



COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT

Contract No. UCPJMU6766

This contract entered into this 11th day of December, 2023, by HTC Global Services, Inc. hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From 12/11/2023 through 12/10/2024 with four (4) one-year renewal options.

The contract documents shall consist of:

- (1) This signed form;
(2) The following portions of the Request for Proposal RFP FDC-1175 dated June 15, 2023
(a) The Statement of Needs,
(b) The General Terms and Conditions,
(c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
(d) Addendum No. One, dated July, 25, 2023
(e) Addendum No. Two, dated August 3, 2023
(3) The Contractor's Proposal dated July 28, 2023 and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
(a) Negotiations Summary, dated December 1, 2023
(b) Commonwealth of Virginia Agency Contract Form Addendum to Contractor's Form, dated October 26, 2023, which shall govern in the event of conflict.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:
By: Sutbir Randhawa
Digitally signed by Sutbir Randhawa
Date: 2023.12.20 01:16:34 -0500'
(Signature)

Sutbir Randhawa
(Printed Name)

Title: Vice President

PURCHASING AGENCY:
By: [Signature]
(Signature)

Buyer Senior
(Printed Name)

Title: Doug Chester

**RFP # FDC-1175 Information Technology Consulting Services  
Negotiation Summary for HTC Global Services, Inc.**

**December 1, 2023**

- Parties agree that this Negotiation Summary modifies RFP# FDC-1175 and the Contractor's initial response to RFP# FDC-1175, and in the event of conflict this negotiation summary shall take precedence.
- Contractor hereby rescinds confidentiality of its entire proposal dated Month/Day/Year and all subsequent negotiations.
- Contractor's pricing schedule for the Purchasing Agency is as follows:  
(All prices are in US Dollars and per hour rates)

<b>Oracle Core Technologies</b>	Onsite	Offsite
Project Manager	166.00	138.00
Senior Engineer	147.00	119.00
Engineer	138.00	109.00

<b>Change Mgmt Training, Svcs, and Certs</b>	Onsite	Offsite
Project Manager	204.00	171.00
Senior Change Mgmt SME	190.00	157.00
Change Mgmt SME	166.00	133.00

<b>Oracle/PeopleSoft Enterprise Solutions</b>	Onsite	Offsite
Project Manager	190.00	157.00
Senior Engineer	166.00	133.00
Engineer	147.00	114.00

<b>Microsoft Azure and M365</b>	Onsite	Offsite
Project Manager	166.00	138.00
Senior Engineer	157.00	128.00
Engineer	144.00	114.00

<b>Data Analytics/Visualization/Warehouse/Lake</b>	Onsite	Offsite
Project Manager	190.00	157.00
Senior Engineer	171.00	138.00
Engineer	152.00	124.00

<b>Cisco Tech., Infrastructure Support, and Visualization</b>	Onsite	Offsite
Project Manager	171.00	138.00
Senior Engineer	157.00	128.00
Engineer	143.00	114.00

<b>Other Technology</b>	Onsite	Offsite
Project Manager	195.00	166.00
Senior Engineer	193.00	154.00
Engineer	152.00	124.00

- Onsite pricing shall be inclusive of all travel costs.
- Billable hours shall be for actual work hours on authorized projects/tasks rounded to the quarter hour. Billable hours shall not include travel time.
- Contractor shall provide detailed invoicing to include project title, number of hours worked onsite and/or offsite, role of individual(s) performing the work, and specific tasks performed.
- The University may also request that these services be provided as a fixed-fee project, as would be mutually agreed to prior to services being rendered, with deliverables billed upon completion of milestones.
- The University may also request that these services be provided as a monthly subscription service, as would be mutually agreed to prior to services being rendered, with deliverables determined by monthly service requirements.

9. The Purchasing Agency reserves the right to reject any assigned personnel at any time with or without cause. Contractor shall provide a suitable replacement within a timely manner.
10. Contractor has disclosed all potential fees. Additional charges will not be accepted.

**COMMONWEALTH OF VIRGINIA AGENCY  
CONTRACT FORM ADDENDUM TO CONTRACTOR'S FORM**

AGENCY NAME: James Madison University  
CONTRACTOR NAME: HTC Global Services, Inc  
DATE: 10/26/2023

The Commonwealth and the Contractor are this day entering into a contract and, for their mutual convenience, the parties are using the standard form agreement provided by the Contractor. This addendum, duly executed by the parties, is attached to and hereby made a part of the contract. In the event that the Contractor enters into terms of use agreements or other agreements of understanding with University employees and students (whether electronic, click-through, verbal, or in writing), the terms and conditions of this Agreement shall prevail.

The Contractor represents and warrants that it is a(n) // individual proprietorship // association // partnership  corporation // governmental agency or authority authorized to do in Virginia the business provided for in this contract. (Check the appropriate box.)

Notwithstanding anything in the Contractor's form to which this Addendum is attached, the payments to be made by the Commonwealth for all goods, services and other deliverables under this contract shall not exceed Purchase Order Amounts; payments will be made only upon receipt of a proper invoice, detailing the goods/services provided and submitted to James Madison University. The total cumulative liability of the Commonwealth, its officers, employees and agents in connection with this contract or in connection with any goods, services, actions or omissions relating to the contract, shall not under any circumstance exceed payment of the above maximum purchase price plus liability for an additional amount equal to such maximum purchase price. In its performance under this contract, the Contractor acts and will act as an independent contractor, and not as an agent or employee of the Commonwealth.

The Contractor's form contract is, with the exceptions noted herein, acceptable to the Commonwealth. Nonetheless, because certain standard clauses that may appear in the Contractor's form agreement cannot be accepted by the Commonwealth, and in consideration of the convenience of using that form, and this form, without the necessity of specifically negotiating a separate contract document, the parties hereto specifically agree that, notwithstanding any provisions appearing in the attached Contractor's form contract, none of the following paragraphs **1 through 18** shall have any effect or be enforceable against the Commonwealth:

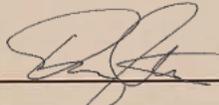
1. Requiring the Commonwealth to maintain any type of insurance either for the Commonwealth's benefit or for the contractor's benefit;
2. Renewing or extending the agreement beyond the initial term or automatically continuing the contract period from term to term;
3. Requiring or stating that the terms of the attached Contractor's form agreement shall prevail over the terms of this addendum in the event of conflict;
4. Requiring the Commonwealth to defend, indemnify or to hold harmless the Contractor for any act or omission;
5. Imposing interest charges contrary to that specified by the Code of Virginia, §2.2-4347 through 2.2-4354, Prompt Payment;
6. Requiring the application of the law of any state other than Virginia in interpreting or enforcing the contract or requiring or permitting that any dispute under the contract be resolved in the courts of any state other than Virginia;
7. Requiring any total or partial compensation or payment for lost profit or liquidated damages by the Commonwealth if the contract is terminated before its ordinary period;
8. Requiring that the contract be "accepted" or endorsed by the home office or by any other officer subsequent to execution by an official of the Commonwealth before the contract is considered in effect;

9. Delaying the acceptance of this contract or its effective date beyond the date of execution;
10. Limiting or adding to the time period within which claims can be made or actions can be brought;
11. Limiting the liability of the Contractor for property damage or personal injury. The parties agree that this clause does not extend the Contractor's liability beyond its own acts or those of its agents/employees;
12. Permitting unilateral modification of this contract by the Contractor;
13. Binding the Commonwealth to any arbitration or to the decision of any arbitration board, commission, panel or other entity;
14. Obligating the Commonwealth to pay costs of collection or attorney's fees;
15. Granting the Contractor a security interest in property of the Commonwealth;
16. Bestowing any right or incurring any obligation that is beyond the duly granted authority of the undersigned agency representative to bestow or incur on behalf of the Commonwealth.
17. Requiring the "confidentiality" of the agreement, in whole or part, without (i) invoking the protection of Section 2.2-4342F of the Code of Virginia in writing prior to signing the agreement (ii) identifying the data or other materials to be protected, and (iii) stating the reasons why protection is necessary.
18. Requiring the Commonwealth to reimburse for travel and living expenses in excess of the agency policy located at <https://www.jmu.edu/financemanual/procedures/4215mie.shtml>

This contract may be renewed annually by the Commonwealth after the expiration of the initial term under the terms and conditions of the original contract except as noted herein. If the Commonwealth elects to exercise the option to renew the contract for an additional renewal period, the contract price(s) for the succeeding renewal period shall not exceed the contract price(s) of the previous contract term increased/decreased by no more than the percentage increase/decrease of the "Other Services" category of the CPI-W of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

This contract has been reviewed by staff of the agency. Its substantive terms are appropriate to the needs of the agency and sufficient funds have been allocated for its performance by the agency. This contract is subject to appropriations by the Virginia General Assembly.

IN WITNESS WHEREOF, the parties have caused this contract to be duly executed, intending thereby to be legally bound.

AGENCY by   
 Title Buyer Senior  
 Printed Name Doug Chester

CONTRACTOR by Sutbir Randhawa  
 Title Vice President  
 Printed Name Sutbir Randhawa

Digitally signed by Sutbir  
 Randhawa  
 Date: 2023.10.30  
 17:53:20 -04'00'

# James Madison University

*Commonwealth of Virginia*

## Information Technology Consulting Services

RFP# FDC-1175



TECHNICAL PROPOSAL | AUGUST 15, 2023

*This proposal was prepared...*

**For:**

**James Madison University**  
Procurement Services MSC 5720  
752 Ott Street, First Floor, Suite 1023  
Harrisonburg, Virginia 22807

**Doug Chester**

Buyer Senior, Procurement Services  
PH: (540) 568-4272  
E-mail: [chestefd@jmu.edu](mailto:chestefd@jmu.edu)

**By:**

**HTC Global Services, Inc.**  
Global Headquarters  
3270 West Big Beaver Road  
Troy, Michigan 48084

**Jeffrey Davis**

Senior Client Partner, Public Sector  
PH: (301) 675-2412  
Email: [jeffrey.davis@htcinc.com](mailto:jeffrey.davis@htcinc.com)

Reimagining a better shared world

August 15, 2023

**James Madison University**  
**c/o Doug Chester, Buyer Senior, Procurement Services**  
Procurement Services MSC 5720  
752 Ott Street, Wine Price Building  
First Floor, Suite 1023  
Harrisonburg, VA 22807

**INFORMATION TECHNOLOGY CONSULTING SERVICES – RFP NO.: FDC-1175**

Dear Mr. Chester:

**HTC Global Services, Inc.** is pleased to provide our response to your Request for Proposals, RFP No. FDC-1175 for Information Technology Consulting Services. We appreciate the opportunity and your time and consideration in reviewing our qualifications and experience in providing these services.

HTC has been providing supplemental professional IT consulting services and delivering turn-key business application solutions for over 50+ years. We have provided these services to, literally, hundreds of Higher Education and Public Sector clients, giving us a deep understanding of the critical business issues and technology challenges these clients typically face. We work in partnership with our clients to identify ways to enhance performance and implement strategic solutions that enable focus on core missions. This approach helps to ensure a return on investment by reducing program costs, increasing operational benefits, and improving service levels to end customers.

We are proposing services for the following technologies, as listed in the RFP.

a. Oracle Core Technologies	g. Change Management Training
b. Oracle/PeopleSoft Enterprise Solutions	i. Infrastructure Support
d. Microsoft Azure and M365	l. Other Technology
f. Data Analytics	

We will staff your project teams with consultants grounded in best practices and relevant experience, who are well-trained, and who understand how to deliver effective, team-based technical resources to meet your needs. HTC has proven processes and procedures in place for recruiting, training, and retaining its personnel. Our Global Technical Recruiting practice provides a comprehensive view of the entire fulfillment process, from identifying, locating, and qualifying candidates through multiple interviews and verification/background checks, presenting candidates to the client and long-term consultant care.

Jeff Davis will be your main point of contact throughout the procurement phase. As Vice President of HTC, and by the authority of the Board of Directors, I, Sutbir Randhawa, am authorized to sign contracts and forms, legally binding HTC Global Services. Please feel free to contact me regarding contractual matters.

Respectfully submitted,

**Sutbir Randhawa**  
Vice President  
**HTC Global Services, Inc.**  
PH: (248) 786-2500  
E-mail: [sutbir.randhawa@htcinc.com](mailto:sutbir.randhawa@htcinc.com)

**Jeffrey Davis**  
Account Partner, Public Sector  
**HTC Global Services, Inc.**  
PH: (301) 675-2412  
Email: [jeffrey.davis@htcinc.com](mailto:jeffrey.davis@htcinc.com)

## RESPONSE MATRIX

We have prepared our response by following the sequence in the RFP, [Section V. Proposal Preparation and Submission / B. Specific Proposal Instructions](#). Within each of these major sections, we have responded to the questions in [Section IV. Statement of Needs](#).

The following chart outlines the RFP requirements mapped to our response. The two right columns, under “HTC’s Response” match the Table of Contents, on the following page.

RFP: SECTION V. PROPOSAL PREPARATION / B. PROPOSAL INSTRUCTIONS		HTC'S RESPONSE (TOC)	
	RFP: SECTION IV. STATEMENT OF NEED	SECTION	PAGE
	<b>1. Return RFP cover sheet and all addenda acknowledgements, if any, signed and filled out as required.</b>	<b>1. RFP COVER SHEET</b>	1
	<b>2. Plan and methodology for providing the goods/services as described in Section IV. Statement of Needs</b>	<b>2. PLAN &amp; METHODOLOGY</b>	3
	1). Describe your corporate competencies/experience providing IT consulting services ...	2.1 Corporate Competencies/Experience	3
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	b). Oracle/PeopleSoft Enterprise Solutions	2.1.2 Oracle/PeopleSoft	6
	d). Microsoft Azure and M365	2.1.3 Microsoft Azure and M365	10
	f). Data Analytics	2.1.4 Data Analytics	16
	g). Change Management	2.1.5 Change Management	18
	i). Infrastructure Support	2.1.6 Infrastructure Support	21
	l). Other Technologies	2.1.7 Other Technologies	26
	2). Describe approach and methodology that will be used to provide IT consulting ...	2.2 Approach & Methodology	34
	<b>3. A written narrative statement to include, but not be limited to, the expertise, qualifications, and ...</b>	<b>3. EXPERTISE/QUALIFICATIONS/RESUMES</b>	36
	3). Provide the names, qualifications, and experience of personnel to be assigned to ...	3.1 Qualifications of Personnel	37
	4). Describe the ability to provide continuity of consultants throughout the duration ...	3.2 Continuity of Consultants	41
	5). Describe IT consulting services available from your firm. Examples of services may ...	3.3 HTC's IT Consulting Services	44
	6). Describe training options and specify associated costs in Section X. Pricing Schedule ...	3.4 Training	49
	7). Provide examples of recent projects at higher education institutions comparable to ...	3.5 Recent Projects Similar to JMU	50
	8). Describe the ability to provide for a thorough transfer of knowledge to JMU IT on any ...	3.6 Knowledge Transfer	53
	9). Describe your approach to project management.	3.7 Project Management	54
	10). Describe how your firm would propose a functional staffing plan indicating the ...	3.8 HTC's Staffing Plan	56
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	<b>4. Offeror Data Sheet, included as Attachment A to this RFP.</b>	<b>4. ATTACHMENT A: OFFEROR DATA SHEET</b>	59
	<b>5. Small Business Subcontracting Plan, included as Attachment B to this RFP.</b>	<b>5. ATTACHMENT B: SWAM UTILIZATION SHEET</b>	61
	<b>6. Identify the amount of sales your company had during the last twelve months with each VASCUPP ...</b>	<b>6. VASCUPP SALES</b>	64
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## SECTION 1. RFP COVER SHEET AND ADDENDA ACKNOWLEDGEMENT

*Return RFP cover sheet and all addenda acknowledgements, if any, signed and filled out as required.*

Please see the following page for HTC's RFP Cover Sheet, acknowledging the receipt of Addendum 1 & Addendum 2. This form has been signed by Sutbir Randhawa, Vice President, who has been granted authority to sign for and bind the firm contractually, as stated in the Letter of Transmittal on the previous page.

**REQUEST FOR PROPOSAL**  
**RFP# FDC-1175**

**Issue Date:** June 15, 2023  
**Title:** Information Technology Consulting Services  
**Issuing Agency:** Commonwealth of Virginia  
James Madison University  
Procurement Services MSC 5720  
752 Ott Street, Wine Price Building  
First Floor, Suite 1023  
Harrisonburg, VA 22807

**Period of Contract: From Date of Award Through One Year (Renewable)**

**Sealed Proposals Will Be Received Until 2:00 PM on August 3, 2023 for Furnishing the Services Described Herein.**

*SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.*

All Inquiries For Information And Clarification Should Be Directed To: Doug Chester, Buyer Senior, Procurement Services, [chestefd@jmu.edu](mailto:chestefd@jmu.edu); 540-568-4272; (Fax) 540-568-7935 by July 20, 2023 by 5:00 PM EST.

**NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.**

In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm:

HTC Global Services, Inc.  
3270 West Big Beaver Road  
Troy, MI 48084

By:

  
(Signature in Ink)

Name: Sutbir Randhawa  
(Please Print)

Date: July 28, 2023

Title: Vice President

Web Address: [www.htcinc.com](http://www.htcinc.com)

Phone: (248) 786-2500

Email: [Sutbir.randhawa@htcinc.com](mailto:Sutbir.randhawa@htcinc.com)

Fax #: (248) 786-2515

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1  #2  #3 \_\_\_\_\_ #4 \_\_\_\_\_ #5 \_\_\_\_\_ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:

YES;  NO; *IF YES* ==>  SMALL;  WOMAN;  MINORITY *IF MINORITY*:  AA; HA;  AsA;  NW;  Mi

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

## SECTION 2. PLAN & METHODOLOGY

Plan and methodology for providing the goods/services as described in Section IV. Statement of Needs of this Request for Proposal.

### 2.1 Corporate Competencies/Experience

Describe your Corporate Competencies/Experience providing IT consulting services for one or more of the technologies listed below.

#### 2.1.1 A). ORACLE CORE TECHNOLOGIES

##### HTC'S ORACLE PRACTICE

HTC is a premier Oracle partner and has received significant recognition for its successful public sector projects. The following graphic highlights HTC's Oracle Capabilities.



HTC and Oracle collaborate to provide a community of practice that offers a balanced approach to managing change. By combining our in-depth regulatory, compliance, and industry knowledge with Oracle's comprehensive suite of technology solutions, our mutual clients gain a streamlined, enterprise-wide approach to address their business issues, reduce costs, optimize business performance, and enable operational efficiency. Following is a listing of HTC's Oracle Services.

##### HTC's Oracle Services

###### Advisory Services

- Products Assessment / Evaluation
- Business Process Advisory
- Maturity Assessment and Roadmap
- Discovery & Design (Business Trans)
- Organization Readiness Assessment
- Proof of Concepts / Proof of Values

###### Migrations / Upgrades

- EBS 11i / R12.1 to R12.2.X upgrade
- DB upgrade to 19c
- EBS migration to OCI/AWA

###### Managed Services

- Application Support
  - Dedicated/Shared Model
  - L1/L2/L3/L4 support
  - Modern Tickets/Issue Tracking

###### Implementations / Rollouts

- Implementations and Rollouts
- Configurations, Customizations, and Enhancements
- Application Integrations
- Reporting and Data Analytics
- Automated Testing Solutions

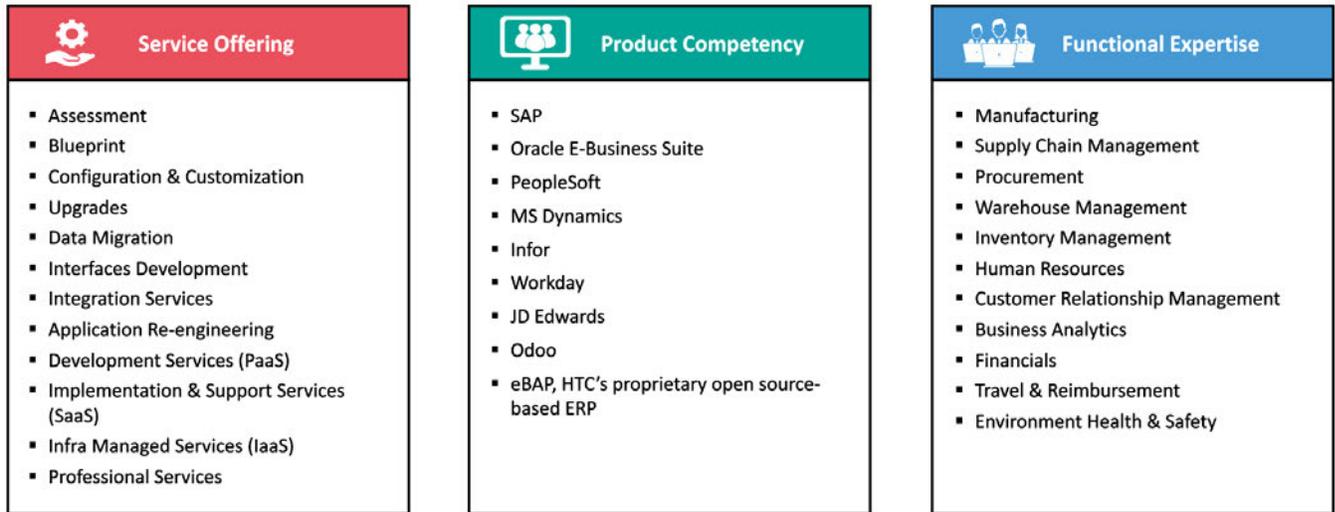
###### Cloud Services

- Implementation & Support Services (SaaS)
- Development Services (PaaS)
- Infra Managed Services (IaaS)
- Upgrade & Support Services (On-Prem)

###### Run Management Services

- Follow the Sun Monitoring
- Migrations, Installations, & Upgrades
- Audits/Regulatory Compliance

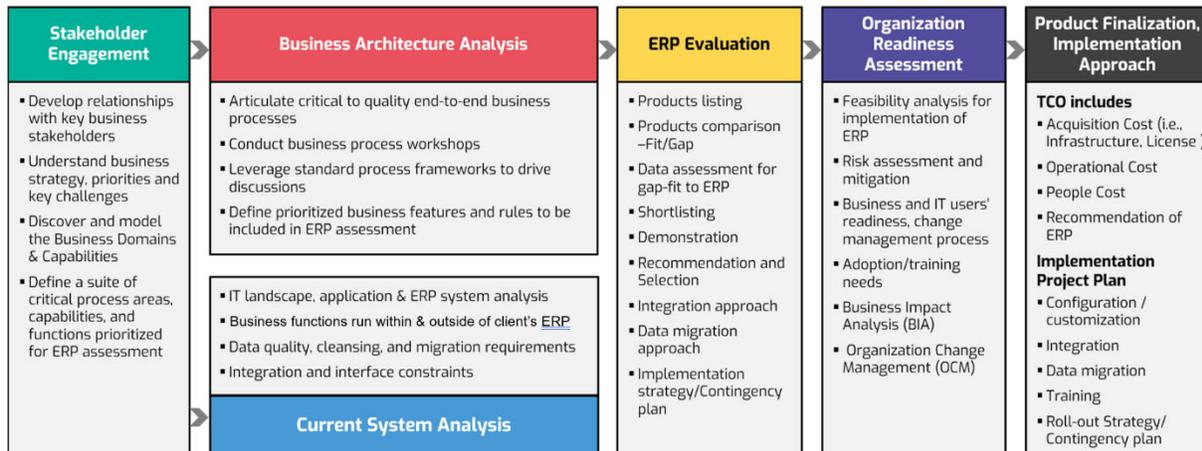
## HTC's ERP Service Offerings, Product Competencies, and Functional Expertise



## HTC'S ORACLE CLOUD SERVICE OFFERINGS

Throughout HTC's Oracle practice, we have added to our Oracle Cloud qualifications with years of expertise in the similarly architected [Oracle E-Business Suite](#); [Oracle Business Intelligence and Analytics](#) including [Oracle Cloud ERP](#) and [Human Capital Management Applications](#); [Hyperion](#), [Interaction Hub](#); [User Productivity Kit](#).

## HTC's Oracle ERP Transformation Advisory Services



## HTC's Oracle Services

Below we have listed the various services HTC provides for its Oracle clients.

### Implementation & Support Services (SaaS)

- Implementation
- Cloud Life Cycle Services
- (Application Management Support)
- Enhancement Services
- Functional Application Management
- Technical Application Management
- Reporting as a Service
- Testing as a Service

### Infra Managed Services (IaaS)

- Hosting & Migration Services
- Infrastructure & OS Administration
- Security Administration
- Network Administration
- Monitoring and Performance Mgmt.
- Database Administration
- Application Administration

## 2.1.2 B). ORACLE / PEOPLESOFT ENTERPRISE SOLUTIONS

### ORACLE PEOPLESOFT OFFERINGS

In addition to our Oracle Core Services, HTC also provides services for [PeopleSoft Human Capital Management](#) and all related modules; [PeopleSoft Financials and Supply Chain](#) and all related modules; [Taleo Business Edition and Enterprise Edition](#); [Oracle Customer/Student Relationship Management](#), [Oracle database and infrastructure](#), and many industry-niche Oracle products.

#### Service Offerings:

- End-to-end Implementation & Support
- Application Maintenance & Support
- Upgrade Assessment and Support
- Enhancement & Customization
- Fluid & UX/UI
- Reports

#### Technology Expertise:

##### Application Skills:

- Human Capital Management
- Campus Solutions
- Finance and Supply Chain
- Customer Relationship Management

##### Technical Skills:

- Application Designer (PTools)
- XML/BI Publisher
- Conversion and Interface dashboard
- Fluid Design
- CI and Application Engine
- SQR and PeopleSoft Queries

### HTC'S ORACLE E-BUSINESS SUITE OFFERINGS

HTC's Oracle practice specializes in helping clients implement, upgrade, and maintain Oracle's Enterprise and Business Intelligence product lines. We provide expert project management, application and technical consulting, database administration and infrastructure support that allow clients to take maximum advantage of the rapid advance of technology. Our consulting solutions range from project strategy and planning, software assessment and selection, to implementation and integration, cloud services and change management. Our solutions provide you with higher productivity, lower costs and accelerated return on investment.

#### Service Offerings:

- End to End Implementation and Reimplementation Support
- EBS upgrade from 11i to R12.2.X
- EBS upgrade from R12.1.X to R12.2.X
- EBS upgrade from R12.2.X to R12.2.X
- Application Maintenance and Support
- Upgrade Assessment and Support
- Enhancement and Customization

#### Technology Expertise:

##### Application Skills:

- Financials and Projects
- Supply Chain Management
- Discrete and Process Manufacturing
- Human Resource Management System
- Oracle Hyperion
- Oracle OBIEE

##### Technical Skills:

- XML/BI Publisher
- SOA/BPEL
- OA Framework and ADF
- Oracle Workflows
- Oracle Forms and Reports
- Oracle Apex Development

## HTC'S ORACLE / PEOPLESFT SERVICES CASE STUDIES:

### SAN DIEGO CC DISTRICT - PEOPLESFT CAMPUS SOLUTIONS IMPLEMENTATION

#### Scope of Work:

HTC was selected to implement PeopleSoft Campus Solutions, HCM, Financials, Hyperion Budgeting, and Portal. Per the client's request, HTC implemented the PeopleSoft Finance and HCM pillars in version 9.0.

- The implementation of Campus Solutions began in version 9.0. During the project, the team collectively decided there were advantages to upgrading Campus Solutions to version 9.2 before final testing and Go Live. Therefore, this project included both implementation and upgrade of PeopleSoft Campus Solutions.
- HTC was responsible for implementing all core ERP applications for the District, and for developing the PeopleSoft portion of integrations to all other systems.
- As this project included many departments and processes, Organizational Change Management was critical. HTC had provided consulting to support the overall OCM and training efforts and is working with SDCCD to be sure that PeopleSoft processes meet SDCCD's stakeholders' needs.

### THE PEW CHARITABLE TRUST – PEOPLESFT FINANCIALS 9.2 IMPLEMENTATION

#### Scope of Work:

- Since January 2020, HTC has managed Tier 3 and Tier 4 operations including product development for PeopleSoft Financials 9.2 system by working along with the client's in-house platform team.
- Provided Production Support troubleshooting and issue resolution as well as small to medium system changes, and product development.
- As a part of the service HTC also delivers to related projects outside of this Production support managed service through separate dedicated project teams.
- The HTC team leverages its dedicated Microsoft Center of Excellence (CoE) team providing various value-added solutions, methodologies, and resources, HTC is able to leverage its CoE expertise to assess Pew's design, architecture etc., in order to develop solutions that are in line with industry best practices and standards.

#### Benefit to the client:

- HTC's experience and expertise in the PeopleSoft Financials environment and the advantage of a strong customer relationship resulted in a perfectly tailored and affordable support approach, with zero transition cost or business impact.

## LAKE COUNTY, INDIANA - ORACLE CLOUD IMPLEMENTATION (FULL SUITE)

### Scope of Work:

- Full suite ERP Solution with Risk Management and HCM Cloud.
- A one-stop-shop for all inventory, order, procurement, payment and journal consolidations & planning and budgeting.
- Simplified Hiring process and workforce deployment.
- Grants with Project Financials integration to monitor awarded projects.
- Fully Integrated Planning and Budgeting with narrative reporting for ERP budgetary control and Human Capital Management.
- Integrated risk management and policy automation for auditing and greater control

### Benefits:

- Tightly integrated Oracle ERP with PBCS to monitor budget versus actuals.
- Timely insights into GL activity by using tools of user choice.
- Restricted access to general ledger accounts.
- Integrated project financials to monitor project performance.
- Prevent users from posting to invalid accounts, eliminating redundancies
- Integrated Risk Management to identify and mitigate risks.

## CITY OF PHILADELPHIA, PENNSYLVANIA - ORACLE EBS IMPLEMENTATION

### Scope of Work:

HTC implemented Human Resources, Payroll, Advanced Benefits, Time and Labor and Human Resources Self Service functional areas in a time-bound manner for 34,000 employees.

- Payroll Implemented for 60 departments
- 13 Combined Union Codes - each having separate payroll rules
- Multiple Rotation plans and Shift plans, and Multiple Earning policies based on CUCs.
- Complex calculation of payroll, overtime, and accrual
- Integration with Kronos time clock

### Benefits

- Simplified Payroll and Time Entry process, and Employee data Management
- Intuitive user experience, and guided process
- Minimal manual or paperwork
- Reduction in Data Discrepancies
- Data has a single source of truth, as all modules, and processes are integrated

## THE UNIVERSITY OF NOTTINGHAM - PEOPLESOFT INTEGRATION

### Challenges:

- Integration of various third parties
- Multi Language Implementation, with different models of data from legacy.
- Interfacing was not real time and performance issues due to the conventional file based interfacing.
- Manual validation and processing of the student academic progress.

- Lack of proper reporting and analytics framework resulted an overhead of costs for the Recruitment and Admissions team.

**Solution:**

- HTC Provided BeSpoke functionalities for the university with multi-language support.
- Delivered 158 PEAM Rules and customizations (31 integrations, 35 conversions, and 5 major frameworks)
- Various frameworks for data conversion, placement management, ceremony, scholarship disbursement, and maintenance
- Implemented the latest tool features like Activity Guides, Pivot Grids for reporting tools, thus providing various WorkCentre dashboards.

**Benefits:**

- Fast paced execution of the business process with a streamlined approach.
- High adoption rate of the end users and student community
- Data Analytics to present the business stake holders and real time integration of various transactions.
- Simplified Admissions process

**Partial Listing of HTC’s Oracle/PeopleSoft Clients:**



### 2.1.3 D). MICROSOFT AZURE AND M365

#### HTC'S MICROSOFT CENTER OF EXCELLENCE

HTC is a [Microsoft Gold Partner](#) with a [dedicated Microsoft practice and Center of Excellence](#) having focus areas in Azure and Microsoft 365. [One of our Cloud clients is Microsoft itself](#), for whom we have developed and implemented innovative marketing automation solutions using Microsoft technologies. We have an active relationship with Microsoft, enabling us to develop strategies and recommendations for a complete and sustainable Microsoft solution.

HTC has deep and active [experience working in the Microsoft Azure and M365 cloud environments](#). On behalf of our clients, HTC consultants have [deployed new Azure-native applications, re-platformed on-prem applications into Azure, and built new Azure-based data warehouse solutions](#).

HTC has [migrated data into the cloud and developed and managed M365 and Power Platform based solutions](#). Additionally, we have integrated applications within the cloud and in hybrid cloud-to-ground arrangements, [stood up and provisioned entirely new Azure environments](#), and maintained existing Azure-based solutions.

[With regard to Azure and M365, HTC has been very successful in past implementation and migration projects due to the following key elements:](#)

- Highly skilled consultants who have “been there and done that” in very complex Microsoft Cloud support, integration, implementation, and migration projects.
- We know the right tools to use for each element of a project, and we have experience with all the industry-leading tools.
- We use our robust and proven Estimation Methodology so that our customers have the assurance that our comprehensive solutions will be delivered on time and on budget.

If any of the above elements are missing, the chances of achieving a truly successful implementation or migration are greatly diminished. At the heart of our solution lie three foundational components that set HTC apart, they are as follows:

- HTC has a vast array of Microsoft Cloud experience.
- HTC has the expertise to support James Madison University in all phases of the implementation and management of Azure and M365 solutions.
- HTC has highly skilled onshore and offshore Cloud consultants who work closely together and have extensive prior experience delivering successful projects for clients like James Madison University.

