JMU

JAMES MADISON
UNIVERSITY.

COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT

Contract No. UCPJMU6767

This contract entered into this 11th day of December, 2023, by HyperGen, 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 August 11, 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 27, 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:	PURCHASING AGENCY:
By: _____	By: _____
(Signature)	(Signature)
Sherry Z. Dyer	Doug Chester
(Printed Name)	(Printed Name)
Title: VP of Sales	Title: Buyer Senior

Rev. 5/12/21

RFP # FDC-1175 Information Technology Consulting Services
Negotiation Summary for HyperGen, Inc.

December 1, 2023

1. 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.

2. Contractor's pricing schedule for the Purchasing Agency is as follows:
   (All prices are in US Dollars and per hour rates)

Oracle Core Technologies	Onsite	Offsite
Sr. Functional Lead	165.00	160.00
Senior Engineer	145.00	140.00
Engineer	125.00	120.00

Oracle/PeopleSoft Enterprise Solutions	Onsite	Offsite
Sr. Functional Lead	165.00	160.00
Senior Engineer	145.00	140.00
Engineer	125.00	120.00

Microsoft Azure and M365	Onsite	Offsite
Project Manager	145.00	115.00
Senior Engineer	145.00	115.00
Engineer	145.00	115.00

Security and Federation Services	Onsite	Offsite
Project Manager	145.00	115.00
Senior Engineer	145.00	115.00
Engineer	145.00	115.00

Desktop and Mobile Device Management	Onsite	Offsite
Project Manager	145.00	115.00
Senior Engineer	145.00	115.00
Engineer	145.00	115.00

Cisco Tech., Infrastructure Support, and Visualization	Onsite	Offsite
Project Manager	145.00	115.00
Senior Engineer	145.00	115.00
Engineer	145.00	115.00

Audio Visual Technologies	Onsite	Offsite
Project Manager	145.00	115.00
Senior Engineer	145.00	115.00
Engineer	145.00	115.00

3. Onsite pricing shall be inclusive of all travel costs.

4. Billable hours shall be for actual work hours on authorized projects/tasks rounded to the quarter hour. Billable hours shall not include travel time.

5. 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.

6. 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.

7. 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.

8. 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.

9. Contractor has disclosed all potential fees. Additional charges will not be accepted.

AGENCY NAME: <u>James Madison University</u>

CONTRACTOR NAME: HyperGen Inc

DATE: <u>10/27/2023</u>

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 /X 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 <u>James Madison University.</u> 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;
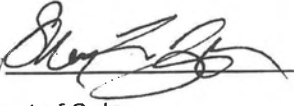
9. Delaying the acceptance of this contract or its effective date beyond the date of execution;

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 _____

Title __ Vice President of Sales _____

Printed Name __ Sherry Z. Dyer _____

October 2022

JMU

JAMES MADISON
U N I V E R S I T Y®

Information Technology Consulting Services
RFP No. FDC1175

Submitted to:
Doug Chester, Buyer Senior, Procurement Services

HYPERGEN INC.
ORACLE®
PARTNERNETWORK

30th
ANNIVERSARY

Sherry Dyer, VP of Sales

7810 Carvin Street

Roanoke, VA 24019

800-497-3744 X350

Certified **SBA WOSB**
Woman Owned Small Business

ORACLE®
PARTNER NETWORK

certified
WBENC
WOMEN'S BUSINESS ENTERPRISE

August 11, 2023

RFP No. FDC-1175

James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Building, First Floor, Suite 1023
Harrisonburg, VA 22807

Dear Mr. Chester,

On behalf of HyperGen Inc., I would like to thank you for the opportunity to present our expertise and qualifications in response to RFP No. FDC-1175 for Information Technology Consulting Services. As a leader in the PeopleSoft Consulting Services industry, we possess the functional strength and the technical flexibility required to support the needs of James Madison University ("JMU").

HyperGen offers several distinctive advantages compared to other Information Technology Service firms. With over 30 years of experience providing quality IT Services and Solutions nationwide, we have had the privilege of serving several universities throughout the country. Our unique position enables us to meet JMU's Information Technology Consulting Services needs and requirements based upon the following:

Dedicated Resource: Our proven track record in providing Onshore Remote and Onsite Consulting Services demonstrates our in-depth expertise and strategic approach to successfully utilizing PeopleSoft projects and support.

Swift Response: JMU will have a single point of contact for account management, who is readily available to assist and rapidly respond to service needs.

Harmonious Staffing: Whether you require a specialized PeopleSoft skillset for a new module deployment or enhancement, or a custom application to improve your business processes, we can provide the necessary staff support when needed. Our resources can seamlessly scale on your PeopleSoft projects, relieving the stress of onboarding resources or facilities requirements.

