

Solution based on Salesforce Platform and PSS enhanced with Team CoreSphere Forms and Public Sector Solutions (PSS) Omni Scripts—implements a robust session management and draft-saving

framework that allows public users to securely pause and resume applications at any point during the submission process. Team CoreSphere Forms and PSS Omni Scripts use Salesforce's "Save for Later" patterns with Data Raptors to automatically store user inputs, uploaded documents, and partially completed steps in real time. Users can exit at any moment, and the system preserves their progress as a draft record, which appears in their dashboard with indicators such as "Draft," "Last Updated," and "Continue Application." CARA (CoreSphere Automated Response Agent) can proactively remind users about incomplete drafts and guide them back to where they left off.

The solution also leverages Salesforce's native session management controls to ensure secure, stable, and configurable user sessions throughout the application process. Salesforce admins can configure session timeout durations to support long, uninterrupted engagements—typically between 15 and 24 hours for public-facing application flows—ensuring residents can complete complex forms without unexpected logouts. Administrators can also enforce stricter policies for inactivity, automatically terminate sessions, or manually revoke active user sessions when needed through Salesforce Setup. These session controls include secure session tokens, idle timeout limits, automatic logout on browser close (optional), and policies for re-authentication based on risk. Combined with draft-saving, the system ensures that even if a session expires or is terminated, no user progress is lost. Users can log back in and instantly resume their application from the exact point they left off, maintaining both usability and security.

3.1.7 4.2.1.7 Vendors should describe how the solution implements a transparent and dynamic time-tracking module within the public dashboard.

The proposed One-Stop Licensing Portal incorporates a transparent, real-time time-tracking module integrated directly into the public-facing dashboard and Digital Wallet to provide applicants with clear visibility into processing timelines and workflow progress. Built on Salesforce Experience Cloud and powered by real-time and near-real-time data synchronization through MuleSoft APIs, the time-tracking module dynamically displays estimated and actual processing durations for each major stage of the licensing lifecycle, such as submission receipt, initial review, technical evaluation, inspection scheduling, and final determination.

As agencies advance an application through internal steps in their backend licensing systems, MuleSoft captures milestone changes and updates the dashboard immediately, enabling applicants to track elapsed and remaining time using visual indicators like progress bars, milestone markers, and countdown timers.

The module also provides contextual expectations, including typical review durations, reasons for delay (e.g., pending documentation or scheduling requirements), and projected completion windows based on historical processing patterns and agency-provided SLAs. Users can drill into any application to view timestamp history, audit events, agency notes, and required actions, supported by proactive alerts delivered through email or SMS based on defined preference settings. This transparency not only improves applicant confidence and satisfaction by eliminating uncertainty but also reduces inbound status inquiries to agency staff—enabling agencies to focus on decision-making rather than manual communication. The fully responsive design ensures that all time-tracking features function seamlessly on mobile devices, allowing applicants to monitor progress anytime, anywhere.

3.1.8 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.

Our proposed solution includes a robust, mobile-friendly inspection capability designed specifically to support field inspectors operating in environments where network connectivity may be unreliable or entirely unavailable. Leveraging Salesforce Public Sector Solutions (PSS) Licensing, Permitting & Inspection (LPI) and the Salesforce Mobile Application framework, the inspection module enables inspectors to access assigned inspections, review associated application and permit details, complete inspection forms, capture photos and field notes, and record outcomes without requiring continuous network connection. This ensures uninterrupted productivity, minimizes reliance on paper-based processes, and enhances the timeliness and accuracy of recorded inspection data.

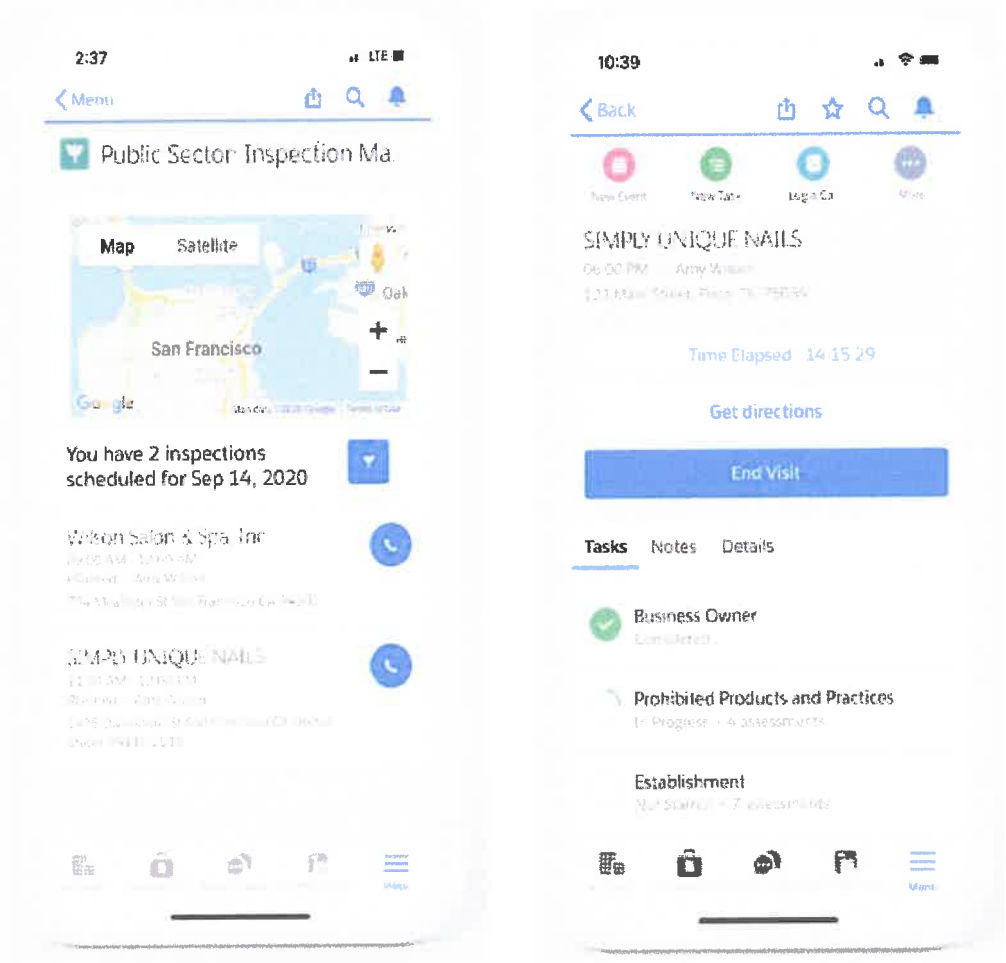


Exhibit 13. Offline Mobile Inspection Experience with Checklist

The offline inspection experience is enabled through Salesforce's mobile offline synchronization technology, which securely downloads all relevant inspection records, checklists, instructions, and supporting documents to the inspector's device before they begin work. Inspectors can open the Salesforce mobile app or an optional branded inspection app and view not only their assignment list but also contextual data such as inspection history, location information, regulatory conditions, and permit details. Any updates made in offline mode—including structured field data, digital signatures, annotated photos, attachments, and comments—are stored locally and fully encrypted on the device until connectivity is restored. This ensures the integrity and security of inspection data even when working in remote locations such as quarries, construction sites, rural manufacturing facilities, or environmental monitoring zones.

Once the device reconnects to a cellular or Wi-Fi network, the app automatically queues and uploads all offline work to Salesforce LPI. Conflict resolution and version control processes ensure that data synchronization is reliable and transparent, notifying inspectors if a record they were working with has changed since it was downloaded and allowing them to reconcile updates as needed. Upon successful upload, the inspection results are processed within Salesforce and can be forwarded through MuleSoft to the appropriate agency backend system, triggering subsequent workflow steps or updating the applicant-facing status dashboard within the One-Stop Portal. Applicants and agency users can then immediately see that an inspection has been completed, scheduled, rescheduled, or requires corrective action.

This offline inspection module also supports advanced mobile functionality to improve data accuracy and field efficiency. The solution makes use of device capabilities such as GPS location capture, barcode/QR scanning for asset or permit validation, voice-to-text transcription, timestamping, and on-device photo annotation, allowing inspectors to document findings thoroughly even in harsh or constrained environments. Configurable and dynamic inspection checklists ensure that inspectors are guided through standardized and compliant workflows for each type of inspection, reducing variance and ensuring consistency across agencies. The system can also enforce mandatory responses and conditional questions that appear only when certain conditions are met, ensuring data completeness and regulatory accuracy.

The architecture is designed so that agencies continue to manage detailed inspection processing and enforcement actions within their existing backend systems. MuleSoft synchronizes inspection results, attachments, and scheduling updates with those systems using secure and credential-scoped APIs. Because the offline inspection functionality is integrated directly into the broader One-Stop Licensing ecosystem, completed inspections automatically trigger status updates visible to applicants through the digital wallet and public dashboard without requiring inspectors to submit additional reports or manually notify applicants or agency staff.

From a security perspective, access to the offline module is governed by the same Role-Based Access Control (RBAC) framework used across the solution. Only authenticated inspectors who have been granted appropriate permissions can download inspection records to their device. All offline data is stored in encrypted form using platform-level encryption on the mobile device, ensuring protection in the event of device loss or theft. Once uploaded successfully, temporary offline local storage is cleared according to retention policies.

3.1.9 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.*

Our Proposed solution leverages a dual-deployment strategy: Salesforce Experience Cloud for responsive public access and the Salesforce Mobile Platform for highly functional agency operations. By adopting Mobile-First design principles, Responsive Web Design (RWD), and native mobile capabilities such as offline data capture and geo-location services, the system ensures that critical Licesning Permitting and Inspection functions are accessible anytime, anywhere, significantly enhancing citizen engagement and operational efficiency.

Architectural Methodology and Platform Selection

The mobile accessibility strategy for the Salesforce LPI solution rests on a differentiated but interconnected architectural approach, ensuring each user group receives an optimized experience tailored to their tasks and environment.

The solution is built entirely on the Salesforce Customer 360 Platform, which provides a unified data model (single source of truth) for LPI data, irrespective of the access point. Mobile access is achieved via two distinct deployment methods:

User Group	Access Channel	Core Technology	Mobile Deployment Focus
Public Users (Applicants)	One Stop Portal	Salesforce Experience Cloud	Responsive Web Design (RWD)
Agency Users (Inspectors, Reviewers)	Secure Mobile Application	Salesforce Mobile App	Native Functionality, Offline Mode, Optimized Performance

For the Public Portal, the solution employs a **Mobile-First Design** philosophy. This mandates that the user experience (UX) is initially designed and optimized for the smallest screen size (smartphone) before scaling up to tablet and desktop interfaces.

Responsive Web Design (RWD), utilizing HTML5, CSS media queries, and Salesforce Lightning Web Components (LWC), ensures that the One Stop Portal dynamically adapts its layout, navigation, image sizing, and input fields to the specific viewport of the mobile device. This approach is critical for the public, who should not be required to download an application simply to check their permit status or pay a fee.

Mobile Functionality for Public Users (One Stop Portal)

Public users access the LPI services primarily through the One Stop Portal, which is designed to function as a fully featured, browser-based application on any mobile device. Full functionality must be ensured for the complete LPI lifecycle.

Application and Submission

Mobile functionality enables citizens to initiate and complete complex LPI tasks directly from their device:

- **Guided Application Flows:** Utilizing Salesforce Flow, the application process is broken down into mobile-friendly steps, minimizing screen clutter and requiring fewer clicks.
- **Document Uploads:** The portal integrates directly with the mobile device's native capabilities, allowing users to upload documents by instantly taking a photo (e.g., proof of insurance, site photos) or selecting files from their camera roll or cloud storage.
- **Pre-population of Data:** Leveraging Salesforce integrations and profile data, form fields are pre-populated drastically reducing typing requirements on small screens.

Status Tracking and Communication

The mobile portal provides real-time access to the status of applications, inspections, and payments.

- **Dashboard View:** A clean, widget-based dashboard summarizes outstanding actions and statuses, optimized for vertical scrolling.
- **Notifications:** Push notifications (if the user saves the portal link to their home screen) or SMS integration alerts users to status changes, eliminating the need to constantly check the desktop.

Payments and Scheduling

The mobile interface incorporates fully functional e-commerce capabilities.

- **Optimized Payment Interface:** Payment gateways are selected and integrated to ensure they are mobile-responsive and support widely used mobile payment methods (e.g., Apple Pay, Google Pay).
- **Mobile Appointment Scheduling:** Citizens can schedule necessary appointments or inspections using calendar components optimized for touch interaction (e.g., large date pickers, clear time slots).

Mobile Functionality for Agency Users (Salesforce Mobile App)

Agency users (inspectors, field officers, remote reviewers) require highly reliable, robust, and often offline-capable tools. Their mobile experience is delivered through the **Salesforce Mobile App** or a tailored implementation of **Field Service Lightning (FSL)**.

Inspection and Checklist Execution

The core of the agency's mobile functionality is conducting field inspections with full data capture capabilities.

- **Offline Data Synchronization:** Crucially, the Salesforce Mobile App allows authorized users to download relevant inspection data (permits, site history, checklists) before entering areas with poor connectivity. Data captured during the inspection is automatically queued and uploaded (synced) once connectivity is restored, ensuring no loss of work.
- **Dynamic Checklists:** Inspection forms utilize conditional logic that adapts based on previous answers, reducing scrolling and cognitive load on small screens.

- **Geolocation Stamping:** The application automatically captures and stamps the GPS coordinates of the device when an inspection is started and completed, verifying the inspector's location and timing for compliance and auditing purposes.

Documentation and Evidence Capture

Field teams must efficiently capture evidence without cumbersome peripherals.

- **Photo and Video Integration:** Direct camera integration allows inspectors to take high-resolution, geo-tagged photos and videos which are immediately associated with the LPI record in Salesforce. Annotations (arrows, highlights) can be added directly on the mobile screen.
- **Electronic Signature Capture:** Digital signature fields enable inspectors and property owners to sign off on compliance documents directly on the tablet or smartphone screen.
- **Voice-to-Text Transcriptions:** Utilizing the native mobile device microphone, inspectors can dictate notes and observations directly into the LPI record, dramatically speeding up documentation compared to typing.

3.1.10 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.

The proposed One-Stop Licensing Portal, built on Salesforce Experience Cloud and powered by Public Sector Solutions (PSS) Licensing, Permitting & Inspection (LPI), incorporates a highly flexible and fully user-controlled notification framework that enables citizens, businesses, and agency staff to configure how they receive updates throughout the licensing and permitting lifecycle. The notification system is designed to allow users to choose their preferred communication channels—including email, SMS/text messaging, or both—and to customize notification settings for specific events such as application submission confirmation, requests for additional information, inspection scheduling and completion, approval or denial outcomes, renewal alerts, payment confirmations, and system-wide announcements. These preferences can be managed directly within each user's profile in the One-Stop Portal, giving applicants granular control over how and when they are notified, in alignment with accessibility needs and personal communication styles.

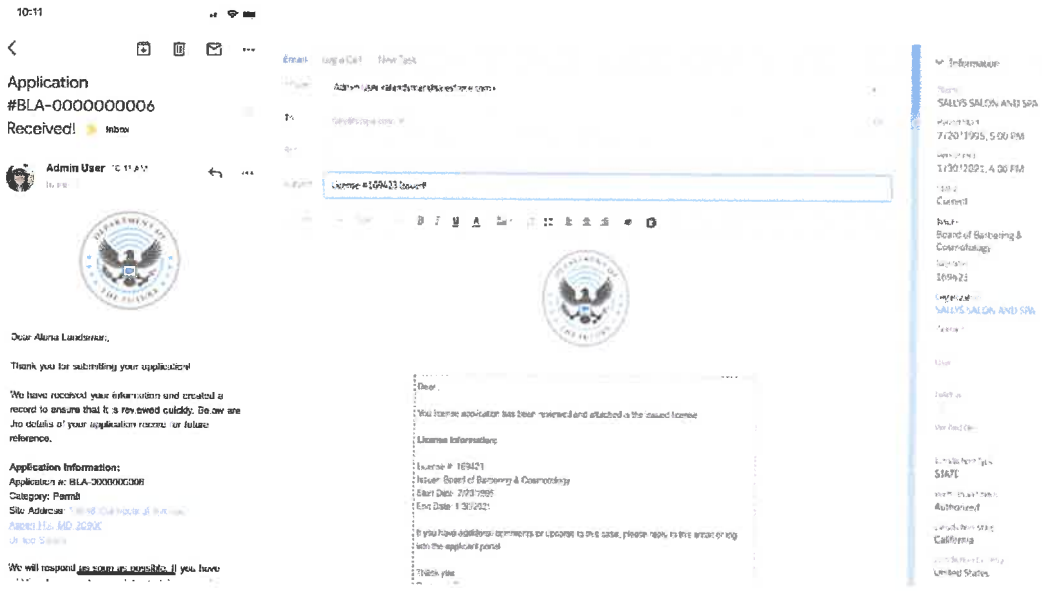


Exhibit 14. Mobile and Email Notifications

The notification engine leverages Salesforce's native Platform Events, Flow Orchestration, and Notification Builder, supported by real-time and near-real-time updates flowing from agency licensing systems through MuleSoft Experience and Process APIs. When status changes are detected in agency backend systems—such as "Under Review," "Inspection Scheduled," or "Approved"—MuleSoft propagates those updates securely to Salesforce, where they trigger workflow-based notifications that are distributed based on the user's configured preferences. This ensures that users always receive timely and accurate updates without needing to manually check the portal or contact agency staff. Notifications are simultaneously reflected in the applicant's digital wallet dashboard, where milestone visualizations and status timelines provide a synchronized view of progress.

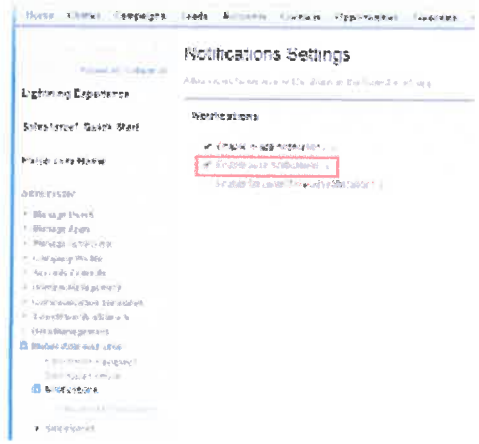


Exhibit 15. Notification Controls and Settings

For mobile-friendly engagement, the system supports SMS messaging through integration with services such as Twilio or native Salesforce Mobile Messaging, while email communications are routed securely using the State's preferred email infrastructure (Microsoft Exchange or Gmail) via SMTP relay or Graph API integration. This ensures state consistency of branding, strong governance, and traceable audit logging. Additionally, users can opt in or out of different message types at any time, with full transparency into which notifications they are eligible to receive and why. Future enhancements such as push notifications to mobile devices or app-based alerts can be incorporated without architectural redesign due to the platform's extensible design.

From an accessibility standpoint, the system supports WCAG-compliant formatting, customizable message templates, and multilingual support where required, ensuring inclusive communication for diverse populations. For agency personnel, internal notifications integrate seamlessly with Microsoft 365 and Google Workspace calendars and email systems, enabling automated scheduling reminders and workflow routing without requiring staff to leave their familiar productivity environment

3.1.11 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.

Solution based on Salesforce platform and PSS enhanced with Team CoreSphere's Forms module and integrated Document Upload Wizard—provides a flexible, secure, and user-friendly form and document management capability that fully supports the creation, submission, and tracking of digital forms and required documentation for permits and public applications. Team CoreSphere Forms is a configurable, no-code/low-code module built on the Salesforce platform that allows agencies to rapidly design dynamic, fillable forms using conditional logic, reusable components, program-specific validations, and multilingual support. Forms automatically adapt based on user responses, ensuring residents see only the fields relevant to their situation—reducing confusion, form abandonment, and errors.

The Document Upload Wizard enhances this experience by providing a secure, intuitive interface for collecting required attachments throughout the application or permitting process. Users can upload documents from any device, including mobile, and the wizard supports multiple file types, drag-and-drop actions, and real-time validation (e.g., file type, size, completeness). When combined with ACE (Agent for Care Engagement), the system can automatically identify document types (e.g., Driver's License, Utility Bill, Passport), extract data, and compare the details against the application to verify consistency. The upload wizard also guides users on *which documents are needed*, *why they are required*, and *whether additional files are missing*, reducing back-and-forth with staff. All files are securely stored in Salesforce with encryption at rest and in transit, controlled access, and audit trails. Administrators can easily create new form templates, update document requirements, and configure workflows without code, ensuring the system can evolve as permitting regulations change. Together, Team CoreSphere Forms and the Document Upload Wizard deliver a complete, secure, and accessible digital submission experience that supports both standard data collection and complex permit workflows.

3.1.12 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.*

Our proposed implementation of the West Virginia One-Stop Licensing Portal strategically leverages Salesforce Experience Cloud, powered by Public Sector Solutions (PSS) Licensing, Permitting & Inspection (LPI), in combination with MuleSoft's API-led integration architecture to deliver a unified, modern, and highly accessible digital experience for both public users and state agencies. This approach ensures that while the portal provides a single point of entry for citizens and businesses to interact with the licensing and permitting ecosystem, existing agency permitting systems and back-office platforms continue to operate independently and retain full control of downstream processing, compliance, inspections, and enforcement logic. **MuleSoft acts as the secure, scalable, and intelligent integration backbone, enabling seamless interoperability and data exchange between the One-Stop Portal and the diverse technologies used across participating state agencies.**

From a public user's perspective, implementation is centered on creating an intuitive and accessible user experience that modernizes interactions with state licensing operations. Applicants—whether individuals acting for themselves or business representatives using delegated access—can initiate applications, search for permits, upload documents, pay associated fees, and track progress directly from the portal using a personalized digital wallet. This mobile-friendly interface provides real-time visibility into application status, renewal timelines, transaction records, and issued permits, while eliminating the need to navigate independent agency systems. Instead of fragmented interactions, citizens engage through a single, consistent, and responsive interface that operates smoothly on desktops, tablets, and smartphones, meeting expectations for modern government service delivery.

