

From: **Whittaker, Frank M** <frank.m.whittaker@wv.gov>
Date: Wed, Jul 31, 2024 at 11:28 AM
Subject: Fwd: Emergency Request for Purchase of Tableau
To: Rosen, Bryan D <bryan.d.rosen@wv.gov>
Cc: Hustead, Crystal G <crystal.g.hustead@wv.gov>, Lyle, Tara L <tara.l.lyle@wv.gov>, Greg Clay <gregory.c.clay@wv.gov>, Totten, Mark L <mark.l.totten@wv.gov>, Alisha S Pettit <alisha.s.pettit@wv.gov>

Bryan,

Your emergency request for 71 one year licenses for Tableau software is approved
Please follow all emergency procedures outlined in the Purchasing Division
Procedures Handbook and return the resulting contract to this office within 30 days of this
approval for public posting.

Please let me know if you have any questions or concerns.

----- Forwarded message -----

From: **Hustead, Crystal G** <crystal.g.hustead@wv.gov>
Date: Wed, Jul 31, 2024 at 9:34 AM
Subject: Fwd: Emergency Request for Purchase of Tableau
To: Frank M Whittaker <frank.m.whittaker@wv.gov>, Tara L Lyle <tara.l.lyle@wv.gov>

Please see the attached emergency purchase request from DHHR

----- Forwarded message -----

From: **Rosen, Bryan D** <bryan.d.rosen@wv.gov>
Date: Wed, Jul 31, 2024 at 9:32 AM
Subject: Fwd: Emergency Request for Purchase of Tableau
To: Crystal G Hustead <crystal.g.hustead@wv.gov>
Cc: Price, Robert L <robert.l.price@wv.gov>, Heather M White <heather.m.white@wv.gov>,

Debolt, Kimberlie K <kimberlie.k.debolt@wv.gov>, Althea M Greenhowe
<althea.m.greenhowe@wv.gov>

Crystal, please see the attached emergency purchase request for Tableau software licensing. The request is for 12 months (1 year license term) at a cost of approximately \$475K. I urge approval of this purchase as the software is integral to our operations. This request is necessary due to vendors' responses to a CRFQ not adhering to pricing requirements.

Bryan

----- Forwarded message -----

From: **Petry, Stephanie F** <stephanie.f.petry@wv.gov>

Date: Wed, Jul 31, 2024 at 9:12 AM

Subject: Emergency Request for Purchase of Tableau

To: Bryan D Rosen <bryan.d.rosen@wv.gov>

Cc: OSA MIS Purchasing <osamispurchasing@wv.gov>, Mike J Morris
<michael.j.morris@wv.gov>

Good Morning Bryan,

Please see attached request for your review and approval.

Thank you,

Stephanie Pettry

Stephanie Pettry

Procurement Specialist-Team Lead

Office of Management Information Services

Office of Shared Administration

West Virginia Departments of Health, Health Facilities, and Human Services

One Davis Square, Suite 200

(321 Capital Street)

Charleston, West Virginia 25301-1785

P: (304) 558.2558 | dhr.wv.gov

PLEASE COPY osamispurchasing@wv.gov

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--

Frank Whittaker, CPPB, NIGP-CPP

Assistant Director

West Virginia Purchasing Division

2019 Washington Street, East

Charleston, WV 25305

(304) 558-2316

frank.m.whittaker@wv.gov



Sherri A. Young, D.O., MBA, FAAFP
DH Cabinet Secretary



Michael J. Caruso
DHF Cabinet Secretary



Cynthia A. Persily, Ph.D.
DoHS Cabinet Secretary

STATE OF WEST VIRGINIA
DEPARTMENTS OF HEALTH, HEALTH FACILITIES, AND HUMAN SERVICES

Office of Management Information Services | Shaun Charles, Chief Information Officer

To: Bryan Rosen, Director
OSA, Purchasing

From: Stephanie Pettry, Procurement Specialist
OSA, Office of Management Information Services

Re: Emergency Purchase Tableau Software Licenses

The Office of Management Information Services (OMIS) on behalf of the Bureau for Public Health (BPH) is seeking approval to award an emergency purchase for seventy-one (71) Tableau software licenses for a twelve-month period.

A solicitation was released on July 17, 2024 (CRFQ MIS2500000001) for the following:

PRODUCTS REQUIRED FOR COMPLETE TABLEAU SOFTWARE

PLATFORM Tableau 8 Core Base (Server) MFG Part 200001798-2a; Embedded Analytics 8 Core Base (Server) MFG Part 200001800-2a; Tableau Creator (Server) MFG Part # 200001773-2a; Tableau Training eLearning (Creator) MFG Part # 200001553, (69) Sixty- Nine Tableau Creator MFG Part # 200001773

Upon review, it has come to our attention that the bids submitted by vendors Carahsoft and Tek Tap were incomplete.