HyperGen has had the privilege of being a qualified supplier for IT Consulting Services for JMU in the past and look forward to being able to partner with JMU for future projects! By leveraging our experience gained through assisting numerous clients, we are confident that we can deliver high-value professional services that complement the skills, experience, and knowledge of your internal resources. If I can be of further assistance or provide additional information, please do not hesitate to contact me.

Sincerely,

Sherry Z. Dyer
Vice President of Sales
7810 Carvin Street
Roanoke, VA 24019
Phone: (800) 497-3744 EXT. 350
Email: dyers@hypergeninc.com

Table of Contents

1. Cover Sheet and Addenda Acknowledgements
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, chesterfd@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:

HyperGen Inc.

7810 Carvin Street

Roanoke, VA 24019

Date: August 11, 2023

Web Address: www.hypergeninc.com

Email: dyers@hypergeninc.com

By: _____
(Signature in Ink)

Name: Sherry Z. Dyer
(Please Print)

Title: Vice President of Sales

Phone: (800) 497-3744 EXT. 350

Fax #: _____

ACKNOWLEDGE RECEIPT OF ADDENDU: #1 _SZD_ #2 _SZD_ #3____ #4____ #5____ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:

☒ YES; ☐ NO; *IF YES* ⇒⇒☒ SMALL; ☒ WOMAN; ☐ MINORITY   *IF MINORITY*: ☐ AA; ☐ 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.

2. Plan and Methodology

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

HyperGen understands JMU seeks to contract with qualified firms to provide expertise and a range of services to support technologies used, which the Contractor will serve on special projects when needed. The Contractor will need to provide reports to JMU summarizing options and recommendations. Additionally, the Contractor will serve as a technology advisor to understand, communicate, and propose solutions requested by JMU. HyperGen also understands the Contractor will serve as a resource of research, implementation, troubleshooting, and other technical tasks to support the efforts of JMU's IT staff. HyperGen understands our functional consultants will be represented as experts in the tasks and functions assigned as well.

1. Corporate Competencies/Experience

Describe your corporate competencies/experience providing IT consulting services for one or more of the technologies listed below.

a. Oracle Core Technologies

For over 30 years, HyperGen has been providing IT Consultant and Recruitment Services with over 20 years dedicated to Oracle Core Technologies to our clients, which include but is not limited to the following:

- Oracle Database
- Fusion Middleware
- Service-Oriented Architecture (SOA)
- Business Process Management (BPM)
- Identity Management
- Master Data Management (MDM)
- WebCenter – Sites, Portal, Social
- OBIEE
- Golden Gate
- Oracle Data Integration (ODI)

b. Oracle/PeopleSoft Enterprise Solutions

HyperGen is an Oracle Partner firm providing technology-driven IT Services and Solutions. We offer consultants skilled in Enterprise Resource Planning (ERP) Software Solutions such as Oracle and PeopleSoft Huan Capital Management, Financials, Manufacturing, Supply Chain Management, Campus Solutions and related modules.

Also, HyperGen offers ERP Consulting Services with integrated Project Management that is geared to work closely with our client's staff at all levels, to scope projects and to provide consistent monitoring and approval throughout the complete project lifecycle. We can offer Onsite Functional Consulting Services, which provides Functional Consultants to assist clients with Fit/Gap Analysis, Best Practices, Business Process Reengineering, Setup and Configuration, Module Rollout, Training, Testing, Documentation, Support and Temporary Staff Augmentation. Unique to HyperGen is our Functional Team has the full support of and access to HyperGen's Onshore Remote Lab for assistance at any time during a project. Additionally, HyperGen provides Technical Consultants for Staff Augmentations, Systems Analysis, Technical Documentation, Customization, Systems Integration, Data Conversion and much more. Our

Technical Consultants are widely diversified in a variety of development tools, languages, database architectures, hardware platforms, networking and related development applications.

PeopleSoft Project Management

HyperGen offers PeopleSoft related Project Management Services as part of our overall solution package to clients. Our Project Management Services are geared to work closely with the client's staff at all levels to scope all project types and to develop comprehensive project plans. Once developed, our Project Managers can execute the plan either independently, jointly with client staff or turn over a "ready to run" plan to the client. We have successfully managed such projects as: implementations, upgrades, new module deployment, custom system development, etc. Additionally, our Project Managers can manage all aspects of the project including budgeting, costing, recruiting, execution, resource allocation, problem solving and all other tasks related to successfully performing a project according to an established timeline and budget.

PeopleSoft Functional Consultancy

HyperGen's PeopleSoft Functional Consultants can assist clients with Fit/Gap Analysis, Best Practices, Business Process Reengineering, Setup and Configuration, Module Rollout, Training, Testing, Documentation, Support and Temporary Staff Augmentation.