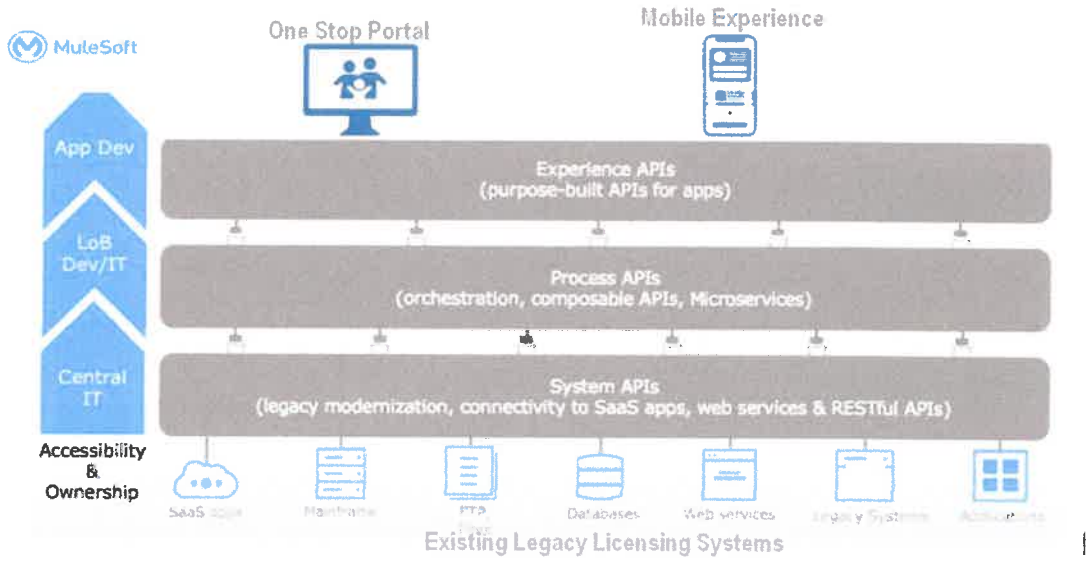


Exhibit 16. MuleSoft Integration Layer

For agencies, the solution enables operational efficiency, improved transparency, and greater collaboration without burdening staff with new systems or extensive retraining. Rather than requiring a disruptive replacement of established legacy licensing systems, MuleSoft enables secure interoperability through reusable APIs that orchestrate workflow and data exchange between Salesforce and backend platforms. Agencies benefit from standardized intake data, improved validation quality, reduced manual handling, and robust performance insights through dashboards and reporting. Meanwhile, their existing systems continue to manage internal evaluations, inspection scheduling, technical reviews, and compliance actions without structural change. This model delivers modernization incrementally and sustainably—protecting technology investments while accelerating service improvements.

The digital wallet experience within the One-Stop Portal is significantly elevated through real-time and near-real time integrations that allow applicants to stay fully informed throughout the lifecycle of their applications. By continuously synchronizing status updates from agency permitting systems via MuleSoft, the portal provides a dynamic and interactive dashboard that visually represents the progress of each application through key milestones such as submission, intake review, technical review, inspection scheduling, approval, or issuance. Instead of static or ambiguous status indicators, applicants receive clear, contextual, and actionable insights supported by visual timelines, color-coded progress bars, and proactive alerts delivered through email, SMS, or portal notifications. The digital wallet becomes a personalized command center where users can instantly access submitted documents, download issued permits, manage renewal deadlines, track required follow-up actions, and maintain a complete history of transactions—all from a mobile-friendly interface optimized for intuitive navigation.

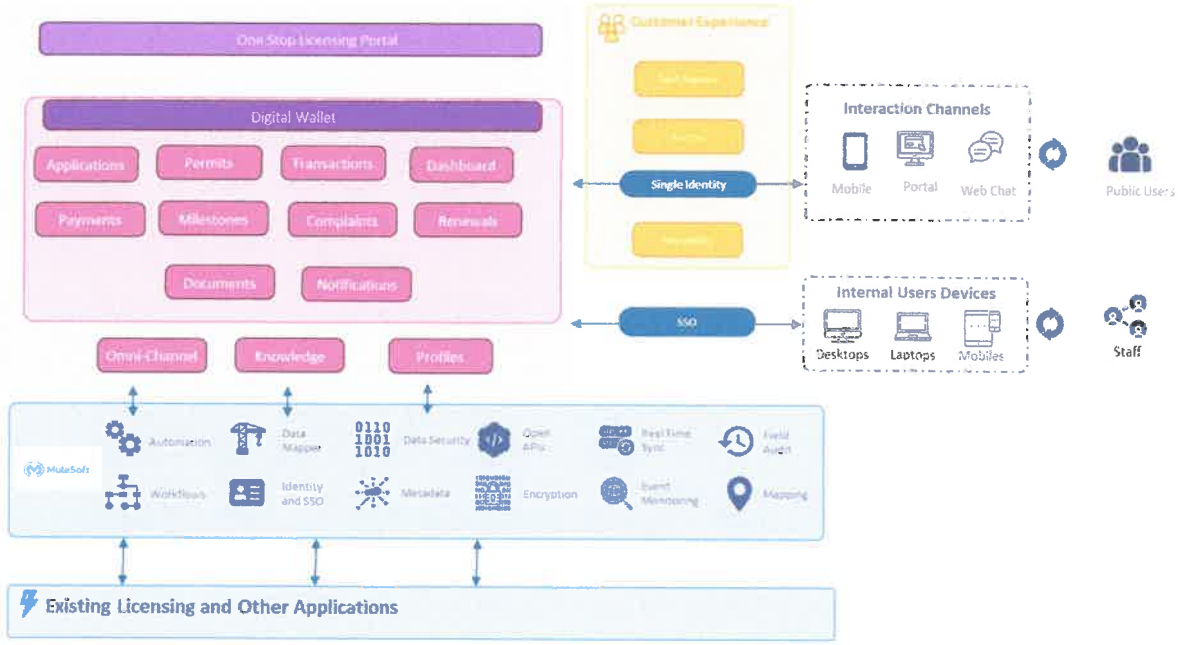


Exhibit 17. MuleSoft Integration Topology Layer

To enable this integration, MuleSoft employs an **API-led connectivity model** composed of System, Process, and Experience APIs that enable secure, structured, and maintainable information

flow. This architecture supports a spectrum of integration use cases, including real-time, near real-time, and batch-based interactions—each aligned to business requirements and backend system capabilities.

Real-time APIs support use cases requiring immediate responsiveness and confirmation. For example, when an applicant submits a new license application through the One-Stop Portal, a real-time Application Submission API processes the transaction instantly, transforming the payload into agency-specific formats and delivering acknowledgement back to Salesforce. Real-time APIs may also support fee calculation inquiries or business registration validation through Secretary of State records, enhancing accuracy and eliminating redundant manual checks at intake.

Near real-time APIs support the synchronization of application status updates between agency systems and the public dashboard. For example, a Status Sync API periodically retrieves status updates such as "Under Review," "Additional Information Required," or "Inspection Scheduled," and surfaces them directly to the applicant's digital wallet. These updates are essential for transparency and allow applicants to remain informed without contacting agency staff. Similarly, a Renewal Eligibility API can monitor backend records to trigger renewal reminders, ensuring proactive and compliant engagement.

Batch APIs enable high-volume, scheduled data exchanges optimized for analytics, historical updates, and onboarding processes. Examples include nightly batch jobs importing permit history records, compliance reports, and inspection archives to support dashboard analytics and workload planning. Batch synchronization also supports large-scale updates such as periodic fee schedule changes or migration of legacy licensing datasets when new agencies are onboard.

This integration approach ensures that the One-Stop Portal is not merely an overlay but a fully orchestrated system that enhances operational performance and user experience while minimizing risk. Synchronization events across real-time, near real-time, and batch interfaces keep public users informed through a dynamic status dashboard that provides milestone-based tracking of every application. Applicants can see progress through the full lifecycle—from submission to agency receipt, review, inspection, decision, and permit issuance—supported by notification alerts, document visibility, and a complete history of centralized interactions within the digital wallet.

Together, Salesforce Experience Cloud, PSS LPI, and MuleSoft provide a highly scalable and future-proof foundation for digital modernization. The State gains a service delivery ecosystem that improves public satisfaction, reduces administrative burden, increases transparency, and supports long-term transformation without disruption to core regulatory operations. As more agencies join the platform, reusable API assets accelerate implementation and compound return on investment, ensuring that the One-Stop Portal grows into a comprehensive statewide digital government framework that supports West Virginia's long-term vision for accessible, efficient, citizen-focused public services.

3.1.13 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.

Team CoreSphere has proposed Salesforce Shield to provide data security. Salesforce Shield provides enhanced, enterprise-grade data security, privacy, and compliance on top of Salesforce's standard security features. It is especially useful for government, healthcare, and regulated industries—which aligns very well with Team CoreSphere's State & Local and Federal engagements. Shield has three primary components: Platform Encryption, Event Monitoring and Field Audit Trail. Shield uses **advanced, org-specific encryption** to secure sensitive data at rest across the Salesforce platform.

Team CoreSphere provides ongoing support and maintenance for our platform. Our support and maintenance approach is described in sections 3.2.18 in response to requirement 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.:"

3.1.14 4.2.1.14 Vendors should demonstrate a comprehensive, flexible, and secure approach that supports interoperability, minimizes disruption, and enhances operational efficiency.

The proposed integration approach utilizes MuleSoft's Anypoint Platform to deliver a technically robust, secure, and scalable API-led connectivity architecture that enables seamless interoperability between the One-Stop Licensing Portal—built on Salesforce Experience Cloud and Public Sector Solutions (PSS) LPI—and the State of West Virginia's existing licensing, permitting, inspection, and enforcement systems. MuleSoft provides the abstraction and orchestration framework necessary to unify a diverse landscape of legacy and modern technologies, allowing the State to implement modernization incrementally while minimizing disruption to agency operations. By decomposing integration into Experience, Process, and System API layers, MuleSoft ensures that backend systems remain autonomous and stable, while providing standardized, reusable integration endpoints that drive consistent workflows and real-time communication across agencies.

At the system level, System APIs abstract the proprietary complexity of backend licensing systems—whether databases, mainframe services, on-prem or cloud COTS platforms—and expose secure, normalized data services for key functions such as permit submission, workflow status, inspection results, fee structures, renewal triggers, and issued permit records. These APIs utilize secure protocols such as HTTPS/TLS1.2+, OAuth2, JWT/JWE tokens, and can incorporate message-level encryption for sensitive or regulated data. MuleSoft connectors and adapters enable interoperability with a wide range of systems, including REST, SOAP, JDBC, SFTP, Oracle, SQL Server, ESB-based systems, and flat-file batch engines, making integration feasible without re-architecting legacy applications.

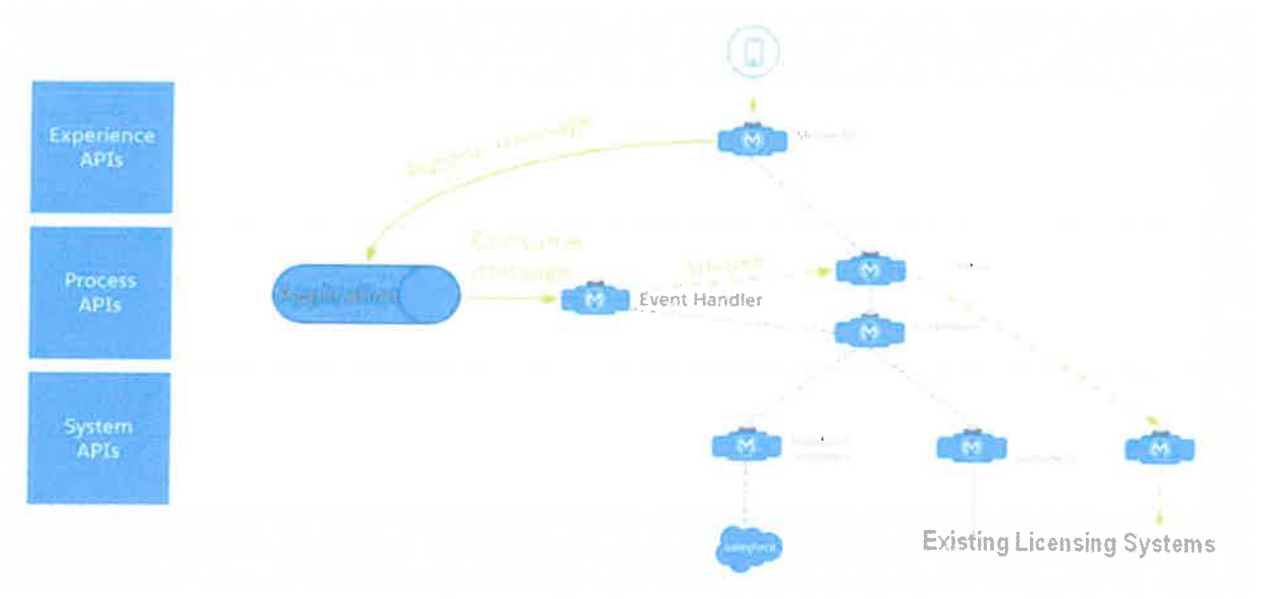


Exhibit 18. Interoperability with API Layers

Process APIs orchestrate cross-agency workflows, performing data transformation, normalization, aggregation, enrichment, and routing logic using Data Weave mapping. They support complex multi-agency licensing flows, including parallel and sequential approvals, conditional routing rules (e.g., permit depends on tax clearance), error handling, retry logic, and long-running asynchronous processes. Messages can be persisted in Object Store v2 or exchanged using event-driven patterns to support resilience and scalable throughput. Process APIs also manage real-time and near-real-time synchronization cycles, ensuring that status updates, document changes, inspection scheduling updates, and renewal triggers flow efficiently back to Salesforce, enabling transparency via dashboards.

Experience APIs expose tailored data sets to the Salesforce portal and digital wallet in a format optimized for public use, powering real-time dashboards, milestone tracking, and notification workflows without exposing backend complexity. These APIs can be consumed by Salesforce Flows, Platform Events, Change Data Capture streams, or Lightning Web Components, enabling responsive user experiences that reflect immediate backend changes. MuleSoft supports both real-time event streaming for high priority interactions (e.g., application submission acknowledgement) and near-real-time polling patterns for systems not capable of pushing updates. Scheduled batch APIs support nightly consolidation of large datasets such as historic permit volumes, inspection archives, and compliance reports for analytics and performance dashboards.

Security is enforced through a centralized API Gateway, deployed through Anypoint API Manager, which controls authentication and authorization policies, rate limiting, throttling, IP allow-listing, token lifetimes, client credential management, and JSON threat protection. Integration monitoring is handled through Anypoint Monitoring, API Analytics, and custom log forwarding to the State's SIEM for continuous audit, anomaly detection, and governance visibility. This provides full traceability across orchestration events, payload transformations, workflow triggers, and external system calls—supporting compliance with internal cybersecurity policies and external regulatory requirements.

The architecture supports horizontal scaling and high availability through clustering, load balancing, and containerization options such as Cloud Hub V2 with Kubernetes orchestration, ensuring resilient performance under peak licensing periods. The approach also accelerates onboarding of new agencies via reusable APIs and canonical data models, making enterprise expansion cost-effective and repeatable.

This integration strategy dramatically improves operational efficiency by eliminating manual data entry, reducing intake errors, accelerating turnaround times, and enabling real-time visibility into application progress through the public dashboard and digital wallet. The One-Stop Portal becomes the orchestration front end for the licensing ecosystem, while agency systems continue performing specialized processing without disruption. Progressive modernization is enabled by design, ensuring that agencies transition into the unified environment at their own pace while preserving ongoing business continuity.

3.1.15 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-l et seq., which mandates full implementation of the One-Stop-Shop Permitting Program by January 1, 2027.

Our approach focuses on creating a environment for end users to utilize a one stop portal with integration to existing legacy systems. In Year 1 we will build the One-Stop-Shop Portal, a single, public-facing Experience Cloud portal where residents and businesses can discover and access the forms related to all seven (7) divisions in scope. The portal will include a searchable permit/catalog, multi-step application forms, document upload, OCR preprocessing, status dashboards, digital wallet/payment initiation, and a secure applicant account experience (federated SSO).

During Year 1 we will completely onboard the Department of Commerce and the Department of Environmental Protection (DEP) migrating their highest-volume permit types and making them fully operational in the portal (application intake, payment, internal processing workflows, issuance and digital delivery). Simultaneously, we will integrate the portal with the remaining departments (the other five divisions) so that those departments can begin accepting and processing applications via the portal as soon as they are ready. Integration includes API-based data exchange, event notifications, and interim connector/RPA approaches where APIs are not immediately available.

In subsequent years we will onboard the remaining departments according to a priority-by-complexity plan that we will finalize with the State during discovery. That prioritization will be driven by (a) statutory/regulatory deadlines, (b) transaction volumes, (c) integration complexity, and (d) customer impact; we will publish and agree on a prioritized onboarding roadmap following the discovery phase.

This proposed path meets the statutory deadline while delivering measurable citizen value early (a single portal and two fully onboarded major agencies by Jan 1, 2027). The hybrid integration/replacement strategy minimizes go-live risk and cost, while giving the State the option

to modernize problematic legacy systems in a controlled, prioritized manner. The phased onboarding for remaining departments after Year 1 lets the State balance complexity, risk, and budget and gives you the flexibility to re-prioritize based on real discovery findings.

Our proposed solution, built on Salesforce Public Sector Solutions (PSS) with the Licensing, Permitting & Inspections (LPI) module and Experience Cloud, provides a clear, strategic, and future-proof approach to determining when legacy agency systems should be replaced versus when they should be integrated into the new One-Stop-Shop Permitting Portal. Given West Virginia's wide mix of legacy platforms, including Access databases, custom .NET applications, OASIS-based permit tools, ESRI/GIS systems, and paper-driven workflows, our strategy prioritizes replacing systems that add technical debt, create citizen friction, or lack scalability, while integrating only those systems that deliver specialized, non-replicable capabilities. This ensures that the State benefits from a unified permitting backbone in Salesforce without disrupting mission-critical operations or duplicating functionality already delivered by high-value systems. The goal is a smooth, phased modernization path that balances operational continuity, cost efficiency, and enterprise modernization. Below given are our five strategic recommendations for integration versus replacement, each explained in a single detailed paragraph.

Replace outdated, fragmented, or Access-based systems with Salesforce as the unified system of record.

Legacy Access databases, spreadsheets, paper forms, and standalone SQL systems carry significant technical debt, lack auditability, and cannot scale to the State's multi-agency permitting volume. Replacing these with Salesforce PSS-LPI ensures standardized data models, configurable workflows, centralized reporting, and a modern digital experience. Migrating these systems into Salesforce reduces duplication, improves permitting timelines, and establishes a single authoritative record for all applications and renewals. This replacement approach maximizes modernization benefits while eliminating dozens of unsupported or agency-specific legacy tools.

Integrate specialized platforms such as ESRI GIS, OnBase EDMS, and OASIS financial systems where functionality cannot be cost-effectively replicated.

Certain agency tools provide advanced spatial analytics, repository management, or financial reconciliation workflows that are best preserved rather than replaced. Salesforce integrates seamlessly with ESRI for mapping, with OnBase for document storage, and with OASIS for fee posting and reconciliation, allowing agencies to retain the capabilities they rely on. This integration-first approach respects existing State investments, avoids expensive redevelopment, and ensures that users can access external data directly within Salesforce dashboards, creating a unified experience without full system replacement.

Replace agency-specific public portals with a consolidated Salesforce Experience Cloud portal for all permit intake and citizen interactions.

Current agency portals create inconsistent user journeys, duplicate login experiences, and fragmented ways of applying for permits. Migrating all public-facing workflows into a unified Experience Cloud portal ensures citizens and businesses have one secure entry point to apply, track status, upload documents, and pay fees. This consolidation reduces confusion, simplifies

navigation, strengthens accessibility, and significantly lowers the operational burden on agencies. Retiring these portals improves the customer experience while allowing Salesforce to serve as the front door for all State permitting services.

Maintain and integrate high-complexity or mission-critical line-of-business systems during the transition period while planning long-term replacement.

Systems such as GL Suite for alcohol permitting, mining-specific compliance applications, or safety inspection platforms may require a phased approach due to their embedded regulatory logic and long operational history. Instead of immediate replacement, these systems can exchange key data with Salesforce such as status updates, inspection results, and payment confirmations so agencies still gain statewide visibility. Over time, as workflows stabilize within PSS-LPI, these systems can be evaluated for consolidation into Salesforce, enabling a future roadmap that reduces overall complexity without operational disruption.