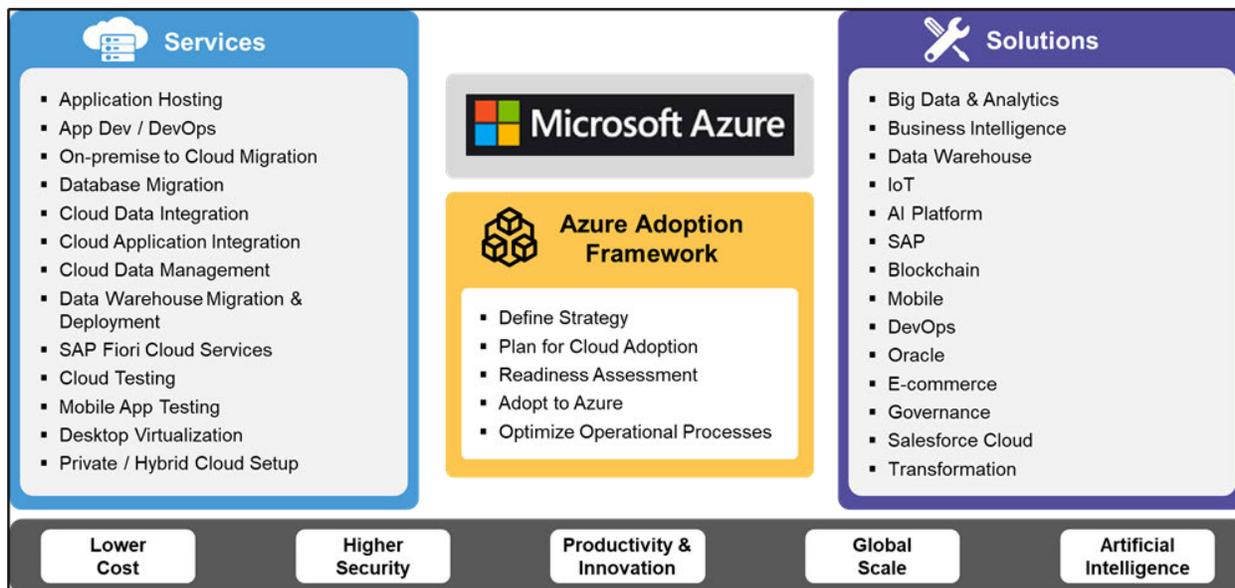
[HTC has been recognized as a Public Sector Global Partner of the Year, a Microsoft Inner Circle Partner, and a certified Gold partner in multiple Microsoft competencies](#). While we work with Microsoft clients in many industries, we specialize in Public Sector/Not-for-Profit services.

## HTC'S MICROSOFT AZURE CAPABILITIES

HTC's partnership with Microsoft enables us to share our experience, knowledge, and expertise to fulfil our global customers' requirements. It also supports us to provide services / solutions utilizing the latest technologies to develop our customers' business.

We provide various Microsoft services with the support of our CoEs for global Clients. We have a successful record of implementing Azure services.

### HTC's Microsoft Azure Services



- Enterprise-wide cloud implementation across all three deployment models
  - IaaS – Virtual Machines, Containers and Registries, Auto scaling & Automation, Virtual networks and subnets, VPN tunnels, Security implementation
  - SaaS – Power BI, CRM, Office 365 integration
  - PaaS – Web Applications, Mobile Apps, Azure function, Azure Web Jobs, Azure storage which includes Blobs, ADLS, Azure Synapse, Cosmos DB, along with Big Data cluster
- Any third-party platforms from Azure Marketplace
- Building CI/CD pipelines using Azure DevOps

### Partial Listing of HTC's Microsoft Azure Accomplishments:

- Federated Data Warehouse Setup in MS Azure
- Developed scalable architecture for POS data enrichment
- Conglomeration of different data sets in SQL and Cosmos DB for unified reporting / analytics
- NextGen application development leveraging server less Azure functions to reduce hosting costs
- Leveraged AI based Azure Cognitive Search for faster indexed scan
- Migration of Applications and Databases by 'Lift and Shift' approach
- Re-engineered on-premises applications to cloud native solutions

## HTC'S MICROSOFT AZURE CASE STUDIES

### PINKERTON – DIGITAL ENTERPRISE APPLICATION MIGRATION

#### Scope of Work:

- Designed and rearchitected enterprise web application from .NET SQL on-prem to Azure-based common platform.
- Re-platformed the app (Threat Monitoring, Employee Screening, Global Asset Management (GAM), Risk Advisory, Link Analysis)
- Designed and rearchitected with better exception and logging using dedicated insights. and handled the data latencies using active-active geo-distribution, Redis cache.
- Rearchitected and implemented the enterprise app to consolidate the array of apps on to a common platform which included Enterprise Application, Customer Portal, Vendor Portal, and Mobile Application.
- Enabled data visualization and forecasting using Power BI data analytics and reporting.
- Provided uniform access to the entire product and service offerings along with a common integration platform for relevant third-party applications.

#### Benefits

- 50% reduction in cost by replacing and consolidating licensed tools.
- 30% efficiency improvement with automated notification and report generation
- Provided secure, runtime scaling and faster data exchanges between regions with distributed frontend applications and database, adhering to local privacy regulations

### UNITED EDUCATORS – DIGITAL ENTERPRISE APPLICATION MIGRATION

#### Customer's Challenge:

- Customer does not have an enterprise monitoring tool to monitor the hybrid environment (On-Prem and Azure)
- Environment is not compliant with industry guidelines and audit issues

#### Scope of Work:

- Conduct design discussions and finalize the approach
- Rollout Azure Arc for all environments
- Onboard on-premises Windows VMs into Azure Arc
- Create RG, Tagging, RBAC, and Update management for the newly onboarded on-premises VMs
- Review Azure Policies for Azure VM, extend the same to Arc-enabled servers
- Review existing Azure Monitoring and Azure Log analytics workspaces and implement the gaps
- Refine existing Monitoring and Logging and extend the same to Arc-enabled on-premises Servers

#### Benefits

- Consolidation of monitoring tools to reduce the cost
- Outage reduction through 100% monitoring coverage

## HTC'S MICROSOFT 365 CAPABILITIES

Following are HTC's Microsoft 365 services.



### Power Platform



### Cloud & Client Support / Mgmt.

- M365 Administration
- Subscription Management
- Support/Help Desk
- Training

### Governance

- Processes
- Policies
- Taxonomies/IA
- Metrics

### Deployment & Migration

- Strategy/Planning/Execution
- Readiness Assessment
- Onboarding/Implementation
- Migration

### Security

- Modern Auth
- MFA
- Assessment
- Monitoring

### Business Processes

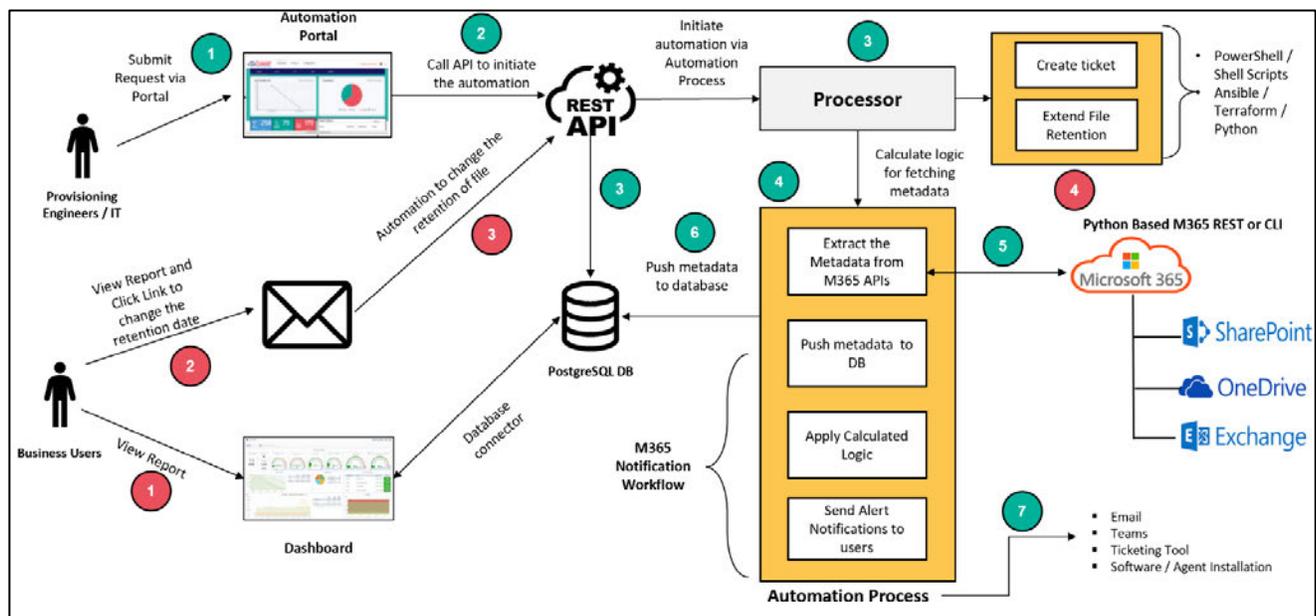
- Business Process Analysis
- Workflows
- Compliance
- EDiscovery

### Projects & Solutions

- Modern Workplace
- Custom Apps
- Integration
- Data Analytics/Reporting

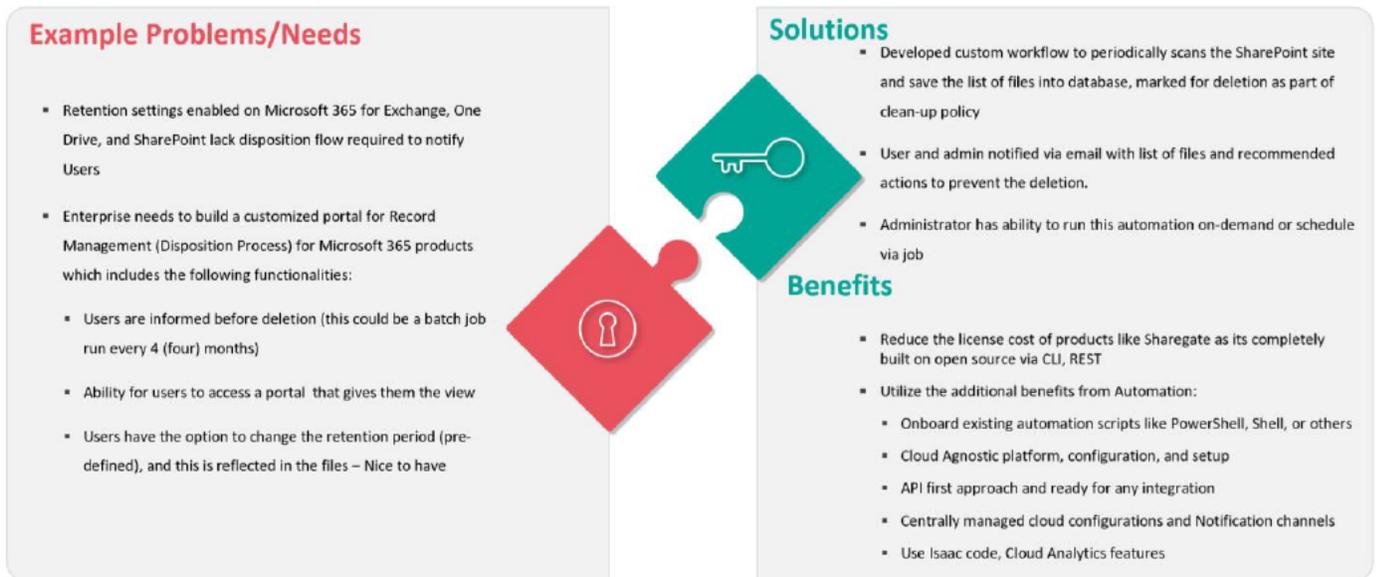
HTC manages and maintains Microsoft Active Directory, DNS, DHCP, Exchange/Office365, and Group Policy in a Windows Server environment for a large number of users.

The following graphic depicts an **HTC Solution Approach Example of M365 Process** for Records Management.



Following is an **HTC example of Automation Build for Microsoft 365.**

Disposition review allows users to review all content before it is removed



## MICROSOFT 365 CASE STUDY

### CONFIDENTIAL CLIENT - MODERN WORKPLACE ASSESSMENT PROJECT

#### Scope of Work:

The Client has requested HTC to perform a Modern Workplace Assessment on better utilizing and adopting Microsoft 365, comparing the capabilities of Slack versus Microsoft Teams, securing its use of Microsoft 365, and utilizing the Power Platform components to rapidly provide a compelling Modern Workplace experience to users. Following are the work product solutions provided.

- Findings, opportunities, and recommendations on Client's use of Microsoft 365 to support team/business unit collaboration and document management needs
- Recommendations on using the Power Platform components to rapidly provide business app and Modern Workplace capabilities to support Client use cases
  - Training & Coaching recommendations
  - Best Practices
- High level comparison of the capabilities of Slack vs MS Teams in the context of how Client users communicate and do their work
- Security recommendations and Modern Workplace best practices in the context of Client's use of Microsoft 365
- Governance recommendations on Client's future use and management of Microsoft 365 and OneDrive
- Prioritize go forward work items and develop a Modern Workplace roadmap

## GATES CORPORATION – O365 MIGRATION & GLOBAL INFRASTRUCTURE SUPPORT

### Scope of Work:

- Network Operation Center
- Security Operation Center
- Incident and Problem Mgmt.
- Active Directory/Azure AD
- Exchange On-prem/Exchange Cloud
- O365 Migration
- Windows and Linux Servers, Storage & Backup/Recovery
- SharePoint, SQL Server DBA
- ITIL Business Process Development & Automation Tools

### Technical Service Desk

- L1 and L2 support to more than 15,000 desktop users
- Multi language Support
- Onsite support
- Trouble shooting, installation, and configuration for Windows 10
- Support for O365
- User provisioning and de-provisioning
- Patching using SCCM
- Connectivity support and upgrades

### Partial Listing of HTC's Microsoft Clients



**2.1.4 F). DATA ANALYTICS/VISUALIZATION/WAREHOUSE/LAKE**

**HTC’s Data Analytics Solutions**

Our data analytics solutions and services bring a wealth of expertise and decades of experience to bear on real-world business data challenges. We are particularly adept at leveraging cloud and emerging technologies, innovative approaches, and diverse collaborative teams to build solid, secure, and integrated data management solutions that deliver real business value.

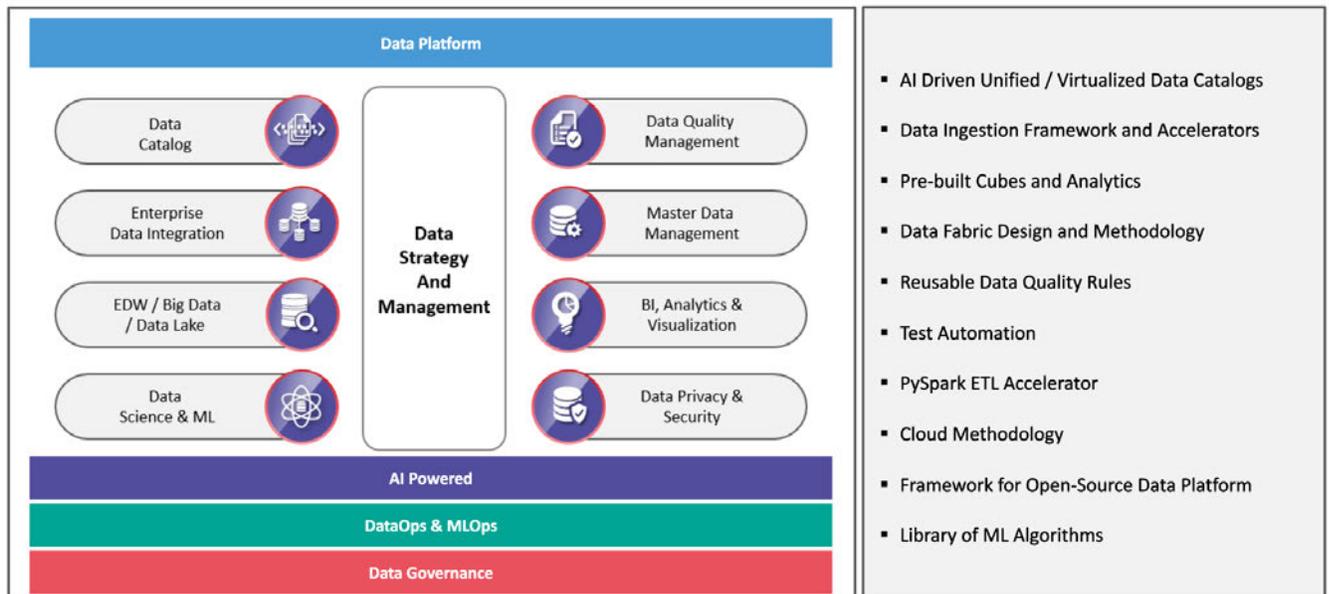
Beyond building new systems and maintaining existing ones, we regularly re-platform data repositories onto new cloud-based solutions, help clients rationalize and implement big data analytics solutions, and seamlessly integrate partner systems. We enable our clients to leverage advanced data analytics solutions to transform their data management landscape for the digital age and beyond.

We can help you be strategic about collecting, storing, refining, sharing, and safeguarding your data, the new capital. HTC can provide data analytics consulting services, data monetization services, data security solutions, and data modernization services that are designed to help you discover new possibilities to accelerate your success and growth.

HTC manages the entire data transformation lifecycle including:

- Data Warehouse – effective and efficient storage of needed data for historical and analytical purposes.
- Data Integration (ETL and ELT) – effective movement and transformation of data
- Master Data – creating and maintaining a golden record and single source of the truth
- Reporting – generating value from raw data within a company’s data stores
- Data Governance – putting a strategy in place to manage the lifecycle of data

**HTC Data Management & Analytics Services**



**HTC’S DATA SCIENCE CAPABILITIES**

HTC’s comprehensive BI and Analytics services help you convert your data into timely and actionable insights by unlocking hidden opportunities and insights to sharpen and quicken decision-making. Our top-notch data scientists have been developing statistical models and ML algorithms that our clients can deploy in their business processes.

Our data and content management capabilities run the length of the value chain – from marketing spend optimization to conjoint analysis for product configuration. We also offer early-warning systems and tailored offers based on system and collector data. Our churn-prediction-propensity model and real-time executive dashboards mitigate mission-critical risks effectively and with cost benefits.

Types of Analytics	Tools and Technologies	
<ul style="list-style-type: none"> <li>• Descriptive</li> <li>• Diagnostic</li> <li>• Predictive</li> <li>• Prescriptive</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Azure ML Studies</li> <li>• Google Vision</li> <li>• IBM Watson</li> <li>• IBM SPss</li> <li>• AWS SageMaker</li> <li>• R.Python, Caffee, Theano</li> </ul>	<ul style="list-style-type: none"> <li>• Apache MXNet</li> <li>• Apache SparkML</li> <li>• Real-time Application Deployment</li> <li>• Reusable Solutions</li> <li>• Tools and Frameworks</li> <li>• Exploratory Services</li> <li>• H2O AI</li> </ul>

**HTC’S DATA ANALYTICS CASE STUDY**

**A LEADING DATA INSIGHTS AGENCY - BUSINESS INFORMATION REPORTING SOLUTION**

**Scope of Work:**

HTC was contracted to provide a reporting solution.

- HTC built an Operational Data Store (ODS) and reporting database and provided analytics capability
- HTC built an ODS layer, analytics packages, and loaded them into the reporting database
- HTC implemented and tuned the SAAS analytics cubes and used aggregation and slowly changing dimensions to improve reporting
- HTC implemented personalized access to various credit reporting agencies and their users

**Benefits**

- Reduced report processing time
- Faster record retrieval achieved by defining aggregations
- Improved user experience

## 2.1.5 G). CHANGE MANAGEMENT TRAINING, SERVICES, & CERTIFICATION

HTC is partnering with International Software Systems, Inc. (ISSI) for Change Management Training, Services, & Certification. HTC has maintained a successful (long-standing) business relationship with ISSI throughout several successful engagements.

### ISSI CHANGE MANAGEMENT AND TRAINING SERVICES

In consultation with the JMU, ISSI and HTC will provide organizational change management and training, as needed. An Organizational Change Management warrants a strategic approach, identifying and engaging key stakeholders from JMU to drive the process in collaboration with the HTC Change Management Team. The steps involved in the HTC Team's proposed change management process are as follows.

Throughout the Organizational Change Management (OCM) processes, ISSI will gather stakeholder feedback, track the adoption of new tools and procedures, and gauge the effectiveness of communications, training, and coaching.

ISSI has been providing Change Management and Training services using our Learning Management Software to our clients for over 20 years. With each implementation of our Learning Management Software, we develop a change management process including training and communication plans. Executing these practices assists our clients with their new software and services to ensure maximum growth and development, ultimately increasing a rewarding return on investment.

#### ISSI's Change Management Methodology

ISSI follows the Proci methodologies for Change Management using a structured, adaptable, repeatable approach to enable individuals to successfully move through changes in each organization. We follow the ADKAR OCM pillars methodology to create and implement OCM plans.

ISSI uses the tools and techniques available for organizational change management approach to accomplish client objective. To engage users in preparing for the changes, ISSI's team conducts feedback surveys, identifies, and builds networks of change champions and change agents, within the client organization, establishes strong governance, creates communication plans, and leverages and interactive activities.

Our subject matter expert is a certified PROCI consultant and will use the ADKAR methodologies. Building their desire for change, promoting their knowledge of the change ability to execute the change and reinforce the desired behaviors for the change. Including coding, policy and Moving from a current state to a desired future state.

#### ISSI's Training Methodology

Team ISSI follows the ADDIE methodology: Analyze, Design, Development, Implement, and Evaluate. The plan will outline the types of training needed, the target audiences, and the delivery

methods. ISSI offers several training approaches (previously curated for SSA, LoC, and DoE) and will produce audience-specific training to include,

- Reviewing the training objectives
- Identifying existing material such as Quick Reference Guides, On-demand 'How-To' videos and Job Aids,
- Selecting the most suitable training materials and organize them into categories and sequences,
- Creating new training materials using instructional design models such as ADDIE,
- Reviewing and revising the curated and created materials and testing and validating them for effectiveness.

### Partial Listing of ISSI's Change Management & Training Clients

Some of our clients include the Social Security Administration, the Library of Congress, University of Maryland Baltimore, Department of Energy, Department of Defense, and the Dallas Area Rapid Transit.

## ISSI CHANGE MANAGEMENT CASE STUDY

### SOCIAL SECURITY ADMINISTRATION – CHANGE MANAGEMENT

The Social Security Administration has been a returning client for over 10 years.

#### Scope of Work:

ISSI's team analyzed the project and program management processes (such as practices, methodologies, and techniques) used to plan, organize, execute, control, and monitor programs, to identify areas that required better governance, increased efficiency, and/or improved quality.

Using support metrics, we were able to identify change requirements in the training processes and methodologies transitioning solely from paper and classroom to online and automated course training. We were also able to identify areas where end users needed refresher training. The following bullets briefly detail the services provided.

- Perform a business requirement analysis identifying stakeholders and end users and their functional, technical, resources, as well as their reporting requirements.
- Develop a comprehensive plan outlining the work's scope, a timeline for implementation, and resource requirements.
- Create a robust communication plan including key metrics for effective and timely communications between stakeholders and our team.
- Deliver communication plans, schedules, and training to assist the transition from a legacy training format to a modern, efficient, enterprise workforce development and ultimately provide a substantial cost savings and Return on Investment.

#### Benefits

- The steps taken to ensure OCM success were:
- Analyzing gaps in the current state

- Articulating the future state and creating a compelling case for the change
- Evaluating the magnitude and nature of change
- Documenting the results and communicating them to stakeholders.

## ISSI TRAINING CASE STUDY

### SOCIAL SECURITY ADMINISTRATION – LEARNING MANAGEMENT SYSTEM

#### Scope of Work:

- The SSA Office of Learning tasked Team ISSI with implementing a new Learning Management System that initially served over 10,000 end users.
- The communications included workshops, instructor-led training, employee website announcements and links to training.
- Over the 12-year life of the contract, 61,500 SSA executives, managers, employees, and contractors leveraged the training opportunities in the system.

## 2.1.6 I). CISCO TECHNOLOGIES, INFRASTRUCTURE SUPPORT, AND VIRTUALIZATION

### HTC'S APPLICATIONS INFRASTRUCTURE

Service-oriented applications are built upon complex web of hardware and software components on both distributed and mainframe systems that are layered interconnected and highly distributed. HTC solutions for Application Infrastructure ensure business continuity by measuring, tracking, and reporting application service levels across the application stack — including web, portal, and application servers, and message-oriented middleware systems on distributed and mainframe environments — while quickly locating the root-cause of failures to shorten resolution time.

Because HTC Application Infrastructures Management solutions are built to provide a holistic management approach, they deliver end-to-end visibility across the entire infrastructure, complete monitoring of application components, its interdependencies and the application custom business logic, and comprehensive analysis and reports on visitors' activity, patterns, and trends all at once.

### HTC'S INFRASTRUCTURE TEAMS

HTC's Infrastructure teams specialize in strategic planning, design, and execution of mid and large-scale architecture solutions aligned to meet global business and organizational requirements. Resources possess extensive strategic and practical experience in infrastructure technologies including Servers, Storage, Databases, Network architecture, Operating Systems, and emerging technologies.

Other Services Include:

- Practical knowledge [designing customer's infrastructure migrations](#) into the private & public Clouds
- [Strong knowledge of Infrastructure](#) related to Servers, Storage, Network, Operating Systems, Databases, Virtualization and Middleware
- Perform full IT assessments & work with internal/external customers to deliver the best overall technical solutions for their designated environments
- [Managed several major Data Center migrations for large customers](#) and worked with customers to ensure minimum disruption and down time during migrations
- Provide architectural consulting expertise, direction, and assistance to IT management
- Provide oversight for the solution to define the steps necessary to transition from current-state to future-state
- Work with clients to [identify Disaster Recovery needs](#) & recommend appropriate changes to meet their business continuity needs
- Assess market technology choices to determine fit, including software, hardware, storage, databases, middleware, load balancing, cloud solutions, etc.
- Identify opportunities to optimize IT investments and align IT investments to target enterprise architecture

- [Perform gap analysis and develop transition and sequencing plans](#) to guide modernization initiatives from current-state to target architecture
- Manage the design and integration of new technologies into new and existing systems, including the transition and migration of corporate systems
- [Manage and maintain Microsoft Active Directory, DNS, DHCP, Exchange/Office365, and Group Policy in a Windows Server environment for a large number of users](#)
- Install new and rebuild existing servers and configure hardware, peripherals, services, settings, directories, storage, etc. in accordance with operational requirements
- [Provide system administration of desktop and server systems connected to local and wide area networks; and desktop system management responsibilities](#) involving account monitoring, security, Operating System (OS) installation, and other local area network system administration related functions
- Perform daily system monitoring, verifying the integrity and availability of all hardware, server resources, systems and key processes
- [SAN \(Storage Area Network\) administration](#) will include configuration, initial installation and upgrade, device management, rendering performance and reliability recommendations, as well as providing recommendations on the integration of SAN products into the Agency's overall computing environment

## HTC'S MANAGED INFRASTRUCTURE AND CLOUD SERVICES (MICS)

[Managed Infrastructure & Cloud Services \(MICS\)](#) is an HTC core enterprise service and is a formalized collection of well-defined IT infrastructure-focused delivery capabilities. HTC provides services throughout the following eight towers:

- Data Center Hosting Services
- Monitoring Services
- Provisioning Services
- Infrastructure Management Services
- Cybersecurity Services
- Service Desk Services
- Technology Solutions
- Business Continuity/Disaster Recovery

HTC provides and supports flexible products and solutions which can be deployed by various infrastructure options such as public cloud, private cloud, or hybrid cloud. [We can provide hosting options for either our various "home grown" application solutions or Commercial off the shelf \(COTS\) products.](#) We often customize versions of an application and provide it as a hosted service to a customer at a lower cost of ownership.

HTC offers SaaS (Software-as-a-Service) applications as we have found that it is a model that allows us to be more agile in adapting changes to requirements and offers our clients the ability to implement changes in their businesses to be more competitive and successful.

## Cloud Engineering

HTC delivers a comprehensive suite of cloud engineering and management services to enable optimum IT services delivery across hybrid cloud and on-premises landscapes. Because our

cloud services are tailored to your situation and requirements, the focus is always on supporting your business strategy and helping you eliminate the investment and complexity associated with IT initiatives. HTC can help you with:

- Cloud Strategy Development
- Cloud Readiness Assessment
- Cloud Systems Integration
- Cloud Solutions Engineering
- Cloud Migration Services
- Cloud Application Modernization
- Cloud Application Development
- Cloud Managed Services

### HTC’S Cloud Services Strength

With our mature Cloud, best practices, extensive cloud engineering expertise, best-of-breed tools, skilled Cloud resources, and proven delivery methodology, HTC is the perfect partner to drive sustainable value for your organization. Furthermore, we are adamant about helping our clients address security, compliance, and privacy issues as they shift to the cloud.

HTC’s extensive pool of skilled and certified Cloud engineers and architects provide deep and broad subject matter expertise across a broad set of Cloud platforms and technologies (e.g. AWS, MS Azure, IBM Bluemix, Oracle Cloud, CA, Salesforce, Informatica, Cloud Foundry.)

The following graphic depicts HTC’s Cloud and Infrastructure Services Offerings.

<b>Cloud</b>	<b>Hybrid Workplace</b>	<b>Infrastructure Management</b>	<b>Cyber Security</b>		
<ul style="list-style-type: none"> <li>▪ Cloud Advisory, Strategy, and Solution</li> <li>▪ OnPrem to Cloud Data Migration Services</li> <li>▪ Cloud Factory</li> <li>▪ Cloud Managed Services (Platform Enabled)</li> </ul> <p><small>#Modernization, #Efficiency, #Security, #Agility, #Savings, #Strategy, #Consolidation, #Transparency, #Growth, #AI/ML</small></p>	<ul style="list-style-type: none"> <li>▪ Unified Communication &amp; Collaborations</li> <li>▪ VDI, Desktop as a Services</li> <li>▪ M365 Service</li> <li>▪ Device as a Service</li> <li>▪ Unified Endpoint Management</li> <li>▪ Digital User Experience Management, Field Services Management</li> </ul> <p><small>#DEX, #Analytics, #Hybrid, #WFH, #Mobility, #Device, #AI/ML</small></p>	<ul style="list-style-type: none"> <li>▪ Infrastructure Operations Compute, Storage, Network, &amp; Backup</li> <li>▪ Hosting Services</li> <li>▪ IT Service Desk</li> <li>▪ DR as a Service</li> <li>▪ Monitoring, Automation, &amp; AIOps</li> </ul> <p><small>#Reliable, #Secure, #SLA, #Global, #Tiered, #Shared, #Outcomes, #PMO, #Productivity</small></p>	<ul style="list-style-type: none"> <li>▪ Perimeter Security – SOC, IDS/IPS, Anti Virus, Malware</li> <li>▪ Network Security – VAPT, ZZZZZSASE</li> <li>▪ Endpoint Security – Phishing, Patching, MFA, MDM</li> <li>▪ Application Security – Cloud, SSO, Secure Code</li> <li>▪ Data Security – SSL/TLS, DLP, NIST, ISO 27001 IT policies</li> </ul> <p><small>#Strategy, #Policy, #Simulation, #SIEM, #CISO, #Architecture, #Assessments</small></p>		
<b>IT Service Management</b>	Employee Experience for IT users with increased productivity and predictability. <small>#incident, #problem, #change, #Catalog, #Service_Level, #Virtual, #Agent, #Performance_Analytics, #Asset, #Cost, #CMDB</small>	<b>IT Workflows</b>	<b>Now Platform</b>	<b>Employee Workflows</b>	<b>Customer Workflows</b>

## HTC’S NETWORK SYSTEM MANAGEMENT

### Network, Systems and Applications Monitoring

HTC’s Network Monitoring solutions ensure reliable access to critical business applications by continuously monitoring and self-managing the availability and performance of your underlying network and systems infrastructure. That means your users will receive the services they need when they need them.

You'll no longer find out about problems after users call in to complain. HTC's solutions proactively identify potential disruptions in service, self-heal issues as they arise, and automatically send trouble tickets to the right person with the right information drastically reducing mean-time-to-repair (MTTR).

### **Network Management (LAN/WAN)**

HTC Network Management solutions allow taking control of network performance and ensure Quality of Service across the network portion of the infrastructure. This includes being responsible for a multitude of tasks including ensuring the availability and performance of the network, documenting service levels, resolving outages and performance degradations, tracking usage and bandwidth, managing capacity, and accurately planning for growth.

HTC has experience in managing a diverse collection of devices from numerous vendors, isolating the source of performance degradation throughout the network, minimizing recurring WAN expenses, and providing consistent reporting across their heterogeneous network infrastructure.

### **Systems Management (Servers)**

HTC has implemented various systems management software components that perform specific tasks to monitor and manage health and availability across complex, multi-vendor, multi-platform computing environments. These Systems Management components provide a cross-domain/enterprise approach that reveals true process management for comprehensive, vendor-neutral understanding of performance.

Automated management includes automated corrective actions and desired state management, reducing personnel involvement, especially time wasted in searching for faults, then researching and fixing those faults. Role-based management views with pertinent information provide instant understanding of complex infrastructure underpinnings and their relationship to business processes.

### **Network Security Specialist/Engineer**

HTC's Network Service Solutions keeps client infrastructures up and running, minimizing downtime in even the most complex environments. This HTC core competency is backed by HTC's world-class technical expertise and decades of experience supporting public and private enterprises. We provide single-point-of-contact, multi-vendor support, addressing break-fix requirements through SLA-based contractual arrangements.

HTC provides cross-platform problem resolution, leading or participating in Emergency Response Teams to achieve quick service restoration for switches, routers, servers, desktops, BlackBerry devices and any other infrastructure components that support your mission. Our maintenance approach is proactive and preventive, eliminating failures before they occur. And if one occurs, we respond with speed, agility, and the right part in hand to perform the repair with minimal downtime for end users.

HTC provides follow-the-sun help desk customer service support 24/7 for all our clients. Using ISO 9001-2000 best practices and ITIL processes, HTC delivers services that adheres to the most demanding performance requirements and service level agreements. Our successful customization of processes and procedures to each customer's unique demands consistently results in 100 percent attainment of all performance objectives.

Additionally, our support teams will take a long-term view of the solution with the client's capabilities and culture in mind. Even when requirements necessitate a divergence from these qualities, HTC will continue to be client-focused and provide the necessary support to ensure the project's ongoing success.