PeopleSoft Technical Consultancy

HyperGen's PeopleSoft Technical Consultants can perform systems analysis, technical documentation, creation of system enhancements/customizations, systems integration, data conversion, 3rd party interface development, testing, support, installation, configuration, best practices, architecture assessment, mentoring and training. In addition, they can install, configure and maintain the entire PeopleSoft suite on multiple platforms supported by PeopleSoft. Our Technical Consultants are widely diversified in a variety of development tools, languages, leading technologies, hardware, networking, database architectures, supporting application software and automation. This has proven to be a valuable asset to clients, for our staff can typically fulfill more than limited roles when the project requires insuring successful deployments. In addition, they have a proven track record in their mentoring skills assisting client staff to quickly ramp up on new technologies. Our Technical Consultants are the perfect resource for the rapid and economical delivery of your IT advancement needs.

PeopleSoft Upgrade Consultancy

HyperGen's PeopleSoft Upgrade Consultants have in-depth knowledge of the full upgrade lifecycle. Our consultants can manage the complete upgrade independently or as part of a team effort. They are also developers, installers and functionally knowledgeable, which enables them to resolve problems faster and more accurately due to their diversified background. Our Upgrade Consultants also manage all of the updates/fixes, bundles, tax updates and change management during the upgrade. We have developed many unique collaborative applications, scripts and techniques that streamline the upgrade process even further. These solutions have been developed and tested during real world upgrades and have a proven track record to support them. By partnering with HyperGen, our clients receive the exact amount of assistance needed to perform their upgrade at a lower cost and in a faster timeframe than they would be able to achieve via any other means.

Systems Integration

HyperGen offers Systems Integration Services, which assist clients in trying to gather disparate systems and maximizes their corporate investment in the Information Technology applications. We have

performed successful integration projects for many of our clients and have a proven track record for unsurpassed integration services.

Data Migration

HyperGen has performed numerous data migration projects from legacy applications. Through numerous projects of this type, we have developed our own software application for the automation of migration script development. The HG Data Mapping tool can dramatically reduce the data mapping and conversion efforts required when migrating legacy data into PeopleSoft. Traditional, methods cannot match the accuracy and efficiency of our team when they have this software tool at their disposal. Our consultants can concentrate on the actual analysis and mapping efforts without the need to conform the legacy data to specific formats for the more effective use of their expertise and knowledge during the project.

c. Desktop and Mobile Device Management

Our seasoned professionals are adept at crafting tailored solutions for seamless desktop and mobile device management. From provisioning and deployment to configuration and ongoing maintenance, we ensure that your devices remain efficient, secure, and accessible anytime, anywhere. HyperGen has years of experience working with Windows and Apple equipment ranging from computers to mobile devices. We have handled Windows PC's of multiple vendors and even built custom machines for clients. These systems incorporate Windows operating systems ranging from Windows XP to Windows 11, Linux Operating systems (CentOS, Ubuntu & Oracle Linux) and Windows Servers ranging from Windows 2000 to Server 2022. We have datacenters that are managed by HyperGen that utilize varying hardware, Operating Systems and Virtualization technology. We have utilized third-party management tools as well as internal Microsoft tools for updates, patch management and anti-virus handling.

d. Microsoft Azure and M365

HyperGen Inc. boasts a deep-rooted understanding of Microsoft Azure and M365 ecosystems. Our certified experts help you harness the power of cloud computing, enabling scalable and flexible solutions that drive innovation, collaboration, and productivity within your organization. We have dealt with multiple clients using Microsoft 365 and Azure integration. This includes local AD and Azure AD interconnectivity. We have years of experience in handling the Microsoft 365 environment for Azure AD and Exchange, synchronization between local Windows AD and Azure AD. We've setup and managed several virtual environments in Azure. We are currently a Microsoft Partner and can levy that relationship with any future endeavors.

i. Cisco Technologies, Infrastructure Support, and Virtualization

With a wealth of experience in Cisco technologies, HyperGen Inc. is your partner in building resilient and high-performance networking infrastructures. Our experts excel in network design, implementation, and optimization, leveraging Cisco's cutting-edge solutions. Additionally, we specialize in virtualization technologies that enhance resource utilization and streamline IT operations. HyperGen has dealt with Cisco equipment ranging from Wireless, networking, virtualization hardware, routers and phones.

j. Audo Visual Technologies

HyperGen Inc. goes beyond traditional IT boundaries to deliver exceptional audio-visual technology solutions. Whether it's designing immersive conference rooms, advanced multimedia presentations, or interactive collaboration spaces, we transform your workplace into a hub of innovation and engagement.

2. Approach and Methodology

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.