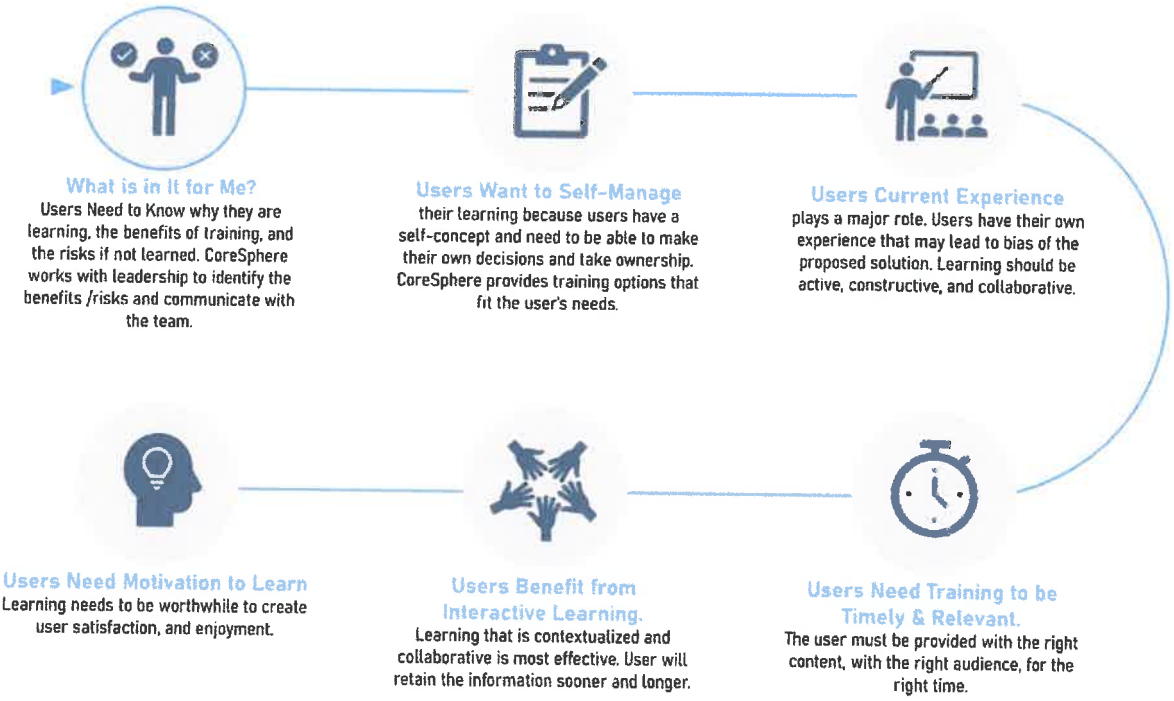
Adopt Salesforce as the long-term strategic permitting platform while using integration as a bridge for continuity and risk reduction.

Salesforce's configurable workflows, permit templates, inspection tools, and analytics capabilities position it as the long-term backbone for statewide permitting modernization. Integration is used deliberately as a transitional mechanism so agencies can gradually adopt new workflows without service interruption. As permit types, inspections, and renewals migrate into Salesforce, legacy systems naturally phase out, reducing cost and complexity over time. This balanced approach ensures modernization success by aligning technology transformation with agency readiness, regulatory requirements, and operational stability.

3.1.16 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.

Team CoreSphere's training approach is designed with the end-user in mind, emphasizing adult learning principles and aligning with your organization's needs. Our primary goal is to equip users with the knowledge and skills to effectively utilize the new system in their day-to-day activities, while highlighting how the platform improves and transforms existing business processes.

We prioritize user adoption by engaging stakeholders throughout the development lifecycle, fostering incremental learning and promoting shared knowledge. This collaborative approach encourages greater ownership of the system, ensuring its sustained use post-implementation.



Team CoreSphere recognizes that comprehensive, interactive training is essential for successful adoption and enhanced productivity. We have extensive experience delivering training across diverse technology platforms to a wide range of users, including business subject matter experts (SMEs), management teams, trainers, and technical support personnel, as detailed in the project plan.

To meet your organization's unique needs, Team CoreSphere will develop a tailored training strategy and deliver content through the most effective methods. Our recommended keys to success include:

1. **Stakeholder Engagement**: Identifying diverse training needs and preferred delivery methods, such as virtual sessions, instructor-led training, self-paced modules, and system-integrated guidance.
2. **Customized Design**: Adapting training content for different audiences and training types, whether technical or functional.
3. **Targeted Development**: Creating intuitive training materials tailored to each delivery method.
4. **Interactive Delivery**: Facilitating training sessions using real-life scenarios and hands-on engagement.
5. **Continuous Feedback**: Collecting participant feedback through surveys to assess and refine training effectiveness.

By operationalizing these principles, Team CoreSphere delivers end-to-end training and support to ensure a seamless transition to the new platform and sustains user success.

Team CoreSphere provides a diverse range of training modalities designed to meet the varied needs of end-users. These training options are tailored based on an initial assessment and refined throughout the project to ensure maximum effectiveness and relevance.

- **Train-the-Trainer Program:** Team CoreSphere empowers key program representatives to become expert trainers, enabling them to cascade knowledge effectively within the organization. This approach ensures sustainability and ongoing user support post-implementation.
- **Virtual or Onsite Training:** Tailored for specific user roles and levels of experience, these sessions equip users with the skills to navigate the application and perform their business functions effectively. Sessions can be recorded, edited, and distributed for ongoing learning or onboarding purposes.
- **Traditional Training Videos:** Produced video content featuring detailed visuals, step-by-step instructions, and narration. These videos serve as easily accessible, reusable resources for users to revisit as needed.
- **Integration with Client Learning Management Systems (LMS) or Training Tools:** Team CoreSphere can integrate training materials into the client's existing LMS or training platform, streamlining access and ensuring alignment with organizational learning strategies. If no LMS is available, Team CoreSphere can recommend and implement alternative training tools.

By offering a mix of training options and integrating with existing resources (if applicable), Team CoreSphere ensures a comprehensive, scalable training program tailored to your organization's needs.

Team CoreSphere recommends the following training materials to ensure comprehensive and effective learning.

For System Administrators

- **Administrator User Guides**: Scenario-based guides covering administrative tasks such as account, service, and user/staff setup; assessments; forms; report/dashboard configuration; and other key responsibilities.
- **Salesforce Trailhead**: Customized catalogs of Salesforce Trailhead modules tailored to system administrators for learning platform features and acquiring Salesforce Administrator certification.

For End-Users

- **End-User Guides**: Modular, scenario-based guides organized by user role and program, designed to simplify learning and allow easy updates by stakeholders.
- **Quick Reference Guides**: One-page handouts summarizing the most-used functions, available as printable resources or shared electronically for quick access.
- **Training Session Recordings**: Audio and video recordings of training sessions for use as refreshers or for onboarding new hires.

In-App and Digital Learning Tools

- **Salesforce In-App Guidance**: Native Salesforce feature providing contextual pop-up prompts directly within the system to provide targeted, on-screen support in training or production environments.
- **AI-Generated Training Videos**: Customized videos with images, text, and AI-narrated voiceovers for engaging and scalable training delivery.
- **Salesforce Trailhead Learning Community**: Simplified access to relevant Trailhead modules through curated catalogs, enabling users to learn at their own pace, as described in the table below.

Roles & Role Descriptions				
Salesforce Admin	**Salesforce Superuser**	**Business Analyst & Standard User**	**Product Owner**	**Executives & Key Stakeholders**
Full access to the org, add/remove users, can update org details.	Responsible for creating reports, importing data, mass updates, updating picklist values.	Subject Matter Experts who fully understand the business process.	Primary owner of the Salesforce application and decision maker.	Sponsors and Leadership staff
Trailhead Descriptions				
Salesforce Admin Basics is a guideline to learn basics of Salesforce arch and admin responsibilities.	Salesforce for Superusers is essential for Superusers who perform similar tasks as Admins, but don't manage the architectural work.	Business Analysis and Standard User are guidelines for all Business Analyst and Standard Users to get started with Salesforce Basics.	Salesforce Knowledge specific to the project.	High-level Salesforce Knowledge specific to the role.
Trailhead Links				
Admin	Superuser	Business Analysis and Standard User	Pending (project specific)	Pending (role specific)

Additional Supporting Materials

- **Training Outlines**: Step-by-step outlines with data preparation instructions to support future trainers' proficiency.
- **Job Aids**: Concise, user-friendly resources designed to provide step-by-step guidance for performing specific tasks within the system.
- **Business Process Flows**: Visual representations of workflows to clarify system usage aligned with organizational processes.
- **User Permission Matrix**: Detailed documentation outlining system permissions by user role for clarity and governance.
- **Data Dictionary/Configuration Workbook**: Reference material detailing field definitions, configurations, and system customizations.

Training Assessment and Evaluation

Team CoreSphere's approach to training includes thorough assessment and evaluation processes to ensure effectiveness and identify opportunities for improvement.

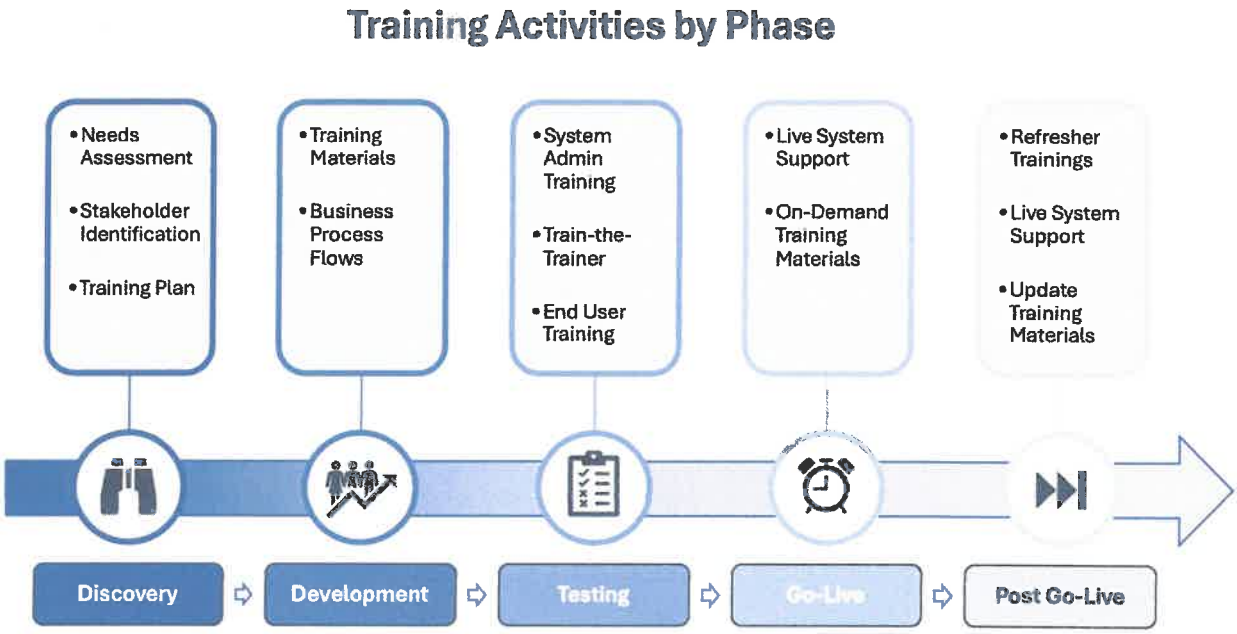
1. **Pre-Training Assessment**: Trainees complete a survey directly in the Salesforce application to provide insights into their roles, responsibilities, and prior knowledge.
    a. This information is used to develop a customized training plan tailored to user needs.
2. **Training Surveys**: After each session, trainees complete an evaluation survey to provide feedback on the facilitator's performance and the training content.
    a. Survey results are analyzed to enhance future sessions and address identified gaps.
3. **Check for Understanding Activities**: Trainers incorporate interactive activities, such as quizzes, role-playing scenarios, and group discussions, during sessions.
    a. These activities help gauge trainee comprehension in real-time and identify areas requiring additional support.

The effectiveness of the training delivery is assessed using data and feedback from multiple sources:

1. **Project Team Feedback**: Obtained through review sessions and formal sign-off on training outcomes.
2. **Pre- and Post-Tests**: Trainees complete assessments to measure knowledge gained during the training.
3. **Trainee Feedback**: Self-assessments capture participants' confidence levels and perceived readiness to apply what they've learned.
4. **Trainer Observations**: Trainers provide insights on common areas of confusion and identify individuals needing additional support.

Training Timeline

Each phase of the project—Discovery, Development, Testing, Go-Live, and Post Go-Live—includes targeted training activities, as described in the sections above, and are designed to ensure a smooth rollout, user readiness, and long-term system adoption. From assessing needs and developing materials to delivering live support and refresher trainings, our training approach is structured and comprehensive. This following graphic outlines the training activities over the course of the project.



3.1.17 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.

The proposed solution includes a comprehensive and accessible self-paced learning ecosystem designed to support both agency users and public constituents throughout and beyond implementation. Training and enablement are delivered through Salesforce's integrated **my Trailhead / Trailhead learning platform**, Experience Cloud knowledge resources, and on-demand digital training assets tailored specifically for the One-Stop Licensing Portal. These tools enable users to learn at their own pace, access content from any device, and continuously build competency as system functionality evolves. Agency staff, including licensing officers, intake teams, supervisors, and inspectors, are supported through structured learning paths that incorporate interactive modules, guided walkthroughs, simulations, and role-specific training tracks that reinforce hands-on system use and best practices. The platform provides progress tracking, milestone badges, and knowledge evaluations to promote measurable proficiency and ensure confidence in operating Salesforce PSS LPI, using workflow dashboards, and understanding the integrated process flows supported by MuleSoft.

For public users and business applicants, the One-Stop Portal will include a **self-service Knowledge Center** that hosts articles, quick-start tutorials, FAQs, video walkthroughs, step-by-step application guidance, and best-practice resources designed to simplify portal navigation, application preparation, and digital wallet usage. These learning assets are fully accessible across desktop and mobile devices and designed to support users with varying levels of technical comfort. Contextual help embedded directly within the application forms—such as tooltips, inline explanations, and guided wizards—reduces the learning curve by aiding at the moment of need,

eliminating reliance on phone or in-person support. Additionally, video-based learning segments and workflow journeys help users understand how to submit applications, upload documents, check status, manage renewals, and use delegation features within business digital wallets.

Following implementation, training remains accessible through continuous learning feature releases, system enhancements, and new module availability, allowing agencies to onboard new employees efficiently and enabling public users to remain informed as the portal expands. The platform's analytics capabilities allow administrators to track training adoption and identify where supplemental instructor-led or targeted coaching may be beneficial. Because the training model is self-paced, always available, and integrated directly into the technology ecosystem, it supports long-term sustainability without requiring recurring live training cycles.

In summary, the solution delivers a modern learning experience that empowers users through flexibility, accessibility, and personalization. Agency personnel gain structured professional development aligned to their operational roles, while constituents receive self-guided support that improves self-sufficiency and reduces dependency on agency staff for basic assistance. This strategic approach enables successful adoption and ensures that the One-Stop Licensing Portal becomes a widely understood and effectively utilized resource across the State of West Virginia.

3.1.18 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 proposed One-Stop Licensing Portal solution, delivered on Salesforce Experience Cloud and integrated through MuleSoft's API-led architecture, is engineered to interoperate seamlessly with the State of West Virginia's existing productivity ecosystems, including both Google Workspace and Microsoft 365. The solution supports enterprise-grade interoperability at the identity, communication, scheduling, collaboration, and document-management layers, ensuring continuity and productivity for agency personnel and streamlined interactions for public users.

From an identity standpoint, Salesforce supports single sign-on authentication using SAML 2.0, OAuth 2.0, and OpenID Connect, enabling integration with Azure Active Directory (AAD) and Google Identity Services for centralized credential control and Multi-Factor Authentication (MFA). This ensures a unified identity backbone across Salesforce, MuleSoft, Microsoft 365, and Google Workspace, providing secure authentication and role-based authorization while preserving state identity governance policies.

For communication and scheduling workflows, Salesforce provides native integration connectors for Microsoft Exchange Web Services, Microsoft Graph API, and Google Calendar APIs, enabling real-time bi-directional synchronization of calendar events, inspection schedules, and automated workflow reminders. For example, inspection scheduling events created in Salesforce LPI can automatically generate calendar invitations through the appropriate backend provider (Exchange or Google Calendar), while MuleSoft can orchestrate synchronization logic for complex scheduling scenarios requiring downstream system confirmation. Email notifications can be routed through SMTP relay via Exchange Online or Gmail, ensuring that outbound messages originate from state-approved domains and comply with continuity and branding standards.

Document interoperability is supported through Salesforce Files Connect, which provides secure integration to Google Drive and Microsoft OneDrive / SharePoint using OAuth-based delegated access. This allows agency personnel to attach documents directly from existing content repositories to application or inspection records without duplicating storage or compromising chain-of-custody requirements. The integration maintains native document versioning, permissions inheritance, encryption at rest, and access auditing. Public users can likewise upload documentation to the portal from their connected cloud storage locations or mobile devices. To support structured workflow document handling, MuleSoft System APIs can exchange metadata and version control details with backend licensing repositories when required.

For collaboration, the solution integrates with Microsoft Teams and Google Meet through plug-ins and deep link handling, enabling agency staff to initiate virtual meetings from within a Salesforce case or inspection record. Metadata such as meeting links, outcomes, and file notes can be logged directly into the workflow record in Salesforce. MuleSoft's Anypoint Platform enables service-level monitoring of integration flows, performance dashboards, and API policy enforcement for secure message transport across platforms, supporting TLS 1.2+, IP allow-listing, token expiration policy controls, and encrypted payload options (JWE/JWT) for sensitive application data.

Performance and reliability are enhanced through API-led integration patterns—Experience, Process, and System APIs—ensuring that the solution operates cleanly with both cloud-native and legacy agency systems without imposing unnecessary direct integration load or requiring refactoring of existing application logic. This layered approach protects each agency's permitting and licensing systems while enabling scalable collaboration workflows. Webhooks, event streaming (Platform Events and Change Data Capture in Salesforce), and polling patterns are selectively applied based on real-time vs. near-real-time requirements for operational workloads.

By designing interoperability around open standards, secure integration protocols, reusable APIs, and federated identity services, the solution ensures that the State's employees continue to work within familiar tools and processes while benefiting from a modernized enterprise data and workflow layer. This reduces adoption friction, supports hybrid operations, accelerates time-to-value, and maximizes the return on existing technology investments.

3.1.19 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.

Team CoreSphere's solution, built on the Salesforce Platform, is designed from the ground up to evolve as the State's operational, technical, and organizational needs expand. Salesforce's cloud-native architecture, combined with Team CoreSphere's modular implementation approach, enables the State to seamlessly onboard additional agencies, extend capabilities, and adapt to new requirements without large redevelopment efforts.

The Salesforce Platform provides a **highly configurable, metadata-driven architecture** that allows new features, workflows, intake forms, licensing types, and business processes to be added without code or with minimal low-code enhancements. This ensures that:

- New agencies can be onboarded without disrupting existing operations.
- Workflows, rules, and forms can be updated quickly as regulations or processes change.
- Additional functionality can be introduced incrementally, reducing risk and accelerating adoption.

Team CoreSphere's implementation model uses reusable components, templates, and standardized design patterns that support rapid expansion.

Team CoreSphere's solution is intentionally structured to support multiple divisions, boards, and agencies within a centralized Salesforce environment. This includes:

- **Shared data models** where appropriate, with agency-specific segmentation and access controls.
- **Configurable workflows** that can be tailored to each agency's regulatory and operational needs.
- **Role-based access** ensuring each agency views and manages only its relevant data.
- **Reusable components** such as online applications, renewals, payments, queues, approvals, and communications.

This architecture ensures the State can scale from a single agency to dozens without re-architecting the platform.

Salesforce's cloud infrastructure automatically scales to accommodate:

- Increases in user volume
- Growth in licensing/permitting workload
- Additional data storage
- Higher system activity during peak periods (e.g., renewal cycles)
- Geographic or operational expansion

There is no need for the State to provision hardware, expand data centers, or manage server capacity—Salesforce handles this seamlessly.

3.1.20 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.

The proposed One-Stop Licensing Portal solution, implemented on the Salesforce Experience Cloud platform and supported by MuleSoft's Anypoint Platform, is engineered with high availability, resiliency, and operational continuity as core architectural principles. Salesforce provides enterprise-grade uptime backed by a 99.9% SLA, powered by a globally redundant,

multi-zone cloud infrastructure designed to ensure continuous service availability even under peak load conditions. MuleSoft Cloud Hub further supports this resilience through multi-region failover, horizontal scaling, active-active load distribution, and automated process restarts, ensuring that integration flows remain available and performant across varying transaction volumes. Together, these capabilities ensure that the One-Stop Portal remains accessible to citizens, businesses, and agency users with minimal service disruption and predictable operational reliability.

To maintain trust and transparency, the solution incorporates well-defined maintenance governance and communication processes. Planned maintenance windows are scheduled outside of core business hours to minimize user impact and are communicated well in advance through the portal's notification system, email alerts, and optional SMS updates. System status indicators and service health dashboards, such as those available on Salesforce Trust and MuleSoft Status, allow users and administrators to monitor real-time platform performance and availability. These resources provide direct visibility into release schedules, ongoing maintenance activities, and incident resolutions, ensuring clear and open communication with the public and agency stakeholders.

The solution also includes extensive disaster recovery and rapid failover protocols designed to ensure business continuity in the event of unexpected outages, critical events, or infrastructure incidents. Salesforce maintains geographically diverse mirrored environments, while MuleSoft offers automated failure detection, retry logic, queue-based buffering, and message persistence that prevents transactional loss if backend systems become temporarily unavailable. Recovery point objectives (RPO) and recovery time objectives (RTO) are measured in minutes rather than hours, ensuring that services can be restored quickly with minimal disruption. MuleSoft's high availability clustering, API Gateway policy enforcement, and Anypoint Monitoring dashboards provide continuous observability, enabling IT operations teams to detect issues proactively, isolate root causes, and resolve them rapidly.