**HTC'S INFRASTRUCTURE SERVICES CASE STUDY**

**GATES CORPORATION – GLOBAL INFRASTRUCTURE SUPPORT**

**Scope of Work:**

Operations Center

- Network Operation Center
- Security Operation Center
- Incident and Problem Mgmt.
- Active Directory/Azure AD
- Exchange On-prem/Exchange Cloud
- O365 Migration
- Windows and Linux Servers, Storage & Backup/Recovery
- SharePoint, SQL Server DBA
- ITIL Business Process Development

Technical Service Desk

- L1 and L2 support to more than 15,000 desktop users
- Multi language Support
- Onsite support
- Trouble shooting, installation, and configuration for Windows 10
- Support for O365
- User provisioning and de-provisioning
- Patching using SCCM
- Connectivity support and upgrades

**HTC's Partial List of Infrastructure Services Customers**

	Fortune 50 Investment Banking Company		Fortune 100 Banking & Insurance Company
A Global Auto Manufacturer			
			
			G&S CHRISTOPHER AND BANKS
			

**2.1.7 L). OTHER TECHNOLOGY:**

**HTC'S SALESFORCE PRACTICE**

HTC has over a decade of experience in providing a wide range of customized services for the Salesforce portfolio of products. This includes – Salesforce Lightning Platform, Sales Cloud, Service Cloud, Marketing Cloud, Community Cloud, Analytics Cloud, Financial Services Cloud, and Salesforce AppExchange.

**HTC's Salesforce Service Offerings**

Advisory Services

- Strategy & Roadmap
- Migration Analysis
- Technical Health Analysis
- Sales Process Improvement
- Marketing Qualified Leads
- Customer Service Agreement

Managed Services

- 24/7 Monitoring - Helpdesk and L1/L2/L3 support
- Application Maintenance & Support
- Audits
- Support & Training

Implementation Services

- Custom Application Development
- AppExchange Product Dev & Management
- Data migration and integration with external systems
- Deployment
- Consulting
- Portal transitioning to create powerful interactive communities
- Social and mobility services
- Remote admin and support.
- Data Analysis
- Salesforce Testing Services

**HTC's Salesforce Center of Excellence**

The infographic displays the following metrics and services:

- 10+** Years of Salesforce Services
- 200+** Salesforce Consultants
- 50+** Salesforce Engagements
- Cloud Alliance Consulting Partner
- Governance
- Certified Consultants
- Solutions / Accelerators
- Best Practices
- Processes & Methodologies

Services offered include:

- Sales Cloud
- Marketing Cloud
- Financial Services Cloud
- Service Cloud
- Analytics Cloud
- CPQ
- Experience Cloud

## Partial Listing of HTC's Salesforce Clients



## HTC'S SALESFORCE IMPLEMENTATION CASE STUDY

### STANFORD UNIVERSITY – LEGACY MODERNIZATION – CLOUD

HTC has been the premier Salesforce partner for the Graduate School of Business (GSB) since 2011. We have re-engineered and migrated 25+ applications from a variety of legacy technologies to Salesforce-based solutions – including Admissions, Registration, Retention, Financial Aid, Housing, Executive Education, Course Planning and Evaluations, Recruitment, Faculty Record, et al. Each application presents different complexities (e.g., some have algorithms for auto matching) and are built for different user bases (Students, Faculty, Administrative Office, Academic Administration and Public facing apps).

The initial set of applications were built in Salesforce Classic (Force.com). Once Salesforce released Lightning, HTC switched to building new applications in Lightning, or using Lightning web components. HTC resources are experts in building custom Salesforce Lightning solutions of all kinds for our customers.

HTC also developed all necessary Salesforce system integrations. Synchronized mechanisms designed and built by HTC enable application data to flow seamlessly from PeopleSoft through SQL Server and into Salesforce. Easy integration mechanisms have also been created with other cloud platforms.

In 2017, HTC also began working with the School of Humanities and Sciences to implement and enhance key CRM functionalities in Salesforce. Current efforts are focused on creating a function-rich Salesforce-based Academic Advising system.

In 2021, our major focus continued to be implementing various enhanced security protocols in Salesforce, and to systematically migrate existing applications from Salesforce Classic to Salesforce Lightning.

## THE UNIVERSITY OF MARYLAND - TERP APPLICATION PORTAL (TAP)

The University of Maryland (UMD) is in the process of deploying a new Applicant Portal for use in their undergraduate admissions process. This portal supports the entire lifecycle of an applicant as it will allow them to register, monitor the status of their application, track checklist items to completion, view their decision, and indicate enrollment and preferences.

HTC provides Salesforce Consulting services in delivering the Terp Application Portal (TAP). The HTC team assists with the full development lifecycle from technical design to development, testing, and deployment. The HTC Salesforce development team collaborates with the UMD Salesforce project team and UMD clients to gather requirements and configure the Salesforce application based on business needs with robust documentation.

This highly technical team is also engaged in web application development on the Salesforce platform. The types of roles/responsibilities supported include development, architecture, quality assurance and functional analysis. HTC is also responsible for the planning and facilitation of user acceptance testing of the Terp Application Portal (TAP) solution to include educating and coaching the Project Team on the UAT lifecycle and UAT best practices.

## WEB & INTERNET SERVICES

HTC has developed a solid reputation for its ability to design, develop, and implement quality Web and Internet-based solutions. From brochure-style websites to functional web applications to engaging responsive interface designs, HTC has broad experience developing every type of web-based system JMU is likely to need.

HTC developed complex custom applications from the ground up for Fortune 100 companies and the government sector for over 30 years. Please note that many of these systems are either entirely web-based or consist of major components, such as front-ends to legacy systems, that are web-based. In either case, all these projects involved the utilization of tools specific to the client's requirements and standards.

### Human-Centered Design

Human-centered design stands at the heart of application modernization. New technologies and devices demand a new user-centered focus to be successful. Our Experience-Driven Design (XDD) team will work with your stakeholders to drive web-based projects to an outcome that meets both organizational and customer-centric objectives. Our process starts with clarifying the needs of the organization and synchronizing them with the needs of your users. We do this collaboratively and rapidly to set an overall design trajectory for the project. Detailed design of application features can be fleshed out through a human-centered approach to Agile development.

### Responsive Web Design

In a web-based world where people have multiple devices and tend to start their work on one device and later transfer to another, it's imperative that most web applications be aware of users' workflow, their context, and their devices. HTC's default expectation when starting new

application development projects is that the application will need to be context-aware and support a full range of ever-evolving user devices.

## Experience-Based Prototyping

Our Experience Prototyping engagements excel at driving consensus about what a software product should be and how it should perform. By engaging key stakeholders across functional areas in a series of rapid design sessions, we quickly get everyone talking together and working toward a common visualization of the system.

## Mobile Design

While many applications can be designed to operate effectively via mobile web and responsive design techniques, some applications are best suited to native mobile development. Our teams have the experience and skills to help you understand which approach is best suited to meet your objectives.

Lastly, HTC's streamlined approach to continuous testing of web applications ensures rapid verification of changes, whether planned in routine releases or in support of urgent consumer needs to promotional events. HTC defines a formal methodology to conduct performance monitoring of web-based applications, network traffic, usage statistics, and surveys based on years of experience in this space.

## HTC'S WEB AND INTERNET SERVICES CASE STUDY

### HARVARD UNIVERSITY – WEBSITE APPLICATION DEVELOPMENT

#### Scope of Services:

- Develop a web application to capture Faculty of Arts & Science (FAS) supplemental salary information
- Workflow based system for administrators and faculty to submit their supplemental salary request
- Integrate the application with Harvard's existing payroll information system

#### Solution:

- Utilized HTC's Global Delivery Model
- Developed the application in compliance with OWASP security standards and W3C (AA) usability standards
- Support 200+ supplemental salary request form submissions in a year
- Dashboards / Reports to view all of the faculty's information in their department
- Centralized repository for faculty's supplemental salary details
- Automated cost share calculation process for administrators to validate the supplemental requests
- Streamlined workflow process for supplemental salary requests with less manual intervention
- Quicker updates to supplemental salary request based on the funding agencies' requirements

## Benefits:

- Cost Savings through Global Delivery
- Delivery Excellence – Quality and on time delivery
- Process Improvement – Suggestions for overall process improvement
- Accessible User Interface and Design
- Secured development process

## TECHNICAL SUPPORT AND SERVICE DESK SOLUTION

HTC provides follow-the-sun technical and help desk customer service support 24/7 for all our clients. Using ISO 9001-2000 best practices and ITIL processes, HTC delivers service that adheres to the most demanding performance requirements and service level agreements.

Our 24/7 help desk service support and tools provide efficient, flexible options for reducing costs, improving performance, and enhancing ROI on all your IT resources. HTC uses best practices to improve your quality and efficiency. HTC's Desk Side Support Services keeps client infrastructures up and running, minimizing downtime in even the most complex environments. This HTC core competency is backed by HTC's world-class technical expertise and decades of experience supporting public and private enterprises. We provide single-point-of-contact, multi-vendor support, addressing break-fix requirements through SLA-based or T&M contractual arrangements.

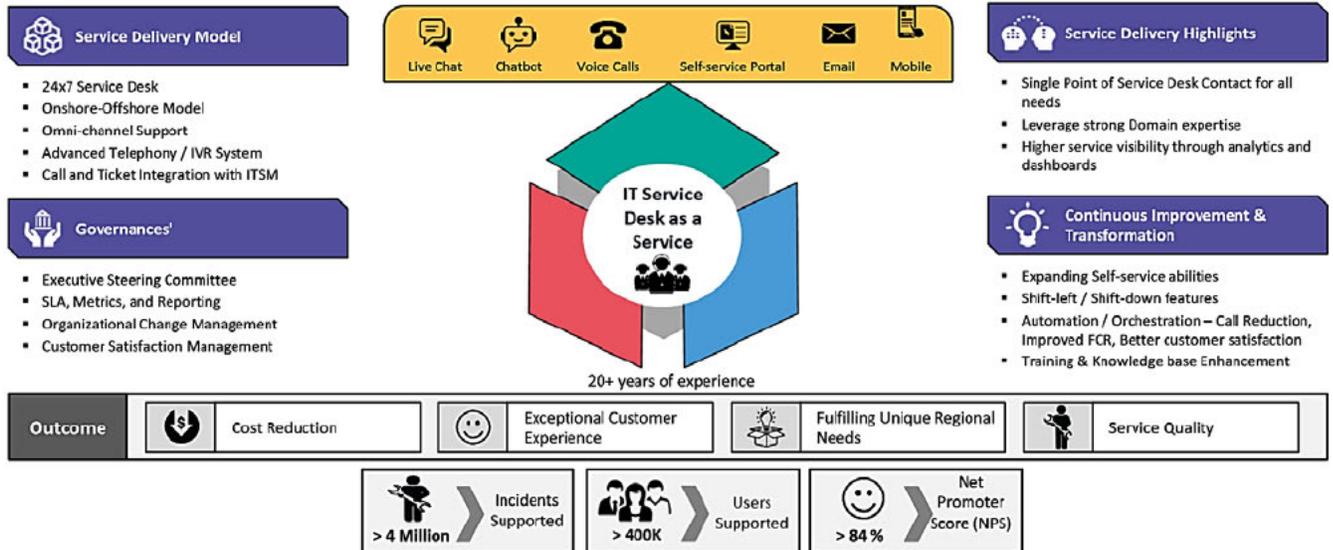
HTC's Help Desk services can help dramatically improve customer satisfaction and significantly reduce costs at the same time. HTC's fully integrated 24/7/365 Help Desk offers a single point of contact for all services and support. We offer:

- Unsurpassed expertise in managing and optimizing Service Desks
- 24/7/365 national, international coverage
- Precisely the services needed – delivered onsite or remotely
- Problem resolution services across heterogeneous technology platforms
- SLA-based, fixed, and variable contract options

Our Technical Support and Service Desk is a full-service solution built for and designed to align with the way in which companies conduct business, operating 24x7x365, supporting your business applications & systems. Our team of professionals support over 2,000 technical infrastructure and business applications; are trained to provide rapid, courteous, efficient, and accurate responses to user problems/incidents.

## HTC's Service Desk Services

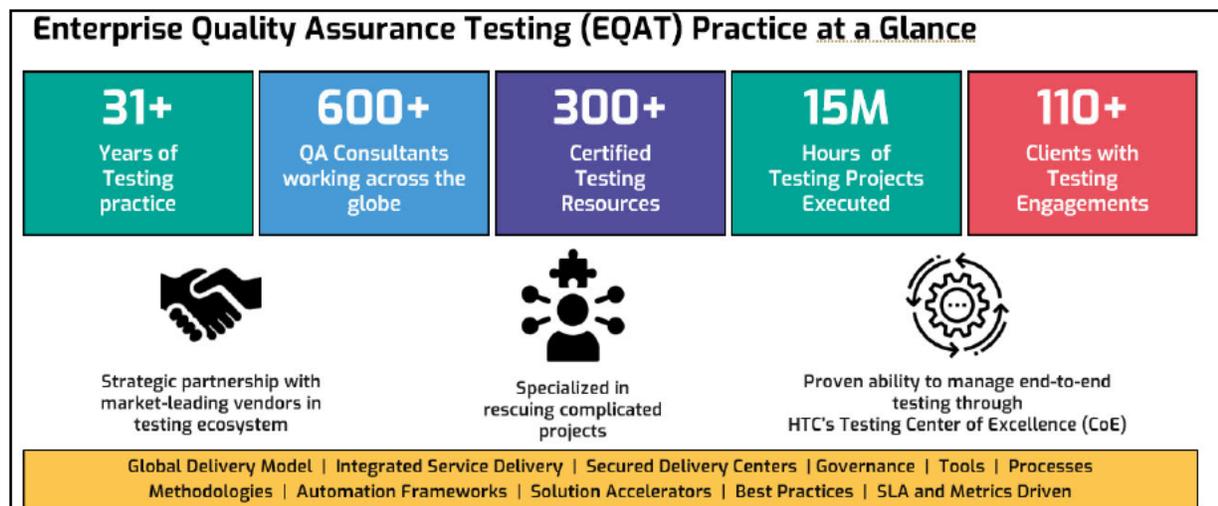
HTC leverages the ITIL methodology for production support. We have a full-fledged support team that offers Help Desk and technical support during post-implementation and maintenance.



## SOFTWARE QUALITY ASSURANCE (QA) AND TESTING

Ever-increasing competition is compelling companies to improve business outcomes by launching software applications with quick time-to-market. The faster organizations try to expand their digital capabilities, the more they are turning to next-gen technologies such as AI, RPA, Big Data and so on. Software Quality Assurance (QA) and Testing is the unseen force that propels your digital agenda by balancing cost, speed, and quality without compromises.

The following graphic shows the highlights of HTC's Enterprise Quality Assurance Testing (EQAT) Practice followed by HTC's Accelerated Quality Assurance Platform for E2E Quality Assurance.



## HTC'S ELECTRONIC DOCUMENT MANAGEMENT SERVICES

Documents are everywhere – in large volumes and diverse formats. Particularly challenging are the semi- and unstructured documents, which are both paper-based and digital. Conventional, template-based data extraction techniques like OCR fail to process such documents with speed and precision. Such techniques require manual validation, which is error-prone and time-consuming. At the same time, it leads to lower data quality and increases the overall processing costs.

HTC uses Artificial Intelligence (AI) to streamline our clients' document digitization journey. intelligent Document Processing (iDP) is a cloud-based platform that leverages the power of AI and smart automation to process all document types efficiently and effectively. The platform covers the entire data extraction lifecycle, including pre-processing, indexing and classification, scanning and extraction, data validation, and content management. iDP improves the productivity of downstream applications, thereby enabling them to generate insights faster. Our modules and toolset streamline your document digitization journey.

Following are capabilities we offer within this practice.

### **iDigitize and iPackage**

- Scan directly to the cloud for quick access
- Pre-process -- Noise reduction, de-skewing
- Automatic document classification
- Full support for OCR, ICR and IMR

### **iValidate**

- Business rules and data validation
- Ability to search DB based on comments
- Intuitive UI for validation, correction
- Ability to release or hold a document

### **iLearn**

- Data identification, ML rules and patterns
- Tagging, NLP and AI/ ML/ deep learning
- Data capture in multiple languages
- Multi-engine, multi-pass data extraction

### **iManage**

- Integrate with downstream applications
- Analytics and dashboard view of modules
- Document and content management
- Document archive and data transfer

## HTC'S ARTIFICIAL INTELLIGENCE PRACTICE

Organizations must recognize that data and AI are catalysts for enterprise reinvention and can fully capitalize on their potential. HTC Global Services, as an AI solutions company, helps companies utilize their data, people, and processes ready for AI, with strong underpinnings for continuous reinvention and greater growth, efficiency, and resilience.

Artificial intelligence for businesses can resolve problems, automate tasks, and serve your customers better. Thanks to AI solutions, you can improve your operations and business performance without adding more people to your team.

### **Our Capabilities**

We partner with our clients providing a range of tailor-made AI solutions for businesses to help navigate complex data sets for making better decisions and bringing a new era of productivity and efficiency. Our data analysts, scientists, and engineers are adept at designing and implementing

beneficial algorithms for data infrastructure analysis, data preparation, AI/ML platform selection, refining the models, and providing support.

Following is a brief synopsis of our suite of AI solutions and services.

- Machine Learning (ML) and Analytics  
We leverage the most sophisticated scientific techniques and technologies to develop AI solutions that enable actionable insights and decisions from structured, semi-structured and unstructured data.
- Business Process Management (BPM)  
Our BPM solutions analyze how users interact with services and provide insights from large data sets generated by organizations, to empower decision-making.
- Robotic Process Automation (RPA)  
We provide a wide range of automation services and solutions powered by cognitive technologies that efficiently mimic human actions to reduce operating expense, and enhance productivity and operational efficiency.

## E-GRAMS – HTC’S END-TO-END GRANTS MANAGEMENT SOLUTION

Managing a grant lifecycle can be tedious, time-consuming, and stressful given the frequent changes in requirements and regulations. But a comprehensive and easy-to-use grant management system can make the task of grants management lighter. HTC’s EGrAMS (Electronic Grants Administration and Management System) is just that solution. It is a web-based, enterprise-grade, end-to-end grants administration and management solution that handles all phases of the grant’s lifecycle for grantors, with a powerful reporting facility for grantees.

EGrAMS, a digital grant management system, improves transparency and accountability by tracking performance in real-time and automatically sending notifications and alerts. Grantors can set up review criteria, scoring rubrics, collaborate and review for consensus, generate rank lists, and funding recommendations. A single instance of EGrAMS can support several departments, agencies, chapters, or offices.

Below are highlights of HTC’s E-Grams software:

- Extensible architecture
- Available as an on-premise or cloud-based SaaS solution
- Highly scalable, interoperable, portable across platforms and operating systems
- Digitizes and automates all grants management tasks
- Option to collaborate and review for consensus and generate rank lists and funding recommendations
- Reduction in Total Cost of Ownership, with the ability to configure several grant programs in a single instance
- Proven track record of implementations in several agencies in the US and Canada

## 2.2 APPROACH & METHODOLOGY

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*Describe the approach and methodology that will be used to provide IT consulting services to James Madison University. Include how your firm would manage the scope of projects.*

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### **HTC'S TALENT SERVICES OVERVIEW**

HTC has been recruiting, qualifying, and placing staff in the information technology discipline for over 50 years. Throughout this time, we have provided staff augmentation services for, literally, hundreds of public sector clients including higher education; states, cities, and local governments; K-12 schools and school districts; and healthcare organizations, as well as clients in the private sector.

Our success as an IT consulting company begins with our people. We are IT experts with experienced technology practices and proven solutions that our clients rely upon. Our Talent Services are built around a technical recruitment team, a local and global sourcing model, IT delivery capabilities, business solution expertise, and thousands of HTC consultants and alumni. A suite of recruiting and talent management tools aid the proven process that delivers the results our clients require.

### **HTC'S HIGHER EDUCATION EXPERIENCE**

HTC has experience providing services to Higher Education clients and we proudly serve these institutions as a trusted advisor in implementing technology solutions to transform teaching, learning, and the way they do business. We have served over 250 higher education institutions with more than 300 campuses and have extensive experience with other large, complex research-intensive clients.

We understand that organizations struggle to find the right talent to keep pace with business demands. We find this is especially true with our higher ed clients, as IT Departments are dealing with continually increasing needs across a vast and diverse organization, on an already constrained budget. That's where we come in; providing staff augmentation to supplement your internal IT team in an efficient and cost-effective manner.

Additionally, we understand the challenges specific to Higher Education and the critical IT issues you face, as well as your need to focus time, energy, and resources on core competencies for the future. We also have a firm understanding of compliance with Local, State, and Federal regulatory requirements which state universities are required to meet. HTC monitors compliance through a rigorous commitment and adherence to our established quality processes and procedures.

We can help you add the right people, at the right time, with a wide range of staffing solutions that will help you achieve business goals on target and within budget. Additionally, over the past couple of years, HTC has taken an aggressive approach to building our consultant resource bench, increasing our speed to fulfill our clients' needs.

## KEY DIFFERENTIATORS

Our methods are proven accelerators designed to give you the best value for your consulting investment. We believe that our corporate strengths, identified below, position us to respond to the long-term trends, changing demands and competition within our principal markets.

- **Long-term Client Relationships**—We have been in business since 1990. We continually achieve high client satisfaction and have great success renewing client relationships. A prominent client from our first year in business, Ford Motor Company, remains one of our top five clients today in terms of annual revenue. This relationship exemplifies the kind of long-term commitment that we have toward our clients and speaks to the quality and breadth of the services that we provide.
- **Scale of Operations**—The competitive landscape for the delivery of IT services is highly fragmented. In almost every major market we compete with larger national and international publicly held firms, as well as a host of smaller regional and local privately held firms. For the past several years, large clients have attempted to consolidate the purchasing of IT services and work with fewer firms. Because of the relatively large scale of our operations, we have been able to remain a vendor to some of these large clients. Our successes have come at the expense of local and regional competitors that currently lack the scale to compete successfully for this work.
- **Balanced Business Model**—HTC has developed a business model that enables us to provide superior, leading-edge services that are routinely updated to meet the current needs of our clients. We have developed a reputation for thought leadership in selected industry verticals.
- **Valued Service Offerings**—We offer services to our clients in both the private and public sectors, including core competencies in QA/QI & Testing; Project Management Office / Business Analysis; IT Strategy; Business and Technology Transformation; Application Development and Maintenance; Business Intelligence; Managed Services; Talent Management; ERP / CRM, as well as managed hosting; call center support; and the resale of certain hardware and software products. We believe that having these valued service offerings is often a competitive advantage, particularly when competing against smaller local and regional firms.
- **Collaboration** - Collaboration is the foundation of our engagement approach. We start by listening and learning about your business, its operations, systems, and goals. With that knowledge we leverage our expertise, methodologies, and best practices to tailor our services, solutions, and resources to meet your needs. As stated earlier, we understand the unique challenges of our public sector clients, making collaboration the key to a successful project.

## SECTION 3. EXPERTISE, QUALIFICATIONS, AND RESUMES

*A written narrative statement on your EXPERTISE, QUALIFICATIONS, EXPERIENCE of the firm and RESUMES of specific personnel to be assigned to perform the work.*

### HTC CORPORATE INFORMATION

HTC Global Services, a certified Minority Business Enterprise (MBE), is a leading global provider of Information Technology and Business Process Services and Solutions with 12,000+ skilled associates. HTC is an ISO 9001 and ISO 27001 certified organization, and its processes and methodologies are compliant to SEI CMM Level 5. Our well-established Quality Management System ensures that the solutions developed, and services provided meet stringent quality standards and conform to our clients' requirements.

Staffed by a team of more than 12,000 highly qualified and experienced professionals, HTC offers (in addition to Talent Services/Staff Augmentation), Application Management, Application Modernization, Business Process Services, Cognitive/Artificial Intelligence, Digital Workplace, Cybersecurity, Data Management, Digital Content Management, Digital Services, ERP & CRM, Managed Infrastructure and Cloud Services, Program Management, Service Desk, and Transformational Advisory Services.

HTC has state-of-the-art infrastructure facilities designed to support software development, package/platform implementations and support services. We provide a complete range of services and 24x7x365 support to customers using resources on-site and off-site at our facilities. Our centers are equipped with state-of-the-art infrastructure and are inter-connected through high bandwidth and secure communication links.

### HTC Locations and Size

HTC provides IT Services to customers across various geographical areas such as North America, Europe, the Middle East, and Asia Pacific. We have 12 Delivery Centers across multiple time zones in North America, India, and Malaysia. In addition, our [12,000+ consultants](#) work out of our delivery centers, local offices, and client facilities, depending on client project requirements. HTC also maintains its own LEED-certified Data Center located in Troy, Michigan.

While we are an international firm, we assure JMU that [all work for the services proposed under this contract will be performed by USA-based employees in USA-based facilities](#). HTC has [approximately 2,000](#) U.S. based resources to fulfill the needs of JMU under this contract.

### HTC'S Financial Strength & Stability

[HTC is financially sound with a strong balance sheet and borrowing capability](#) including access to two \$25M lines of credit with PNC Bank; of which, neither have an outstanding balance. Additionally, HTC has significant free cash flows to fund large global engagements. This is amply demonstrated by two significant acquisitions (more on this below) purchased as all-cash transactions, which doubled the revenues of the company.

HTC is well prepared to invest and meet the challenges of a furious pace of growth by further strengthening the organization in all dimensions: organization structure, systems, staff, skills, and services. [HTC's leadership team has the capability and confidence to achieve sustained growth by focusing on the three key success factors: Customer Focus, Employee Orientation, and Quality.](#)

### Corporate Acquisitions & New Corporate Identity

HTC acquired CareTech Solutions in December 2014 and HTC Inc. in June 2017. These acquisitions have strengthened our capabilities to provide highly focused IT services and solutions that empower our clients' business acceleration. The acquisition of HTC, Inc. has increased our depth and breadth of experience in IT Staff Augmentation. HTC brought with it a Global Recruiting Team with over 50 years of experience in placing qualified candidates in all areas and specialties within IT. HTC's and (the then formerly) HTC recruiting teams took the best of each other's methodologies and practices and created a more robust, quality-focused Staff Augmentation practice.

On November 30, 2021, HTC Global Services revealed its new brand identity uniting HTC Global Services, CareTech and HTC under a single brand - HTC Global Services. The company's new identity embodies its renewed ambitions and aspirations. It reflects both the transformation journey and the transformative impact it has for its customers, employees, and stakeholders, now and beyond.

## 3.1 QUALIFICATIONS OF PERSONNEL

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*Provide the names, qualifications, and experience of personnel to be assigned to James Madison University. Designate who would be assigned as the primary contact for the account.*

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### 3.1.1 PRIMARY CONTACT

[Your dedicated Account Partner and Primary Contact is Jeffrey Davis.](#) Jeff has 30+ years of experience supporting clients in the D.C./Maryland/Virginia area respective to their IT Professional Services. He has been focused on developing successful partnerships for over 20 years in the Public Sector, including Higher Education. He has leveraged his extensive experience to drive strategic initiatives and forge key partnerships within the public sector. With a proven track record of success, Jeff possesses a deep understanding of the unique challenges and opportunities present for his Higher Education clients.

As your dedicated Account Partner, Jeff will oversee the coordination of resources and will be in regular contact with you in person, over the phone, and through email to ensure your requirements are being satisfied and to plan for future needs. Again, he is your main point of contact throughout this procurement phase as well as for all account matters during the contract to follow.

Jeff's contact information is listed below. Please feel free to contact him for any of your service needs, issues, etc. [Jeff is local and can meet with you in-person when requested.](#)

**Jeffrey Davis**  
Senior Client Partner, Public Sector  
PH: (301) 675-2412  
Email: [jeffrey.davis@htcinc.com](mailto:jeffrey.davis@htcinc.com)

### 3.1.2 ACCOUNT MANAGEMENT TEAM

#### HTC'S PROPOSED ACCOUNT MANAGEMENT TEAM

HTC partners with their clients to support projects through all project lifecycle phases from project ideation and intake through project closure as necessary. Administrative project support typically includes project and portfolio coordination, resource allocation, project communications, meeting facilitation and coordination, and project reporting at various organizational levels. HTC works with each client to tailor these activities to best meet the needs of the organization and projects.

HTC has a team of professionals ready to assist you in managing the JMU IT Consulting Services contract. Following, we have provided the names and roles and responsibilities of each person on your Account Management Team.

**Account (Client) Partner – Jeffrey Davis** – as stated in the previous section, Primary Contact, Jeff is your main point-of-contact and will be directly in contact with JMU's Managers to better understand your needs. Also, he will work with HTC's recruiting personnel to ensure the appropriate staff is made available at the right time, for the right duration, and at the right cost. Jeff will also work with the HTC executive support team and JMU Managers to ensure:

- HTC follows all processes and procedures that are outlined in the contract, SOW, etc.
- HTC provides requested staff within the timeframe agreed upon.
- Appropriate Task/Work Orders and Schedules are in place.

**Delivery Manager, Mitch Rhinehart** will be in contact with JMU on a day-to-day basis during an active project, to better understand their needs and directions and to ensure HTC staff is performing/delivery to the required services that were described within the RFQ/SOW. Mitch will also be involved in assuring that proper reporting and invoicing are delivered to the client in a timely manner. Mitch will also be responsible for:

- Ensuring all deliverables (if applicable) are being met.
- Performance Issues on an engagement are being handled appropriately and timely.
- Both the JMU Management and HTC Management are kept informed of the status and outstanding issues through regularly scheduled calls and meetings.

**Consultant Service Manager (CSM), Jenny Rupley** is responsible for consistently providing care for IT Staff Augmentation team members to ensure all are treated with dignity and respect and are made part of the HTC family. The CSM will work with the consultant on career planning, preparation for their annual performance reviews, managing salary exceptions/escalations, and sddfvvc mmremarketing, performance coaching, managing terminations, managing system data and assisting with equipment issues. The CSM will facilitate the execution of corporate policies and procedures, provide day-to-day management of employees to reduce legal risks and ensure

regulatory compliance, while maintaining a positive and professional working relationship with all members of the HTC team, customers, clients, and all service partners through timely, accurate, and professional communication.

Jenny will be deeply involved with the HTC employee, Recruiting Director, and JMU's Manager before and after an engagement has started by:

- Providing support to and facilitating the engagement of employees.
- Contacting or meeting in person all new employees within first week – follow up on onboarding and review any client specific orientation materials.
- Regularly visiting employees and Client Managers to develop intelligence on the account, identify issues, and promote employee engagement.
- Developing client/project specific retention programs and coordinating events.
- Maintaining a tracking system for contacts, action items, and account notes.

**Recruiting Director, Tara Smith** will direct recruiting efforts, demand prioritization, recruiter management, communication, and recruitment subject matter expertise. Tara is responsible for internal partner relationships with the Account Manager and CSM for the delivery of qualified consultants. She will be responsible for the following:

- Establishing consistent communication with internal and external clients to build working relationships.
- Understanding explicit hiring criteria and unique client nuances.
- Effectively communicating with HTC's recruiting teams to support the current and proactive building of consultant pipelines for a particular account.
- Providing ongoing management of recruiters in order to handle any backfills that may arise during an engagement.
- Developing and documenting a standardized and repeatable program with the goal of continued excellence and enhancing recruiting performance.
- Creating a working environment for recruiters and recruiting administrators that will encourage repeatable, predictable performance.
- Tara will have the overall responsibility for providing a qualified consultant delivery.

### **Performance Issues**

When issues in the workplace occur involving either behavior and/or performance, HTC appropriately addresses the issue. Depending upon the circumstances, appropriate actions may include incident investigation, behavior/performance counseling, coaching/training, removal from the assignment, and termination of employment. If any relevant issues involve both an HTC and JMU employee, HTC will work professionally in cooperation with the HR representatives of both companies to appropriately address the issue. HTC will follow the same Issue Escalation Process for any project issue that cannot be resolved. Particularly regarding staff performance issues on client projects.

### 3.1.3 RESUMES

*Resumes of specific personnel to be assigned to perform the work.*

Please see [Appendix A](#) for resumes of our key personnel, covering the following technologies.

- a. Oracle Core Technologies
- b. Oracle/PeopleSoft Enterprise Solutions
- d. Microsoft Azure and M365
- f. Data Analytics
- g. Change Management Training
- i. Infrastructure Support
- l. Other Technology

## 3.2 CONTINUITY OF CONSULTANTS

*Describe the ability to provide continuity of consultants throughout the duration of a project.*

HTC has been providing IT Consulting Services to many corporate and government organizations in various geographies by placing consultants in various technology areas. HTC has more than 11000+ highly qualified and experienced professionals globally. HTC's capability in providing the right candidates, matured sourcing, and on-boarding processes has resulted in successful projects and high client satisfaction.

### Methodology

HTC organizes a transition from the current support team to HTC using a disciplined, proactive processes that optimizes the turn-over time, catalogs all approved processes and procedures, and enacts a set of checks and balances to ensure that all work performed is delivered in a consistent manner, adheres to solid business and technical quality standards, and provides value back to the business. Throughout the course of the service delivery cycle, we track our performance and look for opportunities to improve delivery efficiencies to demonstrate the "value we bring to our clients."

HTC's dedicated team of recruiters works 24x7 to meet any unplanned resource requirements with niche skills. HTC's stringent recruitment process ensures the best quality of resources enabling clients to save time and cost by avoiding the internal interview process. HTC ensures that resource skills are always up-to-date and encourages employees to participate in their required certification programs and reimburses certification expenses.

### Resource Ramp-up / Ramp-down Strategy

HTC maintains an organization-wide bench strength (5% to 10%) to meet any immediate resource requirements, quick turnaround for mobilization of resources, and seamless provision of services. This helps us to place the appropriate resources on short notice.

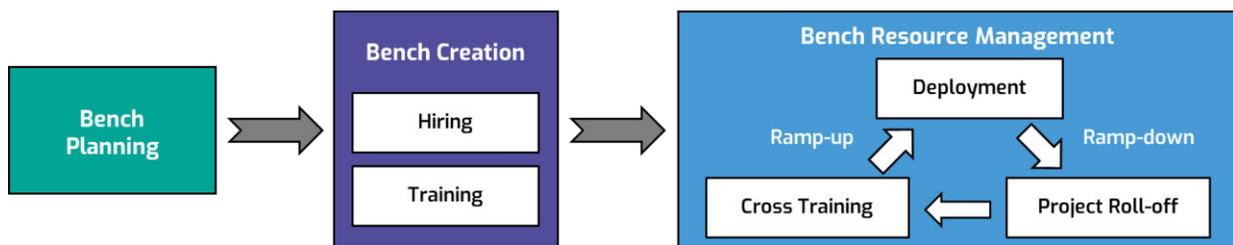


Figure 1: Resource Strategy

### ACTIVE RESOURCE MANAGEMENT

HTC will use its proven Active Resource Management (ARM) model to meet the resource requirements of the customer. This ARM model provides flexibility to quickly ramp-up/ramp-down resources based on the demand, along with cost advantages. The ARM model meets the requirements of the customer using the **Core and Flex teams**.