HyperGen's Account Executive will monitor project progression and is available at any time to assist JMU with any resource needs. When JMU needs resources to assist with internal IT needs, JMU will send the request to the Account Executive. The Account Executive along with our support staff will be able and available to provide assistance during the full project lifecycle.

Once qualified consultants are internally interviewed and availability is confirmed, the Account Executive will then provide the qualified consultants to JMU for review and coordination of the initial phone interviews. HyperGen's Account Executive will assist in every aspect of the interview process as needed. Additionally, the Account Executive will work with JMU to complete contracts for the consulting service once a viable consultant is selected.

Once JMU has selected the consultant to perform the requested services, the Account Executive will work with JMU in contract negotiations and the completion of the contract. When the consultant begins work, the Account Executive and JMU will receive weekly status reports for work performed and will remain in communication with the consultant as well as JMU to ensure the work is being completed to the satisfaction of JMU.

3. Experience of Personnel

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.

HyperGen has assigned the following personnel to JMU. Due to the services being provided will be on an as needed basis, we have provided consultants who we know will remain available for the duration of the term of this contract, which will include the Account Executive/Primary Contact, Senior Recruiter, Recruiter, and Senior System Administrator. Additionally, we have provided sample resumes for Project Manager, Functional SME and the Technical Developer positions to ensure we are able to fulfill this portion of the contract services as well.

Ms. Sherry Z. Dyer, Account Executive/Primary Contact
Ms. Dyer began working with HyperGen Inc. in 1993 and was a driving force in the establishment of the present-day corporation. She performed various roles in the development and advancement of the company. In the initial years of employment, she held positions of Corporate Manager, Technical Consultant, and Sales Representative. She led the sales team in the marketing of IT Consulting and Recruitment services. Ms. Dyer's responsibilities have steadily grown and she now holds the position of CEO and VP of Sales. Ms. Dyer continues to exhibit leadership and direction for the growing company on a daily basis.
Please see Appendix A for Ms. Dyer's complete resume.

Ms. Dana Garrett, Senior Recruiter
Ms. Garrett's broad-based background encompasses exceptional work ethic and commitment to organizational objectives within a highly competitive and rapidly changing marketplace. She is a proactive manager, team builder and tactical planner with ability to attract and secure key players in building strong and lasting business relationships. She has been recognized for decisive leadership and proven ability to face challenges head-on and execute sound decisions while fulfilling client resource needs. She has 18

years of full lifecycle recruiting expertise specializing in Engineering, Information Technology and ERP Consultation Business.

Please see [Appendix B](#) for Ms. Garrett's complete resume.

Ms. Suzanne Salzano, Recruiter

A highly motivated and experienced HR professional with a strong background in recruitment, employee engagement, and onboarding. Proven track record of creating and implementing HR policies and procedures, as well as collaborating with upper management and outside vendors to maintain CSR standards. Experienced in post-closing, customer care, and recruiting, with excellent communication and problem-solving skills. Proficient in handling complex transactions, reconciling accounts, and generating reports. Adept at working with large volumes of candidates in both blue and white-collar categories.

Please see [Appendix C](#) for Ms. Salzano's complete resume.

Mr. Ted Ouimette, Senior System Administrator

Mr. Ouimette is a dedicated and motivated Technology Systems Administrator with the keen ability to multi-task at a proficient level. He is a professional end user, technical trainer and program developer. He is a highly effective communicator with multi-dimensional experience at all levels of a business team and has the ability to tailor a company's vision with practicality with vast knowledge of industry hardware and software solutions.

Please see [Appendix D](#) for Mr. Ouimette's complete resume.

Ms. Roblyn Brand, Project Manager

Ms. Brand brings a wealth of experience as a PeopleSoft Developer, Administrator, and PeopleSoft SQL Server DBA. She has expertise as both a Project Manager and as a Technical Lead in PeopleSoft v8.9, 9.0, 9.1 and 9.2 Upgrades. She has expertise in PeopleSoft Financials, HRMS, Campus Solutions and Interaction Hub Applications including Upgrades, PeopleTools, PeopleCode, Integration Broker, SQR's, Architectural /Technical Assessment and Change Management using PUM and Change Assistant.

Please see [Appendix E](#) for Ms. Brand's complete resume.

Mr. Adey Harris, Project Manager

Mr. Harris is a Senior Program Manager and ERP/Cloud Consultant with experience in helping clients implement, upgrade and manage their enterprise and cloud applications systems. His efforts have helped clients improve and streamline their business processes enabling their employees to be more efficient and productive. He has the ability to manage and unify efforts amongst Business and IT teams. He is skilled at understanding the big picture, identifying complex business issues and translating them into system specifications and designs. This allows clients to achieve focused and successful ERP new implementations and upgrades. He is also skilled in Scope and Quality management, building a vision for delivery success and executing Strategies that generate quantifiable results.