From a security and compliance perspective, both Salesforce and MuleSoft support rigorous operational controls, real-time monitoring, and full logging of integration of traffic, role access, workflow execution, and system behaviors. These capabilities allow for comprehensive incident tracking and ensure that both planned and unplanned events are managed transparently and effectively. Because the One-Stop Portal is architected as a decoupled front-end layer, even if an agency backend becomes temporarily unavailable, the portal remains fully operational—displaying appropriate status messaging while queuing transactions for synchronization once systems recover.

multi-zone cloud infrastructure designed to ensure continuous service availability even under peak load conditions. MuleSoft Cloud Hub further supports this resilience through multi-region failover, horizontal scaling, active-active load distribution, and automated process restarts, ensuring that integration flows remain available and performant across varying transaction volumes. Together, these capabilities ensure that the One-Stop Portal remains accessible to citizens, businesses, and agency users with minimal service disruption and predictable operational reliability.

To maintain trust and transparency, the solution incorporates well-defined maintenance governance and communication processes. Planned maintenance windows are scheduled outside of core business hours to minimize user impact and are communicated well in advance through the portal's notification system, email alerts, and optional SMS updates. System status indicators and service health dashboards, such as those available on Salesforce Trust and MuleSoft Status, allow users and administrators to monitor real-time platform performance and availability. These resources provide direct visibility into release schedules, ongoing maintenance activities, and incident resolutions, ensuring clear and open communication with the public and agency stakeholders.

The solution also includes extensive disaster recovery and rapid failover protocols designed to ensure business continuity in the event of unexpected outages, critical events, or infrastructure incidents. Salesforce maintains geographically diverse mirrored environments, while MuleSoft offers automated failure detection, retry logic, queue-based buffering, and message persistence that prevents transactional loss if backend systems become temporarily unavailable. Recovery point objectives (RPO) and recovery time objectives (RTO) are measured in minutes rather than hours, ensuring that services can be restored quickly with minimal disruption. MuleSoft's high availability clustering, API Gateway policy enforcement, and Anypoint Monitoring dashboards provide continuous observability, enabling IT operations teams to detect issues proactively, isolate root causes, and resolve them rapidly.

From a security and compliance perspective, both Salesforce and MuleSoft support rigorous operational controls, real-time monitoring, and full logging of integration of traffic, role access, workflow execution, and system behaviors. These capabilities allow for comprehensive incident tracking and ensure that both planned and unplanned events are managed transparently and effectively. Because the One-Stop Portal is architected as a decoupled front-end layer, even if an agency backend becomes temporarily unavailable, the portal remains fully operational—displaying appropriate status messaging while queuing transactions for synchronization once systems recover.

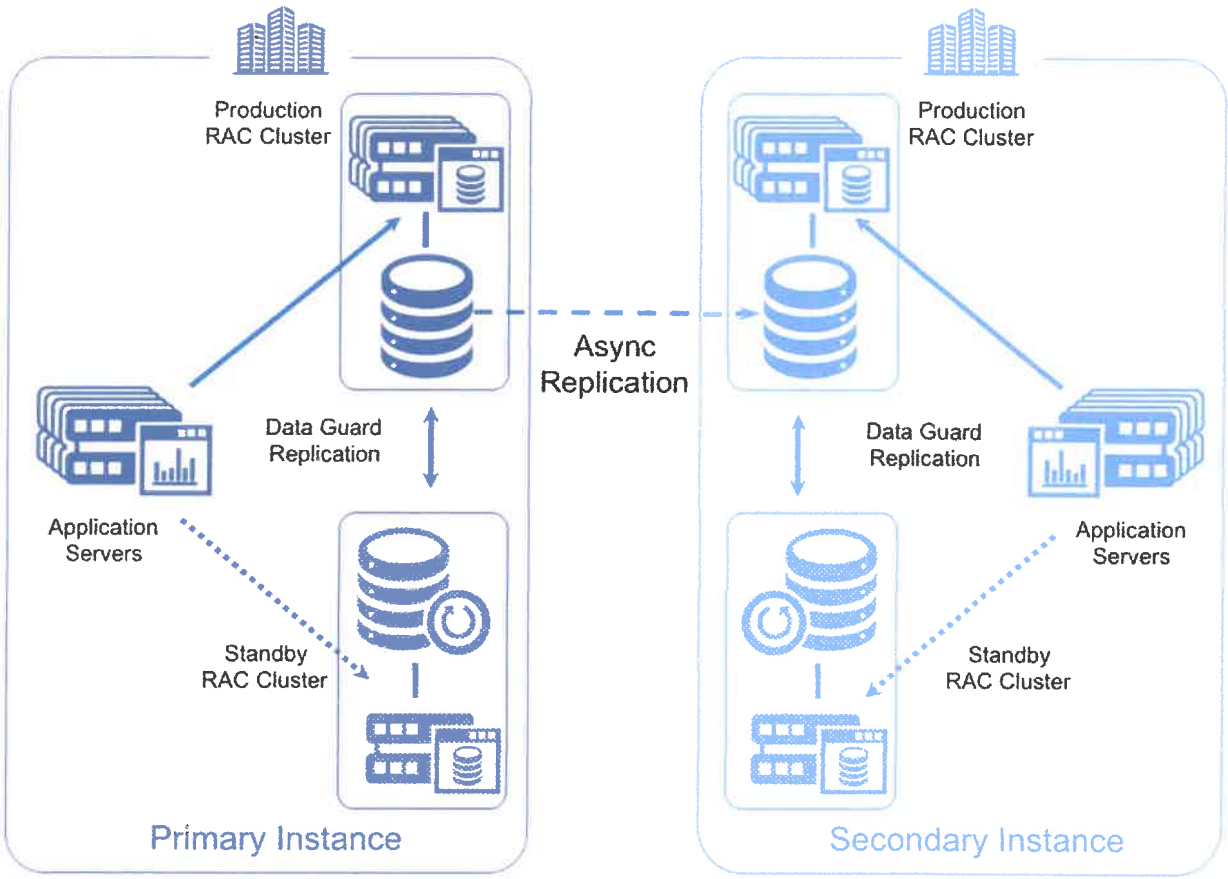


Exhibit 19. Backup and Recovery Architecture

For business continuity purposes, our platform supports disaster recovery with a dedicated team and a 4-hour recovery point objective (RPO) and 12-hour recovery time objective (RTO).

As part of our Continuous Site Switching program, Our platform Salesforce switches the active and ready instance locations approximately once every 6 months. Continuous site switching allows us to continuously improve our operations and infrastructure to provide you with the high availability of our services you've come to expect. In addition, continuous site switching satisfies the internal compliance requirement of many of our customers that their instances are capable of being served from either geographic location throughout the year.

Additional details on Disaster Recovery can be provided with the execution of an NDA between Team CoreSphere-Salesforce and State.

3.1.21 4.2.1.21 Vendors' solution must include a description of the project management approach and relevant tools to be utilized.

Team CoreSphere is responsible for leading and executing all phases of the software implementation using its CorePMP framework, which spans from project initiation through deployment and closure. This structured approach ensures consistent delivery and alignment with project goals. Throughout the lifecycle, Team CoreSphere also provides ongoing support through

established communication routines, Agile practices, and project management processes to maintain transparency, track progress, and address issues collaboratively with stakeholders. An overview of the CorePMP methodology we will utilize along with key activities within each stage is provided in the Exhibit below.

There are six (6) phases in the CorePMP framework that Team CoreSphere is responsible for conducting: Initiation, Plan/Discovery, Architecture/Design, Execute/Build/Implementation, Control/Test, and Close/Deploy.

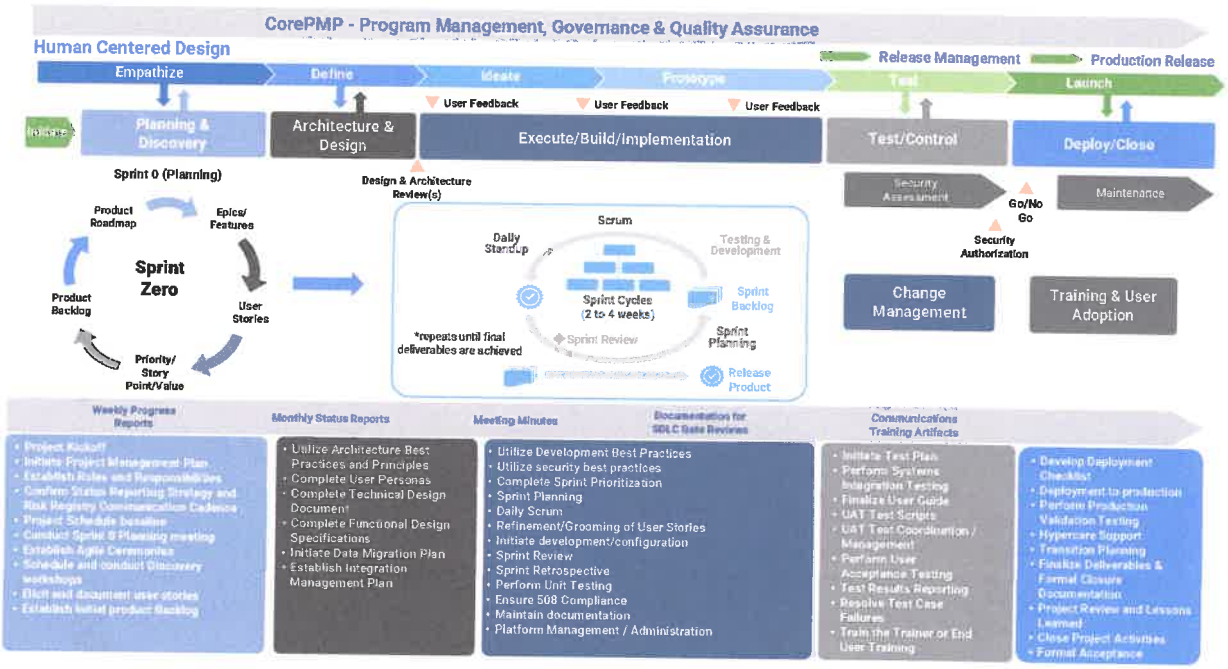


Exhibit 20. CorePMP Software Implementation Methodology

Phase 1: Initiation

The Initiation phase focuses on kicking off the project, establishing governance and project controls and engaging stakeholders to validate key project details. Activities and progress metrics for this Phase are provided on the table below:

Activities	Progress Metrics

• **Project Kickoff**
• **Initiate Project Management Plan**
• **Establish Roles and Responsibilities**
• **Establish Communication plan**
• **Confirm Status Reporting Strategy and Risk Registry Communication Cadence**
• **Project Schedule baseline**
• **Finalize the Resource Plan**
	• Project Kick-off Meeting
	• Meeting Minutes with Action items & Decisions
	• Integrated Project Management Plan
	  ○ Communication Plan
	  ○ Scope Management
	  ○ Schedule Management
	  ○ Resource Management
	  ○ Risk Management
	  ○ Quality Management
	  ○ Deliverables Management
	• Establish Weekly & Monthly Status Report

Activities	Progress Metrics
	Cadence to include schedule and cost management reports (ex., Labor Burn Down Charts/Reports, Monthly Budget Report, etc.) • Risk and Opportunity Registry • High Level Project Schedule with WBS • Milestone Acceptance

Phase 2: Plan / Discovery

The Discovery Phase provides the groundwork for the management and scheduling activities for successful implementation. Discovery phase is used to confirm the systems process; user stories prioritize and complete the Fit Gap Analysis document. Activities and progress metrics for this Phase are provided on the table below:

Activities	Progress Metrics
• **Document Analysis** • **Conduct user research and Interviews** • **Schedule and conduct Discovery workshops** • **Elicit and document user stories** • **Initiate HCD Define Phase** • **Establish Initial product Backlog**	• Meeting Minutes with Action items & Decisions • Weekly & Monthly Status Report Cadence to include Schedule and Cost Management reports • Approved Project Schedule with WBS • Business Process Flows • Wireframes and Mock-ups • Requirements Management Plan • Requirements Traceability Matrix (RTM) • Baseline Product Backlog into Epics & User stories • Milestone Acceptance

Phase 3: Architecture and Design

The Design stage ensures that the overall design for the systems, their connectivity, procedures, and policies are in place before the start of the development cycles, minimizing developmental roadblocks. Activities and progress metrics for this Phase are provided on the table below:

Activities	Progress Metrics
• **Complete User Personas** • **Complete Technical Design Document** • **Complete Functional Design Specifications** • **Complete Initial product Roadmap** • **Conduct Sprint 0 Planning meeting** • **Establish Agile Ceremonies** • **Initiate Data Migration Plan** • **Establish Integration Management Plan**	• Meeting Minutes with Action items & Decisions • Fit Gap Analysis • System Design Document • Baselined Data Strategy • Baselined Data Dictionary • Baselined Integration Management Plan/Approach • Milestone Acceptance

Phase 4: Execute/Build/Implementation

Configuration will be executed in Agile Sprints based on defined User Stories. Likewise, the development of data migration scripts and processes will be executed. Our Agile Methodology is described below in more detail. Activities and progress metrics for this Phase are provided on the table below:

Activities	Progress Metrics
• **Sprint Planning** • **Daily Scrum** • **Refinement/Grooming** • **Initiate development/configuration** • **Sprint Review** • **Sprint Retrospective** • **Complete Sprint Prioritization**	• Meeting Minutes with Action items & Decisions • Sprint Planning • List of prioritized selection of backlog items to be worked on during sprint to include description, acceptance criteria, and estimation. • Daily Scrum Documented shared daily updates on individual progress and align plans to achieve sprint development goal. • Refinement/Grooming Collaborative review and clarification with business of items from backlog to effectively work once committed to sprint. • Sprint Review Demonstrated and documented completion of development work reviewed with stakeholders to receive feedback. • Sprint Retrospective Documented reflection of team's performance and identified areas of improvement and collaboration. • Implementation Plan Proposed and Approved Acceptance Criteria/Test Plan per phase • Milestone Acceptance

Phase 5: Control/Test

Testing occurs throughout our Agile sprints. User Acceptance Testing (UAT) is the key to this phase. UAT will occur in a fully configured QA sandbox instance using mocked-up data. User Stories will be utilized to complete UAT and all defects along with severity will be logged. Activities and progress metrics for this Phase are provided in the table below:

Activities	Progress Metrics
• **Initiate Test Plan and Test strategy** • **Perform SIT (Systems Integrated Testing** • **Perform UAT (User Acceptance Testing)** • **Training (Train the Trainer or End User Training)**	• Meeting Minutes with Action items & Decisions • Configuration Management • Change Control Board/Process • Test Results • UAT Results (Bugs, Enhancements and

Activities	Progress Metrics
• **User Adoption** • **Finalize User Guide** • **Go/No-Go**	Change requests) • Training Plan • User Guides and Videos • Milestone Acceptance

Phase 6: Close / Deploy

Prior to deploying into production environment training on how to use the system with examples of how the new platform improves users' day-to-day activities using various training methodologies is performed. System is deployed to production, the implementation is closed out, and Operations & Maintenance begins. Activities and progress metrics for this Phase are provided on the table below:

Activities	Progress Metrics
• **Develop Deployment Checklist** • **Complete Deployment Plan** • **Deploy to pre-production.** • **Validate in pre-production.** • **Deployment of production.** • **Perform PVT (Production Validation testing)** • **Hypercare Support** • **Transition Planning** • **Finalize Deliverables & Formal Closure Documentation** • **Financial Closure** • **Lessons Learned** • **Project Review and Evaluation** • **Archiving** • **Project Closure Communication** • **Close Project Activities** • **Formal Acceptance**	• Deployment Management Plan *Objectives and Scope* *Objectives and Scope* *Stakeholder Roles and Responsibilities* *Timeline and Milestones* *Risk Management* *Communication Plan* *Testing and Quality Assurance* *Deployment Strategy* *Post-Deployment Evaluation* • Release Notes • Deployment Readiness Checklist including UAT Sign-off • Transition Plan • Project Closeout Acceptance

Agile Methodology

At the heart of CorePMP is a scrum agile development approach and framework depicted in the Exhibit below.

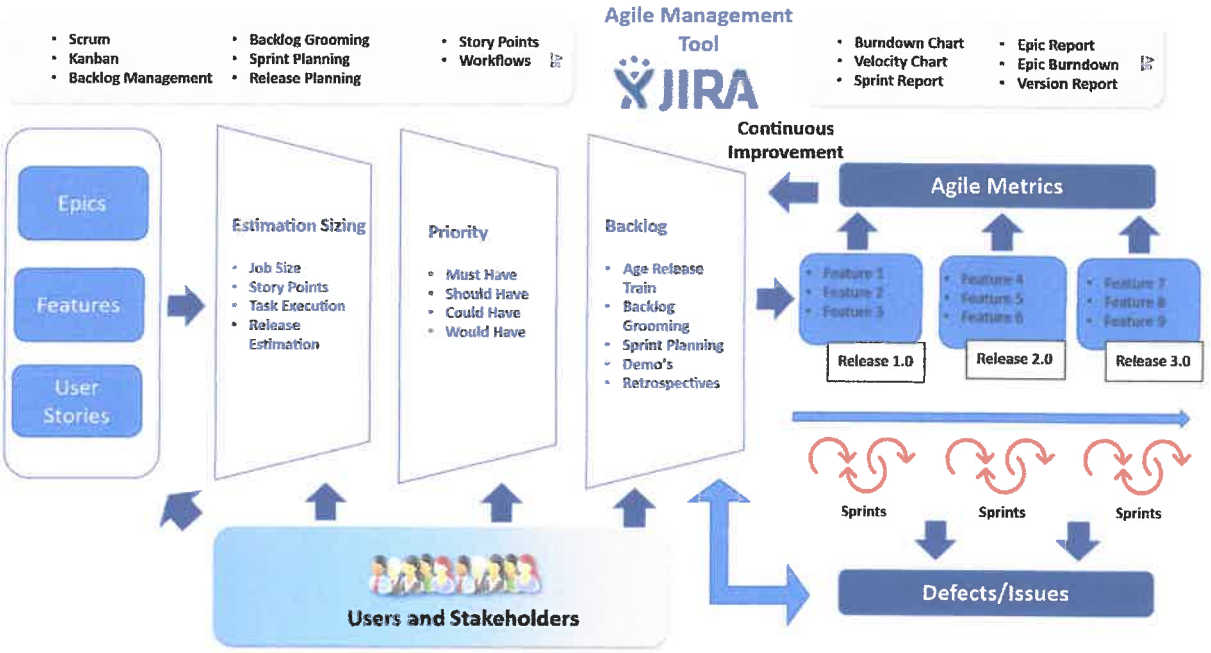


Exhibit 21. Scrum Agile Process

Team CoreSphere adheres to Agile best practices and will manage the development via a structured process including but not limited to the following:

Backlog Refinement: An event that happens throughout the product delivery lifecycle. Team CoreSphere will conduct detailed refinement sessions with our Montana counterparts to maintain and update the Project Backlog. As a result of these sessions, the intrinsic value of the story may decompose into multiple acceptance criteria. During the refinement sessions, notes are added as additional nuances to support the acceptance criteria. These acceptance criteria and grooming notes are used by the to do unit and integration testing at their end and validate the functional value of the user story. The following key definitions and Agile constructs will be used in support of the project and our approach towards User Stories and Requirements Definition.

Product Backlog represents the total population of User Stories that have been defined for the applications(s). The backlog is organized by Sprint, Increment and Release, including enhancements and break-fix. The Product Backlog is a living list of User Stories. User Stories for later Increments and Releases are assigned as such for tracking purposes, so that no requirement is lost. It is expected that User Stories in the backlog will have a status of "Release 1" when they are approved and "Deferred" or "Release X" once the decision is made not to immediately assign them to the active Release. These user stories are then reviewed, documented, sized, and prioritized to build a product backlog. The product backlog is then used to build a Sprint and Release plan and is constantly groomed.

Epics - Epics will be developed for initiatives that are large enough such that their development could span multiple releases. There are Business Epics (functional solutions) and Architectural Epics (technology solutions).

User Stories - Epics will be decomposed into User Stories, which should be constructed in a way that describes intent; for example: "<user role> can <activity> so that..." User Stories are primarily used to describe intent. User Stories do not contain implementation details. User Stories must contain acceptance criteria. Acceptance criteria are sets of requirements that must be completed for the story to be considered finished and to let the State stakeholders know that the story is done. We will capture all Epics, and User Stories in an Agile project management tool as our Story Board or your Agile Management tool such as Jira or Azure DevOps.

Priority: Team CoreSphere will facilitate Backlog prioritization with the State. Each user story will be assigned a priority to align with Critical, Must Have, Nice to Have goals of the solution. The priority will be data input to the Sprint Planning and development process.

Definition of Ready (DOR) is based on mutually agreed criteria that a User Story must meet prior to being accepted into a Sprint, (i.e., development on a User Story will not be started until these defined criteria are met). The project performs design and development work only after User Stories are documented and approved.

The Definition of Done (DOD) is based on a list of criteria which must be met before a User Story is considered to be done. Formal acceptance criteria are defined for each User Story that is assigned to a sprint and acceptance criteria must be met before User Stories are considered done.

Product Roadmap Sprint Zero will serve as the key planning and strategy stage of the project. Using the above defined agile approach and in addition to the specified deliverables, sprint zero will result in a much more detailed Agile Plan and include a completed product backlog of prioritized user stories. A cadence of sprint rituals and tools will be established, and core deliverables will be prepared. These deliverables may continue to be refined in future sprints as information is available. A core System architecture and design will be established along with governance and configuration management processes.

Sprint Planning: Occurs at the start of the Sprint and defines the work that will be completed and assigned to the resources. As part of the Sprint Planning meeting, the team will estimate the work that needs to be completed.