## Core Team

The Core team includes experienced consultants who will be actively involved in the project on a long-term basis. This core team is responsible for Knowledge Management (KM), liaison with customers, coordination and delivery of service activities, and execution of project tasks. This core team takes the end-to-end responsibility of the project.

## Flex Team

The Flex team includes consultants available to handle sudden spikes in workload. The flex team consists of the Shadow team (fully trained and immediately available) and the On-Demand team (available on prior notice). Based on the customer's requirement, the shadow team or on-demand team will be deployed in the project within a short turnaround time.

HTC manages sudden peaks and valleys in the workload at short notice using the following techniques:

- Shadow Resources
- Bench Resources
- Pipeline
- New Recruitment

The following diagram illustrates HTC's ARM model:

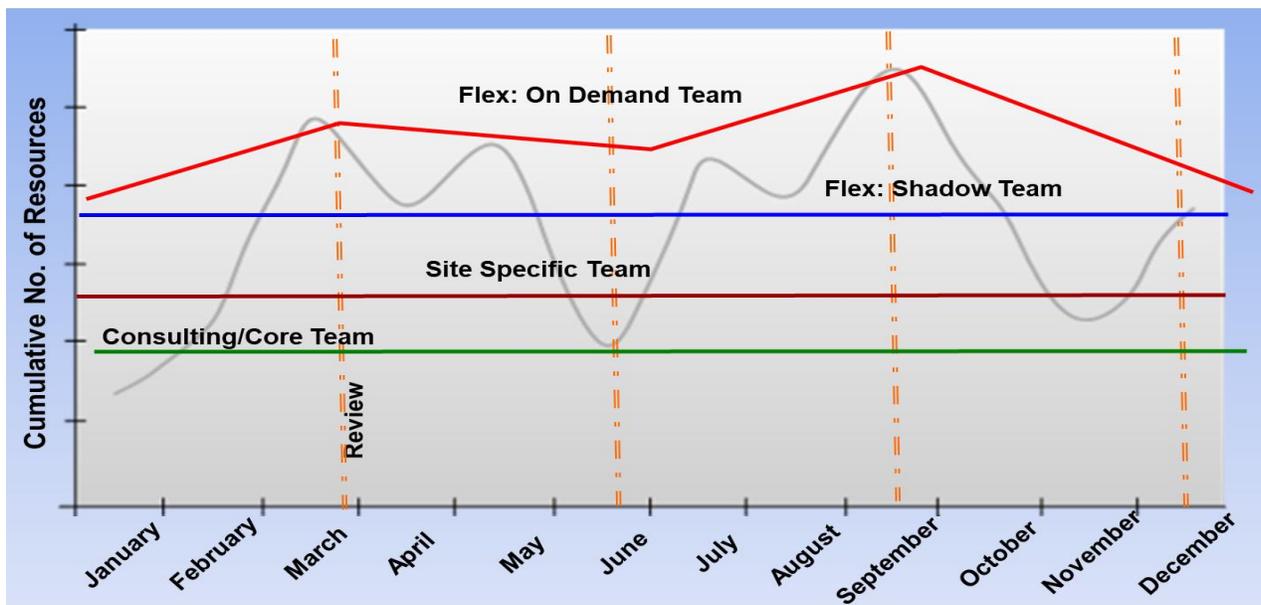


Figure 2: HTC's ARM model

## Benefits of ARM Model

The following are the benefits of the ARM model

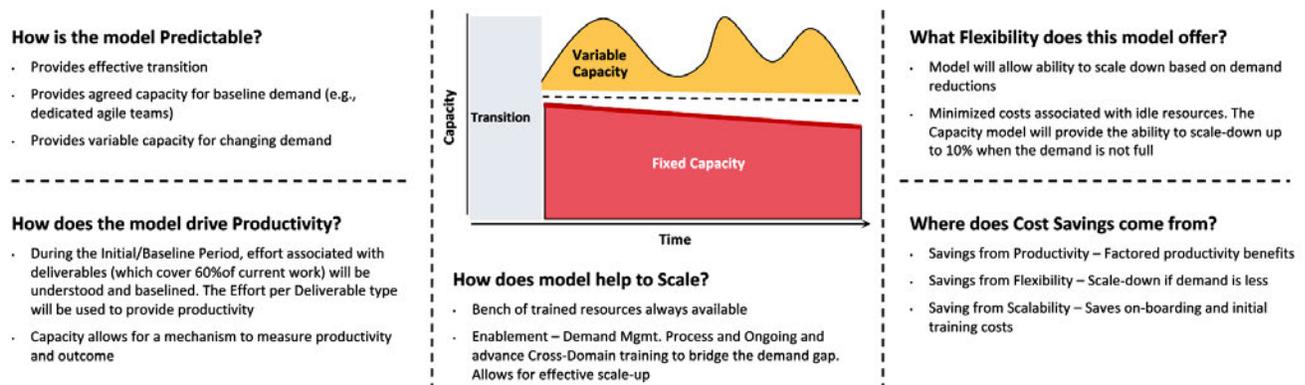
- The core team will consist of existing resources with in-depth knowledge of the client's business, technologies, standards, and processes that will mitigate the transition risks

- Provides the ability to convert fixed costs to variable costs
- Continuity of service delivery using shadow team
- Flexibility in quick resource ramp-up / ramp-down based on demand
- Ability to meet the demand consistently throughout the engagement
- Minimum time spent for knowledge transition when new resources are added
- Meet and exceed SLAs related to resource deployment

Additionally, HTC’s Field Support service relies on strong partnerships with its customers for collaboration on defined standards and documented operating procedures. During the transition phase, HTC will transition Field Support responsibility through Knowledge Transfer and the development of Standard Operating Procedures (SOP). SOP documentation will include metrics, reporting, and standards for running and optimizing the current Field Support environment, as well as standard approaches and timelines for continuous improvement recommendations.

### CAPACITY PLANNING

HTC’s Managed Capacity Operating Model leverages established processes to manage demand, capacity, and resource onboarding with an overall governance model that aids efficiencies. Our Capacity Management Model allows for predictability, productivity, flexibility, scalability, and cost savings. Following is a snapshot of HTC’s Capacity Operating Model.



Our ability to Scale:

- Ability to ramp up to 2,000 resources in ~3 months
  - Global bench 12% - 15%
  - Pipeline of 1,500 candidates to join in ~3 months
  - 300+ resources available any time from our training pool
  - 100+ recruiters globally
- Maintain a client-specific bench
- Training academy to provide client-specific training for HTC resources

### 3.3 HTC's IT CONSULTING SERVICES

*Describe IT consulting services available from your firm. Examples of services may include, but are not limited to, the following:*

#### 3.3.1 IMPLEMENTATION

#### HTC'S IMPLEMENTATIONS SERVICES

HTC conducts full implementation services including planning, transition, business and gap analysis, requirements gathering, recommendations, testing, deployment, third-party integrations, remediation, data migration, documentation, application programming and support services; knowledge transfer and training, etc. [Following is a partial listing of HTC's software implementation services.](#)

- CRM Applications
  - Salesforce
  - Microsoft Dynamics 365
- Homegrown Applications
  - E-Grams (Grants Management Software)
  - Guidewire
  - WIC (Women, Infants, and Children) software applications
- DevOps Solutions
- iDoc™ Fax Management
- ERP Applications
  - Oracle
  - PeopleSoft
- SAP/S4 Hana
- OnBase
- Sitecore
- API and Microservices
- AI Solutions
- Healthcare Digital Analytics Platform
- Cloud Hyper Automation Platform
- Unified Cloud Data Platform (UCDP)

#### HTC's Implementation Methodology

HTC offers an Implementation Methodology to provide you with a complete integrated software solution. Our implementation methodology was specifically structured to balance shorter project durations with maximum knowledge transfer, modern best practices, and optimal business processes. The combination of Cloud-first implementation methodology and applications ensures you of a world-class system for the immediate needs and for sustained growth capability.

Our methodology reflects our belief that organizations can no longer afford to function with silos supported by specific applications. Your business needs require that users clearly understand how applications are tools to facilitate efficient business processes. With HTC's implementation methodology, users focus on improved business processes to drive the application functionality required.

HTC's methodology is a scalable, structured, iterative approach divided into phases. Each phase builds upon the one that came before, delivering new functionality to meet organizational needs without the uncertainty associated with a more traditional "waterfall" approach. Data conversion

occurs repeatedly during each phase, as does testing and knowledge transfer. When the applications go into production, there are no surprises—only a smooth-running system and a workforce that knows how to use it.

### 3.3.2 DEVELOPMENT

#### APPLICATION SERVICE PROVIDER

HTC has more than five decades of experience in supporting and maintaining a wide range of IT applications. We manage the IT applications portfolio of several leading global conglomerates. Our development and support services confer cost savings and maximize application availability, agility and predictability at lower recurring cost, lower risk of downtime, greater ROI, improve performance and quality. We help customers to optimize and modernize their application portfolio using our expertise.

Our Application Development and Maintenance (ADM) align the business and IT needs of the customers. Our robust ADM process lowers the TCO of our customers. Based on our vast experience, HTC has developed an ADM practice (framework, processes, and best practices) to deliver ADM services. HTC’s ADM practice follows well-defined governance process with clear accountability and escalation process. Our robust infrastructure, technological competency, flexible engagement and delivery models, and mature service delivery process make us one of the most preferred service partners.

#### HTC’s ADM Services

Service

- Solution Architecture and Design
- App. Development, Maint. & Support
- App. Modernization / Migration
- Enterprise Application Integration
- Testing

People

- Experienced Service Delivery Managers
- Subject Matter Experts
- Domain Specialists
- Certified Consultants

Frameworks and Tools

- PM Tools
- KM Tools
- QA/Testing Tools
- ITSM Tools
- DevOps Tools
- Test Automation
- SmartSync
- App. Profiler
- Legacy Migration

Platforms

- Open Source
- Mainframe
- QA/Testing
- Big Data
- Java
- ECM
- ERP (Oracle/SAP)
- Mobility
- Data Mgmt. & Analytics

State-of-the-Art Infrastructure

- Secure Development / Support Center
- Redundant Power and Communications
- Disaster Recovery Centers

Best Practices

- Knowledge Transfer Onsite And Offshore
- Test Data Preparation/ Data Migration
- Offshore Agile
- Shift Left Methodology
- Separate Design Sprints

#### Support Practice Areas

Our Application Development and Delivery practice is reinforced and supported by key practice areas such as: PM/ BA, DevOps, Cloud, Mobility, UX/ UI, and QA / Testing to provide a holistic solution and support for our customers. In addition, our Business Consulting group specializes in

Enterprise Architecture, IT Strategy, Supply Chain, and Digital Marketing. This collection of technical knowledge, business experience, and delivery strength is key to differentiating HTC and is routinely engaged through our Managed Services approach.

## HTC'S DEVOPS PRACTICE

Traditional software development does not match the speed of the demanding business and technical changes as the various teams work in silos. DevOps eliminates the gaps of traditional software development approaches by enabling seamless collaboration, integration, and synchronization between development, QA, and IT operations. The DevOps team works collaboratively throughout the product lifecycle to increase the speed, efficiency, and quality of the software.

HTC can be your DevOps service provider as we offer highly integrated DevOps solutions to enable agile transformation through the automation of key processes in development, testing, virtualization, integration, delivery, release orchestration, monitoring, and analytics.

Through several DevOps services – from DevOps consulting to implementation, we enable your teams to assess their DevOps adoption and implement or optimize DevOps tools and processes.

## SOFTWARE ENGINEERING

Software Engineering is at the core of HTC's BUILD, INTEGRATE, and SUPPORT strategy for providing Information Technology Services. Each of HTC's offices delivers Software Engineering services. Overall, our firm is known for successfully completing Software Engineering projects on schedule and on budget.

Our success in Software Engineering is largely based on our unique methodology for application development. We understand that quality development begins with an understanding of the wants and needs of the client. HTC also knows that no two projects are ever the same. HTC developed the Cyber Application Process (CAP) to serve as our software development lifecycle (SDLC) for application development projects.

Built on commercial best practices and continually refined through lessons learned, CAP is structured to be either a complete, standalone SDLC or a framework to support a client's preferred SDLC, existing tools, or licensed software for modeling, testing, and configuration management. CAP supports both incremental and iterative approaches and is compatible with Rapid Application Development (RAD) and the Rational Unified Process (RUP). This enables HTC to support agile and extreme programming with adherence to the client's preferred methodology or in a blended approach.

The use of CAP also ensures that, throughout the engagement and at each major phase, the business requirements are identified, tracked, reflected, addressed, and met in all analysis, design, build, test, and implementation deliverables. CAP drives:

- Solution Analysis – Identifies and defines a need for the new system
- Requirements Analysis - Analyzes the information needs of the end-users

- Architecture – Creates a blueprint for design with specifications for the hardware, software, people, and data resources
- Coding and Debugging – Creates the programs of the final system
- System Testing – Evaluates the system’s delivered functionality
- Implementation – Installation, and release
- Post-Implementation Support – Maintenance and enhancements

## Development Methodologies

HTC has developed capabilities with the most modern and relevant methodologies to develop and deliver applications to their clients, including Agile/Lean Iterative methodology, DevOps with CI/CD, and Global Delivery for Application Development.

### 3.3.3 PROJECT MANAGEMENT

Please see Section 3.7 Project Management

### 3.3.4 ARCHITECTURE AND DESIGN

#### HTC’S USER EXPERIENCE (UX) PRACTICE

Great experiences have to be designed before they can be built. HTC’s User Experience Services (UX services) ensure your entire application development process meets the needs of all users, from consumers to partners and employees. We start by doing direct user studies to understand the different types of users, the contexts within which they work, and the objectives they have for using the product. Then, we undertake a collaborative design process involving key stakeholders to define workflows and interfaces that meet business needs and support user objectives.

Building on mobile-first and minimalist design modalities, the iterative process ensures all affected parties have a voice in the solution design and builds consensus about what digital customer experience solutions should get built.

We offer a range of digital experience services to help businesses provide amazing experiences to customers everywhere and every time. Leveraging both established and emerging tools, we help our customers build disruptive mobile apps, websites, chatbots, and AR/VR-driven digital experience solutions with robust features and engaging user interfaces.

Our new line of services in mobility and the Internet of Things (IoT), natural language processing (NLP), and chatbots further augment our digital experience service to help you maximize the reach and responsiveness of your business and achieve fast-track growth.

The following is a listing of services HTC provides.

### UX Design Services

- Discovery
  - Brand Analysis
  - Competitive Benchmarking
- Prototyping
  - Mood Boards
  - Low Fi & Hi-Fi Wireframes
- UI Detailing
  - Style Guide Creation
  - Design Specifications

### UX Consulting Services

- Strategy
  - UX Strategy
  - UX Standards
- Analysis
  - Heuristic Evaluation
  - Competitive Analysis
- UI Detailing
  - Early and Advanced Prototype Testing
  - Multi- Device Usability Testing
- User Research
  - Web Analysis

### UI Development Services

- Design Implementation
  - Visual Design
  - RIA Theming & Graphics
- Prototyping
  - HTML/CSS Development
  - Front End Scripting
- Validation
  - W3C Validation & Accessibility
  - Checks Browser Compatibility
- Integration
  - Prototype – Integration
  - Server-side scripting
- Digital Content Management
  - Copy/ Images/ Videos & Audios
  - Content Migration & Maintenance

## 3.4 TRAINING

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*Describe training options and specify associated costs in Section X. Pricing Schedule. Include a catalog of training offerings and differentiation between technical staff and end-user training.*

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Please see [Section 2.1.5. G\). Change Management Training, Services, & Certification](#). Training services will be provided by International Software Systems, Inc. (ISSI).

## 3.5 RECENT PROJECTS SIMILAR TO JMU

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*Provide examples of recent projects at higher education institutions comparable to James Madison University. Describe the project, time frame, end result, etc.*

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### STANFORD GRADUATE SCHOOL OF HUMANITIES AND SCIENCE

HTC has been the premier Salesforce partner for the Graduate School of Business (GSB) since 2011. We have re-engineered and migrated 25+ applications from a variety of legacy technologies to Salesforce- based solutions – including Admissions, Registration, Retention, Financial Aid, Housing, Executive Education, Course Planning and Evaluations, Recruitment, Faculty Record, et al. Each application presents different complexities (e.g., some have algorithms for auto matching) and are built for different user bases (Students, Faculty, Administrative Office, Academic Administration and Public facing apps).

The initial set of applications were built in Salesforce Classic (Force.com). Once Salesforce released Lightning, HTC switched to building new applications in Lightning, or using Lightning web components. HTC's resources are experts in building custom Salesforce Lightning solutions of all kinds for our customers.

HTC also developed all necessary Salesforce system integrations. Synchronized mechanisms designed and built by HTC enable application data to flow seamlessly from PeopleSoft through SQL Server and into Salesforce. Easy integration mechanisms have also been created with other cloud platforms.

In 2017, HTC also began working with the School of Humanities and Sciences to implement and enhance key CRM functionalities in Salesforce. Current efforts are focused on creating a function-rich Salesforce- based Academic Advising system.

In 2021, our major focus continues to be implementing various enhanced security protocols in Salesforce, and to systematically migrate existing applications from Salesforce Classic to Salesforce Lightning.

### THE UNIVERSITY OF MARYLAND - TERP APPLICATION PORTAL (TAP)

The University of Maryland (UMD) is in the process of deploying a new Applicant Portal for use in their undergraduate admissions process. This portal supports the entire lifecycle of an applicant as it will allow them to register, monitor the status of their application, track checklist items to completion, view their decision, and indicate enrollment and preferences.

HTC provides Salesforce Consulting services in delivering the Terp Application Portal (TAP). The HTC team assists with the full development lifecycle from technical design to development, testing, and deployment. The HTC Salesforce development team collaborates with the UMD Salesforce project team and UMD clients to gather requirements and configure the Salesforce application based on business needs with robust documentation.

This highly technical team is also engaged in web application development on the Salesforce platform. The types of roles/responsibilities supported include development, architecture, quality assurance and functional analysis. HTC is also responsible for the planning and facilitation of user acceptance testing of the Terp Application Portal (TAP) solution to include educating and coaching the Project Team on the UAT lifecycle and UAT best practices.

## SAN DIEGO CC DISTRICT - PEOPLESOFT CAMPUS SOLUTIONS IMPLEMENTATION

### Scope of Work:

HTC was selected to implement PeopleSoft Campus Solutions, HCM, Financials, Hyperion Budgeting, and Portal. Per the client's request, HTC implemented the PeopleSoft Finance and HCM pillars in version 9.0.

- The implementation of Campus Solutions began in version 9.0. During the project, the team collectively decided there were advantages to upgrading Campus Solutions to version 9.2 before final testing and Go Live. Therefore, this project included both implementation and upgrade of PeopleSoft Campus Solutions.
- HTC was responsible for implementing all core ERP applications for the District, and for developing the PeopleSoft portion of integrations to all other systems.
- As this project included many departments and processes, Organizational Change Management was critical. HTC had provided consulting to support the overall OCM and training efforts and is working with SDCCD to be sure that PeopleSoft processes meet SDCCD's stakeholders' needs.

## LOS ANGELES CC DISTRICT - PEOPLESOFT CAMPUS SOLUTIONS IMPLEMENTATION

### Scope of Work:

- The Los Angeles Community College District is the nation's largest Community College District with over 180,000 employees.
- HTC led the successful implementation of PeopleSoft Campus Solutions 9.2 for LACCD. The team deployed all core modules using a phased deployment method.
- The consulting team included a full-time project manager, technical lead, and functional leads, and was responsible for all the development effort.
- HTC implemented PeopleSoft Campus Solutions using PeopleTools and has provided extended functional support for that application during and post-implementation.
- LACCD is currently working with HTC to extend Application Managed Services

## THE UNIVERSITY OF NOTTINGHAM - PEOPLESOFT INTEGRATION

### Scope of Work:

- HTC Provided BeSpoke functionalities for the university with multi-language support.
- Delivered 158 PEAM Rules and customizations (31 integrations, 35 conversions, and 5 major frameworks)

- Various frameworks for data conversion, placement management, ceremony, scholarship disbursement, and maintenance
- Implemented the latest tool features like Activity Guides, Pivot Grids for reporting tools, thus providing various WorkCentre dashboards.

**Benefits:**

- Fast paced execution of the business process with a streamlined approach.
- High adoption rate of the end users and student community
- Data Analytics to present the business stake holders and real time integration of various transactions.
- Simplified Admissions process

### 3.6 KNOWLEDGE TRANSFER

*Describe the ability to provide for a thorough transfer of knowledge to JMU IT on any given project.*

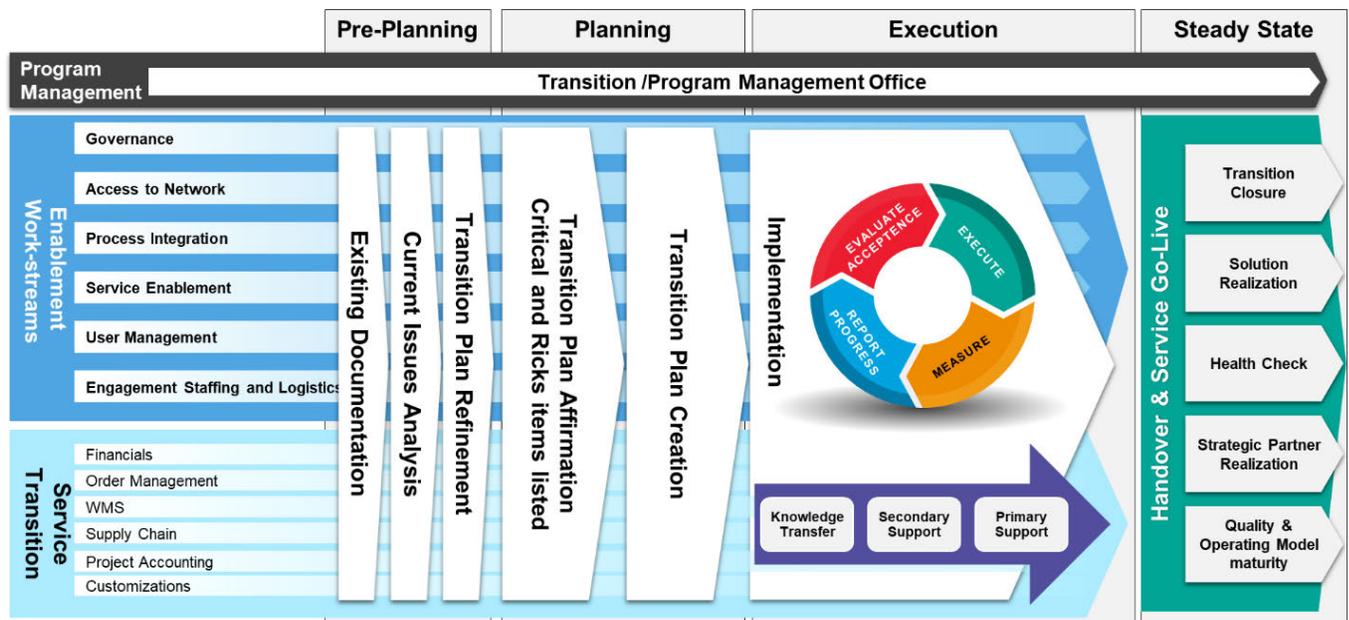
HTC knows that transferring capability is far more valuable than simply transferring knowledge. Our proven approach integrates knowledge transfer with capability transfer because we recognize that comprehension and understanding are necessary components to learning practical skills and abilities. This practical knowledge produces active achievement, a “can do” attitude. Thus, we focus each aspect of the project on transferring capability from our consultants to the client’s employees.

The HTC Team’s capability transfer approach focuses on the following objectives:

- Involving client staff in the design of the capability transfer plan
- Addressing both functional and technical capability transfer
- Involving client staff in the process from the beginning of the project
- Instituting integrated HTC and client work teams throughout the project
- Utilizing both formal and informal training opportunities to transfer capability
- Measuring progress periodically and consistently

The HTC Team understands that capability transfer should occur over the life of the project, not just within one specific timeframe. However, it is imperative we consider such factors as project milestones, impact on staff, and delivery risk when we design and deliver the components of the capability transfer program. Therefore, we will help you tailor a successful program that will meet the changing conditions of a systems implementation and the varying assignments of project staff.

#### HTC’s Knowledge Transfer Methodology



## 3.7 PROJECT MANAGEMENT

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*Describe your approach to project management.*

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### HTC'S PROJECT MANAGEMENT METHODOLOGY

HTC's Project Management Methodology defines the life cycle of project management and presents processes, tools, and techniques that enable the effective administration of IT engagements. It also provides a consistent discipline for managing HTC engagements across Client segments and solution sets. The methodology guides a project's quality and efficiency and incorporates continuous improvement.

A Project Management discipline is core to HTC's ability to perform and successfully conclude IT engagements. The processes defined within the methodology support management oversight and control of a project from start to finish. Technical capability is but one component of a productive venture. A management discipline ensures that sound business principles are applied to the overall effort. Through all our delivery processes, HTC offers more than just technical competence; we also provide process management.

HTC's methodology promotes functional maturity and high-quality project management through all phases of the project lifecycle. The development and continuous improvement of this methodology utilizes industry best practices from sources such as PMI, CMMI, ISO, insight from HTC thought leaders, and the lessons learned throughout 50 years of successful client partnerships.

The following is a brief description of how each phase within the project lifecycle is managed.

- **Scope Management:** In the Initiation and Planning phases, project scope, dependencies and deliverables are documented in the Statement of Work and are further detailed as the actual Work Plan is developed. Throughout the project life cycle, a Change Management process is invoked to control adjustments or additions to the project deliverables. Unauthorized scope-creep is controlled through HTC's prescribed Project Change Management approach.
- **Schedule Management:** The project schedule is established during the Planning phase. A Project Work Plan is created that sets the timeframes for the engagement including schedules for interim deliverables, quality checks, status reporting, and final closure. The baseline Work Plan is presented to the project sponsors for endorsement as part of the Planning phase to ensure alignment of expectations from all project stakeholders.

During the Execution phase, actual activity is tracked against the baseline plan to provide a comparison of actual-to-estimated progress. Regular variance analysis and reporting provides progress visibility to the Client and ensures all plan deviations are addressed

- **Cost Management:** As the project schedule is established during the Planning phase, the project budget is also set. The Project Management Plan contains the cost factors of the engagement (e.g., billable hours, software and hardware purchases, expenses),

which become part of the overall project baseline. The baseline establishes the approved project budget for which the project manager is held accountable.

During the Execution phase, actual expenditures are tracked against the baseline budget to provide a comparison of actual-to-estimated costs. Regular variance analysis and reporting provides visibility to the Client and assures all budget deviations are addressed.

- **Document Management:** As a component of project coordination and administrative support, management and sharing of project artifacts and documents is critical to project success. HTC will leverage any/all tools made available or required by the client. If an internal repository is not available, HTC will, at the client's discretion, provide a SharePoint-based repository (hosted by HTC) to track Project progress, information and artifacts.

This HTC-provided SharePoint tool is designed to facilitate effective communication among HTC project team members, client project team members, and stakeholders to promote information sharing and collaboration by all project participants. The project sites are structured to support HTC's project management and delivery methodologies and a workspace is tailored for our clients' project to accommodate the particular needs of the engagement, the project team, and the project's work products.

Best practices, tools, and templates are all linked to the SharePoint project site for easy access. Facilities such as document repositories, project logs, and discussion boards enable the project site to be a complete representation of all of the project's work efforts.

## 3.8 HTC's STAFFING PLAN

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*Describe how your firm would propose a functional staffing plan indicating the number, characteristics, and schedule for the consultants.*

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HTC will staff each project based on the specific requirements for each scope of work. As we do not have a specific scope of work at this time, we have provided a general description of how HTC deploys the best candidate for each request.

### **HTC's Recruiting, Training, and Retaining of its Qualified Personnel**

HTC has proven processes and procedures in place for recruiting, training, and retaining its personnel. This process seeks to identify internal HTC personnel who have the needed experience and technical skills. If no one from within HTC meets the requirements, the process supports recruiting new HTC personnel.

HTC understands that the success of our professional services engagement with clients depends on our ability to manage, assign, and recruit qualified personnel in a timely and cost-effective manner. HTC's process is governed by our ISO 9001 quality assurance standards. Stringent evaluations are performed to determine the accuracy and depth of skills and the availability of identified candidates. Selected candidates are further screened and interviewed in accordance with HTC ISO 9001 recruiting plans and policies to ensure that they are high-quality candidates who fully meet requirements and fit within the client's culture.

Furthermore, HTC's recruiters have the depth of knowledge and experience needed to provide personnel quickly, and this is the culmination of several critical components:

- A skilled management team who understands how to organize and deliver for our clients.
- A highly experienced local recruiting team that understands and focuses on timely candidate submissions.
- A national recruiting team with recruiters and support personnel who are managed and "load-balanced" to focus on time-sensitive recruiting needs.
- A robust candidate database and knowledge repository.

HTC's goal will be to respond to new requests within four hours and identify potential candidates within two business days of receiving requests from JMU.

## 3.9 SUBCONTRACTORS

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*Describe the functions that may be provided by a subcontractor of your firm. Specify the expertise and credentials required from the subcontractor.*

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HTC has teamed with two partners to assist in providing the various requirements from JMU. Below, we have provided a brief description of each firm and the services they will provide, as well as their certifications (i.e., SWAM, MBE, etc.).

### ZILLION TECHNOLOGIES, INC (SWAM CERTIFIED)



**SWaM Cert#: 693017 (Small, Minority-Owned Business)**

20745 Williamsport Place, Ashburn, Virginia 20147

[www.zilliontechnologies.com](http://www.zilliontechnologies.com)

Contact: Ramakrishna Pinnelli, VP - Technology Transformation

PH: (571) 286-8561

[rk@zilliontechnologies.com](mailto:rk@zilliontechnologies.com)

#### About Zillion

Zillion Technologies is a global technology consulting and solutions provider that creates value for clients by delivering industry-specific solutions, strategic outsourcing, and application management. Zillion specializes in developing robust, intuitive applications. Their software will ensure your business can rapidly adjust to the constant shifts in your marketplace with an emphasis on security, integration, efficiency, intuitive experiences, and mobility.

#### Services include:

##### Analytics and Visualization

Zillion has expertise in technologies, processes, and applications to convert raw data into meaningful information that can drive strategic planning and decision making. Their business intelligence services are process-focused, results-oriented, and highly adaptive. Zillion's consultants use industry leading tools and best practices to find the insights in your data and display those insights in timely, contextually appropriate dashboards.

##### Data Management

Next to the people who staff your organization, data is the greatest asset you can have. Whether you are managing data you already have or looking to mine new data from external sources, Zillion will help plan, execute, and maintain a value creating data strategy.

Regardless of the technologies you have invested in, we have consultants who understand how to maximize your return. Zillion Technologies consultants work with Ab Initio, Informatica, Oracle, IBM, Microsoft, and Pentaho products.

## INTERNATIONAL SOFTWARE SYSTEMS, INC. (CERTIFIED SBE)



**Certified Small Business (not by the Commonwealth of Virginia)**

7337 Hanover Parkway Suite A | Greenbelt, MD 20770

[www.issi-software.com](http://www.issi-software.com)

Contact: Margaret Gates

PH: (301) 886-8847

[mgates@issi-software.com](mailto:mgates@issi-software.com)

HTC is partnering with International Software Systems, Inc. (ISSI) for Change Management. HTC has maintained a successful (long-standing) business relationship with ISSI throughout several successful engagements.

### About ISSI

ISSI was established in 1995 in Maryland and is a [Certified Minority Business Enterprise](#) and GSA IT MAS Schedule holder, offering information technology solutions and services. ISSI models its IT solutions on formally defined industry-practiced administrative, program, and project management methodologies, that are regularly reviewed and consistently applied to diversely scoped IT projects for continuous improvement, quality assurance, and successful implementation.

### Change Management Services

In consultation with JMU, ISSI and HTC will provide project change management and training, as needed. Change Management warrants a strategic approach, identifying and engaging key stakeholders from JMU to drive the process in collaboration with the HTC Change Management Team.

## SECTION 4. ATTACHMENT A: OFFEROR DATA SHEET

*Offeror Data Sheet, included as Attachment A to this RFP.*

Please find our completed [Attachment A: Offeror Data Sheet](#), beginning on the following page.

## ATTACHMENT A OFFEROR DATA SHEET

### TO BE COMPLETED BY OFFEROR

1. **QUALIFICATIONS OF OFFEROR:** Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.

HTC has been providing Professional IT Consulting services and delivering turn-key business application solutions for over 50+ years. We have provided these services to, literally, hundreds of Higher Education and Public Sector clients, giving us a deep understanding of the critical business issues and technology challenges these clients typically face.

HTC has proven processes and procedures in place for recruiting, training, and retaining its personnel. Our Global Technical Recruiting practice provides a comprehensive view of the entire fulfillment process, from identifying, locating, and qualifying candidates through multiple interviews and verification/background checks, presenting candidates to the client and long-term consultant care.

2. **YEARS IN BUSINESS:** Indicate the length of time you have been in business providing these types of goods and services.

Years 50 Months 5

3. **REFERENCES:** Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

CLIENT	LENGTH OF SERVICE	ADDRESS	CONTACT PERSON/PHONE #
University of Maryland	4 years	7901 Regents Drive College Park, MD 20742	Sharon Goodall, Project Manager (301) 405-0197 sgoodall@umd.edu
Stanford Business School	12 years	655 Knight Way Stanford, CA 94305	Sean Brandt, Associate Director – IT (650) 736-2486 seanbra@stanford.edu
Michigan State University	10 years	426 Auditorium Rd, East Lansing, MI 48824	Fred Sudler, Associate VP - IT (517) 432-6200 sudler@msu.edu
Pew Charitable Trusts	12 years	901 E Street, NW Washington, DC 20004	Alicia Beach, Sr. Manager, Financial Systems (703) 554-4619 acalabresebeach@pewtrusts.org
AARP	25 years	601 E Street NW Washington, DC 20004	Valerie Rasmussen, Senior Advisor (515) 508-1172 vrasmussen@aarp.org

4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

#### HTC Global, LLC

3270 West Big Beaver Road, Troy, Michigan 48084

PH: (248) 786-2500; Fax: (248) 786-2515

5. **RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA:** Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the [CODE OF VIRGINIA](#), SECTION 2.2-3100 – 3131?