Carahsoft failed to provide pricing for the initial year, while Tek Tap used the same pricing for multiple commodities, raising concerns about the accuracy of their bid. Considering these discrepancies, OMIS reached out to The Office of Shared Administration Purchasing for clarification.

Unfortunately, the response received from DOA indicated that neither vendor adhered to the pricing structure outlined in the solicitation. As a result, it has been recommended that the solicitation be rebid. Additionally, it is advised that we reach out to the vendors to determine the typical contract term length, especially considering the impending expiration date of July 20, 2024, for Contract BMS2400000001.



Given the critical nature of the services provided under this contract, it is imperative that we act swiftly to ensure a seamless transition to a new vendor. Several mission-critical platforms and dashboards within our organization rely on this software, and their functionality is currently compromised due to the contract expiration.

We request your approval to proceed with an emergency purchase for a contract period of one year which will allow us time to issue a new solicitation for these licenses.

Sincerely,

Stephanie Pettry

GOVERNMENT - PRICE QUOTATION

CARASOFT TECHNOLOGY CORP



11493 SUNSET HILLS ROAD | SUITE 100 | RESTON, VIRGINIA 20190
PHONE (703) 871-8500 | FAX (703) 871-8505 | TOLL FREE (888) 66CARAH
WWW.CARASOFT.COM | SALES@CARASOFT.COM



Current Maintenance Expiration: July 30, 2024.

Licenses for Embedded Analytics Server Software may be used solely in conjunction with Customer's external-facing application named DHHR Dashboards

Tableau Services

Tableau Software and/or Tableau Services are subject to the Order Form Supplement for Tableau Products available at www.tableau.com/ofs which is hereby made part of this Order Form.

Unless otherwise provided in the applicable Agreement, any increase in subscription pricing for the first two renewal term will not exceed 5% over the then-current subscription pricing, provided that (a) Customer renews its entire then-current subscription volume under the applicable Order Form combined with any associated add-on Order Forms, and (b) each renewal term is the same duration as the Order Term of this Order Form or one year (whichever is longer). Thereafter, or upon the first such renewal that does not meet the aforementioned criteria for Customer to benefit from the above price cap, any increase in subscription and support pricing will be in accordance with SFDC's pricing and policies in effect at the time of the renewal or as otherwise agreed to by the parties. Notwithstanding the foregoing, any consumption-based Services which are subject to a rate card as set forth in the product terms for the applicable Services and any support or resource-based Services are not subject to any price increase limitations.

Customer must reference Quote number and Contract # on Purchase Order.

Should Customer purchase via Reseller all terms of Carahsoft Quote must be incorporated in Reseller quote and Customer Purchase Order to Reseller.

Any increase in subscription pricing (excluding support and resource-based Services) for the first renewal term will be in accordance with SFDC's pricing and policies in effect at the time of the renewal or as otherwise agreed to by the parties or noted in these quote terms or contract

Licensee agrees that any order for Salesforce Services will be governed by the terms and conditions of the Carahsoft Salesforce Service Terms, copies of which are found at <https://carah.io/SFDC-TOU> and all Schedules and Documentation referenced by the Terms are made a part hereof. The parties agree that any term or condition stated in a Customer purchase order or in any other Customer order documentation (excluding Quotes) is void. In the event of any conflict or inconsistency among the following documents, the order of precedence shall be: (1) the applicable Quotes (and their Contract Vehicle), (2) the TOU, and (3) the Documentation. Licensee acknowledges it has had the opportunity to review the Terms, prior to executing an order.

Product Terms Directory: <http://carah.io/Product-Terms-Directory>

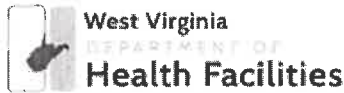
Help & Training: <http://carah.io/Help>

Government Cloud Plus: <http://www.carahsoft.com/government-cloud-terms>

A list of currently available FedRAMP/IL4 Authorized Salesforce products can be found here: https://help.salesforce.com/articleView?id=000270080&language=en_US&type=1



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Michael J. Caruso
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STATE OF WEST VIRGINIA
DEPARTMENTS OF HEALTH, HEALTH FACILITIES, AND HUMAN SERVICES

Office of Management Information Services | Shaun Charles, Chief Information Officer

To: Bryan Rosen, Director
OSA, Purchasing

From: Stephanie Pettry, Procurement Specialist
OSA, Office of Management Information Services

APPROVED

BY: [Signature] DATE: 7/31/24

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Sincerely,

Stephanie Petty



Whittaker, Frank M <frank.m.whittaker@wv.gov>

Fwd: Emergency Request for Purchase of Tableau

1 message

Hustead, Crystal G <crystal.g.hustead@wv.gov>

Wed, Jul 31, 2024 at 9:33 AM

To: Frank M Whittaker <frank.m.whittaker@wv.gov>, Tara L Lyle <tara.l.lyle@wv.gov>