- **Story Estimation:** We use the Fibonacci Sequence (1, 2, 3, 5, 8, 13, 21, 34, etc.) for estimation of the relative complexities of the user stories. In addition to complexity, risk and uncertainty are also factored into the estimation.
- **Team Capacity:** Assuming a 3 Week Sprint, each member of the team has 120 hours for the sprint. That time is usually put into two buckets:
    - (i) Sprint rituals bucket (planning/grooming, review, retrospective, client meetings, admin work, story updating in JIRA etc.)
    - (ii) Sprinting ritual. For a 3-week sprint, the sprinting ritual is usually assigned 90 hours (75%) and 30 hours (25%) are assigned to the sprint ritual bucket.

- **Team Velocity:** Identifies the number of Story Points that can be delivered by the team in each sprint. We track sprint metrics such as Point Taken, Points Delivered, Capacity Hours (sprinting capacity only), Hours/Story Point and Story Point variance. By tracking these metrics, Sprint Velocity can be determined over the course of the first few sprints.

Additionally, the following Agile ceremonies are adhered to for each sprint.

Daily Scrum: The Scrum team meets every day to share what they worked on the previous day, report blockers/impediments for initiative-taking remediation.

Sprint Review/Demo: Occurs at the end of the Sprint to review and demonstrate all the work completed in the Sprint.

Sprint Retrospective: Occurs at the end of the Sprint for the team to identify areas of improvement and define action plans accordingly.

Project Communication

CorePMP and our Agile Scrum approach is complemented with a robust Communication Plan that includes various communication routines and meetings to ensure effective collaboration and information exchange between Team CoreSphere and DVR. Here is a summary of the key communication activities for the project:

1. **Weekly Status Update:** Weekly or bi-weekly status update meetings will be conducted, attended by the project management teams from both Team CoreSphere and the Authority. These meetings will focus on reviewing the status report produced by Team CoreSphere, covering items completed, progress against the plan, upcoming tasks, open issues, project risks, and defects. Updates to the Work Plan will also be discussed and determined.
2. **Monthly Status Report:** A comprehensive monthly status report will be prepared, providing updates on all facets of the project from the previous month.
3. **Agile Routines:** The Project Communication Plan incorporates Agile meeting routines such as Backlog Refinement, Sprint Planning, Sprint Review/Demo, and Sprint Retrospective.
4. **Meeting Notes**: Meeting notes will be completed within two business day of each meeting by Team CoreSphere and sent to stakeholders for review. Work Plan updates will also be completed within three business days if necessary and sent to management for review and approval.
5. **Project Management Routines:** Project management routines include Risk Review Cadence, typically conducted bi-weekly to document new risks, review the risk register, and collaborate on mitigation strategies. Change Control Meetings are typically held weekly to review Change Requests and approve or deny them.

The CorePMP methodology using Agile scrum will serve to guide Team CoreSphere and DVR through the project to successful delivery.

Project Governance

Project governance refers to the framework, processes, and practices put in place to ensure effective oversight, guidance, and support for project delivery. Team CoreSphere believes in a rigorous project governance approach, facilitated by its Project Management Office (PMO), Technical Management Office (TMO), and Functional Management Office (FMO). These integrated entities ensure comprehensive oversight across the entire delivery lifecycle, informing project management, technical, and functional processes. The goal of this governance structure is to confirm adherence to best practices regarding quality, risk management, and technical and functional aspects of the end-to-end solution.

Team CoreSphere's approach to project governance emphasizes several key principles:

Quality Focus: Team CoreSphere prioritizes delivering high-quality solutions to its customers. Through rigorous oversight and adherence to best practices, the organization ensures that projects are executed with excellence and meet the highest standards of quality.

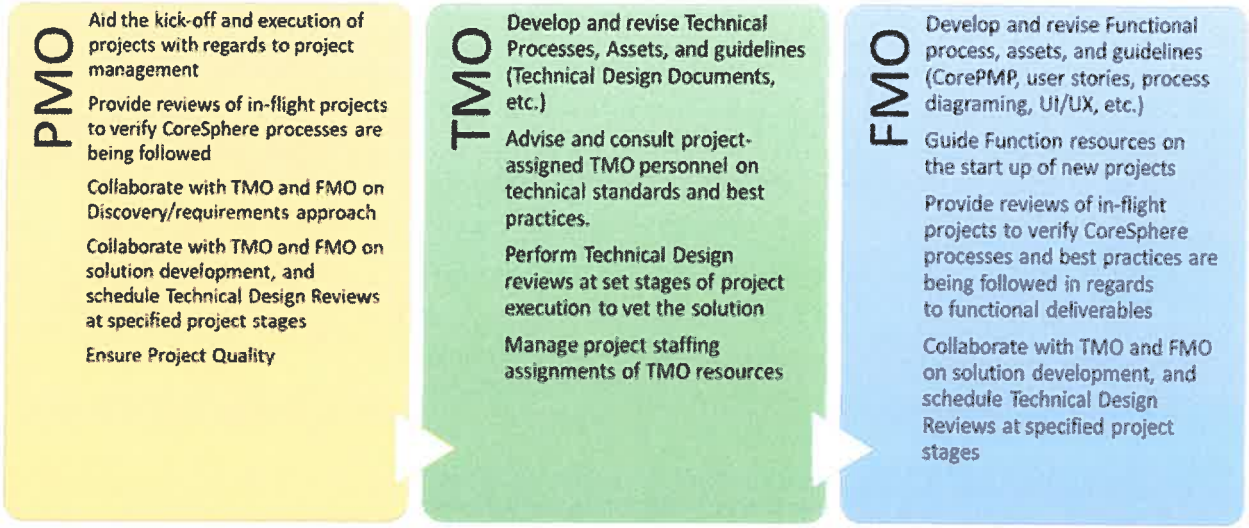
Customer-Centricity: Team CoreSphere is committed to delivering solutions that exceed customer expectations and meet their specific needs. The organization strives to achieve customer satisfaction by understanding their requirements and delivering value-added solutions within the scope of work and contractual constraints.

Collaboration: Team CoreSphere promotes a culture of collaboration, recognizing that the collective expertise of its team members is essential for project success. By leveraging the strengths of its colleagues and fostering inclusivity, the organization ensures that everyone contributes to delivering excellence.

Adaptability: Team CoreSphere acknowledges the importance of adapting solutions to fit the unique needs of its customers. The organization remains flexible and responsive, collaborating with colleagues and stakeholders to tailor solutions that address evolving requirements and challenges.

Professionalism: Professionalism is the cornerstone of Team CoreSphere's approach to project governance. This encompasses embodying the principles of quality, customer-centricity, collaboration, and adaptability, while also demonstrating mutual respect for colleagues and customers.

By upholding these principles and integrating them into its project governance framework, Team CoreSphere ensures that projects are delivered with excellence, scalability, and customer satisfaction, while minimizing cost and schedule variances. This approach fosters a culture of continuous improvement and sets the foundation for successful project outcomes.



The Team CoreSphere Project Management Office (PMO), Technical Management Office (TMO), and Functional Management Office (FMO) play critical roles in ensuring the success of program delivery. Here is how each office provides guidance, oversight, and support to their respective areas:

Team CoreSphere PMO:

The PMO focuses on ensuring Agile Project Management best practices are followed and provides guidance on proactive risk identification and mitigation. They also monitor delivery Key Performance Indicators (KPIs), such as Sprint velocity and defect resolution metrics, ensuring they are being met and trended appropriately. Their responsibilities include:

Facilitating Agile ceremonies and ensuring adherence to Agile principles.

Conducting regular risk assessments and implementing mitigation strategies.

Monitoring and analyzing delivery KPIs to identify areas for improvement and optimization.

Team CoreSphere TMO:

The TMO oversees all technical deliverables and teams, ensuring alignment with Salesforce best practices. They promote an Out of the Box and Configuration first approach to minimize technical debt and provide guidance on decision-making regarding add-ons and customization. Their responsibilities include:

Reviewing technical designs, architecture, and solutions to ensure alignment with Salesforce best practices.

Providing guidance on integration approaches, environment management, and data migration strategies.

Establishing standards for Agile management tools, source code management, and test management practices.

Team CoreSphere Functional FMO:

The FMO focuses on functional processes and deliverables, ensuring product requirements align with Team CoreSphere, Agile, and industry best practices. They monitor Functional execution KPIs and ensure requirements traceability exists for all acceptance criteria and defects. Their responsibilities include:

Facilitating requirements elicitation sessions and documenting product requirements in alignment with best practices.

Monitoring Functional execution KPIs and identifying opportunities for process improvement.

Ensuring requirements traceability throughout the development lifecycle and facilitating product demonstrations according to best practices.

By providing guidance, oversight, and support in their respective areas, the Team CoreSphere PMO, TMO, and FMO contribute to the successful delivery of programs, ensuring alignment with best practices and optimization of project outcomes.

3.1.22 4.2.1.22 Vendor should be able to integrate with the State's Single Sign-On Solution.

The proposed One-Stop Licensing Portal, built on Salesforce Experience Cloud and integrated with backend agency systems using MuleSoft, is fully capable of integrating with the State of West Virginia's Quest-based Single Sign-On (SSO) identity infrastructure. Salesforce natively supports industry-standard identity federation protocols including SAML 2.0, OAuth 2.0, and OpenID Connect, ensuring seamless compatibility with the authentication models typically implemented within Quest Identity and Access Management platforms. Through this integration, users—including public constituents, business delegates, inspectors, and agency personnel—will authenticate through the State's centralized identity authority rather than creating separate portal credentials, enabling consistent identity governance and improving security posture.

Upon login through the Quest SSO service, authenticated identity assertions will be passed to Salesforce, which will map users to the appropriate role, permissions, and entity associations within the One-Stop Portal and the digital wallet. This enables citizens and businesses to manage license applications, submit renewals, receive notifications, and track status updates without needing separate usernames or passwords. For agency users, integration with Quest enables centralized access provisioning and de-provisioning aligned to personnel management processes, ensuring that access is immediately updated when employment, job duties, or security roles change. This supports the State's compliance requirements and enforces least-privilege access control across all licensing workflows.

From a technical integration perspective, Quest SSO acts as the Identity Provider (IdP), while Salesforce functions as the Service Provider (SP), exchanging authentication and authorization

assertions via secure SAML handshakes with certificate-based trust. MuleSoft supports the same federated identity model for system-to-system integrations, ensuring credential isolation, token lifecycle enforcement, and secure connection to backend agency systems. Multi-factor authentication (MFA) for high-risk actions—such as permit approval or delegated business access—can be enforced using the State's existing authentication mechanisms, eliminating parallel MFA systems and reducing friction.

This identity integration also supports auditability and operational monitoring, as Quest remains the authoritative authentication logging system while Salesforce and MuleSoft contribute additional contextual auditing for application-specific activities. This ensures full traceability for access and workflow events across the One-Stop architecture. The combination of Quest SSO and role-based access controls enables a seamless and secure identity experience while ensuring long-term maintainability and minimal disruption to existing infrastructure.

3.1.23 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.

Team CoreSphere has completed Attachment A for our complete cost.

3.1.24 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.

Team CoreSphere and our subcontractors will deploy resources only in the continental united states. We will not utilize resources that are not physically located in the United States. We will not utilize any technology to communicate with banned countries.

3.1.25 4.2.1.25 Vendor should provide constituents access to a digital wallet for payment, refund, and license/permit management.

The proposed One-Stop Licensing Portal incorporates a secure, intuitive, and feature-rich Digital Wallet, providing constituents—individual applicants and authorized business representatives—with a centralized location to manage all financial and licensing activity. Accessible through the Salesforce Experience Cloud portal, the Digital Wallet serves as the user's personalized hub for managing payments, refunds, application records, issued licenses or permits, and compliance documentation. It consolidates all licensing interactions into a single digital experience regardless of how many agencies, permit types, or business entities may be involved, eliminating the need to navigate multiple independent agency systems or maintain separate tracking records.

The Digital Wallet enables constituents to view outstanding balances, make online payments, retrieve payment confirmations, and track refund requests through seamless integration with the State's preferred payment processor or treasury system. Real-time integration via MuleSoft enables the wallet to automatically update payment status; once a transaction is processed, the wallet reflects confirmation, transaction history, fee breakdowns, and refund progress. Any

financial adjustments initiated by agency systems—such as partial or full refunds, credit transfers, or reprocessing of failed payments—are synchronized back to the Digital Wallet, keeping the applicant fully informed without requiring direct agency intervention. All financial records are stored securely and can be printed or exported for audit, tax reporting, or compliance needs.

In addition to financial activity, the Digital Wallet provides comprehensive license and permit lifecycle management. Once approved by the agency system, digital licenses or permits are automatically issued into the wallet via real-time status synchronization through MuleSoft APIs. Users can open, download, display, or print official permit documentation from desktop or mobile devices. The wallet proactively surfaces renewal deadlines, expiration warnings, compliance obligations, scheduled inspections, and outstanding action items, allowing users to maintain regulatory standing without relying on manual reminders. Renewals or amendments can be initiated directly from the wallet, leveraging pre-populated application data to reduce effort and minimize entry errors.

The Digital Wallet is also equipped with delegated access capabilities, enabling business administrators to grant controlled access to employees, consultants, or legal representatives. Delegated users can be restricted by function—such as view-only, financial access, permit management, or renewal submission—ensuring strong governance and operational flexibility. Comprehensive document management capabilities allow users to store reusable supporting documents such as insurance certificates, registration forms, or identity verification materials, enabling fast resubmission during renewals.

By combining real-time integration, financial transparency, lifecycle tracking, document storage, and role-based collaboration within a unified interface, the Digital Wallet transforms the licensing process into a streamlined, self-service experience. It dramatically reduces administrative burden on both constituents and agencies, minimizes application errors, increases compliance confidence, and aligns directly with modern expectations for consumer-grade digital government services.

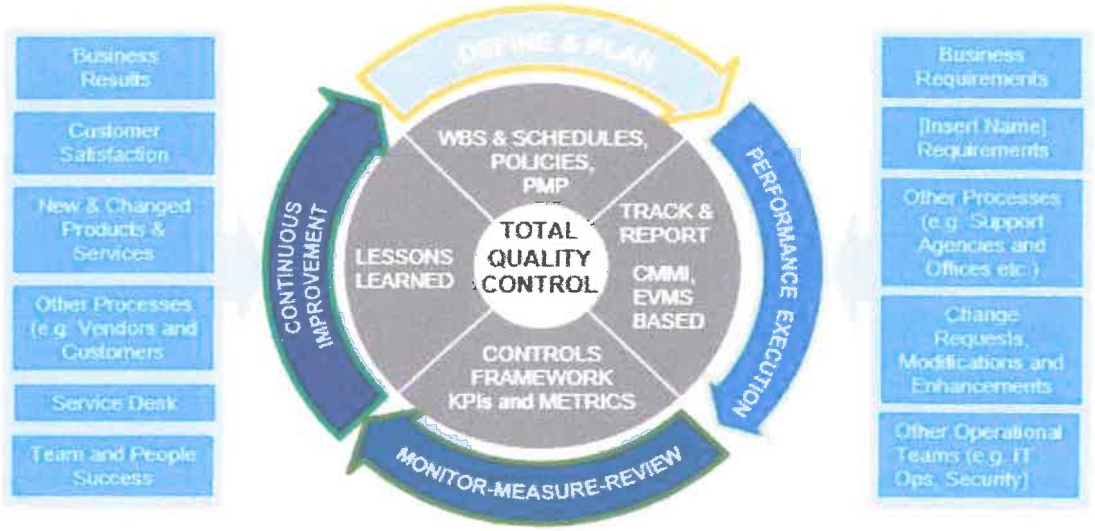
3.2 Approach & Methodology to Compliance with Mandatory Project Requirements – 15 points

3.2.1 4.2.2.1 Vendors must provide a solution for the development and creation of a one-stop shop permitting portal.

Our proposed solution leverages Salesforce Public Sector Solutions (PSS) with its Licensing, Permitting & Inspection (LPI) capabilities, integrated with MuleSoft's Anypoint Platform. The core objective is to create a unified, user-centric digital frontend that simplifies application intake, permit discovery, and status tracking, while preserving the operational integrity of existing agency-specific backend systems. A key feature introduced is the concept of a secure "digital wallet" within the portal, serving as a centralized repository for all submitted applications, downloaded permits, payment records, and other relevant documentation. This digital wallet aims to provide citizens and businesses with a single point of access and management for all their licensing and permitting needs, significantly enhancing convenience and transparency. The Solution elaborates on the technical architecture, integration strategies, user experience enhancements, reporting capabilities, and the strategic benefits this solution offers to the State of West Virginia, its agencies, and its residents.

3.2.2 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.

Team CoreSphere's Quality Management Framework is an integral component of the CorePMP methodology and applied across all project phases. This comprehensive approach embeds quality into every stage – from planning to post-implementation – covering documentation, Salesforce configurations, deliverables, and code. By integrating models like Total Quality Management and Carnegie Mellon's Capability Maturity Model, Team CoreSphere consistently delivers trusted, high-quality Salesforce solutions that position our organization as a trusted partner.



Total Quality Control approach: Team CoreSphere's framework ensures customer satisfaction by embedding quality at each point of the value stream. The Exhibit above highlights our approach that encompasses all aspects of our Salesforce work. Quality standards are defined early, incorporating specific West Virginia requirements. The framework spans privacy, data, security, support, training, availability, and latency measured against clear metrics. Quality gate checkpoints are used to ensure alignment with milestones and compliance with performance standards.

Quality requirements are defined as part of Team CoreSphere's program management lifecycle and are integrated into all planning and delivery activities. Deliverables and artifacts are assessed against pre-established quality standards and metrics. These Quality Control processes are inserted in project and task management plans, supported by an integrated master schedule that outlines quality control activities, assigns inspection responsibilities, and specifies reporting protocols.

Deviations and deficiencies are identified through regular evaluations. Corrective actions—such as targeted training, process improvements, enhanced communication, or management oversight—are implemented as needed. Lessons learned are systematically incorporated into the Quality Control Plan (QCP) to enhance future performance and are captured as part of CMMI Dev L3 quality measures within the organizational knowledge base.

In collaboration with West Virginia, Team CoreSphere conducts discovery sessions and data collection to define initial objectives and key performance metrics. Our surveillance process includes compliance assessments and ongoing refinement of performance baselines. This disciplined approach enables continuous monitoring and testing of changes, fostering predictability, alignment with strategic objectives, and successful outcomes based on repeatable best practices.

As part of our Quality Control Approach, Team CoreSphere ensures full Section 508 compliance for all deployed applications. With extensive experience across 20+ federal agencies, Team CoreSphere leverages Salesforce's inherent 508 compliance features, including Accessibility Mode and standard configuration tools. We supplement these capabilities with both automated and manual accessibility testing to ensure all system components meet [federal/state and local] accessibility requirements.

Quality Empowerment: Team CoreSphere team members are empowered to take ownership of quality management, fostering a self-organizing culture aligned with Agile principles. Team members are equipped with skills to view the project holistically, ensuring quality considerations are integrated into all processes. Aspects such as privacy, data, security, support, training, availability, and latency are all designed with specific quality metrics in mind so that all required user experiences are fully addressed. Team CoreSphere leverages models such as Total Quality Management and Carnegie Mellon's Capability Maturity Model to establish quality as a foundational attribute integrated into every value stream from the outset. Specific quality metrics are applied to program areas such as communication, scope management, risk management, and stakeholder engagement, ensuring all components meet or exceed expectations. This empowerment is supported by a quality immersion program, implemented at the project outset to instill a quality-first mindset across all stages of delivery.

Program Quality: Team CoreSphere incorporates quality into the program architecture from the outset, ensuring it is systematically engineered throughout each phase of the lifecycle, rather than being dependent solely on downstream testing or inspection activities. By focusing on human-centric design, quality is baked into the program at the outset and shows itself in the way Team CoreSphere understands program requirements to post-production O&M support work. Right from the time the program is launched, the process correctly identifies value streams early to guide the formation and scheduling of Agile Release Trains (ARTs). Clear interfaces with product visionaries ensure accurate translation of program objectives, reducing risks associated with miscommunication. Quality benchmarks or gates are defined using continuous improvement cycles, ensuring that objectives are solidified and measured against tangible metrics. A program canvas visualizes current and future states, highlighting opportunities and critical success factors to guide program execution. All program objectives are discovered and listed with their relative ranking of importance along with critical success factors.

Product Quality: Team CoreSphere adopts a system-thinking approach to optimize quality across the entire lifecycle, from discovery and architecture to post-production support. Architectural goals aim to minimize technical debt, with enterprise, information, and application architectures tailored to West Virginia needs. Team CoreSphere's lifecycle-spanning resources, trained in specialized

quality areas, integrate seamlessly with the Agency's framework to ensure consistency. Team CoreSphere resources span the entire life cycle of system development - conception, initiation, discovery, architecture, construction/code, DevOps, testing, training, and support. Quality is monitored through checkpoints at key stages, such as discovery and architecture, which serve as cornerstones for delivering high-quality outcomes. Team CoreSphere's technical expertise and track record of having implemented several systems successfully have led us to believe that for a great quality product discovery and architecture are the critical factors of a high-quality program. Applying these practices ensures a system optimized for faster workflows and sustainable quality improvement.

3.2.2.1 CorePMP Quality Benefits

Team CoreSphere's framework delivers measurable benefits across program and product quality areas:

Features and Benefits of Solution	
Solution Feature	**Benefit to West Virginia**
Quality Empowerment	360-degree view of Quality by all Team CoreSphere members
Program Quality	Comprehensive end-to-end quality lifecycle aligned with all program objectives
Product Quality	Better return on investment (ROI) by implementing the correct architecture and capturing the right architecture view across enterprise, information and applications
Product Testing	Behavior driven and test driven allows Team CoreSphere to deliver high quality work across all functional requirements (FR) and non-functional requirements (NFR) work and enabling the enterprise to meet its program goals.

Team CoreSphere's Quality Management Framework integrates quality throughout every phase of the project lifecycle, ensuring consistent, measurable outcomes. Leveraging proven methodologies, advanced tools, and a commitment to continuous improvement, Team CoreSphere aligns delivery with West Virginia goals and stakeholder expectations.