YES  NO

## SECTION 5. ATTACHMENT B: SWAM UTILIZATION SHEET

Please find our completed [Attachment B: Small Business Subcontracting Plan](#), beginning on the following page.

**ATTACHMENT B**  
**Small, Women and Minority-owned Businesses (SWaM) Utilization Plan**

Offeror Name: HTC Global Services, Inc.                      Preparer Name: Jeffrey Davis, Senior Client Partner

Date August 12, 2023

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes  No \*

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes  No

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes  No

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes  No

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

*\*HTC is certified as a Minority Business Enterprise (MBE) by the State of Michigan chapter of the National Minority Supplier Development Council (NMSDC). Certificate#: MI01477*

**Instructions:** *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWAMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

**Small Business:** "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years.

**Woman-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

**Minority-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

**Micro Business** is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees AND no more than \$3 million in average annual revenue over the three-year period prior to their certification.

**All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSDD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at <http://www.sbsd.virginia.gov/> (Customer Service).**

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**ATTACHMENT B (CNT'D)**  
**Small, Women and Minority-owned Businesses (SWaM) Utilization Plan**

Procurement Name and Number: Information Technology Consulting Services, RFP# FDC-1175

Date Form Completed: August 12, 2023

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses  
for this Proposal and Subsequent Contract

Offeror / Proposer:

HTC Global Services, Inc.  
Firm

3270 West Big Beaver Road, Troy, Michigan 48084  
Address

Jeff Davis, PH: (301) 675-2412  
Person/No.

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount <i>(to include change orders)</i>	Total Dollars Paid Subcontractor to date <i>(to be submitted with request for payment from JMU)</i>
<b>Zillion Technologies</b> 20745 Williamsport PL Ashburn, Virginia 20147	Ramakrishna Pinnelli, VP PH: (571) 286-8561 rk@zilliontechnologies.com	Cert#: 693017 Small, Minority-Owned Business	<ul style="list-style-type: none"> <li>Analytics and Visualization</li> <li>Data Management</li> </ul>	TBD	TBD
<b>International Software Systems, Inc.</b> 7337 Hanover Parkway Greenbelt, MD 20770	Margaret Gates PH: (301) 886-8847 mgates@issi-software.com	<i>ISSI is a certified Small Business, but not by the Commonwealth of Virginia</i>	<ul style="list-style-type: none"> <li>Change Management</li> <li>Training</li> </ul>	TBD	TBD

*(Form shall be submitted with proposal and if awarded, again with submission of each request for payment)*

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## SECTION 6. VASCUPP SALES

*Identify the amount of sales your company had during the last twelve months with each VASCUPP Member Institution. A list of VASCUPP Members can be found at: [www.VASCUPP.org](http://www.VASCUPP.org)*

HTC has not provided services to any members of VASCUPP.

## SECTION 7. ATTACHMENT D: PRICING SCHEDULE

Please find our completed [Attachment D: Pricing Schedule](#), beginning on the following page.

Attachment D – Pricing Schedule

For each technology/category listed below, provide your company's hourly rate for each of the three roles listed. If you refer to the role by a different name, list it in the space provided next to the corresponding role. Onsite pricing must be inclusive of all billables (travel, lodging, meals, etc.)

\*\*\*\*\* The Offeror shall also provide onsite and offsite pricing for all other services/roles not listed below, including training offerings. \*\*\*\*\*

	Onsite	Offsite		Onsite	Offsite
<b>Oracle Core Technologies</b>			<b>Change Management Training, Svcs, &amp; Cert.</b>		
Project Manager or _____	\$175 /hr.	\$145 /hr.	Project Manager or _____	\$215/hr.	\$180/hr.
Senior Engineer or _____	\$155 /hr.	\$125 /hr.	Sr Change Management SME	\$200/hr.	\$165/hr.
Engineer or _____	\$145 /hr.	\$115 /hr.	Change Management SME	\$175/hr.	\$140/hr.
<b>Oracle/PeopleSoft Enterprise Solutions</b>			<b>Security and Federation Services</b>		
Project Manager or _____	\$200/hr.	\$165/hr.	Project Manager or _____	/hr.	/hr.
Senior Engineer or _____	\$175/hr.	\$140/hr.	Senior Engineer or _____	/hr.	/hr.
Engineer or _____	\$155/hr.	\$120/hr.	Engineer or _____	/hr.	/hr.
<b>Desktop and Mobile Device Management</b>			<b>Cisco Technologies, Infrastructure Support, and Virtualization</b>		
Project Manager or _____	/hr.	/hr.	Project Manager or _____	\$180/hr.	\$145/hr.
Senior Engineer or _____	/hr.	/hr.	Senior Engineer or _____	\$165/hr.	\$135/hr.
Engineer or _____	/hr.	/hr.	Engineer or _____	\$150/hr.	\$120/hr.
<b>Microsoft Azure and M365</b>			<b>Audio Visual Technologies</b>		
Project Manager or _____	\$175/hr.	\$145/hr.	Project Manager or _____	/hr.	/hr.
Senior Engineer or _____	\$165/hr.	\$135/hr.	Senior Engineer or _____	/hr.	/hr.
Engineer or _____	\$152/hr.	\$120/hr.	Engineer or _____	/hr.	/hr.
<b>Okta</b>			<b>Secure Research Enclaves</b>		
Project Manager or _____	/hr.	/hr.	Project Manager or _____	/hr.	/hr.
Senior Engineer or _____	/hr.	/hr.	Senior Engineer or _____	/hr.	/hr.
Engineer or _____	/hr.	/hr.	Engineer or _____	/hr.	/hr.
<b>Data Analytics/Visualization/Warehouse/Lake</b>			<b>Other Technology</b>		
Project Manager or _____	\$200/hr.	\$165/hr.	Project Manager or _____	\$205/hr.	\$175/hr.
Senior Engineer or _____	\$180/hr.	\$145/hr.	Senior Engineer or _____	\$203/hr.	\$162/hr.
Engineer or _____	\$160/hr.	\$130/hr.	Engineer or _____	\$160/hr.	\$130/hr.

## APPENDIX A: KEY PERSONNEL RESUMES

Throughout the following pages, we have provided resumes for each of the proposed technologies, including:

- a. Oracle Core Technologies
- b. Oracle/PeopleSoft Enterprise Solutions
- d. Microsoft Azure and M365
- f. Data Analytics
- g. Change Management Training
- i. Infrastructure Support
- l. Other Technology

## QUALIFICATIONS

- PMI Project Management Professional (PMP)
- Member of Project Management Institute (PMI)
- Change Management certified
- Proven leader in creating new teams and solutions from the ground up
- Full life cycle implementations include Cloud Suite ERP/Payroll/HCM for public sector organizations, including Federal, Transit, State, County, and Local government entities
- Managed the project team that built the Federal Agencies' baseline Payroll and HCM system
- Expertise working with Offshore Resources.
- Technical and computer programming background
- 15+ years of Consulting Experience

## EXPERIENCE

### **ERP Project Manager - Oracle**

#### **HTC Global**

August 2021 – Present

- Senior Project Manager for a large multi-year implementation of Oracle Cloud SaaS ERP/Payroll/HCM for a regional government agency in the Midwest USA. This agency provides water reclamation and flood management services within a major metropolitan area. Managing the project with teams, located in the USA and India, as well as niche partners as sub-contractor.

### **ERP Project Manager**

#### **Infor**

February 2019 – August 2021

- Project Manager for the development of the New Pay Payroll and Global Human Resources solution for Federal agencies. Successfully led the delivery of a viable ERP solution among selected vendors. Managed the collaborative project effort between Infor team and its multiple partners.
- Project Manager for the implementation and data migration for one of the largest transportation agencies, moving from an obsolete older financials' legacy solution to new multi-tenancy-based Infor Financials and Supply Chain solution. Duties included large Change Management effort.
- Project Manager for the successful Enterprise Asset Management (EAM) implementation for a mid-sized State transportation entity.

### **Senior Transition / Steady State Project Manager**

**CGI Group**

December 2016 – March 2018

Senior Delivery Manager for CGI's Managed Services offering - ERP hosted solution for state & local government clients supporting transition into a managed services / hosted environment and post-production support. Managed Change Management for transition from legacy to Cloud based solution.

Managed a team of nine (9) staff members who oversaw and supported client accounts across the United States. Public sector accounts include States, Cities, Counties, and School Districts. Hosted Solution includes Hardware/infrastructure setup, configuration, management, and maintenance; operational oversight for daily and nightly batch processing; software incident triage and defect resolution; infrastructure and software upgrades to new technology; and annual disaster recovery exercises.

**Dedicated ERP Software Implementation Project Manager**

Tyler

**Technologies**

July 2015 – December 2016

- Managed the re-implementation of Tyler ERP software for an existing account, from the contract signing through formal transition to the support department on time and within budget.

**Implementation Analyst Manager / Senior Project Manager**

Tyler

**Technologies**

December 2004 – July 2015

I managed five different Tyler Technologies ERP and Schools Implementation areas concurrently:

- Munis ERP Financials and HCM
  - *Munis Implementation Analysts team*: managed a team of Implementation Analysts responsible for the continuing analysis of existing software project implementation best business practices. The Analyst team was also responsible for new product and feature integration into the implementation process.
  - *Munis Tyler University/eLearning team*: managed the team responsible for all forms of electronically supported transfer of skills and knowledge, both internally and client facing. This team built the company's client facing Tyler University Learning Management System (LMS) from scratch for our division.
  - *Munis Implementation Documentation team*: managed the team responsible for the documentation of all existing & new software functionality and features. The team was also responsible for the production of each new release's Major Enhancements guide.
  - *Munis Online Education*: managed resource responsible for coordinating and scheduling our online client training offerings, with sessions ranging from basic overviews to in depth weeklong sessions.
  - *Munis New Hire Training*: managed a team responsible for the development and execution of a new training process for project new hires. Training was achieved through a combination of live in-house SME sessions, online training SME sessions and use of our Learning Management System.

**EDUCATION**

BSBA Computer Information Systems - 1985

Suffolk University, Boston, MA

# Deborah Leyba – Oracle Cloud Project Manager



## PROFESSIONAL SUMMARY

- 25+ years of comprehensive industry experience within the Public Sector, Higher Education and Commercial Markets.
- 10+ years of Project Management experience with a minimum of 4 Cloud implementations/upgrades valued at over \$5M. Includes Financials, Supply Chain and HCM.
- Experienced in crafting, negotiating and managing partnerships with solutions vendors, system integrators and resource providers.
- Assigned as either project Manager/Finance Lead or served as the Application Architect in implementing or upgrading Oracle Application versions including R13.
- Developed and taken clients through full project life cycle phases - Analysis, Design, Build, Test, Implement, Training and Post-Production Support.
- Proposal development, kickoffs, team management skills, development of standards for responses
- Generation of additional revenue during the project lifecycle
- Prepared and manage the project budgets, track actuals, trends and updates.
- Maintain relationships with client project management and other client team members at all levels.
- Establish documentation and procedural standards for Deliverable Materials, and establish, communicate and ensure acceptance criteria.
- Oversee teams' tasks to confirm they are completed on time, budget and address the acceptance criteria and requirements of the business. Ensure compliance with approved project methodology
- Mentored team members.

## RELEVANT EXPERIENCE

**HTC Global Services, Inc.**  
**Principal Program/Project Manager**

**01/2009 - Present**

*Following are projects performed while employed at Ciber Global, LLC.*

**Plum Healthcare, San Marcos CA**  
**Cloud Project Manager**

**01/2023 – 06/2023**

While engaged on the Oracle Fusion Cloud Improvement Project:

- Managed Cloud Project.
- Ciber was contracted to assist in resolution of implementation issues in General Ledger and Payables that were unresolved from prior implementer.
- Review of current processes and suggested process improvements.
- Worked with the team with the design of a new Payables Aging and General Ledger Detail report.
- Verification of balances reporting along with training users how to utilize new reports.

# Deborah Leyba – Oracle Cloud Project Manager



**Family Health Network, Chicago, IL  
Cloud Project Manager**

**04/2022 – 11/2022**

While engaged on the Oracle Fusion Cloud Implementation Project:

- Managed Cloud Project and continue to provide project oversight.
- Implementation of Finance and Procurement applications.
- Creation of Project Management Plan, Risk Register and Issues Log.
- Served as the primary point of contact for all project-related issues and resolution of issues.
- Worked closely with the FHN Project Manager to manage and carefully control the scope of the project.
- Responsible for following the Ciber Straight A's Methodology and for review and completion of the Project Work Products in accordance with the SOW and the Project Management Plan on time and on budget.
- Managed both onsite and global development teams.
- Worked with FHN project manager to identify recommendations for best practice improvements to be considered for next phase after R11 Fusion Go-Live.
- Implementation of Cloud Expenses add on.
- Generated over 250K additional revenue for Ciber.

**City of Philadelphia, Philadelphia, PA  
Project Manager**

**07/2021 – 4/2022**

While engaged on the 12.5 EBS Implementation Project:

- Assisted PM with project forecasting and budgeting
- Standardized all deliverable reporting for project Functional and Technical design documentation
- Implementation of JIRA at customer site
- Reconciliation of deliverables and billing
- PMO status reporting

**Presbyterian Medical Services, Santa Fe, NM  
Assistant PM, Business Process Analyst - Cloud Implementation**

**10/2020 – 06/2021**

While engaged on the Business Process Analyst on EBS Cloud Implementation Project:

- Assisted with standardization of project documentation
- Gathered customer information to begin configuration and test script design
- Design of project plan
- Created Business Process Design document for Order to Cash
- Design of HMRS Cloud cutover plan.

**Glendale Community College, Glendale, CA  
Project Manager**

**12/2019 – 05/2020**

While engaged on the R12 Upgrade 11.5.10 to 12.2.14 Project:

# Deborah Leyba – Oracle Cloud Project Manager



- Conducted discovery sessions and workshops to assist in business process analysis and requirements gathering for R12 upgrade of Financials and HRMS applications.
- Responsible for identification and review of CEMLI's for fit/gap solution approach.
- Assignment of CEMLI's to GSC developers and GCC developers to test changes.
- Worked with GSC developers to retrofit customer's CEMLI's.
- Conducted CRP sessions for applications currently used 11i to R12.
- Designed of project work plan, risk register and issues log.
- Served as the primary point of contact for all project-related issues and resolution of issues.
- Worked with GCC project manager to identify recommendations for best practice improvements to be considered for next phase after R12 upgrade.
- Responsibility for General Ledger and Procure to Pay applications.

## CERTIFICATIONS & TRAINING

- Oracle Fusion Financials 11g General Ledger Certified Implementation Specialist
- Oracle E-Business Suite 12 Financial Management Certified Implementation Specialist: Oracle Receivables
- Oracle E-Business Suite 12 Financial Management Certified Implementation Specialist: Payables
- Oracle E-Business Suite 12 Financial Management Certified Implementation Specialist: Oracle General Ledger
- Oracle E-Business Suite R12 System Administrator Certified Expert
- Oracle E-Business Suite 12 Supply Chain Certified Implementation Specialist: Oracle Purchasing
- R12 Pre-Sales Champion
- R12 HRMS Pre-Sales Champion
- Project Manager: Level 3 Certification
- Microsoft Projects: Orange Belt Certification
- Certified Oracle Master Applications IT Professional
- Certified Oracle Master Applications Technical Trainer
- Oracle Public Sector Specialist
- Project Management Professional Training

## EDUCATION

- Associate Science: Police Administration; Mt. San Antonio College, California - 1975
- Bachelor of Arts: E-Commerce and E-Business; Kennedy Western University, Wyoming – 2007

## PROFESSIONAL SUMMARY

- Professional with 23 years of experience in Human Capital Management and 6 years of experience in Campus Solutions. Michelle brings a combination of real-world business experience as well as experience in executing and managing projects through all phases of a project life-cycle for implementations and upgrades.
- She is experienced in managing implementations and upgrades of fully integrated systems between PeopleSoft Human Capital Management (HCM), Campus Solutions (CS), Finance (FSCM), Enterprise Learning Management (ELM) and Portal (iHub) as well as 3<sup>rd</sup> party systems.
- Michelle has in depth experience in requirements definition, gap analysis, design, development, system configuration, process design, quality assurance testing, training, implementation and post-production support.
- Extensive experience across PeopleSoft HCM including Human Resources, North American Payroll, Time and Labor, Position Management, Compensation, Workflow, Security Administration, Talent Acquisition Management/Candidate Gateway, and Approval Workflow Engine (AWE).
- PeopleSoft Campus Solutions experience in Student Records and Curriculum Management including Instructor Workload and Assignment customizations to help facilitate faculty pay as well as state reporting.

## TECHNICAL PROFICIENCIES

- Experienced in Oracle's PeopleSoft: HCM v5.0 – 9.2, CS v 9.0 – 9.2, ELM v8.9 – 9.1, Portal v8.9 – 9.1, FSCM v8.9 – 9.1
- PeopleTools: Application Designer, PeopleCode, Workflow, Business Process Designer, Data Mover, Process Scheduler, Security, Tree Manager, Query, Messaging, Integration Broker, Approval Workflow Engine (AWE)
- Databases: DB2, Oracle, SQL Server, Informix, Sybase
- PeopleSoft Human Capital Management: Absence Management, Approval Workflow Engine, Benefits Administration, Candidate Gateway, Commitment Accounting, eCompensation Manager Desktop, eCompensation, eDevelopment, ePay, ePerformance, eProfile, eProfile Manager Desktop, Human Resources, Integration Broker, Learning Management, Payroll for North America, Payroll Interface, Position Management, Security Administration, Talent Acquisition Manager, Time and Labor, Variable Compensation, Workforce Administration
- PeopleSoft Campus Solutions: Student Records, Curriculum Management
- PeopleSoft Financials: General Ledger, Accounts Payable, Purchasing, Asset Management
- PeopleSoft Enterprise Learning Management: My Learning, Career Development, eProfile, Blended Learning, Enrollments, Certifications, Learning Administration, Security Admin, Integration Broker
- PeopleSoft Portal: Integration Broker, Pagelets, Security Administration

## RELEVANT EXPERIENCE

**Florida State College of Jacksonville, Jacksonville, FL**  
**Ciber Consulting Services for Multiple Roles**

**05/2016-Present**

CS and HCM Project Manager and Principal Consultant from Ongoing Production Support

- Designed, developed and assist in the processing Adjunct Monthly Pay Process (IRM)
- Built custom ESS pages in Campus Solutions to allow all Faculty to view existing and past teaching contracts. Also created MSS pages with workflow for Deans to view and approve contracts and Administrators to make updates where needed.
- Continue to be called upon regularly to quickly identify issues for HR, Payroll, Benefits and Faculty staffing in PeopleSoft HCM and Campus Solutions.

## HCM Project Manager and Team Lead from May

### PeopleSoft Implementation of HCM, FS, CS and Portal

- Brought into the project as new HCM Manager/Team Lead weeks before expected go-live date to resolve existing issues and lead the team to deploy a successful product. Helped resolve many outstanding issues including completing missing conversion/development requirements, coding, mapping etc. Lead remaining testing and redirected staff for optimum performance.
- Continued on with FSCJ after deploy assisting with balance updates, conversions and W2 processing to ensure correct year-end processing.

## **San Diego Community College District, San Diego, CA HCM Project Manager and Payroll Lead**

**07/2014 – 04/2016**

### PeopleSoft Implementation of HCM, FS, CS and Portal

- Functioned as HCM Project Manager and Payroll Lead for the implementation of HCM 9.2 with PeopleSoft integration for Campus Solutions, Finance and Portal.
- Responsible for managing all stages of the entire HCM project implementation and system integrations. In addition to managing the team I was also Payroll Lead for all project phases from Fit-Gap, Configuration, Design, Development, Testing, Training and Deployment.
- Conducted and documented Fit Gap sessions for Time and Labor, Payroll, Commitment Accounting, Talent Acquisition Management and Position Management before additional staff on-boarded to take over some modules.

## **University of North Texas Systems, Denton, TX Assistant Project Manager / Time and Labor Functional Lead**

**07/2013 – 07/2014**

### PeopleSoft Upgrade of HCM from 9.0 to 9.2 and CS/HCM split

- Served as an Assistant Project Manager, Time and Labor Functional Lead and HCM Security Lead.
- Responsible for the Time & Labor portion of the Upgrade from PeopleSoft HRMS 9.0 to HCM 9.2.
- Reconfigured the TRC and Workgroup configuration and modified the TRC programs and implemented TL WorkCenter and a new WorkCenter for Payroll team.
- Conducted Fit Gap sessions for T&L and Security to determine current customizations in place that could be removed or needed to be retrofitted.
- Demonstrated the new 9.2 functionality available in 9.2 for Time and Labor (TL), WorkCenters and Delegations and constructed WorkCenters for HR and Payroll.
- Configured Time and Labor tables to work with the Approval Workflow Engine (AWE) and take advantage of new functionality available in 9.2 and removing customizations currently in place.
- Customized the AWE workflow for TL to route to the manager or the next inline manager if the current manager was inactive.
- Identified changes required for the T&L Rules and worked with the client to modify rules to simplify coding and reduce processing times.
- Prepared test scripts and lead T&L team through testing phases into a successful go-live.
- Identified and updated UNTS security for new 9.2 modules plus granted access to components that were previously unused and rolled out with the upgrade.

## **Delaware Transit Corporation, Delaware, MD Project Manager / Payroll Lead**

**07/2012 – 01/2013**

- Managed all aspects of the project and resources for PeopleSoft HCM upgrade from 8.9 to 9.1
- Led the functional team focusing during the upgrade on: Workforce Administration, Payroll, Training, Talent Acquisition Management (TAM), Position Management, Absence Management, Labor Relations, Succession Planning, Benefits Administration and Health and Safety.
- In addition to Project Management duties also operated as a Payroll Team Lead for Fit-Gap sessions, design documentation, testing, deploy and training of payroll staff.

**University of Baltimore, Baltimore, MD**  
**HCM Principle Consultant**

**06/2012 – 06/2012**

Analysis and Recommendations for PeopleSoft CG/TAM

- Completed detailed analysis and documentation defining how the client could improve the PeopleSoft Candidate Gateway/Talent Acquisition Management (CG/TAM) application for better screening and workflow capabilities
- Completed all configurations, security, workflow customizations and testing in development and test environments for client approval.
- Worked closely with client functional and technical resources throughout assignment

**King County, Seattle, WA**  
**HCM Payroll Lead**

**09/2010 – 03/2012**

PeopleSoft Implementation of HCM and FS

- Responsible for managing all phases of the Payroll portion of the implementation moving the client from legacy system to PeopleSoft to include complex Time & Labor rules in order to accurately pay 15,000 King County employees, represented by 85 unions.
- Responsible for the design of a custom Worker's Compensation module to fit the intricate requirements of the client. This custom process automated previous manual payroll calculations, generated workflow approvals and triggered processes to update the payroll system. One component utilized Time & Labor delivered TCD processing, another leveraged delivered pay sheet staging tables to push data to directly to payroll
- Instrumental in assisting with, and testing, the construction of complex Time and Labor rules for paying over 85 unions with very specific rules per union for time generation, and approvals.
- Led numerous Payroll staff training classes for garnishments, leave reimbursements, supplemental pay as well as many one-on-one general payroll training sessions.
- Setup new leave plans with new plan types due to special contract rules outside of the standard sick plan.
- Utilized Benefits Administration eligibility rules to drive the automation of enrollments.
- Monitored and assisted in troubleshooting of other BenAdmin eligibility rules processing.

## CERTIFICATIONS & TRAINING

- PeopleSoft Training: Human Resources, Benefits, PeopleTools I & II, PeopleCode, Query and Crystal Report Writing, SQL/SQR, Business Process Designer (Workflow)

## EDUCATION

- Bachelor of Science: Graphic Arts Technology Management and Production Management; University of Central Missouri

## SUMMARY

Krishna has over fourteen (14) years of experience as a PeopleSoft FSCM Functional, and Technical consultant. He has completed five (5) PeopleSoft FSCM implementations, and multiple upgrades, and production support projects. Krishna has led both technical and functional teams through all project phases.

- Hands-on experience working with the following FSCM modules: PO/e-Pro, IN, AM, FA, AP, PC, CA, BI, AR, GL, and T&E
- Data Conversion, and Mass Uploads for various modules within PeopleSoft FSCM
- Proficient with Application Designer, Application Engine, PeopleCode, and Process Scheduler
- PeopleSoft fluid pages experience
- Reporting tools: BI publisher, SQR, PS Query, and nVision
- File Layout, Application Engine, Component Interface, and Excel to CI
- Workflow, and Approval Workflow Engine (AWE)
- Integration Broker between cross pillars including HCM, Campus Solutions, and other third-party systems
- Team leadership skills for all phases of the project lifecycle

## TECHNICAL PROFICIENCIES

- Languages: C, C++, JavaScript, PL/SQL, Visual Basic 6.0, HTML
- Platforms: PeopleSoft FSCM 9.2/9.1/9.0/8.9/8.8, People Tools 8.55/8.54/8.53/8.49/8.48
- Databases: SQL Server 2012/2008/2005/2000, Oracle
- Operating System: Windows 10/7/XP/2000/NT
- People Tools: Application Designer, Application Engine, Application Package, Integration Broker, Component Interface, AWE
- Reporting Tools: PS Query, BI Publisher, Crystal Reports, SQR, and nVision

## RELEVANT EXPERIENCE

**HTC Global Services**  
**Principal Consultant**

**04/2016 – Current**

**While engaged with The Pew Charitable Trusts Support, and Maintenance managed service project.**

Client : The Pew Charitable Trusts

Role: PeopleSoft FSCM Techno-Functional Consultant / Team Lead

Technology/Tools : PeopleSoft FSCM 9.2

Provide support on PeopleSoft 9.2 FSCM modules: Asset Management, Accounts Payables, Purchasing, Supplier Contracts, Grants, Billing, Accounts Receivables, General Ledger, and Expenses.

- The primary responsibility is to support day to day PeopleSoft 9.2 FSCM module issues.
- To implement technical solutions approved by stakeholders
- To create new financial reports as per the business needs
- To monitor, and fix problems with third-party integrations
- Provide oversight and coordinate the activities of 3 offshore developers while serving as the liaison with the client

**While engaged with the Westchester Community College ePro/AP/AM Assessment project.**

Client : Westchester Community College

Role : PeopleSoft ePro/AP Lead

Technology/Tools : PeopleSoft FSCM 9.2

Gather, and document fit-gap requirements for PeopleSoft FSCM eProcurement, Fixed Assets, and Accounts Payables.

- The primary responsibility is to understand the WCC PeopleSoft system, and gather the requirements for ePro, and Accounts Payables modules.
- Prepared Fit Gap analysis for ePro, Accounts Payables, and Asset Management

## **While engaged with the SDMC PS Implementation project.**

Client: School District of Manatee County

Role : PeopleSoft Integration/Technical Lead

Technology/Tools : PeopleSoft FSCM 9.2/ HCM 9.2 PT 8.54

Implement PeopleSoft FSCM and HCM 9.2 for the School District of Manatee County.

- Primary responsibility is to develop the interfaces, conversions, customizations, and reports as needed
- Developed SUA (Single User Account) integration with JPM bank through PeopleSoft Financial gateway
- Developed a custom program to auto reconcile PCard transactions
- Develop custom interfaces MyPGS, Fuel Master, FISH file, etc., per requirements for both HCM and FSCM.
- Worked on data conversions
- Deployed fluid pages
- Customized fluid pages for physical inventory tracking in Asset Management.
- Customized AP & Payroll checks as per business need
- Developed several budget reports
- Developed nVision reports
- Worked on payment forms
- To create all required documentations towards the CEMLI worked

## **While engaged with the ILG PS Implementation project.**

Client: Interval Leisure Group

Role: Purchasing/eProcurement Functional/Reporting Lead

Technology/Tools: PeopleSoft FSCM 9.2/ HCM 9.2 PT 8.54

Implement PeopleSoft FSCM and HCM 9.2 for the Interval Leisure Group.

- Primary responsibility was to understand the ILG system, and design/configure the PeopleSoft system as per the SDMC requirements for Purchasing, and eProcurement modules
- Completed configuration changes for 260 Purchasing Business units
- Worked on GL, and subsystem BU configuration clean up
- Developed 600+ nVision reports
- Extensively worked on PO and ePro modules
- Worked on PO workflow (AWE) configuration
- Worked on other report requests like POPO005, and PSQUERY
- Created a PO configuration guide.

## **While engaged with the SDMC PS Implementation project.**

Client : School District of Manatee County

Role: Purchasing/eProcurement Functional Lead

Technology/Tools PeopleSoft FSCM 9.2/ HCM 9.2 PT 8.54

Implement PeopleSoft FSCM and HCM 9.2 for the School District of Manatee County.

- Primary responsibility was to understand the SDMC system, and design/configure the PeopleSoft system as per the SDMC requirements for Purchasing, and eProcurement modules
- Understanding the legacy system
- Gather requirements
- Fit Gap analysis
- System Configuration
- Extensively worked on PO, and ePro modules.
- Functional lead for eSupplier.
- Conversion Data mappings creation
- Functional specification creation for the customizations, and interfaces

## PROFESSIONAL SUMMARY

Murthy has 12 Years of PeopleSoft Consulting Expertise in V8.x/ V9.x – HRMS Application Portals, Visual Basic, Oracle and WIN NT Platforms. This includes One Implementation project (Time & Labor and Absence Management), three maintenance project, three support project and one Tools Only Upgrades in Remote Development Centers' in India.

He acquired requisite Technical Standards to understand the Business Process in Implementing Customized Software Applications in Industry specific areas of Software Security and Computer Peripherals.

He performed an active role in End-User Analysis, Design, Debug, Testing in Procedural and Object based PeopleSoft Applications. He has significant experience in PeopleCode, Component Interface, SQR, AppEngine, Database programming in Oracle (8.0, 9i), Technical and Functional Designs, Change Management and Knowledge Transfer. He has Strong analytical skills, Capacity to adapt to new environment, learn new tools and Good interpersonal communication skills.

PeopleSoft HRMS V8.x Application Portals (Technical):

- Responsible for HRMS V8.3, V8.8, V9.0, V9.1 & V9.2 customization, custom application development and implementing change requests and Batch Objects
- Utilized Object oriented PeopleCode in V8.x Applications on many projects
- Associated in data migration from legacy system to PeopleSoft HRMS
- Provided Production support for PeopleSoft HRMS V8.x Application Portals
- Modified existing SQR reports and also created new reports
- Actively participated in several UAT meetings in all PeopleSoft applications
- Involved in training business users on new application functionality
- Performed debugging and problem fixing for Online and Batch Programs
- Represented for Application Migration and Change Control procedures/meetings
- Performed Unit, Integration and Database (Parallel) testing

## TECHNICAL QUALIFICATIONS

- **PeopleSoft:**
  - HRMS Application: V8.3/8.8/8.9/9.0/9.1/9.2 – HRMS Time and Labor, NA Payroll, Benefits, Interface, Absence Management on V8.12 to V8.54 People Tools.
  - SQR 4.0/3.0, People Tools 1 & 2 V8.x, People Code, AppEngine.
- **Integration Tools:** Component Interface and File Layout.
- **Languages:** C, C++(OOPS), People Code, SQR, SQL, PL/SQL
- **RDBMS:** Oracle 11G/9i/8i/8.0/7.x, SQL Server 2000/7.0

## RELEVANT EXPERIENCE

**HTC Global Services, Inc.**  
**PeopleSoft HRMS – Senior Consultant**

**05/2016 to Current**

While engaged on the San Diego Community College District -  
PeopleSoft Campus Solution Project:

*Role: Senior Consultant*

Platform: PeopleSoft CS V9.2 on People Tools V8.55 Application Designer, AppEngine, SQR.

Responsibilities:

- Reapplication of Customizations which include changes in the Record properties, record field properties, record People Code, page formats, page field properties, component, menu, security, and Navigations .
- Customization of online pages related Student Records/Student Success/Student Success Service Programming for PeopleSoft CS.
- Developed custom Application engine process on SSSP Student Success Service Programming for PeopleSoft CS.

While engaged on the Samaritan Health Services - PeopleSoft HRMS/HCM  
Project:

*Role: Senior Consultant*

Platform: PeopleSoft HRMS V9.2 on People Tools V8.54 Application Designer, AppEngine, SQR, IB, Data Mover, Oracle 11g for the Application Modules of HRMS

Responsibilities:

- Modified/Created Application Engine programs, SQR reports/interfaces and Modified custom PS objects
- Involved in Enhancing, Modifying, Debugging and Testing PeopleSoft Applications and SQR's for NA Payroll, HR and Benefits modules.
- Developed Test Script Scenarios with navigations, actual and expected results
- Used the PS Query tool to create new queries, which in turn were used to modify various reports

While engaged on the Florida State College at Jacksonville -  
PeopleSoft HRMS/HCM Project:

*Role: Senior Consultant*

Platform: PeopleSoft HRMS V9.2 on People Tools V8.54 Application Designer, AppEngine, File Layout, SQR, PS Query, Data Mover, Oracle 11g for the Application Modules of HRMS.

Responsibilities:

- Enhanced/Modified the State Reporting Framework Tool (Custom Tool Developed for reporting purpose for FSCJ).
- Developed several Sate Reports like Annual Personnel Reports-APR/ Personnel Data Base Reports –PDB, and for Campus Solutions developed - Admission Database Reports-ADB, Student Data Base Reports etc. Using Application Engine programs/ State Reporting Frame Work Tool.

- Created and modified Components, Pages, Records, Fields, Process Definitions and registering Components in Portal, Menu and Permission Lists.
- Used PS Query tool to create new queries, which in turn were used to modify various reports.
- Used PeopleCode extensively to validate the page fields' information entered by the user and to implement the business rules.
- Created custom Application Engine programs to archive historical state reporting data for APR/PDB/SDB/ADB as per business requirement.
- Implemented State Reporting Frame Work Tool in all the modules like HCM/CS/FSCM and taken care the security related to the tool

## EDUCATION

- Bachelor of Science, Computer Science – Andhra University, 2006

### Continuing Training:

- People Tools I 8.42 - PeopleSoft Internet Architecture
- Time and Labor V 9.0
- Oracle Fusion Applications - HCM Security training
- Oracle Applications Cloud Security 2016 Implementation Specialist
- Oracle Sales Cloud Security 2016 Implementation Specialist

## **Azure Administrator**

Suruchi has over 5 years of experience with strong Azure Cloud experience in infrastructure deployment and Managing servers and Microsoft Azure AD .