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Bryan

----- Forwarded message -----

From: **Petry, Stephanie F** <stephanie.f.petry@wv.gov>

Date: Wed, Jul 31, 2024 at 9:12 AM

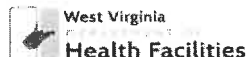
Subject: Emergency Request for Purchase of Tableau

To: Bryan D Rosen <bryan.d.rosen@wv.gov>

Cc: OSA MIS Purchasing <osamispurchasing@wv.gov>, Mike J Morris <michael.j.morris@wv.gov>

Good Morning Bryan,
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Thank you,



Stephanie Petry

Stephanie Petry

Procurement Specialist-Team Lead

Office of Management Information Services

Office of Shared Administration

West Virginia Departments of Health, Health Facilities, and Human Services

One Davis Square, Suite 200

(321 Capital Street)


Charleston, West Virginia 25301-1785

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2 attachments

 **Carahsoft - Tableau Software - 07.31.2024 - Quote 39974689.pdf**
201K

 **Request Memo.pdf**
324K

GOVERNMENT - PRICE QUOTATION

CARAHSOFT TECHNOLOGY CORP



11493 SUNSET HILLS ROAD | SUITE 100 | RESTON, VIRGINIA 20190
 PHONE (703) 871-8500 | FAX (703) 871-8505 | TOLL FREE (888) 66CARAH
 WWW.CARAHSOFT.COM | SALES@CARAHSOFT.COM



TO: Andrew Neely
 Division Director
 Office of Shared Administration
 321 Capitol Street
 Ste 200
 Charleston, WV 25301

FROM: Amanda McGuff
 Carahsoft Technology Corp.
 11493 Sunset Hills Road
 Suite 100
 Reston, Virginia 20190

EMAIL: andrew.m.neely@wv.gov

EMAIL: Amanda.McGuff@carahsoft.com

PHONE: (304) 356-5221

PHONE: (703) 581-6668

FAX: (703) 871-8505

TERMS: FTIN: 52-2189693
 Shipping Point: FOB Destination
 Remit To: Same as Above
 Payment Terms: Net 30 (On Approved Credit)
 Cage Code: 1P3C5
 DUNS No: 088365767
 UEI: DT8KJHZXVJH5
 Credit Cards: VISA/MasterCard/AMEX
 Sales Tax May Apply

QUOTE NO:	39974689
QUOTE DATE:	07/31/2024
QUOTE EXPIRES:	08/05/2024
RFQ NO:	
SHIPPING:	GROUND
TOTAL PRICE:	\$475,138.86
TOTAL QUOTE:	\$475,138.86

LINE NO.	PART NO.	DESCRIPTION	PRICING	QUOTE PRICE	QTY	EXTENDED PRICE
BASE RENEWAL						
1	200001773-2a	Tableau - Creator (Server) Salesforce.com, Inc. - 200001773 Start Date: 07/31/2024 End Date: 07/30/2025	LIST: \$848.80 GSA: \$882.00	\$842.43	OM 71	\$59,812.53
2	200001798-2a	Tableau - 8 Core Base (Server) Salesforce.com, Inc. - 200001798 Start Date: 07/31/2024 End Date: 07/30/2025	LIST: \$176,853.33 GSA: \$188,160.00	\$175,526.93	OM 1	\$175,526.93
3	200001800-2a	Tableau - Embedded Analytics - 8 Core Base (Server) Salesforce.com, Inc. - 200001800 Start Date: 07/31/2024 End Date: 07/30/2025	LIST: \$132,713.33 GSA: \$141,120.00	\$131,717.98	OM 1	\$131,717.98
4	200003620-2	Tableau - Premier Success Plan 30% of Net Price Salesforce.com, Inc. - 200003620 Start Date: 07/31/2024 End Date: 07/30/2025	LIST: \$35,832.60 GSA: \$0.30	\$35,832.60	OM 1	\$35,832.60
9	200003620-2	Tableau - Premier Success Plan 30% of Net Price Salesforce.com, Inc. - 200003620 Start Date: 07/31/2024 End Date: 07/30/2025	LIST: \$63,792.72 GSA: \$0.30	\$63,792.72	OM 1	\$63,792.72
11	200001553-2a	Tableau - Training - eLearning (Creator) (12 Month Access) Salesforce.com, Inc. - 200001553	LIST: \$120.00 GSA: \$117.60	\$119.10	OM 71	\$8,456.10
BASE RENEWAL SUBTOTAL:						\$475,138.86
SUBTOTAL:						\$475,138.86
TOTAL PRICE:						\$475,138.86
TOTAL QUOTE:						\$475,138.86