3.2.2.2 Approach to Problem Mitigation

Problem Triage: Once a problem is discovered, Team CoreSphere's next step is to fully triage the problem by assigning degrees of urgency to each potential issue.

Each problem is fully assessed, examined and documented during the Problem Triage stage where we analyze the scope and breadth of the problem as well as identify the root cause. The goal of this stage is to fully understand the problem so that it can be effectively and immediately remediated. This is a critical step to successful problem management. In our view, investing the necessary time and effort to thoroughly understand a problem before planning and implementing a mitigation strategy is critical. Acting prematurely can negatively impact both mitigation and resolution efforts. Rushing often leads to incorrect assumptions about the scope of the issue and the deployment of solutions that are either ineffective or introduce additional burdens or unintended consequences for customers.

As part of this stage, the appropriate priority and team assignments are solidified. The main factors we examine during this triage are Impact and Severity. When assessing impact, we evaluate whether the problem is currently affecting customers, performance metrics and/or contract deliverables. Also, asking the right questions such as, does the problem impact customers or contract deliverables or only impacts internal users or processes. Issues that immediately impact our customers and/or deliverables are given the highest priority followed closely by those that have the potential to impact on our customers. When assessing severity, we examine the impact the problem has or will have on the stakeholders. Severity is evaluated on a scale of 1 to 5 where a Severity 1 issue is one that prevents us from meeting contractual or organizational goals without a workaround and a Severity 5 issue is one that imposes minimal or no impact on performance goal attainment. By combining Impact and Severity examination we can assign a priority to the problem which ensures that all issues are addressed in the appropriate order in the Resolution or Corrective Action phase.

Corrective Action: Team CoreSphere's problem resolution starts with the creation of a Corrective Action Plan (CAP) for the individual issue. Each CAP has a dedicated owner who is fully accountable for seeing the issue through to resolution. The resolution of each problem is unique to the cause of the problem and may include Short Term Fixes and Workarounds, Permanent Fixes, and Process Improvements. Short Term Fixes and Workarounds are used when the issue is of the highest severity and is actively impeding work. The goal of a short-term fix is to enable work to continue as quickly as possible. These fixes are aimed at immediately lessening the impact of an issue. The goal of a Permanent Fix on the other hand is to completely resolve a problem and return the system or process involved to stable state. Finally, if the root cause of the issue was determined to be something that could be corrected by a new or updated process, Team CoreSphere updates or creates the appropriate processes and procedures to ensure the issue does not recur. Our QA organization tracks the CAPs and certifies completion after resolution.

Team CoreSphere understands the criticality of communication. At each stage of Problem Management, communication is an integral part to optimally resolve problems that may arise. If a problem is discovered that impacts a customer or a deliverable, we notify the customer as appropriate and directed under the individual task order. We ensure the right communication through various channels that use several methods to collaborate and disseminate information:

- Weekly Status Meetings: Focus on schedule performance, technical performance, issues and risks, and resource availability and conflicts.
- Monthly Status Reports (MSR): Reports project details; status of staffing, schedule, technical performance, work package, cost, issues and risks, and action items; work planned for the next reporting period; and delinquencies.
- Bi-Annual Program Management Reviews (PMRs): Used to present the status of the project over the previous six months to executive leadership, including accomplishments, planned actions, and issues. Team CoreSphere will also compare contract performance to contract performance metrics and develop mitigation plans for under-performing areas.

3.2.2.3 Roles and Responsibilities

Table below describes Team CoreSphere Quality Assurance roles, the contract roles to fulfill that QA role, and associated QA responsibilities.

Project Team Role	QA Responsibilities
Quality Control (QA) Manager (Scrum Master/Project Manager/Senior Business Analyst)	Create and maintain the Quality Control Plan Ensure product quality by providing oversight to Implementation and Operational activities Ensure project quality by conducting regular process audits Ensure peer reviews are conducted to ensure the high quality of deliverables prior to submission to West Virginia Provide regular status reports to the Team CoreSphere Program Manager Track all audit deficiencies and corrective action plans Identify and participate in continuous process improvement opportunities
QA Specialist (Salesforce Administrator/Config/Tester)	Lead day-to-day Quality Control tasks Maintain measurable levels of quality across all business areas, as defined by the QCP and QASP Conduct audits and report project status to management Work closely with all stakeholders to improve processes Develop and maintain Quality Control project timelines Ensure compliance with established quality processes, procedures, and standards
Process Owner (Salesforce Architect/Senior Salesforce Developer)	Attend the process audit training Participate in the process audits Identify appropriate artifact(s) for each audit question Address non-conformances identified during the process audit Attend the audit de-brief meeting Comply with established quality processes, procedures, and standards

Exhibit 22. QA Roles and Responsibilities

3.2.3 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.

Team CoreSphere understands that the confidentiality, integrity, and availability of customers' information are vital to their business operations. We use a multi-layered approach to protect that key information, constantly monitoring and improving our application, systems, and processes to meet the growing demands and challenges of security.

Team CoreSphere fully commits to meeting and adhering to all data security requirements established by the West Virginia Office of Technology (WVOT) throughout the entire lifecycle of

the One-Stop Licensing Portal initiative—from initial planning and discovery through design, configuration, integration, testing, deployment, and ongoing support. This includes compliance with WVOT's security policies, standards, and governance expectations related to access control, identity management, secure development practices, vulnerability management, encryption, vendor personnel background review, secure handling of confidential information, and adherence to state and federal regulatory frameworks. The project will operate within a controlled security structure that ensures all activities involving state data, system access, or technology review are executed under strict cybersecurity oversight and formal approval.

3.2.4 4.2.2.4 Vendor's proposed solution must meet FedRAMP requirements.

Our Platform Cloud was granted a Provisional Authority to Operate (P-ATO) by the FedRAMP Joint Authorization Board (JAB) for both Software as a Service (SaaS) and Platform as a Service (PaaS), consistent with the FedRAMP High control baseline. Testing was performed by an independent, third-party assessment organization (3PAO). Salesforce Government Cloud Plus was also granted a DoD Impact Level 4 (IL4) provisional authorization (PA) by DISA.

To obtain compliance with FedRAMP, Platform owners conducted security assessment and authorization activities in accordance with FedRAMP guidance and NIST SP 800-37. As part of this process Salesforce documented a System Security Plan (SSP) for the Government Cloud Plus service offering. The SSP is developed in accordance with NIST SP 800-18. The SSP identifies control implementations for the Our Platform's Government Cloud Plus and in-scope customer facing products (e.g., Lightning Platform, applicable Services) according to the FedRAMP High baseline. A security assessment of the information system was conducted by a 3PAO in accordance with FedRAMP High requirements. The security assessment testing determined the adequacy of the management, operational, and technical security controls used to protect the confidentiality, integrity, and availability of our platform's Government Cloud Plus service offering and the Customer Data it stores, transmits and processes.

Team CoreSphere has developed System Security Plans (SSPs) for numerous Federal and State customers. We leverage the Salesforce FedRAMP package and SSP as a starting point and tailor it to each customer based on their environment and controls in alignment with federal NISt guidelines for systems.

To maintain compliance with FedRAMP, Our Platform conducts continuous monitoring, which includes ongoing technical vulnerability detection, remediation of open compliance related findings, and at least annual independent assessment of security controls by a 3PAO.

3.2.5 4.2.2.5 Vendor must ensure all state Data is encrypted at rest and during transit. Encryption must meet FIPS 140-3 standard.

Our proposed solution implemented on Salesforce Experience Cloud and integrated through MuleSoft Anypoint Platform, ensures that all State of West Virginia data is fully protected using industry-leading cryptographic standards that exceed the requirement for FIPS 140-3 compliant encryption. Both Salesforce and MuleSoft enforce multi-layer data encryption designed to protect

sensitive licensing, permitting, inspection, financial, and identity-related information throughout its entire lifecycle. All data in transit between the portal, MuleSoft, agency backend systems, and end users is encrypted using TLS 1.2 or higher, which includes support for FIPS 140-3 validated cryptographic modules for secure key exchange, handshake protocols, and message confidentiality. For system-to-system integration across APIs, MuleSoft applies secure transport policies including HTTPS/TLS, dynamic client certificate validation, token-based authentication, and optional mutual TLS (mTLS) for elevated assurance.

Data at rest within the Salesforce platform is encrypted using AES-256, delivered through Salesforce Shield Platform Encryption, which utilizes hardware security module-backed cryptography with FIPS-validated components. MuleSoft CloudHub also ensures that all persistent storage—including Object Store, message queues, logs, and integration artifacts—is encrypted using AES-256 encryption at rest, backed by FIPS-validated providers. Encryption keys are managed using secure lifecycle controls including automated rotation, access logging, and separation of duties between platform administrators and application-level roles. MuleSoft's API Gateway further protects sensitive data through configurable data loss prevention policies, payload filtering, and field-level tokenization or masking for PII or confidential regulatory data.

3.2.6 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.

Team CoreSphere will ensure all subcontractors are approved by the State. Currently we are partnered with CloudSynApps. We do not anticipate any other subcontractors to be utilized during our contract execution. Team CoreSphere as the prime will ensure all data security requirements are met by all personnel working on the contract including our subcontractor personnel.

3.2.7 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

Our Proposed Application platform is compliant with NIST 800-53 rev 4 security controls at the High baseline (covering any moderate rating requirements) with an authorization through the FedRAMP Joint Authorization Board (JAB) comprised of the CIOs of DOD, DHS, and GSA.

Based on State's request after signing the NDA with Team CoreSphere and Salesforce , we can provide the evidence.

3.2.8 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.

Our Proposed solution implements a proactive, transparent, and standards-based security program designed to ensure continuous system integrity, compliance with State cybersecurity expectations, and full visibility for the West Virginia Office of Technology. Security is embedded throughout the solution lifecycle using a secure-by-design framework, aligning to industry standards including NIST 800-53, CIS benchmarks, SOC 2, ISO 27001, and FedRAMP Moderate security controls leveraged within Salesforce Experience Cloud and MuleSoft Anypoint Platform. The system incorporates automated, continuous security vulnerability scanning, code analysis (SAST/DAST), dependency checking, penetration testing, and configuration hardening as part of a disciplined Secure SDLC process. Routine vulnerability assessment reports, remediation action plans, and audit logs will be provided to the Office of Technology at scheduled intervals and upon request, ensuring transparency and accountability. Platform-level telemetry using Salesforce Shield Event Monitoring and MuleSoft Anypoint Monitoring allows real-time threat detection, anomaly identification, and incident escalation to State security teams. These security controls, combined with ongoing compliance validation, proactive patching, and structured change control processes, ensure a resilient, defensible, and continuously monitored security posture that protects the integrity of State systems and constituent data.

3.2.9 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.

Team CoreSphere is committed to meeting clearly defined and industry-standard remediation timelines for addressing critical security vulnerabilities in alignment with West Virginia's cybersecurity expectations and established national frameworks such as NIST 800-53, CIS Critical Controls, and FedRAMP vulnerability response standards.

3.2.10 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.

The proposed One-Stop Licensing Portal solution employs a deeply resilient and technically robust business continuity and disaster recovery architecture leveraging Salesforce Experience Cloud, Salesforce PSS LPI, and MuleSoft Anypoint Platform, ensuring data integrity, operational continuity, and alignment with the State's Service Level Agreement (SLA) objectives. Salesforce and MuleSoft operate within multi-region, multi-availability-zone cloud infrastructures that support active-active high availability and fault tolerance. Salesforce guarantees a 99.9% uptime

SLA, supported by globally redundant replicated data centers with automated failover capabilities. MuleSoft CloudHub deploys workers across multi-AZ (Availability Zone) clusters, enabling horizontal scaling, active worker failover, and message durability using persistent queues. If an integration endpoint (such as an agency licensing system) becomes unavailable, MuleSoft queues transactions in encrypted persistent storage and automatically retries once the system is restored, ensuring no data is lost or manually re-entered. This combination provides end-to-end transaction resiliency across portal, integration, and agency back-office platforms.

All application and integration data is protected with AES-256 encryption at rest and TLS 1.2+ encryption in transit, ensuring secure data exchange across internal and external system boundaries. Identity and access enforcement is integrated with the State's Quest SSO platform using SAML 2.0 / OAuth 2.0 / OpenID Connect, enabling secure token propagation for both human users and system-to-system API calls through MuleSoft's API Gateway. The disaster recovery framework includes automated health checks, circuit breaker patterns, retry logic, compensating transactions, and distributed monitoring instrumentation through Anypoint Monitoring, CloudHub Insights, and Salesforce Shield event logs, enabling proactive service failure detection and rapid fault isolation.

Backup management for Salesforce data leverages continuous real-time replication and full nightly backup cycles with configurable retention policies. MuleSoft supports encrypted object store persistence for asynchronous processing and maintains integration of metadata snapshots, supporting rollback if needed. Recovery Time Objective (RTO) and Recovery Point Objective (RPO) targets are measured in minutes, not hours, with automatic platform failover preventing most service interruptions. In the unlikely event of full regional disruption, failover orchestration automatically promotes secondary environments and restores stateful in-flight transactions using durable queues and distributed storage. Disaster recovery operations, including region failover, restoration workflows, and system repair—are verifiable and logged, supporting audit-grade traceability for compliance with State cybersecurity standards and regulations such as NIST 800-53, SOC 2 Type II, FedRAMP Moderate/High, and ISO 27001.

Operational transparency is ensured through public service dashboards such as Salesforce Trust, MuleSoft Status, and the One-Stop Portal's internal monitoring panel, which provide real-time visibility into service health, upcoming maintenance schedules, and incident status messages. Maintenance windows and platform patching are executed outside business hours with structured communication protocols delivered via portal alerts, email, SMS, or push notifications. Regular DR testing, backup verification cycles, simulated failover drills, penetration testing, and security posture assessments are built into the operations framework to ensure proven readiness.

The implementation of the Disaster Recovery (DR) plan for the One-Stop Licensing Portal follows a structured, repeatable, and auditable methodology that ensures operational readiness and alignment with enterprise continuity standards. The DR plan is implemented in coordination with Salesforce platform and MuleSoft's distributed integration resilience model, supported by state IT governance and business continuity policies. Implementation begins with establishing a baseline DR architecture that documents failover strategies, infrastructure redundancy, system component dependencies, critical application workflows, and RTO/RPO requirements defined in partnership with the State. All critical components—including the Salesforce Experience Cloud front end, MuleSoft integration services, and agency-facing interfaces—are configured with geographically

redundant environments and automated failover routing policies to ensure service continuity and prevent single points of failure.

3.2.11 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.

The proposed One-Stop Licensing Portal solution, deployed on Salesforce Experience Cloud hosted on AWS, fully supports the State's requirement for portability and the ability to migrate system data into an existing State-managed cloud tenant following full implementation. Salesforce provides built-in export and bulk data extraction capabilities through secure, scalable mechanisms such as Salesforce Data Export Services, Bulk API, Data Loader, and MuleSoft-managed data pipelines, enabling structured transfer of application data, metadata, transaction history, document artifacts, configuration elements, and audit logs. In alignment with State expectations, the vendor will collaborate with the West Virginia Office of Technology to establish a mutually agreed-upon data migration timeline, format specifications, data packaging requirements, and validation procedures to ensure a seamless and verifiable transfer into the State's preferred cloud infrastructure—such as AWS, Microsoft Azure, or Google Cloud environments. All migration activities will be executed using encrypted transport (TLS 1.2+), FIPS 140-3 validated encryption at rest (AES-256), and controlled file delivery channels, ensuring compliance with State security and governance standards. The vendor will also provide comprehensive data dictionaries, schema documentation, and technical support to ensure that State IT teams can readily operationalize the dataset within their hosting environment. This approach guarantees full data ownership for the State and future portability without vendor lock-in, supporting long-term flexibility and sovereignty over critical licensing and permitting data.

3.2.12 4.2.2.12 Vendor must make the project management interface available and accessible to the State's implementation team at no additional cost

Team CoreSphere utilizes SharePoint as our project management portal that contains project artifacts. We will ensure State users have access to our SharePoint repository at no additional cost.

3.2.13 4.2.2.13 Vendor's solution must provide a real-time data exchange.

The proposed solution enables secure, reliable, and scalable real-time data exchange between the One-Stop Licensing Portal—built on Salesforce Experience Cloud with PSS Licensing, Permitting & Inspection—and the State's existing agency licensing and permitting systems through the MuleSoft Anypoint Platform. MuleSoft supports true real-time interaction through RESTful, event-driven, and streaming API architectures, allowing critical licensing workflow events—such as application submissions, status updates, inspection outcomes, and permit issuance—to be communicated instantaneously between the portal and agency systems. Real-time APIs are managed through MuleSoft's API Gateway and Anypoint Exchange, which enforce authentication, rate limiting, token lifecycle management, and message-level security to maintain transactional integrity and protect sensitive constituent data. MuleSoft's Experience, Process, and System API tiers enable real-time orchestration and transformation of data exchanged across

disparate agency platforms without requiring backend system redesign, and support patterns such as synchronous request-response, webhooks, publish/subscribe event delivery, and real-time notifications using Platform Events and Change Data Capture (CDC) where applicable.

When an applicant submits an application, requests a renewal, or uploads documentation, MuleSoft triggers real-time API calls to the appropriate agency licensing system for immediate acknowledgement, confirmation, and initiation of downstream workflows. As agency systems progress through decisioning or inspection tasks, they publish updates that MuleSoft synchronizes back into Salesforce and the user's Digital Wallet dashboard, enabling real-time milestone tracking and transparency. The platform automatically detects changes and pushes them directly to the portal interface without requiring manual refresh, reducing follow-up calls to agencies and enhancing the applicant experience.

The real-time exchange framework assumes that the State's existing licensing systems support API connectivity and event exchange capabilities—either natively or via adapters, connectors, or gateway endpoints. In cases where legacy systems cannot push data in real-time, MuleSoft will employ hybrid integration techniques such as near real-time polling, message queuing, durable stores, and asynchronous process orchestration to simulate real-time behavior while backend modernization progresses. Regardless of backend maturity, MuleSoft maintains end-to-end transaction traceability, full audit logging, resilience through persistent message queues, and automatic retry behavior to ensure no data loss occurs even if downstream systems temporarily become unavailable.

3.2.14 4.2.2.14 Vendor's solution must be ADA compliant and meet the updated federal requirements.

One-Stop Licensing Portal, built on Salesforce Experience Cloud, will fully comply with Americans with Disabilities Act (ADA) requirements and all updated federal accessibility standards, including Section 508 of the Rehabilitation Act and WCAG 2.1 AA guidelines. The portal's mobile-first, responsive design ensures accessibility for users of all abilities through features such as screen-reader compatibility (JAWS, NVDA, VoiceOver), high-contrast and scalable text, keyboard-only navigation, image alt-text, form field labels, error identification, and support for assistive technologies. The interface will be tested through automated and manual accessibility audits, usability reviews, and compliance checkpoints throughout development and prior to deployment. Accessibility will remain a sustained priority through continuous monitoring, testing, and remediation updates to ensure long-term compliance with evolving federal standards and the State of West Virginia's digital accessibility policies.

3.2.15 4.2.2.15 Vendor must provide 3-tier outage reporting.

The proposed Salesforce solution supports a comprehensive 3-tier outage reporting framework that ensures transparency, timely communication, and rapid escalation for any service disruption. Team CoreSphere provides structured reporting at three levels—Tier 1 (Real-Time Alerts), Tier 2

(Incident Notifications & Status Updates), and Tier 3 (Post-Incident Analysis & Executive Reporting)—to ensure agencies receive the right level of information at the right time.

- **Tier 1 – Real-Time Outage Alerts:** Immediate automated notifications are sent for service interruptions, performance degradation, or critical system impacts. Alerts are delivered through email/SMS(additional subscription required) and can be integrated into agency communication channels.
- **Tier 2 – Ongoing Incident Status Updates:** During an active incident, Team CoreSphere provides time-stamped updates that include current status, scope, affected services, mitigation steps, and estimated time to resolution. These updates follow ITIL-aligned incident management processes and are available via a shared status dashboard.
- **Tier 3 – Post-Incident Reporting:** After resolution, a detailed Root Cause Analysis (RCA) or Post-Incident Review (PIR) is provided. This includes incident timeline, root cause findings, corrective actions, prevention measures, and service restoration validation. Tier 3 reports are delivered within agreed SLA timelines and reviewed with agency leadership as needed.

This 3-tier approach ensures full visibility from initial detection through final resolution while maintaining accountability, compliance, and continuous service improvement across both Salesforce platform components and application layers.

3.2.16 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.

The vendor will provide the State's project team with early and ongoing access to both sandbox and production environments to support collaborative development, configuration review, testing, training, and validation throughout the project lifecycle. Multiple Salesforce Experience Cloud sandboxes—including developer, configuration, and full-copy environments—will be provisioned to allow hands-on evaluation of functionality, integration testing with MuleSoft APIs, and iterative feedback before deployment to production. Access will be governed through role-based security controls aligned to the State's Quest SSO requirements. Early environment availability ensures transparent collaboration, accelerates decision-making, supports continuous quality assurance, and enables the State to actively participate in solution refinement prior to go-live, ensuring successful adoption and operational readiness.

3.2.17 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.

Team CoreSphere will comply with all related costs stated in Attachment A. We will provide an update to our schedule within 6 months of award.

3.2.18 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.

Support:

Team CoreSphere provides comprehensive helpdesk and technical support services to ensure the stability, usability, and ongoing optimization of the deployed solution. Post-deployment, our team delivers timely assistance for end-user access issues, application questions, and incident resolution, with support available via phone and email.