Please see [Appendix F](#) for Mr. Harris' complete resume.

Ms. Ann Marie Mims, Functional SME

Ann Marie brings the experience of more than 35 years of HRMS including 26 years of PeopleSoft hands-on functional & technical experience, project management, lead fit-gap designer, component configuration, test lead (all phases), functional to technical liaison, implementation analyst and data conversion specialist. She considers herself to bring a broad variety of skills defined as 80% functional HRMS and 20% technical. She is specialized in information technology, focusing her software lifecycle expertise on Human Resources, Payroll, Benefits, Time and Labor, Absence Management, Stock Administration, Enterprise Learning Management, Canadian Payroll and ePerformance systems

implementations and conversions. As a functional SME and business process re-engineering specialist, designed and created modifications while overseeing projects implementations, creating and testing project deliverables and documentations.
Please see Appendix G for Ms. Mims' complete resume.

Mr. Johnny Springer, Functional SME
Mr. Springer has worked with PeopleSoft clients since Release 3.0. He is a skilled consultant that has extensive experience managing project teams during the implementation of PeopleSoft as well as configuration, customization, and implementation of PeopleSoft systems. He has worked on global PeopleSoft Implementation projects as both a Team Lead and functional consultant. He has conducted training for Core Team as well as End Users.
Please see Appendix H for Mr. Springer's complete resume.

Mr. Crhistopher Lewis, Technical Developer
Over 25 years of experience in Information Technology with expertise in PeopleSoft HCM/FSCM, database, networking, Microsoft Exchange, and SharePoint administration. A dedicated and hard-working individual with excellent communication skills possessing the ability work with all levels of an organization. Highly successful in meeting new technical challenges and finding solutions to meet the needs of customers.
Please see Appendix I for Mr. Lewis' complete resume.

4. Continuity of Consultants

Describe the ability to provide continuity of consultants throughout the duration of a project.
HyperGen checks the availability of all key staff before assigning them to a project. We ensure key staff submitted and approved will remain on the project for the duration. HyperGen provides the right to our clients to request an alternate consultant for the performance of the project services. HyperGen will present alternate candidates for the client to select and acquire the services of the desired resource. The process of exercising this guarantee provision will take no longer than 15 business days. This guarantee is available only for contractual agreements, which span more than four weeks of service. We strive to have consultants complete the project assignments as we know the negative impacts caused by not having the consistency needed to complete the project in accordance with established timelines. Albeit, we have experienced issues beyond ours and our teams control such as personal matters that have required our firm to find a replacement resource. We assign the highest priority to finding the right resource to minimize any impacts such an occurrence would cause. We also have a core focus on team work at HyperGen, which enables our staff to reduce any downtimes for resource transition that could occur. We can assure JMU these rare instances, when a consultant was not able to complete the project, are handled professionally and in a timely manner.

5. IT Consulting Services Available

Describe IT consulting services available from your firm. Example 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.
With over 30 years in technology-driven IT Services and Solutions, HyperGen is a trusted company. Our clientele has grown over 165 companies and we anticipate continued growth.

At HyperGen, we exceed expectations. We deliver a variety of services, highlighted below, both onsite and from within our U.S. Based Onshore Remote Services Lab. Most importantly, we work closely with our clients to adhere to their budget, timeline, deliverables and all other project requirements. We realize one size does not fit all; therefore, HyperGen offers a variety of services and solutions to provide the level of management you need for your PeopleSoft applications.

Services

PEOPLESOFT® SERVICES

ONSHORE REMOTE SERVICES LAB | **ONSHORE MANAGED** SERVICES & CLOUD HOSTING | **ONSITE CONSULTING** SERVICES

APPLICATION DEVELOPMENT — Interfaces, PeopleTools & 3rd Party Development, Testing & Validation, Reporting

INCIDENT MANAGEMENT — Break-Fix, Data Issues, Root Cause & Resolution, End User Support

RELEASE MANAGEMENT — PUM Images, Upgrades, Bug Fixes, Regulatory Updates

APPLICATION & DATABASE MANAGEMENT — Database Administration, Performance Tuning, Project/Object Migration, Back Up & Refreshes

SPECIAL PROJECTS — Security, Data Conversion, Data Warehousing, Functionality Implementation

HG Maintenance Support Package (HGMSP)

HyperGen's HG Maintenance Support Package Service (HGMSP) is a comprehensive solution to meet your PeopleSoft Update Manager (PUM) Image, Critical Patch Updates (CPU) and PeopleTools Upgrade needs. Our Support Package is a custom fit solution to ensure your ERP system remains current, so you can take advantage of the newest features and technology.