### **Major Strengths**

- Strong experience in Azure and VMWare administration, experience managing Azure Subscription access, security, and cost
- Experience developing Infrastructure scripts to deploy resources and policies using ARM template
- Primarily focused on performance optimization and technical improvements with understanding of decision making and usability.
- Good reputation on managing multiple global Azure subscription and security enablement.
- Strong communication and interpersonal skills with ability to explain technical concepts to non-technical audiences.

### **Education:**

- Bachelor of Technology in Electronics and Communication Engineering from Asansol Engineering College, West Bengal in 2016

### **Technical Skills**

**Cloud:** Azure IaaS

**Scripting:** Terraform, PowerShell

**Admin:** Azure Administrator, VMWare and Server management

### **Certifications:**

- ITIL Foundation, 2017
- Microsoft Azure Az-104, 2021 September

### **Professional Experience:**

#### **HTC Global Services**

**Lead, February 2022 to Present**

#### **UK based Finance bank, NBS**

**System Engineer, October 2016 to February 2022**

### **Project Description:**

Optimized cloud security and performance with proactive changes such as implementing Vulnerability and security changes in Azure and incorporated using IaaS.

### **Responsibilities:**

- Managed Azure Subscription access, security, and cost.
- Azure Active directory deployment for client project. Leveraged Azure sentinel to integrate azure security center, azure firewall, windows defender for vulnerability scans.
- Enabling Azure defender on subscriptions to protect azure and hybrid resources with just-in-time application controls.
- Leveraging password less authentication and conditional access policy to mitigate attacking risks and enabling MFA on accounts which are not capable for password less authentication.
- Applied the RBAC on the resources as per client requirement and utilized azure security token services for the applications/resources access.
- Configured monitor sign-ins, MFA and Privileged Identity Management (PIM) principle.
- Developed Infrastructure scripts to deploy resources and policies using ARM template.

# SURUCHI, PROJECT MANAGER - AZURE



- Good experience in using Terraform to deploy Azure component to cloud.
- Provided second-level support for all server class systems.
- Made recommendations regarding information technology infrastructure overhauls.
- Planned and implemented VMware tools upgrades to system hardware and software, resulting in devolving of compatibility issues
- Standardized job tasks and trained junior team members on industry best practices and standards

## **Environment:**

- Azure, IaaS- Azure VMs, Virtual Network, Network Security group, Azure Storage, Azure Bastion, Azure AD and RBAC, Load balancer, Key vault, Azure Resource Manager, Azure AD, Azure Security Center, MFA, Conditional Access, PIM.

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## PROFESSIONAL SUMMARY

- Multi-faceted professional with over 8 years of work experience, possessing knowledge in IT Business, Research and Data Analysis.
- Developed business cases, requirements, user stories, use cases, test plans, test strategies, test cases, and operational procedures and plans.
- Experience working on projects implemented in Agile methodology.
- Experience in writing user stories in Azure TFS
- Knowledge on process management.
- Experience as a Business Analyst for a large financial institution.
- Excels in the core skills of Project Management

## TECHNICAL PROFICIENCIES

- JIRA
- Scrum
- Unix Shell Scripting
- FI-AR
- Agile
- Project Management
- Power Bi
- MS Visio
- Google Cloud Platforms
- MS Project

## CERTIFICATIONS & TRAINING

- Google Project Management - Jan 2023
- RPA Business Analyst by UiPath - Dec 2022
- SAP ABAP Developer Associate, Sept 2013

## EDUCATION

- Master of Science; Computer Science: University of Memphis, USA, 2019

## RELEVANT EXPERIENCE

**HTC Global Services India Pvt., Ltd, Chennai**  
Lead

**Nov/2022 – Present**

**International Paper, Memphis**  
Application Development Analyst

**Sep/2019 – Jul/2022**

- Automated daily work using Azure DevOps, Bash/Shell, Python, and Linux.
- Worked as Techno-Functional SAP Modules (ABAP & FI).
- Delivered solutions by working with multiple stakeholders worldwide during SDLC (Waterfall & Agile methodologies)
- Highly organized and detail oriented while developing BRD, FRD, use cases, user stories, and wireframes.

- Experience in process development and improvement, change, release, and project management. 2019 - 2022
- Proficient in SQL Queries.
- Strong functional & technical knowledge on SAP Modules -ABAP & FI.
- Knowledge of data management best practices and experience implementing and maintaining them
- Technologies : ETL Tools

## **Intel, Portland, USA**

**Aug/2018 – Dec/2018**

### **System Engineer Intern**

Conducted the performance testing of the persistent memory with different system configurations and databases. The project involved evaluating the speed, efficiency and reliability of storing and accessing data in non-volatile memory modules such as NVDIMMs in comparison to traditional storage solutions such as HDDs or SSDs.

- Enabled SAP HANA, Oracle for automated functional testing on persistent memory.
- Learned deep learning framework Caffe.
- Updated systems to Best Known Methods (BKM) for testing/running
- Python automation scripts of workloads
- Technologies : SAP HANA, Oracle

## **International Paper, Memphis**

**May/2018 – Aug/2018**

### **Business Analyst SAP – Finance Intern**

- Involved in SAP FICSM Implementation project for a new Box Plant at
- Toluca, Mexico.
- Develop and implement strategies for change migration.
- Contribute to Change Management process improvement initiatives.
- Worked on access management in the database to improve security

## **Naaptol.com, Mumbai, India**

**Dec/2011 – Dec/2015**

### **Market Research Analyst**

- Management of Web portal for an up-to-date product list using back end integration of the server with the SQL Server database.
- Active role as MRA in the transformation of Naaptol.com from comparison shopping portal to e-commerce portal.
- Worked on the enhancement of user interface of the portal for better consumer engagement
- Technologies : SQL Server

Vivitha Devi has 4.5 years of experience in Data Analytics. She has experience as a Data Scientist with extensive knowledge in Analytics Domain with strong technical background using a variety of statistical modeling techniques with different software platforms.

## MAJOR STRENGTHS

- Solid experience in Python and R programming with Machine Learning.
- Knowledge in machine learning libraries in python (NumPy, Pandas, Scikit.).
- Good knowledge in Technical document preparation.
- Modeling dataset with Machine Learning & Deep Learning algorithms.
- Modelling dataset with IBM Watson
- Text Analytics using Natural Language Processing and text classification using Naive Bayes algorithm.
- Twitter sentiment analysis from twitter hash tag using tweepy module and created tableau dashboard for visualization.

## Education

- Master of Business Administration, Anna University, Chennai, India (2010-2012)
- Bachelor of Engineering, Agni College of Engineering, Chennai, India (2006-2010)

## Technical Summary

- Analytical Skills: Statistical Techniques, Predictive Modelling, Clustering, Machine Learning, Computer Vision, Modelling Using IBM Watson and Deep Learning (Neural networks, RNN and CNN)
- Programming Language : R, Python
- Reporting Tools : PowerBI, Tableau
- Big Data : Hadoop and Hive (basic)
- Querying Languages : SQL and NoSQL (MongoDB)
- MS Office : MS Excel, MS Word and MS PowerPoint
- Operating Systems : Windows

## Professional Experience

**HTC Global Services (India) Pvt. Ltd.**

**Client: HTC**

**Role: Data Scientist**

**Duration: March 2020 to Present**

**Project Title: Covid-19 Forecasting using IBM Watson [POC]**

## Project Description

Have forecasted the recovery rate and the death rate of the covid-19 patients all over the world using IBM Watson.

#### Responsibilities

- Have created the forecasting model using IBM Watson.
- Have forecasted the recovery rate and the death rate of the covid-19 patients all over the world using IBM Watson

#### **HTC Global Services (India) Pvt. Ltd.**

**Client: Uber**

**Role: Data Scientist**

**Duration: February 2020 to March 2020**

**Project Title: Customer Segmentation using IBM Watson [POC]**

#### Project Description:

This project involves the segmentation of the client's customers based on their basic details like customer ID, age, gender, customer rating, driver rating, no of rides, geographical location, total distance travelled, number of days since last ride using IBM Watson.

#### Responsibilities:

- Have created the clustering model using IBM Watson.
- Have segmented customers into different groups based on their behavioral patterns in order to provide them with the better service.

#### **HTC Global Services (India) Pvt. Ltd.**

**Client: HTC**

**Role: Data Scientist**

**Duration: December 2019 to February 2020**

**Project Title: Bank Document Comparison [Internal Project]**

#### Project Description:

Have created an application for comparing two bank documents using transfer learning

#### Responsibilities:

- Have created a rule based application for comparing the documents and finding the match between the documents.
- Once we identified the match percentage the document will be sent to the appropriate queue for the associates to take the further action.
- Used NLP techniques and Google pertained model

#### **HTC Global Services (India) Pvt. Ltd.**

**Client: HTC**

**Role: Data Scientist**

**Duration: September 2019 to December 2019**

**Project Title: Purchase Order Data Extraction [Internal Project]**

#### Project Description:

Have created an application for the field extraction from the purchase order in the PDF format, such as product name, product code, Net amount, purchase order date, purchase

order number, customer address etc. Have used the google vision API to find the intent blocks of the PDF. From the blocks we have used the NLP and computer vision techniques to extract the information from the particular blocks.

## Responsibilities:

- ❖ Have created a web based application for purchase order data extraction using python and flask.
- ❖ Used NLP and computer vision techniques for identifying the appropriate data from the output of the Google Vision API.

## **HTC Global Services (India) Pvt. Ltd.**

**Client: Ciber**

**Role: Data Scientist**

**Duration: July 2019 to September 2019**

**Project Title: Tickets clustering**

## Project Description:

Have received millions of records of the network alarm tickets from client. Which had lots of sparse data. We cleaned the data and applied the clustering techniques to cluster the alarm tickets which needs to be sent to the particular queue.

## Responsibilities:

- ❖ Data cleaning, Quantitative and Qualitative Statistical Analysis, Text Analysis, pattern recognition using Correlation and clustering techniques.
- ❖ Done Cognitive Analytics using Association Rules and Rule Mining Algorithms

## **HTC Global Services (India) Pvt. Ltd.**

**Client: HTC**

**Role: Data Scientist**

**Duration: March 2019 to July 2019**

**Project Title: Resume Matching Software [Internal Project]**

## Project Description:

Have created a resume matching tool using python and NLP techniques to identify the top matching resumes for the provided JD. And also created further filters based on experience, skill set, job location, technology to pick up the best resumes from the pool of resumes.

## Responsibilities:

- Have created a web based resume matching software tool using python and flask.
- Used NLP techniques for identifying the best resumes for the given JD.

## **Laserbeam Software Pvt Ltd, Chennai, India**

**Client: ASRC**

**Role: Data Analyst**

**Duration: September 2018 to January 2019**

## **Project Title: Sentiment Analysis**

### **Project Description:**

This project involves in identifying the sentiment of the manager feedback given to the employees during the salary compensation. By comparing the sentiments and the rating given by the manager we identified the bias.

### **Responsibilities:**

- Have collected the manager feedback for around three years of the compensation cycle.
- Cleaned the data collected using the NLP techniques.
- Built a model for the text classification using the Naïve Bayes algorithm to predict the sentiments of the manager bias given to the employees.
- Compared the sentiment predicted with the performance rating of the employees to identify the bias shown by the managers towards the employees.

**Laserbeam Software Pvt Ltd, Chennai, India**

**Client: Laserbeam Software**

**Role: Data Analyst**

**Duration: May 2018 to August 2018**

**Project Title: ChatBot Using DialogFlow API [Internal Project]**

### Project Description:

Built a ChatBot for the help desk of the customers about the product using Dialogflow API.

### Responsibilities:

- Have created the needed question and answers about the product.
- Have collected the frequent questions and answers asked by the customers about the product from the team.
- Have created the required intents for the question we have collected.
- Have created the responses for the intents which has been already created to make sure the ChatBot has a proper reply for the question asked.
- Have tested the ChatBot for the proper and appropriate working.

**Laserbeam Software Pvt Ltd, Chennai, India**

**Client: Laird Technologies**

**Role: Data Analyst**

**Duration: January 2018 to April 2018**

**Project Title: Anomaly Detection Engine**

### **Project Description:**

Automation of anomaly detection.

### **Responsibilities:**

- Have automated anomaly detection using python

- This engine can identify the anomalies like outliers, data type mismatch and missing values in the data.
- This engine has been coded in python dynamically which can be used to detect the anomalies in any data.
- This engine has been integrated using flask.

## **HCL Technologies Private Ltd, Chennai, India**

Client: AXA Insurance UK

Role: Analyst

Duration: January 2013 to August 2015

This project involves the data cleansing, data analysis techniques like outlier detection, identifying anomalies and built a machine learning model with the cleansed data to identify the valid customers for providing credit using the classification algorithm.

### Responsibilities:

- Analysis of the customer data.
- Done exploratory data analysis of the customer data
- Used logistic regression for the classification problem of the customer data
- Maintaining the good quality of work with the proper customer satisfaction.
- Handling frequent client calls.
- Responding queries.
- Preparing documents regarding client based queries.
- Handling Audit queries.
- Handle multiple tasks to ensure that all activities are in sync with the prescribed time lines

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## PROFESSIONAL SUMMARY

- An IT Professional with total 15 years of experienced as a Big Data Engineer in analysis, design, development in distributed application which
- includes Apache Hadoop Ecosystem, Kafka, Google Cloud Platform and Big Data tools like HDFS,
- Sqoop, Hive, Spark Core, Spark SQL, Scala, Python, Oozie, Core Java, Google Apache Beam, Big query, and knowledge in Development, Enhancement and Maintenance of Client/Server applications primarily using SQL and PL/SQL based on Oracle (8i, 9i, 10g, 11g, 12c), MS SQL Server, PowerBuilder (v7, v9, v11, 12), Unix Shell scripting, MS VBA Macros and BI Publisher Reporting 12, WTX. 2+ years of experience in Production Support including Configuration management and Platform management. Having exposure to Banking, Finance, ERP domains with Batch, real time data streaming and quality principles.
- Around 4 years of good experience in data engineering and understanding of distributed file systems in Hadoop Ecosystem and Google Cloud, managing massive storage and parallel processing using technologies Sqoop, Hadoop File System, Hive, Spark, Scala, and Google Cloud Platform,
- GCP Apache Beam, Kafka and fair experience in Core Java, Python.
- Experience in dealing with HDFS and Google cloud big query for persisting the data for primary staging and data acquisition.
- knowledge and experience in Hadoop Architecture and various Hadoop daemons such as Name Node, Data Node, Secondary Name Node, Resource Manager and High Availability.
- Experience in dealing with Scoop for injection.
- Experience in dealing with Oozie jobs for scheduling data injection.
- Experience in dealing with Hive to parse, convert to complex data types, filter complex data, performance tuning.
- Good experience in Scala and Apache Spark data analytic s cluster programming framework for writing, re-writing, optimizing new and existing algorithms creating Spark RDDs Data frames for required inputs, perform data transformations, aggregation, filtration and do in memory data. computation to generate the output.
- Experience in processing real time streaming data using Kafka replication and Google Cloud Apache Beam.
- Fair knowledge in Tableau.
- Agile and Waterfall software development methodology.
- Expert knowledge of Software development, Client/Server technology.
- Frequent involvement in managing teams of newcomers and guiding them with best practices.
- Tracking the progress of release and conducting well defined development process.
- Knowledge of software development life cycle for most of the assigned. subjects including analysis with creation of functional and technical requirement. document, development, testing, Peer review and deployment of code to User Acceptance Test (UAT) and Production.
- 8+ years of hands-on experience in application development using Front End technologies.
- PowerBuilder (7.0, 9.0, v11, v12), UNIX and Shell scripting.
- Hands on experience creating test cases and test plans using tool Quality Center in Integrated
- Software Testing phase (IST) and JUNIT 5 with Mokito as well after development.
- Exceptional ability to quickly master new software and apply a full range of abilities. Deployed subjects in Production using technologies Oracle, PowerBuilder, Unix shell scripting, Visual basic. for application (VBA) Macros, BI Publisher 12, WTX and Big Data Tools.
- Strong Team player, enthusiastic learner, sincere and long term committed.
- Handson experience in Migration Projects was Azure SQL FORD Office Ride automobile application. migrated to Google Cloud And database Oracle 11g and GUI PowerBuilder v12, Oracle Report,
- Transfer Agent application migrated to Oracle 11g and BI Publisher 12 application. Also, migration of PowerBuilder v7 and MS SQL server application to MS.NET 2005, MS SQL Server using Crystal. Reporting and XML.

- Major achievements in Oracle SQL and PL-SQL performance tuning, bringing down packages. execution time from 7 days to 5 minutes.
- Participation in daily status off-shore meetings and on-call on shore (Paris and Luxembourg) rotation during working hours as well for urgent needs outside of business hours, reporting issues, recommend improvements, action plans and dependencies.
- Follow up the changes in regular intervals and implement it successfully.
- Effective communication and people skills. Technically competent and result oriented with strong critical thinking skills.
- On Deputation in Production Support to resolve major backlogs pending for years due to my immense application knowledge and gained experience in L2 and L3 prod support with exposure to L1 support.
- Experience in Service Delivery activities involving Platform and Infrastructure Management as well as Release management as configuration manager.
- Knowledge of Banking Domain and approx. 11 years of experience in Finance Domain, around 1(1/2) years of experience in Enterprise Resource Planning (ERP) with relevant experience in Retail Domain and 1+ years' experience in Automobile Industry
- Immense knowledge of Object-Oriented Programming, RDBMS and SDLC processes.
- Sound knowledge in Financial Market which includes subscription and redemption of stocks, Stock exchange, OTC, Bonds, Futures, Forwards, Options, Derivatives and Fund Services, primary involvement in Fund Administration, Fund Accounting and Transfer Agent Services.

## TECHNICAL PROFICIENCIES

- Languages : Scala 2.11, GCP Apache Beam, Power Builder (v9.0, v7.0, v11), BI Publisher 12, VBA Macros, Unix Shell Scripting and WTX, Core Java.
- Exposure to MS.NET 2005, C, C++
- Framework : Spark v2.0.1, v2.3
- Database : Google Cloud Big query, HDFS, Oracle(8i,9i,10g,11g,12c), SQL Server 2005
- Operating System : Windows XP/7/10, UNIX
- MS Technologies : MS.NET 2005, VC++, VB 6, Visual Basics Macros
- Web Technologies : Exposure to HTML, JavaScript, ASP.NET
- Reporting Tools : Data windows, Tableau, BI Publisher, Discoverer, Crystal Reports in ADO.NET
- Big Data : Apache Hadoop 2.7.3, Sqoop 1.4.6, Hive 2.1.0, Spark v2.0.1, v2.3.0, HBase 1.1, Kafka 1.0, Oozie 4.2, Big Query, Apache Beam, Google Cloud, Python 3.8
- Development Methodology : Agile, Agile Frameworks: Scrum, JIRA & JIRA Portfolio, Waterfall
- Application : Oracle Apps 11i
- JAVA Technologies : Exposure to Core Java
- Scala/Java/Beam Development Tool: IntelliJ, Eclipse Saswata Dey Amalendu Dey Specialty Development
- Version Control Tools : Git and GitHub, Bit Bucket (Distributed Systems), SVN StarTeam, VSS (Visual Source Safe)
- Integrated Software Testing Tool : HP Quality Center
- Tools Used : TOAD and SQL Developer (Oracle), SQL Analyzer, Citrix.
- Financial Software : Multifonds for Fund Administration and Transfer Agent (MF) Activities

## CERTIFICATIONS & TRAINING

- Microsoft Azure Fundamentals Scored: 82.6 %
- Oracle Database 12c SQL Certified Associate Scored: 82 %
- ITIL Foundation Certification Scored: 92.50%

## EDUCATION

- Bachelor in Engineering in (Computer Engg.); R.C.E.R.T(Rajiv Gandhi Collage of Engineer Research And Technology, University of Nagpur , Maharashtra.
- HSC ; ICLES MOTILAL Jhunjhunwala COLLAGE,VASHI, Navi Mumbai.
- SSCL; BROAD OF SECONDARY EDU SCHOOL, C.B.S.E.

## RELEVANT EXPERIENCE

### HTC Global Services India Pvt., Ltd, Chennai Data Engineer/ Manager

Oct/2021 – Present

Client: Ford

While engaged with HTC, was involved in the project FSM 360 CDC as a Data Engineer/Manager from Oct 2021 to Nov 2022:

Data Migration and Change data capture to Google Cloud from multiple data sources which involves batch replication. Batch involves ingestion into Google Big query data warehouse once a day. For Change Data Capture Google Big Query Stored Procedure used.

- Google Cloud Data Engineering and Migration Project involved.
- Finalize Migration to Google Cloud Architecture.
- Identify relevant GCP components like cloud storage, big query for data warehousing.
- Created topics with appropriate replication and partition.
- Responsible for creation of datasets, tables, and Stored Procedures for staging replicated data, data cleaning and data warehousing as well as Change Data Capture to ensure data changed in the upstream data source stays up to date in target Google Big query.
- Google Cloud Scheduling jobs to automatize the Batch Replication.
- Agile development methodology
- Technologies : Kafka, Google Cloud (GCP) Dataflow, Apache Beam, Big Query GCP, Big query, GitHub, GCP Scheduler, Google Cloud Pub/Sub, Agile development,
- Azure SQL

### Baset Software Solutions (India) Pvt Ltd Technical Lead

Mar/2021 – Oct/2021

Client: [24] seven.ai

While engaged with IBaseIT, was involved in the project Answers Report as a Mar/2021 to Oct 2021 from Mar/2021 to Oct/2021

University of California, Santa Barbara has ties with lot of educational Institutions. On hourly, daily, weekly, and monthly basis interested users go to their site to ask questions placed in search bar or Chat pot, which are answered as various forms of response. These user queries and responses are categorized into multiple JSON events which are consumed from one Kafka topic in Broker by Google dataflow, used as runner to perform computation. Apache Beam with JAVA used for Kafka replication. pipeline connection, filtration of event attributes, apply windowing to capture data streams of nine.



## CONTACT

**Address :** SYKESVILLE, MD 21784

**Phone :** [REDACTED]

## SKILLS

- Technical Support
- Public Speaking
- Program Management
- Organizational Change Management
- Stakeholder Relationship Management
- Verbal and Written Communication
- Technical Writing
- PowerPoint Presentations
- Presentation Creation and Delivery
- Training and Development
- Information Technology Management
- Primavera P6
- Procurement
- Negotiation
- Multiple project coordination
- Project Planning Oversight

## PROFESSIONAL SUMMARY

Talented Organizational Change Management Subject Matter Expert (SME) focused on promoting adaptability and cohesion. Meticulous attention to detail and successful track record of helping both federal and state government agencies manage their personnel to successfully adopt organizational change, and transition them to their desired future state.

## WORK HISTORY

**Special Project Coordinator, 01/2020 to 07/2022**

**Maryland Board of Nursing (MBON) - Baltimore, MD**

- Conducted research and gathered key information for use in upcoming project planning.
- Managed online communications from social media, email and website sources.
- Edited project documentation for grammar and spelling errors resulting in error-free paperwork.
- Kept meticulous records of all costs and expenses and analyzed that data against budget.
- Monitored project progress, identified risks and took corrective action as needed.
- Maintained open communication by presenting regular updates on project status to Executive Director.
- Kept projects on schedule by managing deadlines and adjusting workflows.
- Edited project documentation for grammar and spelling errors resulting in error-free paperwork
- Worked effectively in fast-paced environments
- Conducted research and gathered key information for use in upcoming project planning

**Sr. OCM Consultant, 09/2016 to 02/2018**

**CSG Government Solutions/MD Unemployment Insurance - Baltimore, MD**

- Prioritized 15 projects and project tasks depending upon key milestones and deadline dates.
- Developed custom solutions based upon clients' strict requirements.
- Determined areas for improvement and implemented change management processes to alleviate problems.

# JILL BELL

- Identified, and analyzed preparation of mitigation tactics for risk assessment & management.
- Supported organizational design and defined roles and responsibilities,
- Identified and managed anticipated resistance.
- Supported training design, development and delivery.
- Skilled at working independently and collaboratively in team environment
- Self-motivated, with strong sense of personal responsibility
- Proven ability to learn quickly and adapt to new situations
- Worked well in team setting, providing support and guidance
- Worked effectively in fast-paced environments
- Managed time efficiently to complete all tasks within deadlines
- Excellent communication skills, both verbal and written
- Passionate about learning and committed to continual improvement
- Organized and detail-oriented with strong work ethic
- Adaptable and proficient in learning new concepts quickly and efficiently
- Used critical thinking to break down problems, evaluate solutions and make decisions
- Cultivated interpersonal skills by building positive relationships with others
- Identified issues, analyzed information and provided solutions to problems

#### **Sr. OCM Consultant, 11/2013 to 01/2015**

##### **CPS Professional Services - Falls Church, VA**

- Provided consulting expertise on discrete lines of business and engagements to large scale federal enterprise transformation initiatives to include SEVP Case Analysis.
- Collaborated with HR partners and other resources to identify design opportunities.
- Enable organizational alignment toward critical business objectives and outcomes.
- Maintained practice skills consistent with PMBOK and CPS EPIM construct.
- Defined future state organizational design principles and guidelines.
- Provided and recommended future state required capabilities, governance, processes and performance metrics.
- Developed change management plans to ensure effective adoption of organization design changes, .
- Coached other professionals and clients in applying change management methodologies and tools on projects/initiatives.
- Provided subject matter expertise in Organizational Change Management (OCM).
- Reviewed processes, identifying areas requiring improvement.
- Skilled at working independently and collaboratively in team environment
- Self-motivated, with strong sense of personal responsibility
- Proven ability to learn quickly and adapt to new situations
- Worked well in team setting, providing support and guidance
- Excellent communication skills, both verbal and written
- Passionate about learning and committed to continual improvement
- Proved successful working within tight deadlines and fast-paced environment
- Identified issues, analyzed information and provided solutions to problems

#### **Change Management Expert, Lead, 09/2012 to 07/2013**

##### **CACI - Arlington, VA**

- Lead OCM activities for NIH Financial legacy system transition to proprietary Oracle eBusiness financials (NIH Business System).
- Created and designed project Stakeholder Analysis, Change Management, Communications, and Work Force Impact plans.
- Analyzed system and policy changes to determine business processes and organizational impacts.
- Demonstrated business analysis, organizational design and development, change facilitation skills as well as in-depth knowledge of clients' businesses.

- Oversaw development of end user training documentation and made edits using UPK.
- Monitored and direct workflow of smaller change management projects or segments of larger projects, including design of project Stakeholder Analysis, Change Management Communications, Work Force Impact and Training plans.
- Worked with internal organizations to effectively deal with large changes in their businesses.
- Analyzed system and policy changes to determine business processes and organizational impacts.
- Anticipated and identified client issues and concerns and proposed advice as appropriate.
- Identified and communicated opportunities to project team to expand services to existing clients.
- Demonstrated competency to work at high technical level on all phases of Change Management.

#### **UPK Developer, 06/2012 to 09/2012**

##### **DC Office Of Financial Systems - Washington, DC**

- Tested programs and databases to identify issues and make necessary modifications.
- Designed, developed, and implemented software applications for website based on analyzed requirements and understanding of industry technical standards.
- Discussed issues with team members to provide resolution and apply best practices.
- Translated customer requirements into written use cases.
- Collaborated on stages of systems development lifecycle from requirement gathering to production releases.
- Developed course content for Oracle EBS APPO and other assigned modules.
- Collaborated with business/functional leads to modify test scripts using UPK.
- Collaborated with SMEs and leads on business process and policy content for training materials.
- Created detailed Business Process Documents to support training materials
- Created and adhered to detailed training development schedules.
- Identified and validated training courses.
- Created UPK training materials.
- Edited and finalized UPK training materials.
- Created content packages for publishing to LMS.
- Conducted peer review on UPK content developed by others
- Proven ability to learn quickly and adapt to new situations
- Excellent communication skills, both verbal and written
- Passionate about learning and committed to continual improvement

#### **OCM Lead, 01/2012 to 05/2012**

##### **ConocoPhillips - Bartlesville, OK**

- Developed program strategy for Communications IT Internal Stakeholder Experience and executing Systems Separation (SST) Program .
- Developed Communication Plan to ensure that information is timely, accurate and consistent across 6 project streams consisting of collective 122 projects.
- Managed timely answers to stakeholder FAQs and entered them into organization's IT Knowledge Center (IT KC).
- Developed and maintained strong working relations with Communication Organizational Change Management (OCM) stream leads and provided coordinated services to program sponsored events.
- Established and oversaw development of project stream scorecards and dashboards to provide accurate and timely status of organization readiness.
- Provided day to day strategy and management of organization readiness work streams.

## **EDUCATION**

**Bachelor of Science:** Communications  
**Florida State University** - Tallahassee, FL

## PROFESSIONAL SUMMARY

- Over 20 years of experience in the field of Remote Infrastructure Management and Remote support teams, System Administrator, Citrix Administrator and Wintel Administrator.
- Experience in ITIL process - Incident Management, Change management and Problem Management.
- Experience in Project Management, Transition Management, Service Delivery, Service Management, and IT operations.
- Ensuring Service Level Agreements (SLAs) are reviewed from time to time and corrective and proactive measures are taken to tackle and address misses.
- Effective Problem Management through Root Cause Analysis (RCA), preventive action implementation and integration into Change and Release management.
- Establishing Knowledge Management framework to capture learnings and enhance delivery toolkits, runbooks on a continuous basis
- Setting up Command center team (L1 team common for all the clients) who does the monitoring of the infrastructure and work on the L1 tasks
- Highlight the Risks in the environment, maintain a Risk Tracker and run a program to remediate the Risks. (Change the RED account to GREEN)
- Drive CSIP & SIP programs to improve the service quality (e.g., reduction of incidents numbers and shared delivery models for better staff utilization).
- Identifying appropriate process methodologies for continual improvement. Ensure CSAT are good and to manage quality customer service experience
- Ensuring Key Performance Indicators (KPI) are met as the part of organizational goals.
- Responsible for managing multiple North America & EMEA based and responsible for overall delivery of these projects.
- Worked on few major DC transition projects, where we transformed & migrated around 10000+ servers. This project includes P2V and location migrations on large scale, Migrations of servers from on premise to cloud
- Recommendations for areas of contract changes that can improve service, lower costs or improve customer satisfaction.

## TECHNICAL PROFICIENCIES

- AWS CCP
- ITIL
- CCA

## CERTIFICATIONS & TRAINING

- AWS Certified Cloud Practitioner. (AWS CCP)
- Completed the "Performance Leadership" training to lift the team performance and engagement - Unisys
- Attended the "Management Effectiveness Improvement Program (MEIP)" - Unisys
- Attended the "Management Development Program (MDP)" - Unisys
- Attended the "Project Management Training" - Unisys
- ITIL V3 Foundation Certificate
- Citrix Certified Administrator (CCA)
- Microsoft Certified Professional (MCP)

## EDUCATION

- MBA in IT from Annamalai University, Tamil Nadu, 2009
- Bachelor of Engineering in Electronics & Communication from Manipal Institute of Technology affiliated to Mangalore University, Karnataka 2009

## RELEVANT EXPERIENCE

**HTC Global Services India Pvt., Ltd., India**  
**Senior Manager**

**08/2021 – Present**

- Handling Infrastructure projects in multiple countries
- Completed Genesys pure cloud implementation in Germany
- Network switch upgrade at New Jersey
- Replace backup internet circuit line with Comcast at New Jersey. (Getting quote from different vendors, finalizing the vendor, contract sign and implementation)
- Internet speed upgrade from 50 Mbps to 1 Gbps (Verizon)
- Replacing wireless link with a point-to-point connection (fiber) between 2 buildings.
- Integrating applications with Okta for SSO
- Coordinating with the vendors and Omega for contract renewals.
- Maintaining and handling all projects/tasks in Jira and driving a weekly call.
- Ensure the changes identified during project execution are closed on-time and keep track of all changes

**Unisys, India**  
**Manager, Delivery**

**07/2006 – 02/2021**

While engaged at Unisys from 07/2006 to 02/2021 he is involved in various projects.

### **Project Name: Datacenter Move**

Company made the decision to close St Just Datacenter and to relocate all services to new CoLo datacenters located in Cody Park, UK. It has been agreed that the Client's St Just environment will be moved to the Cody Park datacenter. The exit strategy agreed with the Client is called "Lift and Shift" to exit out of St Just datacenter.

Lift and Shift consist of taking a system outage on Friday, allowing the whole environment to be securely shutdown, packaged, and transported to Cody Park; where it is unloaded, unpackaged and re-installed after a period of acclimatization. Then it is systematically brought up using pre-agreed start-up procedures, initially for testing then ultimately released for Live production access by Sunday evening.

- Establishing Knowledge Management framework to capture learnings and enhance delivery toolkits, runbooks on a continuous basis
- Highlight the Risks in the environment, maintain a Risk Tracker and run a program to remediate the Risks. (Change the RED account to GREEN)
- Recommendations for areas of contract changes that can improve service, lower costs or improve customer satisfaction.
- Drive CSIP & SIP programs to improve the service quality (e.g. reduction of incidents numbers and shared delivery models for better staff utilization).
- Meeting deadlines without compromising quality norms
- Ensure the project artifacts are up to date through reviews as per the plan.
- Ensure CSAT are good and to manage quality customer service experience.
- Enhanced and Stream-lined the alerts and ticketing process for the customer environment leading to improved ticket resolution time, reduced false alerts and improved the overall uptime of the infrastructure along with cost savings.

### **Project Name: OneDrive Migration**

The client has decided that OneDrive for business will replace the current HomeDrives which are residing on on-premises servers/NAS box scattered at different regions. The requirement is that all 5000 Win10 users to be migrated to OneDrive for Business from their HomeDrives. ShareGate is the tool used for the migration.

Finally delete the users home drive location using a script once confirmation of successful migration has been achieved.

- Establishing reporting, escalation matrix, resolution processes and service reviews
- Managing technical/service relationships through strong governance model
- Part of Transition team and successfully transitioned and onboarded new clients.
- Setting up Command center team (L1 team common for all the clients) who does the monitoring of the infrastructure and work on the L1 tasks
- Identifying the opportunities for Automation and driving until implemented.
- Setting up of Knowledge base for Service Desk which improves the First Call resolution.