Team CoreSphere offers a **dedicated Helpdesk and Technical Support service** designed to assist users with any software issues, technical questions, or system troubleshooting needs related to the Salesforce Platform. Our Helpdesk operates during standard business hours, providing reliable, real-time support through multiple access points including phone, email, and a web-based ticketing portal.

When a user contacts the Helpdesk, their request is logged and categorized based on severity—ranging from general inquiries and low-priority issues to high-impact, time-sensitive incidents. Each category has an associated **Service Level Agreement (SLA)** defining response and resolution timeframes. For example, standard issues typically receive an initial response within **8 business hours**, while critical system outages or high-priority incidents are acknowledged **within 1 hour** and escalated immediately.

Team CoreSphere has a detailed step by step process to troubleshoot issues as they arise or are reported. Our maintenance engineers follow the following high level troubleshooting steps below.

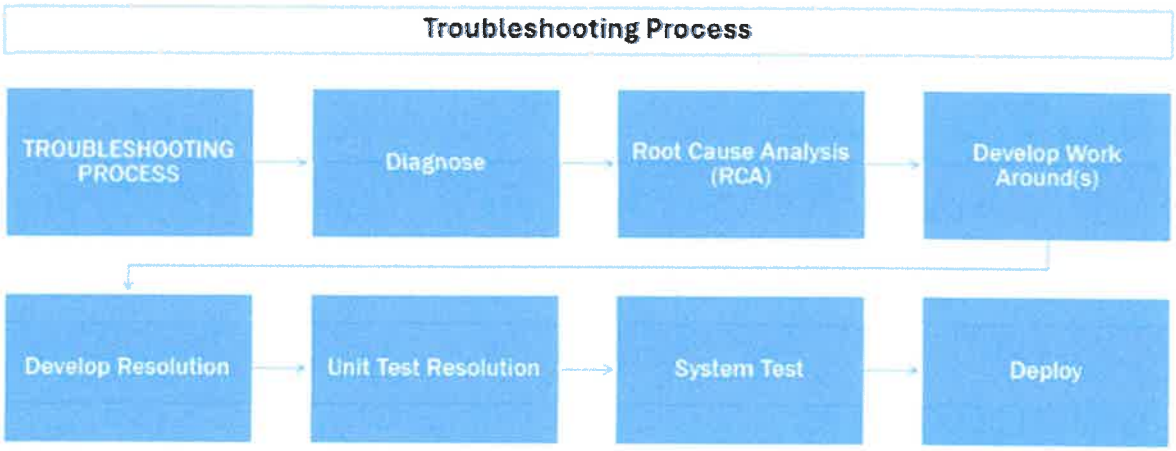


Exhibit 23. Troubleshooting Process

Diagnose: Team CoreSphere will recreate the issue in a replica sandbox environment. If the issue cannot be recreated, Team CoreSphere will gather more information around the conditions of when the incident occurred to ascertain if there are co-existing issues or data dependencies to cause the issue.

Root Cause Analysis (RCA): Team CoreSphere will conduct an RCA to understand how the issue occurred and why it was never discovered through previous system testing. Analysis Report will

be prepared. RCA is important to ensure that system operations are always improving and to make sure similar issues can be identified in advance.

Develop Work Around(s): In many cases, it may be required to create a work around so that the system functionality being interrupted by the issue can still be completed in another manner. The work around will be documented and communicated back to the user community.

Develop Resolution: Team CoreSphere will follow Salesforce best practices in configuring or developing resolutions to issues. Development work will occur in a development sandbox. Documentation will be created to explain the resolution in sufficient detail to understand how the issue was addressed.

Unit Test Resolution: Once the resolution is complete, Team CoreSphere will unit test the functionality to make sure all aspects are still working the way intended according to documented requirements. Once the resolution has passed unit testing, the issue will undergo additional testing.

System Testing: Tickets will be moved to the UAT sandbox for more extensive testing, including:

Functional Testing: Ensure functionality operates as intended.

Integration Testing: Ensure related functionality still operates as intended once the resolution is implemented into the overall solution.

Regression Testing: Ensure the entire system functionality is being affected by the issues. still operates as intended once the resolution is implemented.

Deployment: Upon successful testing, the resolution will be updated to production via a release package. The release package will be pushed to the production system according to the release schedule agreed upon by Team CoreSphere and respective customer stakeholders. Once the package is pushed into the production environment, the designated end users will validate that the changes are indeed reflected in the production environment.

To ensure timely and effective resolution, Team CoreSphere maintains a **clear escalation path** that includes tiered technical support levels. If an issue cannot be resolved at Tier 1, it is escalated to Tier 2 or Tier 3 support teams, which include product engineers, Salesforce specialists, and platform architects. For urgent issues, an **escalation manager** is assigned to oversee progress and coordinate direct communication with stakeholders.

Maintenance

Team CoreSphere has a comprehensive framework for post deployment Operations & Maintenance (O&M) for software maintenance and updates as shown in **Exhibit 51** below:

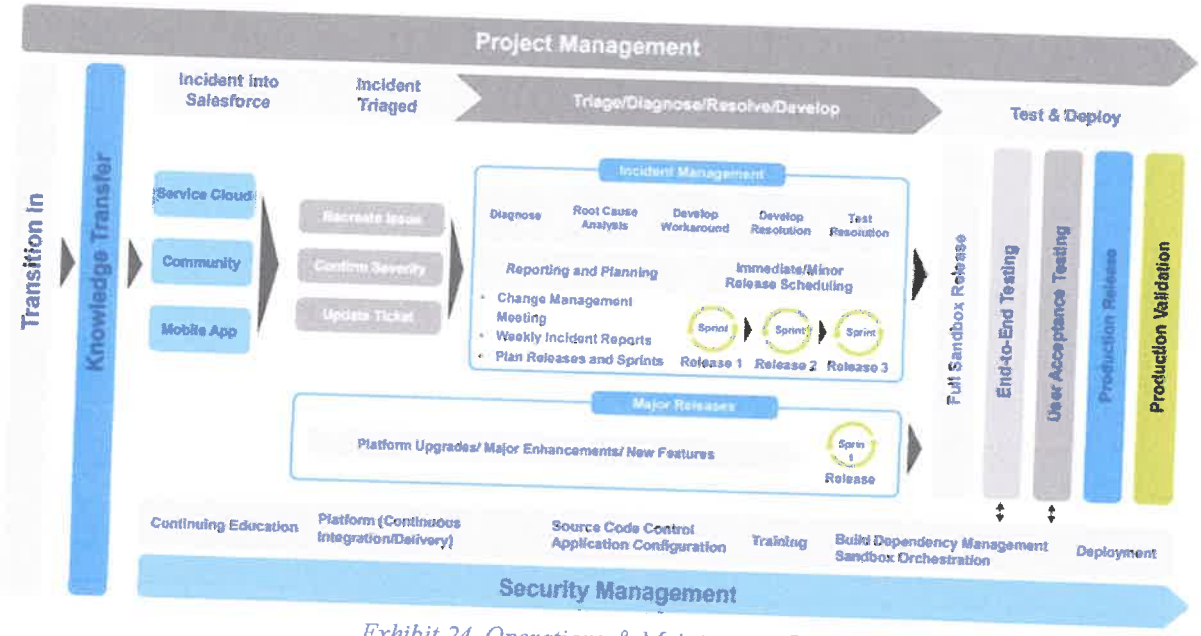


Exhibit 24. Operations & Maintenance Framework

Software maintenance and updates for the deployed solution have multiple facets, including break-fix, enhancements, and seasonal Salesforce upgrades. During this period, Team CoreSphere will perform all maintenance and support as a routine activity, including the establishment and adherence to a software version control and release schedule.

Our solution is based on the Salesforce FedRAMP Government cloud. Under the SaaS license subscription, Salesforce includes a range of **patching, maintenance, and updating services** as part of its **Software-as-a-Service (SaaS) license** offerings. These are designed to ensure continuous availability, performance improvements, and security compliance for all Salesforce customers. Below is a breakdown of what is included:

Automatic Patches and Security Fixes

Salesforce manages all **security patches, bug fixes, and performance optimizations** centrally, with no manual intervention required by the customer. These updates are:

- **Tested and deployed automatically** across all Salesforce environments.
- Released as part of a **regular patching schedule**, typically with minimal to no downtime.
- Inclusive of **critical vulnerability fixes**, ensuring the platform meets global security standards such as ISO 27001, SOC 2, and FedRAMP (for government clients).

Customers do not need to request or schedule these patches—**they are included as part of the SaaS license**.

Three Major Upgrades Per Year

Salesforce provides **three major releases annually** (Winter, Spring, and Summer). These upgrades deliver:

- New platform features and enhancements
- Expanded API capabilities.
- UI/UX improvements

- Backend performance upgrades

Each release is **fully backward compatible**, with **preview environments** provided in advance so customers can test and validate before deployment.

Zero Downtime Deployments

Salesforce performs patches and upgrades using **zero-downtime deployment strategies**, meaning:

- Production environments remain accessible during updates.
- There is no need for agency IT teams to plan or manage maintenance windows.
- All updates are delivered via multi-tenant cloud architecture, ensuring consistency and reliability.

All Salesforce users are always on the latest version of our platform because everyone gets instant upgrades (typically on an opt-in basis). Each time Salesforce releases an updated version of the application and the platform, the entire community can take advantage of the latest innovations from our product development team. Because of our multi-tenant architecture, Salesforce can provide all our customers with a service based on a single version of our application. We can upgrade all our customers at the same time with each release. As a result, we do not have to maintain multiple versions of our application. Each release will be delivered automatically in a transparent manner and will not break your configurations.

When maintenance is scheduled, Salesforce publishes the dates and times of the maintenance windows on trust.salesforce.com. Premier Alerts are sent via email when the maintenance windows are posted to trust.salesforce.com. In the event of planned maintenance that requires customer action in advance (e.g., updating network settings in preparation for additional login pools), Salesforce endeavors to communicate via email to system administrators' months prior to the maintenance.

All the above patching, upgrade, and maintenance services are **included with standard Salesforce licenses** and require **no additional cost** or effort from customers.

Please note: If emergency system maintenance is required, customers may be notified less than one (1) week in advance.

3.3 Qualifications and Experience – 10 points

3.3.1 4.3.1.1. Vendors should highlight a Proven track record designing, deploying, or supporting permitting platforms for state or local agencies.

Team CoreSphere enables our clients of all sizes to increase productivity, improve customer engagement and enhance overall operational efficiency. To allow our customers to benefit from their significant investments in Salesforce, we encourage leveraging out of the box capabilities with configuration as needed. Our capabilities include delivery of case management systems on Salesforce since 2010, each having unique reporting and compliance requirements. We have designed, implemented, and integrated Salesforce solutions at over 40 State, Federal, and other nonprofit agencies, providing subject matter expertise and implementation services for Constituent

Management, Case and Client Management, Grants Management, Public Facing Portals, Citizen Engagement and Outreach, and more. Our team has proven experience managing complex system implementations for large organizations. Our health state and local and human services active clients that have or are implemented a case management solution using Salesforce include:

Agency	Contract Period	Dollar Value
State of New Hampshire, Office of Professional Licensing and Certification (OPLC)	2024 - Present	$2,698,945
State of ND DHHS Office of Refugee Support Services Refugee Programs Data Management System	2023 - Present	$ 1,725,537.23
Travis County Department of Health and Human Services, Texas	2022 - Present	$ 4,025,169.04
Maryland Total Human-services Integrated Network (MD-THINK) program Agile Scrum Team Resources	2018 - Present	$ 15,067,174.45
District of Columbia Department of Behavioral Health (DBH) Customer Relationship Management Platform	2023 - Present	$ 1,804,510.30
Allegheny County Department of Human Services (DHS) Client Management Information System	2020 - Present	$ 1,649,000.00
NH Bureau of Mental Health Services Housing Application Platform	2024 - Present	$ 1,427,840.00

Below we provide three examples of our past performance.

State of New Hampshire, Office of Professional Licensing and Certification (OPLC)	
Contractor / UEI	CoreSphere, LLC. U7QGJ84HBNA7
Contract / Order Number	Contract: OPLC – DoIT #2026-037 Order(s):
Contract / Order Title	STATE OF NEW HAMPSHIRE Office of Professional Licensure and Certification DoIT #2026-037 – Online Licensing System
Performance Dates	01/06/2025 – 12/31/2026
Dollar Value	$2,698,945
Organization Address	7 Eagle Square, Concord, NH 00301
Contact Information	(Primary) Name: Kathryn Wood Title: IT Lead OPLC Business Relationship Management Division New Hampshire Department of Information Technology Organization: NH OPLC Phone: 603-271-3837 Email: Kathryn.A.Wood@doit.nh.gov
Project Information	
Project Overview CoreSphere has been engaged by the State of New Hampshire's Office of Professional Licensing and Certification (OPLC) to modernize and streamline the licensing lifecycle for over 200 license types across 60+ professions. This initiative impacts approximately 200,000 constituents statewide, simplifying how individuals and organizations apply for, renew, and manage professional licenses.	

Objectives

- Replace legacy processes with a modern, user-friendly digital platform.
- Provide self-service capabilities for applicants, licensees, and staff.
- Improve efficiency, transparency, and compliance for licensing operations.
- Enable faster processing times and reduce manual administrative overhead.

Technology Solution

The solution leverages **Salesforce Public Sector Solutions (Public Service Cloud)** combined with **OmniStudio** to deliver a modern, scalable, and secure licensing system. Key features include:

- **Digital License Applications & Renewals** – Intuitive forms, guided workflows, and dynamic rules for different license types.
- **Constituent Portal** – A unified online portal enabling applicants to manage licenses, submit documents, and track status in real time.
- **Case Management** – Automated case routing and approvals for staff efficiency.
- **OmniStudio Flexibility** – Configurable workflows that adapt to evolving licensing policies and requirements.
- **Analytics & Reporting** – Dashboards to track licensing trends, processing times, and compliance metrics.

Expected Outcomes

- A modernized, constituent-friendly licensing platform that reduces processing times and improves user satisfaction.
- Enhanced transparency and accountability in licensing operations.
- Streamlined staff workflows, allowing employees to focus on higher-value activities.
- A scalable solution that can expand with future state needs.

City of Elgin – Digitization of the Permitting & Inspection Processes	
Contractor / UEI	City of Elgin (Client) | Cloud SynApps Inc. (Service Provider)
Contract / Order Number	-
Contract / Order Title	Digitization of the Permitting & Inspection Processes
Performance Dates	October 2021 – January 2022
Dollar Value	$70k
Organization Address	150 Dexter Ct, Elgin, IL, USA Elgin, 60125.
Contact Information	(Primary) Name: Aaron Cosentino Title: Director of Neighbourhood Services Organization: City of Elgin Phone: (847) 450-3772 Email: Cosentino_A@cityofelgin.org
Project Information	

Project Overview

Cloud SynApps (CSA) delivered an end-to-end digital permitting transformation for the City of Elgin using Salesforce Public Sector Solutions. The engagement included detailed planning, requirements analysis, fit-gap assessment, and full configuration of Salesforce PSS, Experience Cloud, OmniStudio, and integration APIs. CSA streamlined permit intake, review, approvals, and inspections; designed an intuitive public portal; implemented workflow automation; and deployed dashboards, testing protocols, and targeted stakeholder training to ensure a stable, user-friendly permitting ecosystem.

Objectives
Modernize Elgin's permitting and inspection processes through a unified digital platform.
Enable citizens, contractors, and developers to submit, track, and manage permits online.
Improve internal efficiency with automated workflows, inspection scheduling, and role-based dashboards.
Enhance interdepartmental visibility through real-time reporting and integrated systems.
Provide a scalable, future-ready permitting foundation for the City.

Technology Solution

- Salesforce Public Sector Solutions for full permit lifecycle management (intake to close-out).
- Experience Cloud to deliver a citizen-facing portal for permit applications, tracking, document upload, and notifications.
- OmniStudio for guided flows and structured application experiences.
- Automated workflows aligning with city-specific rules for reviews, approvals, and notifications.
- Mobile-enabled inspection assignment and completion for field staff.
- Integration APIs connecting Salesforce with internal city systems for unified data and real-time updates.
- Role-based dashboards and analytics for inspectors, administrators, and supervisors.

Outcomes
Faster permit review and approval timelines through automated, digital workflows.
Increased inspection efficiency with mobile-ready field tools and automated scheduling.
Greater transparency for residents and contractors via real-time status tracking and alerts.
Improved operational oversight through dashboards and data-driven decision-making.
Scalable infrastructure that supports additional permit types, integrations, and future municipal needs.

Arizona State Board for Charter Schools – Online Platform Replacement	
Contractor / UEI	Arizona State Board for Charter Schools (ASBCS) - Online Platform Replacement (Client) | Cloud SynApps Inc. (Service Provider)
Contract / Order Number	-
Contract / Order Title	Online Platform Replacement
Performance Dates	August 2022 – August 2024
Dollar Value	$1.16M
Organization Address	1700 W Washington St, Phoenix, AZ , Arizona, 85007.
Contact Information	(Primary) Name: Daniel Cobin Title: Assistant Director of Agency and Charter Holder Operations Organization: Arizona State Board for Charter Schools (ASBCS) Phone: (602) 617-2851 Email: daniel.cobin@asbcs.az.gov
Project Information	

Project Overview

The Arizona State Board for Charter Schools (ASBCS) partnered with Cloud SynApps (CSA) to modernize its legacy system, which lacked flexibility and could not keep pace with the growing number of charter holders and schools. Manual processes—spanning applications, amendments, audits, and site reviews—created delays and limited visibility for internal staff and external representatives. CSA implemented a unified Salesforce-based platform to centralize workflows, enhance regulatory oversight, and provide secure, role-based access for staff, auditors, and charter representatives through both internal tools and external Experience Cloud portals.

Objectives

- Replace ASBCS's outdated legacy system with a scalable, efficient digital platform.
- Centralize and automate charter applications, amendments, audits, and site reviews.
- Provide secure, role-based access for internal staff and external charter representatives.
- Reduce administrative burden by digitizing manual workflows and documentation processes.
- Improve transparency and regulatory tracking using real-time dashboards and structured reporting.
- Strengthen collaboration between ASBCS and external stakeholders via streamlined portals and communications.

Technology Solution

- Salesforce Service Cloud for internal lifecycle management of charter entities, applications, amendments, audits, and reviews.
- Salesforce Experience Cloud portals enabling charter representatives, auditors, and external reviewers to securely access, submit, and manage data.
- Automated workflows for compliance tracking, document routing, approvals, and structured communication.
- Amazon S Drive integration for secure, centralized document storage and retrieval.
- Real-time dashboards and analytics to monitor performance, compliance status, and charter-school lifecycle activities.
- Automated notification frameworks with standardized email templates for consistent communication across all user groups.
- Scalable platform architecture designed to support ongoing regulatory and operational enhancements.

Outcomes

- Significant improvement in operational efficiency through end-to-end process automation.
- Stronger collaboration and reduced delays due to direct system access for external stakeholders.
- Increased transparency with real-time dashboards, lifecycle reporting, and self-service capabilities.
- Improved compliance assurance through automated tracking and structured regulatory workflows.
- Future-ready system architecture capable of supporting additional enhancements and evolving state requirements.

- Centralized document management enabling better audit readiness and reduced reliance on physical records.

3.3.2 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.

Team CoreSphere has 10+ years of experience with deploying solutions that meet this requirement.

Across our state engagements, Team CoreSphere has successfully connected Salesforce solutions to legacy platforms using a combination of APIs, middleware, and secure data pipelines. Common legacy integration patterns include:

- SQL-based and mainframe/on-prem databases
- Older case or licensing systems
- Document repositories and imaging systems
- State-specific data warehouses and reporting platforms
- Custom-built agency applications requiring data synchronization

We support batch, near real-time, and event-driven integration patterns depending on each state's environment and infrastructure maturity. Team CoreSphere leverages Salesforce's native API capabilities—REST, SOAP, Bulk API for integration with legacy systems.

Team CoreSphere has built secure portals for end user access. As an example, we built a statewide licensing and permitting portal for the State of New Hampshire. Any resident in the state can leverage the portal to apply for licensing or permitting to perform various business functions in the state. The portal developed by Team CoreSphere provides a one stop licensing and permitting for New Hampshire residents.

3.3.3 4.3.1.3. Vendors should describe Familiarity with scalable, secure cloud platforms (e.g., Azure, AWS, Google Cloud) and disaster recovery best practices.

Team CoreSphere solution is hosed on the Salesforce Platform. Salesforce is one of the top SaaS platform and is regarded as a very scalable and secure cloud platform. Salesforce has robust disaster recovery practices. Team CoreSphere has over 10 years of experience in implementing Salesforce. We are one of a few top-tier Salesforce vendors. Team CoreSphere is rated at the highest Salesforce partnerships (Summit Level). Salesforce utilizes one Disaster Recovery process for all customers. For business continuity purposes, Salesforce supports disaster recovery with a dedicated team and a 4-hour recovery point objective (RPO) and 12-hour recovery time objective (RTO). Salesforce offers multiple layers of redundancy, so that many failures may be recovered in seconds or minutes. Not all disruptions are declared. Salesforce's RPO number is for when a data center is unavailable. Since data is replicated between data centers, backups are only used should the primary recovery mechanism fail.

To maximize availability, the service is delivered using multiple world-class data centers supporting primary and replicated disaster recovery instances, plus a separate production-class lab facility. The infrastructure utilizes carrier-class components designed to support millions of users. Extensive use of high-availability servers and network technologies, and a carrier-neutral network strategy, help to minimize the risk of single points of failure, and provide a highly resilient environment with maximum uptime and performance.

The Salesforce Services are configured to be N+1 redundant at a minimum, where N is the number of components of a given type needed for the service to operate, and +1 is the redundancy. In many cases, Salesforce has more than one piece of redundant equipment for a given function.