Staying updated on the latest PUM Images includes bug fixes, regulatory updates and new features/functionality such as delivered work centers, activity guides, additional delivered fluid and classic plus pages, improved customization management tools, etc. HGMSP Team members can assist with the development of a PTF library, decoupling of your existing customizations and more. Our U.S. Based

Onshore Remote Services Team will ensure your software is current and functioning, enabling your staff to focus on their critical roles in achieving your corporate ERP goals.

Cloud Hosting and Infrastructure Services

HyperGen's Cloud Infrastructure Services (IaaS) are subscription services for any business that wishes to become modernized and have the capabilities of a Cloud Environment such as maximum flexibility for users, enhanced data compliance, backup and security and the elimination of costly networking hardware!

HG Cloud supports both current releases of PeopleSoft applications as well as those prior to v9.2. Multiple database backends are supported in a Private Cloud instead of multi-tenant. HG Cloud is SSAE16 (Statements on Standards for Attestation Engagements) Type II compliant hosting center. Additional Certifications and Compliance Standards include, HIPPA, HiTrust, ISO 27001, PCI and the Uptime Institute M&O Stamp of Approval.

Oracle Cloud® for PeopleSoft provides Infrastructure and Platform as a Service (IaaS & PaaS) for PeopleSoft Application v9.2 and higher. Utilizing the PeopleSoft Cloud Manager, HyperGen can "Lift and Shift" your PeopleSoft environments to the Oracle Cloud.

Coupled with your choice of HyperGen's IaaS options, HyperGen's Cloud Hosting, Managed Services and HG Maintenance Support Package service offerings provide a full range of solutions that help you maximize the value of your PeopleSoft® investment and improve performance while reducing cost and risk.

HyperGen as a Service (HGaaS)

Our extensive **Technical Resources** combined with our **HG Toolbox** and **Infrastructure** creates HGaaS, a service that is second to none in terms of developing enterprise grade custom software solutions. With over 25 years building, maintaining, and securing IT systems, we have acquired a vast number of technical resources to assist or completely handle your custom software developments.

HGaaS includes the **HG Platform** (PaaS), a streamlined, integrated platform that eliminates the need for developers to be experts in a multitude of technologies. Our **HG Toolbox** that is full of modern and legacy capabilities for both client-server and Web based applications. Our team has also developed a **Web-based Rapid Application Platform** (WRAP) that we offer as part of our cloud platform services. With the WRAP platform, our team can focus on the business and application requirements that dramatically reduces time to delivery for our clients. This platform as a service offering combines our talent with toolsets that can easily turn your ideas or legacy applications into a comprehensive cloud-based solution.

PeopleSoft Emerging Technology & User Experience (UX) Services

Our PeopleSoft staff are experienced in development and deployment of the latest PeopleSoft Emerging Technologies such as PeopleSoft Portal/Interaction Hub (iHub), FLUID User Interface, Tiles, WorkCenters, Dashboards, Elasticsearch Framework, Testing Framework (PTF), Analytic Framework, REST Framework and Crystal to BI Publisher Conversions.

PeopleSoft Project Management

Our Project Managers work closely with your staff to scope and develop comprehensive project plans. Once developed, our Project Managers can execute the plan either independently, jointly with client staff

or turn over a "ready to run" plan to the client. We have successfully managed such projects as: implementations, upgrades, new module deployment, and custom system development.

PeopleSoft Functional Consultancy

HyperGen's PeopleSoft Functional Consultants assist clients with Fit/Gap Analysis, Best Practices, Business Process Reengineering, Setup and Configuration, Module Rollout, Training, Testing, Documentation, Support and Staff Augmentation.

PeopleSoft Technical Consultancy

HyperGen's PeopleSoft Technical Consultants are widely diversified in a variety of development tools, languages, leading technologies, and hardware, and are able to fulfill multiple roles in order to ensure successful deployments. They are experts in installing, configuring and maintain the entire PeopleSoft suite on multiple platforms. In addition, they act as mentors for your staff, so your team can quickly adapt to new technologies. Our Technical Consultants are the perfect resource for the rapid and economical delivery of your IT advancement.

PeopleSoft Upgrade Consultancy

HyperGen's PeopleSoft Upgrade Consultants have in-depth knowledge of the full upgrade lifecycle. They are developers and installers, able to manage the upgrade process independently or as part of team, as well as resolve issues that may arise during the upgrade lifecycle. They function as multiple roles, eliminating the need for additional specialized resources. In addition, we have developed many unique collaborative applications, scripts and techniques that streamline the upgrade process even further. By partnering with HyperGen, our clients receive the exact amount of assistance needed to perform their upgrade at a lower cost and in a faster timeframe then they would be able to achieve via any other means.