## **Project Name: Azure File Sync**

This Project aims to sync the files on the File server to Azure file share. Azure file sync enables centralizing organization's file shares in Azure Files. This reduced the on-premises backup spending by taking the centralized backups in the cloud using Azure backup.

- Involved in Data Migration.
- Helped in reducing backup cost.
- Managed the centralized backup.
- Synced the files to Azure file share.

## **Project Name: Server Migration to Cloud**

This project was to migrate the existing VMs from Data center to AWS cloud (IaaS). Double Take was the tool used for migration.

- Involved in Migration.
- Involved in changing the existing Data Center
- Tools: Double Take, AWS

# RAMDAS N., PROJECT MANAGER



**Tesco HSC, Bangalore, India**  
**Senior Software Engineer**

**12/2005 – 07/2006**

**Microland Bangalore, India**  
**Team Leader**

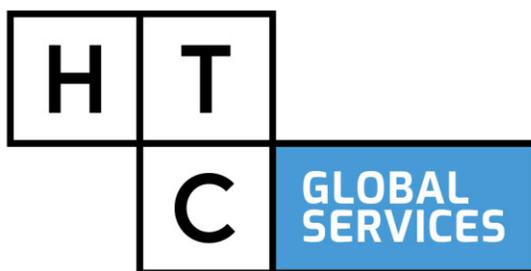
**03/2005 – 12/2005**

**First Apex Software Technologies Pvt Ltd. Bangalore, India**  
**Technical Lead**

**03/1999 – 02/2005**



**Thank You**  
*for this*  
*Opportunity!*



**HTC Global Services, Inc.**

*World Headquarters*

3270 West Big Beaver Road, Troy, MI 48084

Phone: 248.786.2500, Fax: 248.823.0320

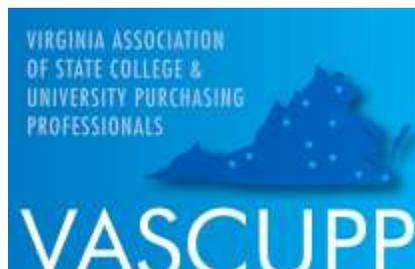


# Request for Proposal

## **RFP# FDC-1175**

**Information Technology Consulting Services**

**June 15, 2023**





**REQUEST FOR PROPOSAL**  
**RFP# FDC-1175**

**Issue Date:** June 15, 2023  
**Title:** Information Technology Consulting Services  
**Issuing Agency:** Commonwealth of Virginia  
James Madison University  
Procurement Services MSC 5720  
752 Ott Street, Wine Price Building  
First Floor, Suite 1023  
Harrisonburg, VA 22807

**Period of Contract: From Date of Award Through One Year (Renewable)**

**Sealed Proposals Will Be Received Until 2:00 PM on August 3, 2023 for Furnishing the Services Described Herein.**

*SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.*

All Inquiries For Information And Clarification Should Be Directed To: Doug Chester, Buyer Senior, Procurement Services, [chestefd@jmu.edu](mailto:chestefd@jmu.edu); 540-568-4272; (Fax) 540-568-7935 by July 20, 2023 by 5:00 PM EST.

**NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.**

In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm: \_\_\_\_\_  
By: \_\_\_\_\_  
(Signature in Ink)

\_\_\_\_\_  
Name: \_\_\_\_\_  
(Please Print)

\_\_\_\_\_  
Date: \_\_\_\_\_ Title: \_\_\_\_\_

Web Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_ Fax #: \_\_\_\_\_

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 \_\_\_\_\_ #2 \_\_\_\_\_ #3 \_\_\_\_\_ #4 \_\_\_\_\_ #5 \_\_\_\_\_ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:  
 YES;  NO; *IF YES* ⇒⇒  SMALL;  WOMAN;  MINORITY ***IF MINORITY:***  AA;  HA;  AsA;  NW;  Micro

**Note: This public body does not discriminate against faith-based organizations in accordance with the Code of Virginia, § 2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.**

# ***REQUEST FOR PROPOSAL***

*RFP # FDC-1175*

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## I. PURPOSE

The purpose of this Request for Proposal (RFP) is to solicit sealed proposals from qualified sources to enter into a contract to provide information technology consulting services for James Madison University (JMU), an agency of the Commonwealth of Virginia. Initial contract shall be for one (1) year with an option to renew for four (4) additional one-year periods.

## II. BACKGROUND

James Madison University is a comprehensive university in Harrisonburg, Virginia and is part of the statewide system of public higher education in the Commonwealth. The university offers programs at the bachelor's, master's and doctoral levels with its primary emphasis on the undergraduate student. JMU's current enrollment is approximately 22,000 full and part-time students. The university employs approximately 4,000 faculty and staff. Further information about the University can be found at the following website: [www.jmu.edu](http://www.jmu.edu).

James Madison University's Office of Information Technology is responsible for technology initiatives for campus. JMU was an early adopter of PeopleSoft/Oracle's Campus Solutions product, serving as a beta for its development and implementation. Additionally, the University uses Oracle's PeopleSoft Financials, Human Resources, and the Interaction Hub for JMU's self-service portal. The University also currently uses Oracle's Identity Management suite. JMU actively manages Windows and Macintosh computer systems. The University's network is powered by Cisco technologies. A series of NEC Private Branch Enterprises (PBX's) and gateways constitute the Voice network.

James Madison University is currently utilizing the following technologies:

- Oracle Identity Management Suite 11g R2 P3
- Oracle/PeopleSoft Campus Solutions 9.2; PeopleTools 8.55.x
- Oracle/PeopleSoft Human Resources 9.2; PeopleTools 8.55.x
- Oracle/PeopleSoft Financial Management 9.2; PeopleTools 8.55.x
- Oracle/PeopleSoft Enterprise Application Portal 9.2; PeopleTools 8.55.x
- WebLogic
- Desktop Management: Microsoft Windows and Macintosh (SCCM, JAMF, Apple Enterprise Connect)
- Microsoft 365 (A5 license)
- Microsoft Active Directory
- Federation Services (Shibboleth, OpenID)
- Cisco technologies (including but not limited to network and video conferencing)
- Virtualization technologies (VMWare)
- Cherwell ITSM
- Salesforce (Enterprise CRM)
- NEC Voice and Collaboration Technologies
- Boomi

Additionally, JMU is engaged in a multi-year initiative ("Reengineering Madison") that will include implementing significant technology platforms such as an enterprise Customer Relationship Management (CRM) platform (Salesforce) and new data solutions for managing and visualizing JMU's data. Reengineering Madison will also involve replacing JMU's current PeopleSoft ERP (Enterprise Resource Management) platform, including Finance, Human Resources, and Student Administration applications, as well as current applications used for

managing the identities of JMU's constituents. For more information on Reengineering Madison, see <https://www.jmu.edu/computing/projects/reengineering-madison/index.shtml>.

The University is aware of other cooperative contracts awarded by higher education institutions in the Commonwealth. Firms currently on a cooperative contract with these institutions are not required to respond to this solicitation. The University reserves the right to request quotes from firms on other cooperative contracts, when it is deemed in the best interest of the University.

James Madison University reserves the right, when not in the best interest of the university, to decline award to any firm already on an existing VASCUPP cooperative contract in order to avoid duplication of contracts.

### **III. SMALL, WOMAN-OWNED AND MINORITY PARTICIPATION**

It is the policy of the Commonwealth of Virginia to contribute to the establishment, preservation, and strengthening of small businesses and businesses owned by women and minorities, and to encourage their participation in State procurement activities. The Commonwealth encourages contractors to provide for the participation of small businesses and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other contractual opportunities. Attachment B contains information on reporting spend data with subcontractors.

### **IV. STATEMENT OF NEEDS**

James Madison University desires to contract with qualified firms to provide expertise and a range of services to support technologies used by the University. Contractor shall serve on special projects as a technology expert when requested and as needed. Reports shall be provided back to the University summarizing options and providing recommendations. Contractor shall serve as a technology advisor to understand, communicate, and propose solutions as requested. Contractor shall serve as a resource of research, implementation, troubleshooting, and other technical tasks to support the efforts of James Madison University Information Technology (JMU IT) staff. Functional consultants shall be represented by the Contractor as experts in the tasks and functions assigned. The University reserves the right to accept or reject any proposed or assigned consultant, without cause, at any time during the duration of the contract.

1. Describe your corporate competencies/experience providing IT consulting services for one or more of the technologies listed below.
  - a. Oracle Core Technologies
  - b. Oracle/PeopleSoft Enterprise Solutions
  - c. Desktop and Mobile Device Management
  - d. Microsoft Azure and M365
  - e. Okta
  - f. Data Analytics/Visualization/Warehouse/Lake
  - g. Change Management Training, Services, & Certification
  - h. Security and Federation Services
  - i. Cisco Technologies, Infrastructure Support, and Virtualization
  - j. Audio Visual Technologies

- k. Secure Research Enclaves
  - l. Other Technology
2. Describe approach and methodology that will be used to provide IT consulting services to James Madison University. Include how your firm would manage the scope of projects.
  3. Provide the names, qualifications, and experience of personnel to be assigned to James Madison University. Designate who would be assigned as the primary contact for the account.
  4. Describe the ability to provide continuity of consultants throughout the duration of a project.
  5. Describe IT consulting services available from your firm. Examples of services may include, but are not limited to, the following:
    - a. Implementation
    - b. Development
    - c. Project Management
    - d. Architecture and Design
    - e. Capacity Planning
    - f. Installation and Configuration
    - g. Performance and Scalability
    - h. Conversion
    - i. Monitoring, Administration and Upgrades
    - j. Training Development
    - k. Operations Metrics
  6. Describe training options and specify associated costs in *Section X. Pricing Schedule*. Include a catalog of training offerings and differentiation between technical staff and end-user training.
  7. Provide examples of recent projects at higher education institutions comparable to James Madison University. Describe the project, time frame, end result, etc.
  8. Describe the ability to provide for a thorough transfer of knowledge to JMU IT on any given project.
  9. Describe your approach to project management.
  10. Describe how your firm would propose a functional staffing plan indicating the number, characteristics, and schedule for the consultants.
  11. Describe the functions that may be provided by a subcontractor of your firm. Specify the expertise and credentials required from the subcontractor.

## V. PROPOSAL PREPARATION AND SUBMISSION

### A. GENERAL INSTRUCTIONS

**To ensure timely and adequate consideration of your proposal, offerors are to limit all contact, whether verbal or written, pertaining to this RFP to the James Madison University Procurement Office for the duration of this Proposal process. Failure to do so may jeopardize further consideration of Offeror's proposal.**

1. RFP Response: In order to be considered for selection, the **Offeror shall submit a complete response to this RFP**; and shall submit to the issuing Purchasing Agency:
  - a. **One (1) original and four (4) copies** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with 3.f. below.
  - b. **One (1) electronic copy in WORD format or searchable PDF (flash drive)** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with 3.f. below.
  - c. Should the proposal contain **proprietary information**, provide **one (1) redacted hard copy** of the proposal and all attachments with **proprietary portions removed or blacked out**. This copy should be clearly marked "*Redacted Copy*" on the front cover. The classification of an entire proposal document, line-item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable. JMU shall not be responsible for the Contractor's failure to exclude proprietary information from this redacted copy.

No other distribution of the proposal shall be made by the Offeror.

2. The version of the solicitation issued by JMU Procurement Services, as amended by any addenda, is the mandatory controlling version of the document. Any modification of, or additions to, the solicitation by the Offeror shall not modify the official version of the solicitation issued by JMU Procurement services unless accepted in writing by the University. Such modifications or additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, JMU reserves the right to decide, on a case-by-case basis in its sole discretion, whether to reject such a proposal. If the modification or additions are not identified until after the award of the contract, the controlling version of the solicitation document shall still be the official state form issued by Procurement Services.
3. Proposal Preparation
  - a. Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in the purchasing agency requiring prompt submissions of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by the purchasing agency. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.

- b. Proposals shall be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.
  - c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, sub letter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and sub letter should be repeated at the top of the next page. The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at the appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.
  - d. As used in this RFP, the terms “must”, “shall”, “should” and “may” identify the criticality of requirements. “Must” and “shall” identify requirements whose absence will have a major negative impact on the suitability of the proposed solution. Items labeled as “should” or “may” are highly desirable, although their absence will not have a large impact and would be useful, but are not necessary. Depending on the overall response to the RFP, some individual “must” and “shall” items may not be fully satisfied, but it is the intent to satisfy most, if not all, “must” and “shall” requirements. The inability of an offeror to satisfy a “must” or “shall” requirement does not automatically remove that offeror from consideration; however, it may seriously affect the overall rating of the offeror’s proposal.
  - e. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.
  - f. Ownership of all data, materials and documentation originated and prepared for the State pursuant to the RFP shall belong exclusively to the State and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by the offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the offeror must invoke the protection of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data is submitted. The written notice must specifically identify the data or materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret materials submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line-item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and will result in rejection and return of the proposal.
4. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to James Madison University. This provides an opportunity for the Offeror to clarify or elaborate on the proposal. This is a fact-finding and explanation session only and does not include negotiation. James Madison University will schedule the time and location of these presentations. Oral presentations are an option

of the University and may or may not be conducted. Therefore, proposals should be complete.

**B. SPECIFIC PROPOSAL INSTRUCTIONS**

Proposals should be as thorough and detailed as possible so that James Madison University may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following items as a complete proposal:

1. Return RFP cover sheet and all addenda acknowledgements, if any, signed and filled out as required.
2. Plan and methodology for providing the goods/services as described in Section IV. Statement of Needs of this Request for Proposal.
3. A written narrative statement to include, but not be limited to, the expertise, qualifications, and experience of the firm and resumes of specific personnel to be assigned to perform the work.
4. Offeror Data Sheet, included as *Attachment A* to this RFP.
5. Small Business Subcontracting Plan, included as *Attachment B* to this RFP. Offeror shall provide a Small Business Subcontracting plan which summarizes the planned utilization of Department of Small Business and Supplier Diversity (SBSD)-certified small businesses which include businesses owned by women and minorities, when they have received Department of Small Business and Supplier Diversity (SBSD) small business certification, under the contract to be awarded as a result of this solicitation. This is a requirement for all prime contracts in excess of \$100,000 unless no subcontracting opportunities exist.
6. Identify the amount of sales your company had during the last twelve months with each VASCUPP Member Institution. A list of VASCUPP Members can be found at: [www.VASCUPP.org](http://www.VASCUPP.org).
7. Proposed Cost. See Section X. Pricing Schedule of this Request for Proposal.

**VI. EVALUATION AND AWARD CRITERIA**

**A. EVALUATION CRITERIA**

Proposals shall be evaluated by James Madison University using the following criteria:

1. Quality of products/services offered and suitability for intended purposes
2. Qualifications and experience of Offeror in providing the goods/services
3. Specific plans or methodology to be used to perform the services
4. Participation of Small, Women-Owned, & Minority (SWaM) Businesses
5. Cost

Allocation of points for evaluation criteria will be published to the eVA solicitation posting prior to the closing date and time.

**AWARD TO MULTIPLE OFFERORS:** Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The Commonwealth reserves the right to make multiple awards as a result of this solicitation. The Commonwealth may cancel this Request for Proposals or reject proposals at any time prior to an award and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous. Should the Commonwealth determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the contractor's proposal as negotiated.

## **VII. GENERAL TERMS AND CONDITIONS**

- A. **PURCHASING MANUAL:** This solicitation is subject to the provisions of the Commonwealth of Virginia's Purchasing Manual for Institutions of Higher Education and Their Vendors and any revisions thereto, which are hereby incorporated into this contract in their entirety. A copy of the manual is available for review at the purchasing office. In addition, the manual may be accessed electronically at <http://www.jmu.edu/procurement> or a copy can be obtained by calling Procurement Services at (540) 568-3145.
- B. **APPLICABLE LAWS AND COURTS:** This solicitation and any resulting contract shall be governed in all respects by the laws of the Commonwealth of Virginia and any litigation with respect thereto shall be brought in the courts of the Commonwealth. The Contractor shall comply with applicable federal, state and local laws and regulations.
- C. **ANTI-DISCRIMINATION:** By submitting their proposals, offerors certify to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and §10 of the Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 (available for review at <http://www.jmu.edu/procurement>). If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender, sexual orientation, gender identity, or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (*§6 of the Rules Governing Procurement*).

In every contract over \$10,000 the provisions in 1. and 2. below apply:

1. During the performance of this contract, the contractor agrees as follows:

- a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
  - b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.
  - c. Notices, advertisements, and solicitations placed in accordance with federal law, rule, or regulation shall be deemed sufficient for the purpose of meeting these requirements.
2. The contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.
- D. ETHICS IN PUBLIC CONTRACTING: By submitting their proposals, offerors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other offeror, supplier, manufacturer or subcontractor in connection with their proposal, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.
- E. IMMIGRATION REFORM AND CONTROL ACT OF 1986: By entering into a written contract with the Commonwealth of Virginia, the Contractor certifies that the Contractor does not, and shall not during the performance of the contract for goods and services in the Commonwealth, knowingly employ an unauthorized alien as defined in the federal Immigration Reform and Control Act of 1986.
- F. DEBARMENT STATUS: By submitting their proposals, offerors certify that they are not currently debarred by the Commonwealth of Virginia from submitting proposals on contracts for the type of goods and/or services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.
- G. ANTITRUST: By entering into a contract, the contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under said contract.
- H. MANDATORY USE OF STATE FORM AND TERMS AND CONDITIONS RFPs: Failure to submit a proposal on the official state form provided for that purpose may be a cause for rejection of the proposal. Modification of or additions to the General Terms and Conditions of the solicitation may be cause for rejection of the proposal; however, the Commonwealth reserves the right to decide, on a case-by-case basis, in its sole discretion, whether to reject such a proposal.

I. CLARIFICATION OF TERMS: If any prospective offeror has questions about the specifications or other solicitation documents, the prospective offeror should contact the buyer whose name appears on the face of the solicitation no later than five working days before the due date. Any revisions to the solicitation will be made only by addendum issued by the buyer.

J. PAYMENT:

1. To Prime Contractor:

- a. Invoices for items ordered, delivered and accepted shall be submitted by the contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the state contract number and/or purchase order number; social security number (for individual contractors) or the federal employer identification number (for proprietorships, partnerships, and corporations).
- b. Any payment terms requiring payment in less than 30 days will be regarded as requiring payment 30 days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment in less than 30 days, however.
- c. All goods or services provided under this contract or purchase order, that are to be paid for with public funds, shall be billed by the contractor at the contract price, regardless of which public agency is being billed.
- d. The following shall be deemed to be the date of payment: the date of postmark in all cases where payment is made by mail, or the date of offset when offset proceedings have been instituted as authorized under the Virginia Debt Collection Act.
- e. Unreasonable Charges. Under certain emergency procurements and for most time and material purchases, final job costs cannot be accurately determined at the time orders are placed. In such cases, contractors should be put on notice that final payment in full is contingent on a determination of reasonableness with respect to all invoiced charges. Charges which appear to be unreasonable will be researched and challenged, and that portion of the invoice held in abeyance until a settlement can be reached. Upon determining that invoiced charges are not reasonable, the Commonwealth shall promptly notify the contractor, in writing, as to those charges which it considers unreasonable and the basis for the determination. A contractor may not institute legal action unless a settlement cannot be reached within thirty (30) days of notification. The provisions of this section do not relieve an agency of its prompt payment obligations with respect to those charges which are not in dispute (*Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 § 53; available for review at <http://www.jmu.edu/procurement>*).

2. To Subcontractors:

a. A contractor awarded a contract under this solicitation is hereby obligated:

- (1) To pay the subcontractor(s) within seven (7) days of the contractor's receipt of payment from the Commonwealth for the proportionate share of the payment received for work performed by the subcontractor(s) under the contract; or

- (2) To notify the agency and the subcontractors, in writing, of the contractor's intention to withhold payment and the reason.
    - b. The contractor is obligated to pay the subcontractor(s) interest at the rate of one percent per month (unless otherwise provided under the terms of the contract) on all amounts owed by the contractor that remain unpaid seven (7) days following receipt of payment from the Commonwealth, except for amounts withheld as stated in (2) above. The date of mailing of any payment by U. S. Mail is deemed to be payment to the addressee. These provisions apply to each sub-tier contractor performing under the primary contract. A contractor's obligation to pay an interest charge to a subcontractor may not be construed to be an obligation of the Commonwealth.
  3. Each prime contractor who wins an award in which provision of a SWAM procurement plan is a condition to the award, shall deliver to the contracting agency or institution, on or before request for final payment, evidence and certification of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the SWAM procurement plan. Final payment under the contract in question may be withheld until such certification is delivered and, if necessary, confirmed by the agency or institution, or other appropriate penalties may be assessed in lieu of withholding such payment.
  4. The Commonwealth of Virginia encourages contractors and subcontractors to accept electronic and credit card payments.
- K. PRECEDENCE OF TERMS: Paragraphs A through J of these General Terms and Conditions and the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors, shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.
- L. QUALIFICATIONS OF OFFERORS: The Commonwealth may make such reasonable investigations as deemed proper and necessary to determine the ability of the offeror to perform the services/furnish the goods and the offeror shall furnish to the Commonwealth all such information and data for this purpose as may be requested. The Commonwealth reserves the right to inspect offeror's physical facilities prior to award to satisfy questions regarding the offeror's capabilities. The Commonwealth further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such offeror fails to satisfy the Commonwealth that such offeror is properly qualified to carry out the obligations of the contract and to provide the services and/or furnish the goods contemplated therein.
- M. TESTING AND INSPECTION: The Commonwealth reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.
- N. ASSIGNMENT OF CONTRACT: A contract shall not be assignable by the contractor in whole or in part without the written consent of the Commonwealth.
- O. CHANGES TO THE CONTRACT: Changes can be made to the contract in any of the following ways:
1. The parties may agree in writing to modify the scope of the contract. An increase or decrease in the price of the contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the contract.

2. The Purchasing Agency may order changes within the general scope of the contract at any time by written notice to the contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The contractor shall comply with the notice upon receipt. The contractor shall be compensated for any additional costs incurred as the result of such order and shall give the Purchasing Agency a credit for any savings. Said compensation shall be determined by one of the following methods:
    - a. By mutual agreement between the parties in writing; or
    - b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the contractor accounts for the number of units of work performed, subject to the Purchasing Agency's right to audit the contractor's records and/or to determine the correct number of units independently; or
    - c. By ordering the contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The contractor shall present the Purchasing Agency with all vouchers and records of expenses incurred and savings realized. The Purchasing Agency shall have the right to audit the records of the contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to the Purchasing Agency within thirty (30) days from the date of receipt of the written order from the Purchasing Agency. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this contract shall excuse the contractor from promptly complying with the changes ordered by the Purchasing Agency or with the performance of the contract generally.
- P. DEFAULT: In case of failure to deliver goods or services in accordance with the contract terms and conditions, the Commonwealth, after due oral or written notice, may procure them from other sources and hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the Commonwealth may have.
- Q. INSURANCE: By signing and submitting a proposal under this solicitation, the offeror certifies that if awarded the contract, it will have the following insurance coverage at the time the contract is awarded. For construction contracts, if any subcontractors are involved, the subcontractor will have workers' compensation insurance in accordance with § 25 of the Rules Governing Procurement – Chapter 2, Exhibit J, Attachment 1, and 65.2-800 et. Seq. of the Code of Virginia (available for review at <http://www.jmu.edu/procurement>) The offeror further certifies that the contractor and any subcontractors will maintain these insurance coverage during the entire term of the contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

MINIMUM INSURANCE COVERAGES AND LIMITS REQUIRED FOR MOST CONTRACTS:

1. Workers' Compensation: Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Commonwealth of increases in the number of employees that change their workers' compensation requirement under the Code of Virginia during the course of the contract shall be in noncompliance with the contract.
  2. Employer's Liability: \$100,000
  3. Commercial General Liability: \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The Commonwealth of Virginia must be named as an additional insured and so endorsed on the policy.
  4. Automobile Liability: \$1,000,000 combined single limit. *(Required only if a motor vehicle not owned by the Commonwealth is to be used in the contract. Contractor must assure that the required coverage is maintained by the Contractor (or third party owner of such motor vehicle.)*
- R. ANNOUNCEMENT OF AWARD: Upon the award or the announcement of the decision to award a contract over \$100,000, as a result of this solicitation, the purchasing agency will publicly post such notice on the DGS/DPS eVA web site ([www.eva.virginia.gov](http://www.eva.virginia.gov)) for a minimum of 10 days.
- S. DRUG-FREE WORKPLACE: During the performance of this contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.
- For the purposes of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a contractor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.
- T. NONDISCRIMINATION OF CONTRACTORS: An offeror, or contractor shall not be discriminated against in the solicitation or award of this contract because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, faith-based organizational status, any other basis prohibited by state law relating to discrimination in employment or because the offeror employs ex-offenders unless the state agency, department or institution has made a written determination that employing ex-offenders on the specific contract is not in its best interest. If the award of this contract is made to a faith-based organization and an individual, who applies for or receives goods, services, or disbursements provided pursuant to this contract objects to the religious character of the faith-based organization from which the individual receives or would receive the goods, services, or

disbursements, the public body shall offer the individual, within a reasonable period of time after the date of his objection, access to equivalent goods, services, or disbursements from an alternative provider.

- U. eVA BUSINESS TO GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS: The eVA Internet electronic procurement solution, website portal [www.eVA.virginia.gov](http://www.eVA.virginia.gov), streamlines and automates government purchasing activities in the Commonwealth. The eVA portal is the gateway for vendors to conduct business with state agencies and public bodies. All vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet eprocurement solution by completing the free eVA Vendor Registration. All offerors must register in eVA and pay the Vendor Transaction Fees specified below; failure to register will result in the proposal being rejected. Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

1. For orders issued July 1, 2014 and after, the Vendor Transaction Fee is:
  - a. Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$500 per order.
  - b. Businesses that are not Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$1,500 per order.
2. For orders issued prior to July 1, 2014 the vendor transaction fees can be found at [www.eVA.virginia.gov](http://www.eVA.virginia.gov).
3. The specified vendor transaction fee will be invoiced by the Commonwealth of Virginia Department of General Services approximately 60 days after the corresponding purchase order is issued and payable 30 days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.

- V. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the Commonwealth of Virginia shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.

- W. PRICING CURRENCY: Unless stated otherwise in the solicitation, offerors shall state offered prices in U.S. dollars.

- X. E-VERIFY REQUIREMENT OF ANY CONTRACTOR: Any employer with more than an average of 50 employees for the previous 12 months entering into a contract in excess of \$50,000 with James Madison University to perform work or provide services pursuant to such contract shall register and participate in the E-Verify program to verify information and work authorization of its newly hired employees performing work pursuant to any awarded contract.

- Y. CIVILITY IN STATE WORKPLACES: The contractor shall take all reasonable steps to ensure that no individual, while performing work on behalf of the contractor or any subcontractor in connection with this agreement (each, a "Contract Worker"), shall engage in 1) harassment (including sexual harassment), bullying, cyber-bullying, or threatening or violent conduct, or 2) discriminatory behavior on the basis of race, sex, color, national origin, religious belief,

sexual orientation, gender identity or expression, age, political affiliation, veteran status, or disability.

The contractor shall provide each Contract Worker with a copy of this Section and will require Contract Workers to participate in training on civility in the State workplace. Upon request, the contractor shall provide documentation that each Contract Worker has received such training.

For purposes of this Section, "State workplace" includes any location, permanent or temporary, where a Commonwealth employee performs any work-related duty or is representing his or her agency, as well as surrounding perimeters, parking lots, outside meeting locations, and means of travel to and from these locations. Communications are deemed to occur in a State workplace if the Contract Worker reasonably should know that the phone number, email, or other method of communication is associated with a State workplace or is associated with a person who is a State employee.

The Commonwealth of Virginia may require, at its sole discretion, the removal and replacement of any Contract Worker who the Commonwealth reasonably believes to have violated this Section.

This Section creates obligations solely on the part of the contractor. Employees or other third parties may benefit incidentally from this Section and from training materials or other communications distributed on this topic, but the Parties to this agreement intend this Section to be enforceable solely by the Commonwealth and not by employees or other third parties.

## VIII. SPECIAL TERMS AND CONDITIONS

- A. **AUDIT:** The Contractor hereby agrees to retain all books, records, systems, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The Commonwealth of Virginia, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
  
- B. **CANCELLATION OF CONTRACT:** James Madison University reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
  
- C. **IDENTIFICATION OF PROPOSAL ENVELOPE:** The signed proposal should be returned in a separate envelope or package, sealed and identified as follows:

From: \_\_\_\_\_

Name of Offeror	Due Date	Time
_____	_____	_____
Street or Box No.	RFP #	
_____	_____	
City, State, Zip Code	RFP Title	
_____	_____	

Name of Purchasing Officer: \_\_\_\_\_

The envelope should be addressed as directed on the title page of the solicitation.

The Offeror takes the risk that if the envelope is not marked as described above, it may be inadvertently opened and the information compromised, which may cause the proposal to be disqualified. Proposals may be hand-delivered to the designated location in the office issuing the solicitation. No other correspondence or other proposals should be placed in the envelope.

- D. LATE PROPOSALS: To be considered for selection, proposals must be received by the issuing office by the designated date and hour. The official time used in the receipt of proposals is that time on the automatic time stamp machine in the issuing office. Proposals received in the issuing office after the date and hour designated are automatically non responsive and will not be considered. The University is not responsible for delays in the delivery of mail by the U.S. Postal Service, private couriers, or the intra university mail system. It is the sole responsibility of the Offeror to ensure that its proposal reaches the issuing office by the designated date and hour.
- E. UNDERSTANDING OF REQUIREMENTS: It is the responsibility of each offeror to inquire about and clarify any requirements of this solicitation that is not understood. The University will not be bound by oral explanations as to the meaning of specifications or language contained in this solicitation. Therefore, all inquiries deemed to be substantive in nature must be in writing and submitted to the responsible buyer in the Procurement Services Office. Offerors must ensure that written inquiries reach the buyer at least five (5) days prior to the time set for receipt of offerors proposals. A copy of all queries and the respective response will be provided in the form of an addendum to all offerors who have indicated an interest in responding to this solicitation. Your signature on your Offer certifies that you fully understand all facets of this solicitation. These questions may be sent by Fax to 540/568-7935.
- F. RENEWAL OF CONTRACT: This contract may be renewed by the Commonwealth for a period of four (4) successive one year periods under the terms and conditions of the original contract except as stated in 1. and 2. below. Price increases may be negotiated only at the time of renewal. Written notice of the Commonwealth's intention to renew shall be given approximately 90 days prior to the expiration date of each contract period.
1. If the Commonwealth elects to exercise the option to renew the contract for an additional one-year period, the contract price(s) for the additional one year shall not exceed the contract price(s) of the original contract increased/decreased by no more than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
  2. If during any subsequent renewal periods, the Commonwealth elects to exercise the option to renew the contract, the contract price(s) for the subsequent renewal period shall not exceed the contract price(s) of the previous renewal period increased/decreased by more than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
- G. SUBMISSION OF INVOICES: All invoices shall be submitted within sixty days of contract term expiration for the initial contract period as well as for each subsequent contract renewal period. Any invoices submitted after the sixty day period will not be processed for payment.
- H. OPERATING VEHICLES ON JAMES MADISON UNIVERSITY CAMPUS: Operating vehicles on sidewalks, plazas, and areas heavily used by pedestrians is prohibited. In the unlikely event a driver should find it necessary to drive on James Madison University

sidewalks, plazas, and areas heavily used by pedestrians, the driver must yield to pedestrians. For a complete list of parking regulations, please go to [www.jmu.edu/parking](http://www.jmu.edu/parking); or to acquire a service representative parking permit, contact Parking Services at 540.568.3300. The safety of our students, faculty and staff is of paramount importance to us. Accordingly, violators may be charged.

- I. COOPERATIVE PURCHASING / USE OF AGREEMENT BY THIRD PARTIES: It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body, (to include government/state agencies, political subdivisions, etc.), cooperative purchasing organizations, public or private health or educational institutions or any University related foundation and affiliated corporations may access any resulting contract if authorized by the Contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the Contractor(s) and shall fully and independently administer its use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this contract or execution of a separate agreement is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of this contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

The Contractor will notify the University in writing of any such entities accessing this contract. The Contractor will provide semi-annual usage reports for all entities accessing the contract. The University shall not be held liable for any costs or damages incurred by any other participating entity as a result of any authorization by the Contractor to extend the contract. It is understood and agreed that the University is not responsible for the acts or omissions of any entity and will not be considered in default of the contract no matter the circumstances.

Use of this contract(s) does not preclude any participating entity from using other contracts or competitive processes as needed.

- J. SMALL BUSINESS SUBCONTRACTING AND EVIDENCE OF COMPLIANCE:

1. It is the goal of the Commonwealth that 42% of its purchases are made from small businesses. This includes discretionary spending in prime contracts and subcontracts. All potential offerors are required to submit a Small Business Subcontracting Plan. Unless the offeror is registered as a Department of Small Business and Supplier Diversity (SBSD)-certified small business and where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the contractor is encouraged to offer such subcontracting opportunities to SBSBD-certified small businesses. This shall not exclude SBSBD-certified women-owned and minority-owned businesses when they have received SBSBD small business certification. No offeror or subcontractor shall be considered a Small Business, a Women-Owned Business or a Minority-Owned Business unless certified as such by the Department of Small Business and Supplier Diversity (SBSD) by the due date for receipt of proposals. If small business subcontractors are used, the prime contractor agrees to report the use of small business subcontractors by providing the purchasing office at a minimum the following information: name of small business with the SBSBD certification number or FEIN, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product/service provided.