3.3.4 4.3.1.4. Vendors should explain their experience managing sensitive data with encryption, access controls, and audit trails.

Team CoreSphere has implemented Salesforce solutions in numerous states. Every state requires Team CoreSphere implements Salesforce Shield to ensure date is encrypted and audit trails are provided. We utilize Salesforce security user profiles for access control to ensure users have access to date that is only required to perform their job functions. Team CoreSphere has implemented these security standards in our current state engagements including State of New Hampshire, Texas, Pennsylvania, North Dakota and Massachusetts.

3.3.5 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.

Team CoreSphere solution is on the Salesforce Government Cloud and Hyperforce platforms, which is fully compliant with FedRAMP Moderate, NIST 800-53, CIS benchmarks, Team CoreSphere security officer ensures that our team is trained on various security standards. We rely on a robust security approach provide by Salesforce for vulnerability scanning and incident response.

3.3.6 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.

Team CoreSphere regularly utilizes the project management tools mandated or preferred by each state to provide visibility and accountability throughout the project lifecycle. Our teams are fully proficient in:

- Jira – For backlog management, sprint planning, user story tracking, and defect management
- Smartsheet – For project schedules, Gantt charts, dashboards, risk logs, and resource planning

- Microsoft Project – For detailed work breakdown structures (WBS), dependencies, and critical path tracking
- Teams, SharePoint, and Confluence – For collaboration, documentation, and knowledge management

We seamlessly integrate into the agency's existing tool ecosystem or configure solutions that match their governance expectations.

3.3.7 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.

Team CoreSphere has a strong record of designing and delivering comprehensive train-the-trainer (TtT) programs and on-demand training portals across multiple state agencies where we deploy licensing, permitting, and case management solutions. Our training approach ensures agencies can scale adoption, maintain internal expertise, and provide ongoing support to both staff and the public. Team CoreSphere has successfully executed train-the-trainer models within statewide programs such as New Hampshire OPLC and other state implementations. Our TtT approach includes:

- Structured training sessions for designated agency trainers, board administrators, and super users.
- Role-based curriculum covering administrators, licensing specialists, inspectors, and back-office staff.
- Hands-on learning through live sandbox exercises, guided workflows, and real-world scenarios.
- Detailed facilitator guides with step-by-step instructions, exercises, and reference materials.
- Certification-style validation to ensure trainers understand key processes and can train others effectively.
- Post-training support, including office hours, Q&A sessions, and refreshers during rollout waves.

Team CoreSphere regularly implements self-paced, on-demand training portals as part of our state solution deployments. These portals typically include:

- Short video tutorials covering user registration, application submission, renewals, payments, and online services.
- Step-by-step guides, FAQs, and knowledge-base articles accessible 24/7.
- Interactive walkthroughs embedded directly into Salesforce Experience Cloud portals (where applicable).
- Training dashboards for administrators to track usage and completion.
- Support for public-facing users, including professionals, applicants, and licensees who need easy-to-follow guidance.
- Internal training libraries for state staff, board administrators, and inspectors, including advanced modules on workflows, reporting, and case management functions.

These materials are designed for non-technical users and ensure high adoption for both internal staff and the general public.

3.3.8 4.3.1.8. Vendors should demonstrate familiarity with uptime guarantees, RTO/RPO metrics, and service-level reporting.

Team CoreSphere has extensive experience meeting and managing Service Level Agreements (SLAs) across every state in which we deliver solutions, including New Hampshire, Maryland, Massachusetts, Texas, Pennsylvania, and the District of Columbia. Our teams support mission-critical licensing, case management, and workflow platforms that require high availability, predictable performance, and transparent reporting.

Team CoreSphere delivers licensing, permitting, and case management solutions exclusively on the Salesforce Government Cloud and Hyperforce platforms, which provide built-in high availability, disaster recovery, and continuity-of-operations capabilities. In this SaaS environment, Salesforce assumes responsibility for the underlying infrastructure, ensuring that Recovery Time Objective (RTO) and Recovery Point Objective (RPO) requirements are consistently met across all state deployments.

Recovery Time Objective (RTO)

Salesforce maintains a highly resilient, multi-tenant architecture with redundancy across multiple Availability Zones. As a result:

- Salesforce targets an RTO measured in minutes, not hours, for platform-level disruptions.
- Failover to secondary infrastructure is automated and orchestrated by Salesforce.
- Team CoreSphere solutions benefit from continuous application availability without requiring agency-specific DR environments.
- Maintenance, patching, and failover procedures are seamlessly handled at the platform level, reducing planned downtime and improving overall service continuity.

Recovery Point Objective (RPO)

Salesforce uses continuous, real-time replication mechanisms to protect customer data across geographically separated data centers. This means:

- RPO is effectively near-zero, with data replicated almost instantaneously.
- All customer records, configurations, customizations, and metadata are stored redundantly and backed up continuously.
- In the event of a system disruption, Salesforce can restore customer environments with minimal to no data loss.

3.3.9 4.3.1.9. Vendors should explain experience working with multi-agency teams, gathering requirements, and managing change.

Team CoreSphere has extensive experience leading and collaborating with multi-agency teams across several states—including Maryland, Massachusetts, Texas, New Hampshire, Pennsylvania,

and the District of Columbia—to deliver enterprise IT modernization, cloud solutions, case management systems, and digital transformation initiatives. Our approach emphasizes structured collaboration, clear communication, and disciplined change management to ensure consensus and successful adoption across diverse stakeholder groups.

One direct example is our work with New Hampshire Office of Professional Licensure and Certification (OPLC), where we support the statewide licensing and permitting platform for over 50 boards, commissions, and regulatory bodies. This project requires extensive collaboration across diverse regulatory programs, each with unique workflows, statutes, and licensing requirements.

The OPLC environment requires managing highly diverse business processes. Team CoreSphere applies a structured discovery and analysis methodology, including:

- Joint workshops with board leadership and program staff
- Detailed AS-IS documentation and TO-BE process mapping for each licensing program
- Requirements traceability across multiple agencies and licensing types
- Prototyping, demos, and iterative validation with end users
- Consolidating requirements into a central backlog that balances statewide needs with board-specific compliance

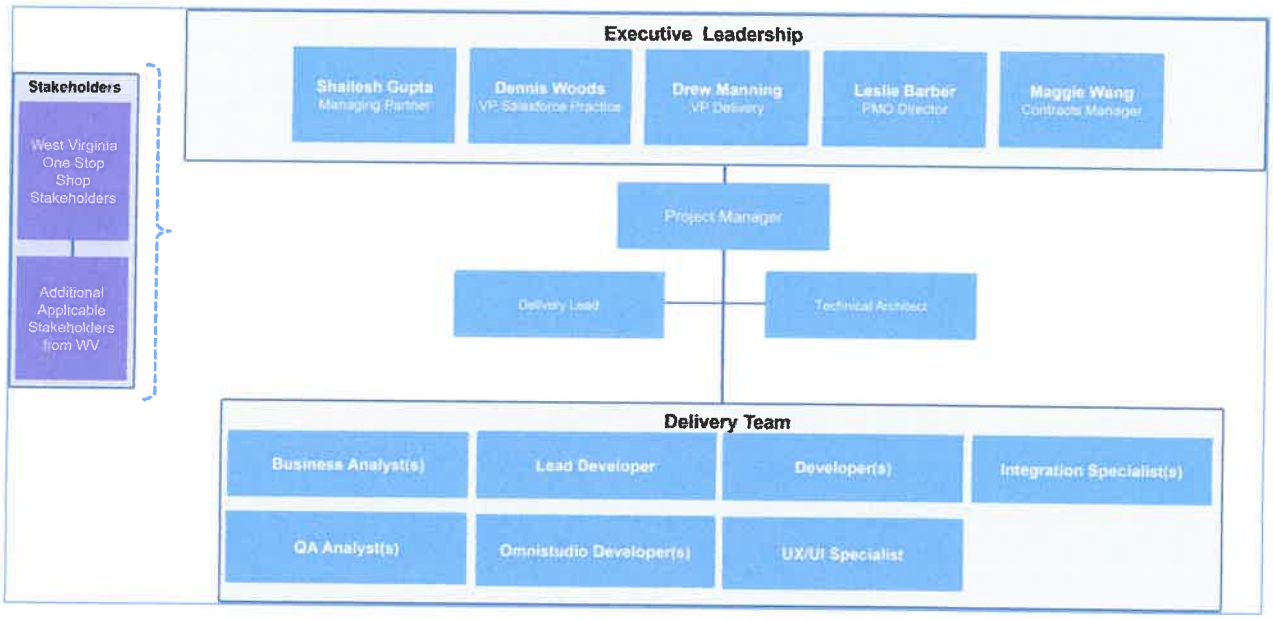
Team CoreSphere brings a proven change management framework rooted in communication, training, and structured stakeholder engagement. Our approach includes:

- Detailed change impact analysis to understand how processes and roles evolve across agencies
- Tailored communication plans that target leadership, program managers, frontline staff, and technical teams
- Creation of user-friendly training materials, job aids, and step-by-step guides
- Pilot phases and phased rollouts to increase adoption and reduce risk
- Ongoing support, including help desk, performance monitoring, and enhancement cycles

Our experience across multiple states has shown that successful transformation requires proactive engagement, transparency, and predictable processes—core principles embedded in Team CoreSphere's delivery methodology.

3.3.10 Project Staffing

Team CoreSphere has created a staffing plan to implement the full functionality required by this RFP.



All of our resources have required certifications based on roles and responsibilities.

- Project Managers – PMP / Scrum certified
- Business Analyst – Scrum certified, Salesforce certified
- Developers – Various Salesforce technical certificates.

The following figure shows Team CoreSphere certifications as validated by Salesforce.

Certifications (370)

Certifications demonstrate Salesforce knowledge and skills. Choose a consultant whose credentials match your project's needs. Learn More

- **Admin Certifications**
  78 total
- **Architect Certifications**
  33 total
- **Associate Certifications**
  31 total
- **Consultant Certifications**
  86 total
- **Designer Certifications**
  5 total
- **Developer Certifications**
  114 total
- **Marketing Certifications**
  1 total
- **Other Certifications**
  10 total
- **Technical Consultant**
  12 total

3.4 Exceeding Mandatory Qualification/Experience Requirements

3.4.1 4.3.2.1. *Vendor's employees must have security training and Vendor must provide records of such training upon request.*

Team CoreSphere employees undergo security training once a year. Our human resources department ensures that every employee undergoes this mandatory training. Each employee must pass the security training assessment and send the certificate of passing to our human resources department. Our contracts with state and federal government mandate that we have 100% compliance with security training. When requested, Team CoreSphere can provide proof of security training compliance.

3.4.2 4.3.2.2. *Vendor must highlight training in WCAG 2.1 and Section 508 compliance for public-facing digital services.*

Team CoreSphere incorporates accessibility from design through deployment, ensuring solutions meet or exceed:

- WCAG 2.1 AA guidelines
- Section 508 accessibility standards
- State-specific accessibility mandates (e.g., Massachusetts ITD accessibility, Texas DIR Accessibility Standards under TAC 206/213, Maryland's Nonvisual Access Regulations)

Our teams use tools such as Axe, WAVE, and SiteImprove, conduct manual keyboard/navigation testing, and ensure accessible content authoring and UI standards across all user-facing components.

Our resources are highly trained in ADA compliance. We have projects in the State of Pennsylvania, Texas, Maryland, North Dakota, and New Hampshire where we ensure the Salesforce solutions meet ADA requirements.

3.4.3 4.3.2.3. *Vendor must show Experience aligning solutions with state IT policies, privacy laws, and accessibility mandates.*

Team CoreSphere has extensive experience delivering compliant, secure, and policy-aligned technology solutions across multiple state and local government environments, including New Hampshire, Maryland, Massachusetts, Texas, Washington D.C., and Pennsylvania.

Team CoreSphere consistently implements solutions that conform to each state's technical architecture, cybersecurity requirements, integration frameworks, and data governance expectations. Examples include:

- Maryland – Team CoreSphere resources delivered solutions fully aligned with Maryland DoIT's Technical Architecture Guidelines, statewide cloud adoption strategy, and Security Accreditation & Authorization requirements.
- Texas (DIR) – Implemented Salesforce-based solutions meeting Texas DIR technology standards, statewide architecture frameworks, and procurement/compliance directives.

- Massachusetts – Delivered modernization and workflow automation solutions aligned with the Commonwealth's Enterprise Architecture, Information Security Program, and statewide DevSecOps standards.
- New Hampshire & Pennsylvania – Implemented case management solutions adhering to state architectural guidelines, data management standards, and agency-specific compliance policies.
- District of Columbia – Implemented solutions aligned with DC OCTO policies, cloud security standards, and district-wide cybersecurity directives.

3.4.4 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).

Team CoreSphere is hosted on the robust Salesforce SaaS platform. Salesforce understands that the confidentiality, integrity, and availability of our customers' information are vital to their business operations and Salesforce's own success. Salesforce uses a multi-layered approach to protect that key information, constantly monitoring and improving our application, systems, and processes to meet the growing demands and challenges of security.

Independent vulnerability assessments and repoint confirm that our security goes far beyond what most companies have been able to achieve on their own. Using the latest firewall protection, intrusion detection systems, and TLS encryption, Salesforce gives you the peace of mind only a world-class security infrastructure can provide.

Multilevel security products from leading security vendors and proven security practices ensure network security. To prevent malicious attacks through unmonitored ports, external firewalls allow only http and https traffic on ports 80 and 443, along with ICMP traffic. Switches ensure that the network complies with the RFC 1918 standard, and address translation technologies to further enhance network security. IDS sensors protect all network segments. Internal software systems are protected by two-factor authentication, along with the extensive use of technology that controls points of entry. All networks are certified through third-party vulnerability assessment programs.

Trust.salesforce.com is the Salesforce community's home for real-time information on system performance and security. On this site you will find:

- Up-to-the minute information on planned maintenance
- Phishing, malicious software, and social engineering threats
- Best security practices for West Virginia
- Information on how we safeguard your data.

Team CoreSphere is implementing Salesforce Shield to ensure platform encryption. During implementation we create RBAC approach. Salesforce utilizes users profiles to create RBAC. We can control granular access at the field level by creating various user profiles that match RBAC requirements.

4. Required Administrative Forms

4.1 Addendum Acknowledgment Forms

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP SEC26*001

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
[ ]	Addendum No. 2	[ ]	Addendum No. 7
[ ]	Addendum No. 3	[ ]	Addendum No. 8
[ ]	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 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.

CoreSphere LLC
Company

Authorized Signature

12-1-25
Date

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

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
[ ]	Addendum No. 3	[ ]	Addendum No. 8
[ ]	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.

CoreSphere LLC
Company

Authorized Signature

12-1-25
Date

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

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
[ ]	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.

CoreSphere LLC
Company

Authorized Signature

12/1/25
Date

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

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.

CoreSphere LLC
Company

Authorized Signature

12-1-25
Date

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

4.2 Certification & Signature Page

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:

Vendor Name : CoreSphere LLC
Address : 6700A
Street : Rockledge Drive
City : Bethesda
State : MD **Country :** USA **Zip :** 20817
Principal Contact : Shailesh Gupta
Vendor Contact Phone: 301-830-4035 **Extension:**

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

Vendor Signature X  **FEIN#** 20-0926452 **DATE** 12-1-25

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

Date Printed: Oct 24, 2025 **Page:** 1 FORM ID: WV-PRC-CRFP-002 2020/05

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:

Vendor Name : CoreSphere LLC

Address : 6700A

Street : Rockledge Drive

City : Bethesda,

State : MD Country : USA Zip : 20817

Principal Contact : Shailesh Gupta, Managing Partner

Vendor Contact Phone: 301-830-4035 Extension:

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

Vendor Signature X  FEIN# 20-0926452 DATE 12-1-25

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

Date Printed: Nov 14, 2025 Page: 1 FORM ID: WV-PRC-CRFP-002 2020/05

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 Doc Description: One-Stop-Shop Permitting Portal -State of WV Proc Type: Central Master Agreement			Reason for Modification: Addendum No. 2
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:
Vendor Name : CoreSphere LLC
Address : 6700A
Street : Rockledge Drive
City : Bethesda,
State : MD Country : USA Zip : 20817
Principal Contact : Shailesh Gupta, Managing Partner
Extension:
~~Vendor Contact Phone: 301-830-4035~~

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

Vendor Signature X FEIN# 20-0926452 DATE 12-1-25

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

Date Printed: Nov 21, 2025 Page: 1 FORM ID: WV-PRC-CRFP-002 2020/05

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 Doc Description: One-Stop-Shop Permitting Portal -State of WV Proc Type: Central Master Agreement			Reason for Modification: Addendum No. 3
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:
Vendor Name : CoreSphere LLC
Address : 6700A
Street : Rockledge Drive
City : Bethesda,
State : MD Country : USA Zip : 20817
Principal Contact : Shailesh Gupta, Managing Partner
Extension:
Vendor Contact Phone: 301-830-4035

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

Vendor Signature X FEIN# 20-0926452 DATE 12-1-25

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

Date Printed: Nov 25, 2025 Page: 1 FORM ID: WV-PRC-CRFP-002 2020/05

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:

Vendor Name : CoreSphere LLC

Address : 6700A

Street : Rockledge Drive

City : Bethesda,

State : MD **Country :** USA **Zip :** 20817

Principal Contact : Shailesh Gupta, Managing Partner **Extension:**

Vendor Contact Phone: 301-830-4035

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

Vendor Signature X **FEIN#** 20-0926452 **DATE** 12-1-25

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

Date Printed: Dec 1, 2025 Page: 1 FORM ID: WV-PRC-CRFP-002 2020/05

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) Shailesh Gupta, Managing Partner

(Address) 6700 A Rockledge Drive, Bethesda, MD 20817

(Phone Number) / (Fax Number) 301-830-4035 / 301-947-9648

(email address) sgupta@coresphere.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.

CoreSphere LLC
(Company)

(Signature of Authorized Representative)
Shailesh Gupta, 12-1-25
(Printed Name and Title of Authorized Representative) (Date)
3041-830-4035, Fax: 301-947-9648
(Phone Number) (Fax Number)
sgupta@coresphere.com
(Email Address)

Revised10/20/2025

Request for Proposal

REQUEST FOR PROPOSAL
CRFP SEC2600000001 - One-Stop-Shop Portal

Example:

Proposal 1 Cost is $1,000,000
Proposal 2 Cost is $1,100,000
Points Allocated to Cost Proposal is 30

Proposal 1: Step 1 – $1,000,000 / $1,000,000 = Cost Score Percentage of 1 (100%)
Step 2 – 1 X 30 = Total Cost Score of 30

Proposal 2: Step 1– $1,000,000 / $1,100,000 = Cost Score Percentage of 0.909091 (90.9091%)
Step 2 – 0.909091 X 30 = Total Cost Score of 27.27273

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

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

CoreSphere LLC
(Company)

Shailesh Gupta, Managing Partner
(Representative Name, Title)

301-830-4035, Fax: 301-947-9648
(Contact Phone/Fax Number)

12-1-25
(Date)

Revised 07/01/2021

4.3 Subcontractor List Submission Form

Subcontractor List Submission (Information Technology)

Bidder's Name: CoreSphere LLC

☐ 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
Cloud Syn Apps	CSA is an integral part of our team proving a gambit of resources with Licensing and permitting expertise including architects business analysts and developers.	

Attach additional pages if necessary

Request for Proposal

Revised10/20/2025

4.4 Any required licensing, corporate registration, or insurance proofs

Team CoreSphere LLC is authorized to conduct business in the United States and will obtain any West Virginia business registration required prior to contract.

Following is the proof of Insurance as requested.

ACORD®

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
6/18/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Insureon, Division of Specialty Program Group LLC / DBA SPG Insurance Solutions LLC in CA 203 N. LaSalle St., 20th Floor, Chicago, IL 60601	CONTACT NAME: PHONE (A/C, No, Ext): (800) 688-1984 FAX (A/C, No): 312-690-4123 E-MAIL ADDRESS:
INSURED Coresphere LLC 6700a Rockledge Dr Ste 220, Bethesda, MD, 20817	INSURER(S) AFFORDING COVERAGE — NAIC # INSURER A: Philadelphia Indemnity Insurance Company — 18058 INSURER B: Philadelphia Indemnity Insurance Company — 18058 INSURER C: Twin City Fire Insurance Company — 29459 INSURER D: INSURER E: INSURER F:

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
C	✓ COMMERCIAL GENERAL LIABILITY CLAIMS-MADE ✓ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ✓ POLICY PRO-JECT LOC OTHER:			46SBAVV1795	6/1/2025	6/1/2026	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG $	$ 1,000,000 $ 1,000,000 $ 10,000 $ 1,000,000 $ 2,000,000 $ 2,000,000 $
C	AUTOMOBILE LIABILITY ANY AUTO ALL OWNED AUTOS SCHEDULED AUTOS ✓ HIRED AUTOS ✓ NON-OWNED AUTOS			46SBAVV1795	6/1/2025	6/1/2026	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident) $	$ 1,000,000 $ $ $ $
C	✓ UMBRELLA LIAB ✓ OCCUR EXCESS LIAB CLAIMS-MADE DED ✓ RETENTION $ 10,000			46SBAVV1795	6/1/2022	6/1/2026	EACH OCCURRENCE AGGREGATE $	$ 4,000,000 $ 4,000,000 $
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N	N / A				PER STATUTE OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	$ $ $
A	Cyber Liability			PHPK2555270	6/1/2025	6/1/2026	Each Occurrence	$5,000,000
B	Professional Liability (Errors and Omissions)			PHPK2555270-008	6/1/2025	6/1/2026	Occurrence/Aggregate	$5,000,000 / $10,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

Proof of Insurance

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

ACORD 25 (2016/03) The ACORD name and logo are registered marks of ACORD