Data Migration

HyperGen has performed numerous data migration projects form legacy applications, and we have developed our own software application for automated migration script development. The HG DataMapper tool can dramatically reduce the data mapping and conversion efforts required when migrating legacy data to PeopleSoft, and allows our team to effectively use their expertise and knowledge of analysis and mapping. Traditional methods cannot match the accuracy and efficiency of our team with this software tool.

6. Training Options

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.

HyperGen typically leverages the Documentation Tools available in use at the clients' site. Many clients have varying documentation tools and in order to provide them with a consistent format for training and documentation, we will adopt your business solution. Our staff are skilled in using the documentation tools provided by Microsoft, PeopleSoft, Oracle, and other industry standard solutions. Our training documentation is a combination of documentation provided by the software supplier and custom materials. HyperGen provides PeopleSoft Functional Custom Training. HyperGen also provides customized training courses to clients and has recently assisted clients with nVision, Recruiting, ePerformance, Benefits Administration Inventory Module features, and other courses.

HyperGen only provides custom PeopleSoft Functional and related training at this time. Our assistance in this area is performed by our PeopleSoft Functional Team experts who will work with your staff to design a course outline specific to your unique team learning needs. For Off-the-Shelf (OTS) training, we can

provide recommendations for JMU based upon the course material requested and this is typically provided through Oracle University or an Oracle Partner firm.

HyperGen does not have a catalog of training offerings.

7. Recent Projects

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

Rhode Island College

Project:	On-Call PeopleSoft Consulting Services
Project Description:	HyperGen is providing On-Call PeopleSoft Consulting Services on an as needed basis as well as providing Slate migration services.
Timeframe:	September 2017 – Present
End Result:	Since the project is ongoing, we do not have an end result as of yet.

Tufts University

Project:	Onshore Remote PeopleSoft Consulting Services
Project Description:	HyperGen is providing Onshore Remote PeopleSoft Application Support Services for Tufts University's HR, FSCM, CS and Interaction HUB on an as needed basis.
Timeframe:	February 2015 – Present
End Result:	HyperGen is continuing to provide Onshore Remote Technical Consultant Services on an as needed basis. Tufts University has continued to renew their bulk hours to receive continued support from our Remote Services Team.

University of Rhode Island

Project:	PeopleSoft and OCI Migration/PeopleSoft and OCI Managed Services
Project Description:	HyperGen is providing Onshore Remote PeopleSoft and OCI Migration and PeopleSoft and OCI Managed Services.
Timeframe:	July 2022 – Present
End Result:	HyperGen completed the PeopleSoft and OCI Migration portion of the project and are currently providing PeopleSoft and OCI Managed Services.

In addition to the provided recent projects, HyperGen has been able to provide/is providing Onshore Remote and Onsite PeopleSoft Consulting Services to the following Higher Education Institutions. HyperGen has experience with serving the needs of the Higher-Ed Community with various PeopleSoft Services and Solutions and has established ongoing relationships with such institutions as:

- University of Virgina Medical Center
- Emory University
- Virginia Polytechnic Institute & State University
- Heald College
- Illinois Central University
- Madison Area Technical College
- Oka University
- Akron University
- Michigan State University
- Berkeley College
- Virginia Community College System
- North Carolina State University
- University of North Carolian – Chapel Hill
- New Jersey City University
- Boston College

- Dartmouth Hitchcock Medical College
- Florida State University
- PASSHE Penn State Higher Education System

- Boise University
- UMass Health Alliance

Additionally, HyperGen is an approved PeopleSoft Services and Solutions vendor for:

- University of Kansas
- Kansas State University
- University of Missouri
- University of Minnesota

- Indiana University
- University of Connecticut
- University of Iowa
- University of Oklahoma

HyperGen continues to develop services for the Higher-Ed Community and has participated/is participating in the PeopleSoft Higher Education User Groups (HEUG) to reach out to more of the Higher Education Industry.

8. Knowledge Transfer

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

HyperGen is experienced in retaining and managing key knowledge in our organization resulting in a smooth and effective continuation of service over the course of projects with our clients. We have maintained repeat business and relationships with clients for over 30 years. Knowledge transfer is critical for the long-term success of any IT project. Through our corporate team approach, our staff meets weekly or more frequently if business needs demand to review the apprise team members of current projects and any related concerns. Through the team approach, our clients will receive their collective knowledge of our team without any impact on their cost estimates. Our IT resource team also maintains a proprietary library of proven project solutions so that our staff can access previous successful project examples to expedite development for current client projects. HyperGen will effectively communicate with your team both through oral and written presentation of the overall project performed and the necessary information needed to ensure your team can maintain any solution going forward.

HyperGen will provide user documentation and technical documentation in an electronic format for all application modules, integrations, interfaces, modifications, and development work performed on behalf of JMU. User manuals will be updated accordingly. All terminology used, data field descriptions established, and code and business processes modeled will be documented by our PeopleSoft experts.