**This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.**

2. Each prime contractor who wins an award in which provision of a small business subcontracting plan is a condition of the award, shall deliver to the contracting agency or institution with every request for payment, evidence of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the small business subcontracting plan. **This information shall be submitted to: JMU Office of Procurement Services, SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.** When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm with the Department of Small Business and Supplier Diversity (SBSD) certification number or FEIN number, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product or service provided. Payment(s) may be withheld until compliance with the plan is received and confirmed by the agency or institution. The agency or institution reserves the right to pursue other appropriate remedies to include, but not be limited to, termination for default.
  3. Each prime contractor who wins an award valued over \$200,000 shall deliver to the contracting agency or institution with every request for payment, information on use of subcontractors that are not Department of Small Business and Supplier Diversity (SBSD)-certified small businesses. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm, phone number, FEIN number, total dollar amount subcontracted, and type of product or service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.**
- K. AUTHORIZATION TO CONDUCT BUSINESS IN THE COMMONWEALTH: A contractor organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the Code of Virginia or as otherwise required by law. Any business entity described above that enters into a contract with a public body shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the contract. A public body may void any contract with a business entity if the business entity fails to remain in compliance with the provisions of this section.
- L. PUBLIC POSTING OF COOPERATIVE CONTRACTS: James Madison University maintains a web-based contracts database with a public gateway access. Any resulting cooperative contract/s to this solicitation will be posted to the publicly accessible website. Contents identified as proprietary information will not be made public.
- M. CRIMINAL BACKGROUND CHECKS OF PERSONNEL ASSIGNED BY CONTRACTOR TO PERFORM WORK ON JMU PROPERTY: The Contractor shall obtain criminal background checks on all of their contracted employees who will be assigned to perform services on James Madison University property. The results of the background checks will be directed solely to the Contractor. The Contractor bears responsibility for confirming to the University contract administrator that the background checks have been completed prior to work being performed by their employees or subcontractors. The Contractor shall only assign to work on the University campus those individuals whom it deems qualified and permissible

based on the results of completed background checks. Notwithstanding any other provision herein, and to ensure the safety of students, faculty, staff and facilities, James Madison University reserves the right to approve or disapprove any contract employee that will work on JMU property. Disapproval by the University will solely apply to JMU property and should have no bearing on the Contractor's employment of an individual outside of James Madison University.

- N. INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the contractor/any services of any kind or nature furnished by the contractor, provided that such liability is not attributable to the sole negligence of the using agency or to failure of the using agency to use the materials, goods, or equipment in the manner already and permanently described by the contractor on the materials, goods or equipment delivered.
- O. ADDITIONAL GOODS AND SERVICES: The University may acquire other goods or services that the supplier provides than those specifically solicited. The University reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services under the same pricing, terms, and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products, components, accessories, subsystems, or related services that are newly introduced during the term of this Agreement. Such additional goods and services will be provided to the University at favored nations pricing, terms, and conditions.
- P. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent of the purchasing agency. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish the purchasing agency the names, qualifications and experience of their proposed subcontractors. The contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of the contract.
- Q. PRIME CONTRACTOR RESPONSIBILITIES: The contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that he may utilize, using his best skill and attention. Subcontractors who perform work under this contract shall be responsible to the prime contractor. The contractor agrees that he is as fully responsible for the acts and omissions of his subcontractors and of persons employed by them as he is for the acts and omissions of his own employees.
- R. CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION: The Contractor assures that information and data obtained as to personal facts and circumstances related to students, faculty, and staff will be collected and held confidential, during and following the term of this agreement, and will not be divulged without the individual's and the agency's written consent and only in accordance with federal law or the *Code of Virginia*. Contractors who utilize, access, or store personally identifiable information as part of the performance of a contract are required to safeguard this information and immediately notify the agency of any breach or suspected breach in the security of such information. Contractors shall allow the agency to both participate in the investigation of incidents and exercise control over decisions regarding external reporting. Contractors and their employees working on this project may be required to sign a confidentiality statement.

## **IX. METHOD OF PAYMENT**

The contractor will be paid based on invoices submitted in accordance with the solicitation and any negotiations. James Madison University recognizes the importance of expediting the payment process for our vendors and suppliers; we request that our vendors and suppliers enroll in our bank's Comprehensive Payable options: either the Virtual Payables Virtual Card or the PayMode-X electronic deposit (ACH) to your bank account so that future payments are made electronically. Contractors signed up for the Virtual Payables process will receive the benefit of being paid Net 15. Additional information is available online at:

<http://www.jmu.edu/financeoffice/accounting-operations-disbursements/cash-investments/vendor-payment-methods.shtml>

## **X. PRICING SCHEDULE**

The Offeror shall provide onsite and offsite hourly rates broken down by position type for the proposed services. Onsite hourly rates shall include all billables (e.g. travel, lodging, meals, etc.). See Attachment D.

In addition to completing Attachment D, the Offeror shall also provide pricing for all other services, including training offerings.

Specify any associated charge card processing fees, if applicable, to be billed to the university. Vendors shall provide their VISA registration number when indicating charge card processing fees. Any vendor requiring information on VISA registration may refer to <https://usa.visa.com/support/small-business/regulations-fees.html> and for questions <https://usa.visa.com/dam/VCOM/global/support-legal/documents/merchant-surcharging-qa-for-web.pdf>.

## **XI. ATTACHMENTS**

Attachment A: Offeror Data Sheet

Attachment B: Small, Women, and Minority-owned Business (SWaM) Utilization Plan

Attachment C: Standard Contract Sample

Attachment D: Pricing Schedule

ATTACHMENT A

OFFEROR DATA SHEET

TO BE COMPLETED BY OFFEROR

1. **QUALIFICATIONS OF OFFEROR:** Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.
2. **YEARS IN BUSINESS:** Indicate the length of time you have been in business providing these types of goods and services.

Years \_\_\_\_\_ Months \_\_\_\_\_

3. **REFERENCES:** Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

CLIENT	LENGTH OF SERVICE	ADDRESS	CONTACT PERSON/PHONE #
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4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

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5. **RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA:** Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the [CODE OF VIRGINIA](#), SECTION 2.2-3100 – 3131?

YES  NO

IF YES, EXPLAIN: \_\_\_\_\_

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ATTACHMENT B

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Offeror Name: \_\_\_\_\_ Preparer Name: \_\_\_\_\_

Date: \_\_\_\_\_

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes\_\_\_\_\_ No\_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date:\_\_\_\_\_

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes\_\_\_\_\_ No\_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date:\_\_\_\_\_

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes\_\_\_\_\_ No\_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date:\_\_\_\_\_

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes\_\_\_\_\_ No\_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

**Instructions:** *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWAMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

**Small Business:** "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years.

**Woman-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

**Minority-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

**Micro Business** is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees **AND** no more than \$3 million in average annual revenue over the three-year period prior to their certification.

**All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSDB at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at <http://www.sbsd.virginia.gov/> (Customer Service).**

***RETURN OF THIS PAGE IS REQUIRED***

**ATTACHMENT B (CNT'D)**  
**Small, Women and Minority-owned Businesses (SWaM) Utilization Plan**

Procurement Name and Number: \_\_\_\_\_

Date Form Completed: \_\_\_\_\_

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses  
 for this Proposal and Subsequent Contract

Offeror / Proposer:

\_\_\_\_\_ Firm

\_\_\_\_\_ Address

\_\_\_\_\_ Contact Person/No.

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)

*(Form shall be submitted with proposal and if awarded, again with submission of each request for payment)*

***RETURN OF THIS PAGE IS REQUIRED***

ATTACHMENT C



COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT

Contract No. \_\_\_\_\_

This contract entered into this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_, by \_\_\_\_\_ hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From \_\_\_\_\_ through \_\_\_\_\_

The contract documents shall consist of:

- (1) This signed form;
(2) The following portions of the Request for Proposals dated \_\_\_\_\_:
(a) The Statement of Needs,
(b) The General Terms and Conditions,
(c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
(d) List each addendum that may be issued
(3) The Contractor's Proposal dated \_\_\_\_\_ and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
(a) Negotiations summary dated \_\_\_\_\_.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:

PURCHASING AGENCY:

By: \_\_\_\_\_ (Signature)

By: \_\_\_\_\_ (Signature)

\_\_\_\_\_  
(Printed Name)

\_\_\_\_\_  
(Printed Name)

Title: \_\_\_\_\_

Title: \_\_\_\_\_

## Attachment D – Pricing Schedule

For each technology/category listed below, provide your company's hourly rate for each of the three roles listed. If you refer to the role by a different name, list it in the space provided next to the corresponding role. Onsite pricing must be inclusive of all billables (travel, lodging, meals, etc.)

**\*\*\*\*\* The Offeror shall also provide onsite and offsite pricing for all other services/roles not listed below, including training offerings. \*\*\*\*\***

	Onsite	Offsite		Onsite	Offsite
<b>Oracle Core Technologies</b>			<b>Change Management Training, Svcs, &amp; Cert.</b>		
Project Manager or _____	_____/hr.	_____/hr.	Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.	Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.	Engineer or _____	_____/hr.	_____/hr.
<b>Oracle/PeopleSoft Enterprise Solutions</b>			<b>Security and Federation Services</b>		
Project Manager or _____	_____/hr.	_____/hr.	Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.	Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.	Engineer or _____	_____/hr.	_____/hr.
<b>Desktop and Mobile Device Management</b>			<b>Cisco Technologies, Infrastructure Support, and Virtualization</b>		
Project Manager or _____	_____/hr.	_____/hr.	Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.	Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.	Engineer or _____	_____/hr.	_____/hr.
<b>Microsoft Azure and M365</b>			<b>Audio Visual Technologies</b>		
Project Manager or _____	_____/hr.	_____/hr.	Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.	Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.	Engineer or _____	_____/hr.	_____/hr.
<b>Okta</b>			<b>Secure Research Enclaves</b>		
Project Manager or _____	_____/hr.	_____/hr.	Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.	Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.	Engineer or _____	_____/hr.	_____/hr.
<b>Data Analytics/Visualization/Warehouse/Lake</b>			<b>Other Technology</b>		
Project Manager or _____	_____/hr.	_____/hr.	Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.	Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.	Engineer or _____	_____/hr.	_____/hr.



July 25, 2023

ADDENDUM NO.: One

TO ALL OFFERORS:

REFERENCE: Request for Proposal No: **RFP# FDC-1175**  
Dated: **June 15, 2023**  
Commodity: **Information Technology Consulting Services**  
RFP Closing On: ~~Thursday, August 3, 2023, at 2:00 p.m.~~  
**Tuesday, August 15, 2023, at 2:00 p.m.**

Please note the clarifications and/or changes made on this proposal:

**James Madison University has extended the RFP closing date to Tuesday, August 15, 2023 at 2:00 p.m.**

Due to the volume of questions received, an additional addendum may be posted at a future date.

1. Question – On the 3<sup>rd</sup> page of the solicitation it states the period of performance is from date of award through one year (renewable). How many renewals periods does JMU expect in terms of being renewable?  
**Answer – Section VII. Special Terms and Conditions, Item F states that JMU has the option to extend the original contract for four (4) successive one-year periods.**
2. Question – How many FTEs are estimated to be needed onsite versus remote?  
**Answer – This would depend on the nature of the engagement.**
3. Question – In order to be awarded this project, does at least one (1) team member need to be SWaM certified? Do sub-contractors need to be small business and SWaM certified?  
**Answer – SWaM certification is not a requirement for award; however, JMU tries to work with SWaM vendors whenever possible. Evaluation points will be given to vendors that are a SWaM vendor or that use SWaM sub-contractors. Additionally, all vendors should complete the SWaM Utilization Plan in the RFP document.**
4. Question - Is there a page limit to RFP response?  
**Answer – No; however, proposals should be prepared simply and economically (see section V.A.3.b.).**
5. Question – What industry partner currently performs this work? What is the incumbent contract number and total dollar value if there is one? Please confirm if we can get the previous proposals or pricing of the incumbent(s).  
**Answer – The University currently has contracts in place with the following vendors - Unicon, Inc., Sierra-Cedar, Inc., Securance Consulting, HyperGen, Inc, Plante & Moran, PLLC, Cherry Bekaert Advisory**

MSC 5720  
752 Ott Street, Room 1042  
Wine Price Building  
Harrisonburg, VA 22807  
Office of 540.568.3145 Phone  
PROCUREMENT SERVICES 540.568.7935 Fax

LLC, Highstreet IT Solutions, LLC, Nautiquos Business Solutions, LLC, Assura, Inc., and Planet Technologies, Inc. Previous spend can be found at [www.eva.virginia.gov](http://www.eva.virginia.gov). Current contracts with the firms listed above can be found at <http://cipag.jmu.edu/cipag/>.

6. Question - Is remote only pricing an option? Will proposals be considered if only remote pricing is provided?  
**Answer – All proposals will be considered, including remote only pricing.**
7. Question – Can vendors only provide pricing for select areas as opposed to all areas?  
**Answer – Offerors may provide pricing for one or more of the technologies/categories listed in the RFP (see Section IV.1.). Offerors should identify their firm’s technology specializations in their proposal.**
8. Question – Is hosting included as part of the services required?  
**Answer – The scope may include hosting services, depending on the specific project.**
9. Question – Is operations and maintenance – patching, vulnerability scanning, remediation, etc. included as a part of the services requested?  
**Answer – The scope may include operations and maintenance services, depending on the specific project.**
10. Question – Given that Oracle’s Identity Management is currently used at JMU, how does JMU anticipate using Okta?  
**Answer – The University has selected Okta as its future Identity Management solution.**
11. Question – What is meant by Secure Research Enclaves?  
**Answer - Using Microsoft’s definition, the Secure Enclave for Research (also known as the Secure Research Enclave) is a reference architecture for a remotely-accessible environment for researchers to use in a secure manner while working on restricted data sets.**
12. Question – Does the scope of the contract include the design and implementation of any hybrid cloud infrastructure?  
**Answer – The scope may include the design and implementation of cloud/hybrid cloud infrastructure, depending on the specific project.**
13. Question – What criteria does the University use to accept or reject proposed or assigned consultants, and how does this impact the contractor’s role and responsibilities throughout the duration of the contract?  
**Answer – Consultants assigned to the University may be rejected based on a variety of reasons including, but not limited to, lack in professionalism, responsiveness, timeliness, knowledge and experience, etc.**
14. Question – Is the work expected to be SOW based or hourly based?  
**Answer – That will depend on the nature of the engagement; however, it is reasonable to expect that either could apply.**
15. Question – It is mentioned that sealed proposals will be received. Is there any that a vendor can submit a proposal online?  
**Answer – No. JMU is not set up to receive electronic responses through eVA or emailed proposal responses.**

16. Question – What is the annual spend at JMU for IT consulting services?  
**Answer – Previous spend can be found at [www.eva.virginia.gov](http://www.eva.virginia.gov).**
17. Question – Assuming an offeror currently holds a contract with a VASCUPP higher education institution, such as the University of Virginia or George Mason University, how does that impact our status on this RFP?  
**Answer – The last paragraph of the *Section II. Background* section states: “James Madison University reserves the right, when not in the best interest of the university, to decline award to any firm already on an existing VASCUPP cooperative contract in order to avoid duplication of contracts.”**
18. Question – Will you prefer vendors with a branch office presence in Harrisonburg? We are only present in Northern Virginia.  
**Answer – A branch office in Harrisonburg, VA is not required.**
19. Question - Are there specific technologies within the listed categories (such as Oracle Core Technologies, Microsoft Azure, etc.) that require specialized expertise or are of higher priority in the context of JMU’s Reengineering Madison?  
**Answer – See RFP *Section II. Background*.**
20. Question - Can you provide more information about the typical scope and size of projects at James Madison University? Are there any specific project management methodologies or frameworks that the university prefers? Do you have any major projects in progress?  
**Answer – The University’s major technology projects can be found at <https://www.jmu.edu/computing/projects-and-initiatives.shtml>.**
21. Question - What is the expected duration of the projects? Will the assignments be short-term or long-term?  
**Answer – The expected duration will depend on the specific project and may be short-term or long-term.**
22. Question - Are there any specific certifications or qualifications required for the assigned personnel?  
**Answer – Required certifications or qualifications will vary based on the specific project. Offerors should include the qualifications and experience of the personnel who may be assigned to perform work for the University in their proposals (See RFP *Section IV.3*).**
23. Question - Can you provide more details on the expected level of involvement and responsibilities of the primary contact for the account?  
**Answer – Expected level of involvement and responsibilities will vary based on the project.**
24. Question - Can you provide more information about the evaluation criteria for assessing the similarity of projects at higher education institutions?  
**Answer – Offerors should provide examples of recent projects at higher education institutions comparable to James Madison University. See RFP *Section II. Background* for more information about the University.**
25. Question - Are there any specific reporting or documentation requirements for IT consulting services?  
**Answer – Reporting and documentation requirements will vary depending on the project.**
26. Question – Allocation of points for evaluation criteria will be published to the eVA solicitation posting prior to the closing date and time. When will this be posted?  
**Answer – The points will be posted the day before the RFP closes.**

27. Question - Does the scope include advising and strategic planning support for the technologies listed?  
**Answer – The scope may include advising and strategic planning support, depending on the specific project.**
28. Question - What will be the engagement model for Vendors that are awarded this contract? Will JMU issue statements of work for the selected vendors to compete? Will the statements of work be for hourly staff augmentation or will it also include fixed price strategic engagements? Can you provide additional information on the anticipated level of collaboration and coordination between the successful bidder and JMU IT staff?  
**Answer – As information technology consulting needs arise, the University will contact a firm(s) on contract to discuss the project for which the University requires assistance. A statement of work will be requested from the vendor based on contract terms and pricing, and additional discussions will occur.**
29. Question - What will be the maximum number of awardees under this contract? Please confirm the anticipated number of awards.  
**Answer – The University does not have an anticipated or maximum number of awards for this RFP.**
30. Question – For this RFP, are resources expected to be on-site or remote in Harrisonburg, VA? Given the skill sets, we’re assuming it’s fully remote, but wanted to verify  
**Answer – Remote is usually acceptable; however, it would depend on the nature of the engagement.**
31. Question - How many users are on Office 365? What license do they have? Provide a license count.  
**Answer – Approximately 30,000 accounts. The majority have A5 licenses with a few having A3 licenses.**
32. Question - Are the licenses being purchased directly with Microsoft or through a Microsoft Partner?  
**Answer – SHI.**
33. Question - Do you currently use Microsoft Teams and/or Microsoft SharePoint?  
**Answer – Yes.**
34. Question - Is there a software in place currently to manage endpoints remotely? If so, what product(s) are being used?  
**Answer - JAMF Pro, Microsoft Intune, and Microsoft Endpoint Configuration Manager are used.**
35. Question - How often are the devices and endpoints being updated? Monthly/quarterly/etc. basis?  
**Answer – Endpoint patches are deployed typically the same month they become available.**
36. Question - Do you have employees working remotely that use a company device?  
**Answer – Yes.**
37. Question - Do you offer Bring Your Own Device (BYOD) to employees?  
**Answer – No.**
38. Question - Is there a Mobile Device Management (MDM) solution deployed?  
**Answer – Yes, for JMU owned devices.**

39. Question - How many desktops/laptops/mobile devices are you supporting?  
**Answer – JMU IT actively manages roughly 4,500 Windows devices, 2,500 Mac devices, and 1,000 mobile devices.**
40. Question - Which version of Windows are the desktops/laptops running on?  
**Answer – Primarily Windows 10 22H2.**
41. Question - Are user devices being backed up? If so, how often, and do you have retention policies in place?  
**Answer – User devices are not centrally backed up.**
42. Question – Are the servers on-site or on the cloud? Hybrid?  
**Answer - Servers are onsite.**
43. If you have a cloud environment, is it Azure/AWS/other?  
**Answer – The University has applications in both Azure and AWS.**
44. Question - How many servers do you have? What operating system are they on? Do you have any Windows Server 2012/2012R2? Any Linux Servers? Microsoft is sunsetting Windows 2012 servers in October. Is there a plan to upgrade/replace your current 2012 servers? Please provide details.  
**Answer – The University has approximately 500 servers. Windows and Linux.**
- **2012R2 (26 servers - all slated to decom by October, with the potential exception of 3 belonging to Card Services, which they handle on their own and are in discussions with IT-Sec about)**
  - **2016 (89 servers)**
  - **2019 (93 servers)**
  - **2022 (7 servers)**
  - **Linux (210 Servers) primarily running RHEL 7 & 8**
  - **16 - VMware Host servers, and 3 management servers, running VMWare version 7. (13 normal hosts, 3 VDI hosts, 2 VCenter servers and the VRealize server)**
  - **54 - additional servers are being tracked, but are either security servers (OS not maintained by us), Other Linux (CentOS) or OVAs (Virtual appliances)**
45. Question - Is there a Disaster Recovery plan in place? What is the infrastructure at the fail over location?  
**Answer - Yes. Disaster Recovery plans exist for critical systems. There is geographical, power, and HVAC redundancy at the failover location, as well as off-site backups in the event of whole data center loss.**
46. Question - How many databases are you using? Please specify which ones.  
**Answer – See RFP Section II. Background.**
47. Question - What are some of the critical applications being used today? Any ERP applications?  
**Answer – See RFP Section II. Background.**
48. Question - What is the network topology currently used, and how are these locations communicating to each other?  
**Answer - On campus locations are serviced via single mode fiber. Off campus locations are a combination of DIA circuits and wireless bridges.**

49. Question - Is there a VPN in place for remote access? Is there a firewall?  
**Answer - Yes to both.**
50. Question - What is the speed of the network connection to the internet? Do you have a backup connection?  
**Answer - Two 8Gbs pipes in active/active state.**
51. Question - How many Routers, Switches, and Firewalls are in your network?  
**Answer - L2 switches: 855  
L3 switches/routers: 10  
Firewalls: 4**
52. Question - How many buildings/locations?  
**Answer – The University has approximately 185 buildings on 750 acres. The campus is divided by interstate 81 and the C&P railroad.**
53. Question - How big is your current IT department, if any?  
**Answer - Approximately 150 employees**
54. Question - Please provide the brand for the switches, network devices, laptops, desktops, and printers.  
**Answer - Cisco Routers and switches for the wired network. The wireless network is Aruba. Laptop/Desktops are a mix of Dell and Apple. Printers vary, but a significant number are leased KM Bizhub devices.**
55. Question - Do you have any cameras to support?  
**Answer: Yes. Cameras are managed by Facilities Management.**
56. Question - Do you currently have a VOIP solution? Who is your VOIP provider? What is the brand of your desktop phones? How many extensions/DID numbers?  
**Answer – The University is currently deploying an NEC VoIP solution with Black Box Network Services, and have approximately 8,000 user and service type extensions. Phones are NEC.**
57. Question - Do you have ticketing system in place? Estimate of tickets per month/quarter?  
**Answer - Yes. The University uses Cherwell as its ITSM ticketing system and receives approximately 49,189 tickets per year.**
58. Question - Do you require someone to be on-site all the time?  
**Answer - That would depend on the nature of the engagement.**
59. Question - Is this a multi-vendor or single vendor award?  
**Answer – This is anticipated to be a multi-award contract.**
60. Question - Is there Change Management system in place?  
**Answer - Technical hardware or software changes are managed through the University's ITSM.**
61. Question - Is there an Information Technology Asset Management (ITAM) solution in place?  
**Answer – Not as such. The University uses Cherwell ITSM for CMDB, and JAMF Pro and Intune for MDM.**

62. Question - What applications are currently in use?

**Answer – See RFP Section II. Background.**

63. Question - The RFP has some focus on Salesforce in the opening. But I see that Huron was awarded a contract for Salesforce work less than 6 months ago. Is JMU looking to understand other options that can support the Salesforce deployment if needed?

**Answer – Yes, the University is interested in other Salesforce resources and skillset augmentation options.**

64. Question – Are there any pain points of issues with the current vendor(s)?

**Answer – No.**

Signify receipt of this addendum by initialing “*Addendum #1* \_\_\_\_\_” on the signature page of your proposal.

Sincerely,

Doug Chester  
Buyer Senior  
Phone: 540-568-4272



August 3, 2023

ADDENDUM NO.: Two

TO ALL OFFERORS:

REFERENCE: Request for Proposal No: **RFP# FDC-1175**  
Dated: **June 15, 2023**  
Commodity: **Information Technology Consulting Services**  
RFP Closing On: **Tuesday, August 15, 2023, at 2:00 p.m.**

Please note the clarifications and/or changes made on this proposal:

1. Question - How far along is the Reengineering Madison project? When is the new system expected to go live?  
**Answer - See RFP Section II. Background.**
2. Question - Can you please share the portfolio of projects/initiatives that will be executed under the Reengineering Madison program?  
**Answer - See RFP Section II. Background.**
3. Question - Can you provide ticket volumes that you are currently experiencing for PeopleSoft for the last one year, preferably by severity?  
**Answer - No. Ticket volume alone is not a good indicator.**
4. Question - What is the size of the existing support team supporting PeopleSoft?  
**Answer - 10 people.**
5. Question - Will existing support team members be moved to the Reengineering Madison project?  
**Answer - Yes, in part.**
6. Question - Can you provide the architecture diagram for your PeopleSoft application and its deployment?  
**Answer - This information may be provided depending on the engagement and after the execution of a SOW.**
7. Question - What is the current PUM level for each of the PeopleSoft application pillar?  
**Answer - This information may be provided depending on the engagement and after the execution of a SOW.**
8. Question - What is the number of environments that exist for each PeopleSoft application pillar (example - DEV, TEST, DMO, UAT etc.)?  
**Answer - 4 environments.**

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9. Question - What is the size of the production database for each of the PeopleSoft application pillar?  
**Answer - This information may be provided depending on the engagement and after the execution of a SOW.**
10. Question - Does Oracle Core Technologies mean the Oracle DBA skill set? If not, please provide more details.  
**Answer - Yes.**
11. Question - What skills are required in Desktop and Mobile Device Management?  
**Answer - Required skills, certifications, or qualifications will vary based on the specific project. Offerors should include the qualifications and experience of the personnel who may be assigned to perform work for the University in their proposals (See RFP Section IV.3.).**
12. Question - Please provide details of the services expected in the following technologies:  
a. Security and Federation Services  
b. Microsoft 365 (M365)  
c. Audio and Visual Technologies  
d. Secure Research Enclaves  
**Answer - Services may vary depending on the nature of the engagement.**
13. Question - What is expected from Svcs and Cert in Change Management? What are the roles of Senior Engineer/Engineer in Change Management?  
**Answer - See RFP Section IV. Statement of Needs and Section D. Pricing Schedule. If your firm refers to a specific role by a different name, list it in the space provided next to the corresponding role.**
14. Question - Does onsite pricing refer to work specifically performed on campus (in person), and does offsite work pertain to work conducted within the US but off-campus, remote?  
**Answer - Yes.**
15. Question - What positions are you looking to fill immediately? Is there current or future project you are expecting?  
**Answer - See RFP Section II. Background.**
16. Question - For onsite services, we find that a base billable rate is suitable for most of our clients, and hotel/travel expenses charged as actuals later. Would you still like a single blended hourly charge for these positions including all expenses?  
**Answer - Yes.**
17. Question - What are the Oracle core technologies focused on consulting services like OBIA, OBIEE, ODI, OAC, etc.?  
**Answer - Unavailable at this time.**
18. Question - Is there a preferred cloud provider like AWS, GCP, or Azure for a data lake/data warehouse solution?  
**Answer - No.**
19. Question - Is the data warehouse/data lake solution in place that required migrating to a new tool stack or a new solution is expected?  
**Answer - See RFP Section II. Background.**

20. Question - Is there a preferred visualization tool for analytics?  
**Answer - No.**
21. Question - Has Fluid UI been implemented in your PeopleSoft Application?  
**Answer - No.**
22. Question - Is the Boomi atom/molecule installed on-premises or in the cloud?  
**Answer – On-premises.**
23. Question - What Salesforce modules have been implemented/utilized?  
**Answer - Implementation is just beginning. See RFP Section II. Background.**
24. Question - Is it mandatory to showcase the amount of sales our company had during the last twelve months with each VASCUPP Member Institution? Can we skip this portion if we do not have an existing/ previous VASCUPP cooperative contract? Will the proposal be deemed non-responsive if we do not have sales during the last twelve months with each VASCUPP Member Institution?  
**Answer - A response to the question is required. If the answer is none/zero, indicate that as your answer. Previous sales/experience with a VASCUPP Member Institution is not a requirement for submitting a proposal or being awarded a contract.**
25. Question - Please confirm whether the "Secure Research Enclave" category includes CMMC readiness testing? Or, is this category meant for the development/implementation of the architecture for these enclaves?  
**Answer - Secure Research Enclave could include CMMC readiness or the development/implementation of the architecture for these enclaves.**
26. Question - How does JMU define "Consulting Services" and "technology advisor"?  
**Answer - See RFP Section IV. Statement of Needs.**
27. Question - Is this a new requirement or an existing requirement?  
**Answer - This RFP is to replace an existing contract with multiple vendors.**
28. Question - What are your Key Performance Indicators?  
**Answer - Key performance indicators will vary depending on the project.**
29. Question - If we have a teaming agreement with a subcontractor, does the subcontractor's experience count as experience for us?  
**Answer - The experience of a subcontractor specified in a proposal may be considered in the evaluation of the qualifications and experience of the Offeror.**
30. Question - Do we need to submit only one response including the price schedule?  
**Answer - Vendors should submit one (1) original and four (4) copies, and electronic copy in WORD format or searchable PDF (on a flash drive) of the entire proposal, INCLUDING ALL ATTACHMENTS. The original, copies, and electronic version should all be the same and include the pricing schedule.**

31. Question - As a firm registered on eVA, do we have to pay the fees before the submission of the proposal (i.e. this stage) or after award? Please also clarify that the subcontractor also has to pay this fee.  
**Answer - eVA fees are only paid upon receipt of a purchase order issued through the eVA system. eVA fees are paid by the vendor listed on the issued purchase order. If a subcontractor is issued a purchase order directly, they would have to pay the associated eVA fees; however, if the purchase order is issued to the prime contractor, and the subcontractor is working under the prime contractor, the subcontractor would not pay the associated eVA fees. The University typically issues purchase orders to the prime contractor.**
32. Question - Do we need to submit provided RFP Cover Sheet as a Cover Page of the proposal?  
**Answer - The RFP cover sheet does not need to be submitted as the cover page of a proposal.**
33. Question - Is there any local preference for this contract?  
**Answer - No.**
34. Question - Is it mandatory to have experience with higher education institutions?  
**Answer - Experience with higher education institutions is not required.**
35. Question - Please confirm whether security assessment and consulting services are included on this contract. If so, should we price this under the category "Security and Federation Services" on the Pricing Schedule?  
**Answer - The scope may include security assessment and consulting services, depending on the specific project. In addition to completing *Attachment D*, Offerors should also provide pricing for all other services.**
36. Question - Is there any flexibility in the initial contract duration of one year? Is it safe to assume that the same terms and conditions will remain same when the project is renewed? Are there any pre-defined criteria to be met by the vendors to get the renewal of contract?  
**Answer - JMU typically issues contracts for one year with subsequent one-year renewals. The terms and conditions of existing term contracts are reviewed at the time of renewal. Contract terms may be negotiated and modified as necessary. See RFP Section VIII.F.**
37. Question - Can you please specify the list of all technologies in each technology area under Section IV? Example: Do we need to consider Oracle Database, Fusions Middleware, SOA, BPM, Identity Management, MDM, Webcenter-Sites, Portal, Content, Social, OBIEE, Golden Gate and ODI when you refer to Oracle Core Technologies? Similarly, can you call out all technologies under each area?  
**Answer - See RFP Section II. Background.**
38. Question - Can you provide more information about the technologies listed in Section II of the RFP, such as Oracle Core Technologies, PeopleSoft Enterprise Solutions, Microsoft Azure, Okta, etc.? What level of expertise and experience is JMU looking for in these areas?  
**Answer - The level of expertise and experience required will vary based on the specific project. Offerors should include the qualifications and experience of the personnel who may be assigned to perform work for the University in their proposals (See RFP Section IV.3.).**

39. Question - What are the expected outcomes of the trainings that a vendor needs to provide to the staff? How much training must be provided in a month? What will be the number of attendees in each session? Will it be a virtual or classroom training?  
**Answer – Training outcomes, frequency, number of attendees, format, etc. will vary depending on specific training needs and agreed upon SOW.**
40. Question - Can you provide more details about the weightage or scoring system that will be used to evaluate proposals based on the criteria stated in the RFP? How will the award decision be made?  
**Answer - See RFP Section IV. Evaluation and Award Criteria. Allocation of points for evaluation criteria will be published to the eVA solicitation posting prior to the closing date and time.**
41. Question - Can you provide more information on the Virtual Payables options mentioned? How can vendors and suppliers enroll in these options?  
**Answer - Offerors may contact the JMU Accounts Payable office, at [acctspayable@jmu.edu](mailto:acctspayable@jmu.edu) or (540) 568-7397 to discuss payment enrollment options.**
42. Question - Please list all the technologies/tools that needs to be replaced/transformed as part of Reengineering Madison program. Are there specific projects the vendor team will be involved if selected?  
**Answer - See RFP Section II. Background.**
43. Question - Does the University anticipate any of its current implementation partners will act as a Systems/Services Integrator and an offeror submitting a proposal in response to this solicitation act as subcontractor if selected?  
**Answer - No.**
44. Question - Are you engaged with any cloud service provider? What is the scope of cloud-based solutions in this RFP?  
**Answer - See RFP Section II. Background.**
45. Question - What are your expectations for the level of service that you would like to receive from the IT consulting firm? How would you measure the success of the IT consulting project?  
**Answer - Expectations and measurements of success will vary depending on the engagement.**
46. Question - What are your expectations for the level of security that you would like to have in place?  
**Answer - JMU follows the ISO standard. When needed other standards are used depending on the need, regulations, requirements, etc.**
47. Question - What are the specific challenges that you are facing with your current IT infrastructure compelling to go through Re-engineering Initiative?  
**Answer - See RFP Section II. Background.**
48. Question - Could you provide more information about the anticipated scope of special projects where the contractor will serve as a technology expert? What are some examples of these projects and their objectives? Can you elaborate the expected deliverables and milestones for the projects covered in the scope this RFP?  
**Answer - See RFP Section II. Background.**

49. Question - Is there any preference for local or regional vendors?

**Answer - No.**

50. Question - Is it safe to assume that offsite means offshore?

**Answer - No. For the purpose of this solicitation, offsite means remote work performed not on campus.**

51. Question - Resources working offshore need to align with client working hours as per US time zones?

**Answer - Yes.**

52. Question - Will JMU provide laptops to the vendor consultants?

**Answer - No.**

53. Question - Will any additional travel costs be considered in the pricing?

**Answer - No. See RFP Section X. Pricing Schedule.**

Signify receipt of this addendum by initialing "*Addendum #2* \_\_\_\_\_" on the signature page of your proposal.

Sincerely,

Doug Chester  
Buyer Senior  
Phone: 540-568-4272