- HyperGen's PeopleSoft experts will create these documents with internal input from JMU.
- All documentation will be completed in accordance with JMU standards.
- All documents will be submitted to JMU for approval.

Our PeopleSoft experts are experienced with developing, evolving and executing knowledge transfer plans, including content development and delivery for JMU's staff and core users. Essentially, HyperGen's process is designed to maintain current information throughout all phases of each of our client's projects.

Analyze:
• HyperGen will gather knowledge and skills from both HyperGen and JMU employees
• Afterwards a knowledge transfer approach is developed.

Collaborate:
• The approach is submitted for the Rockland County's approval and feedback.
• Feedback is incorporated into the knowledge transfer plan. Feedback is solicited during the planning phase through the end of the project.

Document:
• Training materials are developed and documented in various formats for use in both formal and informal training and knowledge transfer methodologies and HyperGen's best practices

Share:
• Information is shared through documented formats, presentations and training.
• Knowledge transfer is an ongoing process throughout the entire project, and happens both verbally and through written documentation and procedures.

9. Approach to Project Management

Describe your approach to project management.

HyperGen has achieved many successful projects deploying a joint Project Management Approach with the philosophy of working closely with our clients to manage the flow of projects to insure it progresses forward according to the established timeline. Our Project Manager is able to oversee our staff objectives and manage their tasks accordingly. With weekly status meetings and open communications, we can eliminate any issues that could arise from lack of communication regarding resource/task assignment and respective deadlines. HyperGen's Account Executive will also monitor project progression and be available at any time to assist JMU and HyperGen's Project Manager with any resource needs. HyperGen follows Oracle and Industry Best Practices for Project Management and will leverage Project Management tools such as MS Project Plan, HG Portal and Client SR tracking systems to promote communication of project objectives and easy access to information for all client staff members.

10. Functional Staffing Plan

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

With each identified project, HyperGen develops a proposed project plan in conjunction with the JMU resources identified as the subject matter experts. Within this plan will be the number of resources, characteristics, resource utilization percentage (i.e., HyperGen vs. JMU resource) any resource outages such as for peak business processes, overall timeline, Change Management processes, and deliverables. The functional staffing plan would require sign off prior to kick off of each project.

11. Functions Provided by Subcontractor

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

HyperGen does not intend to subcontract any of the functions provided in this proposal or being requested by JMU at this time.

3. Narrative Statement

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.

Expertise

HyperGen Inc. is an Oracle Partner firm providing technology-driven IT Services and Solutions nationwide. We offer consultants skilled in Enterprise Resource Planning Software Solutions such as Oracle and PeopleSoft Human Capital Management, Financials, Manufacturing, Supply Chain Distribution, Campus Solutions and related modules. Additionally, we offer IT Recruitment Services, Onshore Remote Services, Managed Services and Hosting Services within our Development Lab in our corporate office located in Roanoke, VA.

HyperGen was established with a commitment to provide unparalleled service and software solutions to clients for their Information Technology needs. Our highly skilled consultants integrate into your corporate atmosphere realizing our function is to augment your internal team. We recognize communication as an important factor and welcome the opportunity to share our PeopleSoft experience in a cost efficient and timely manner. Our corporate philosophy is to provide the highest level of service to build a long-term business partnership with our clients.

At HyperGen, we have an unwavering commitment to our clients to provide a stable environment and exceed the expectations of all whom we form business partnerships with. We do not succeed until we have met the project needs and expectations of every one of our clients and can provide and atmosphere for our employees in which they feel free to contribute and grow. We strive to offer the highest quality services at competitive rates and work closely with our clients to adhere to their budget, timeline, deliverables and all other project requirements.

HyperGen has successfully serviced hundreds of clients. We have a strong record of client satisfaction, and our clients regularly serve as references for us. In fact, a high percentage of our clientele comes from repeat business and word-of-mouth referrals. We have experience offering a full range of consulting within our lines of business.

HyperGen strives to deliver to each client world-class consulting services, on time and within budget. We work closely with the client to understand their business needs and mitigate project risk. HyperGen approaches each project as a partnership, working side-by-side with the client to transfer knowledge and guide the project through completion. Our clients tell us they appreciate HyperGen's delivery of practical IT solutions that work, consistently competent people, deep knowledge of business and IT, and passion for understanding and satisfying client needs.

Qualifications

HyperGen offers distinctive advantages in comparison to other Information Technology Service firms. Hyp9erGen has provided quality IT Services and Solutions nationwide for over 30 years. Our flexible business model utilizes an Onsite and Onshore Remote Services Team of Technology Professionals, reducing your costs while addressing your business process needs within a reduced timeframe. HyperGen is uniquely positioned to meet the Information Technology Consulting Services needs and requirements of JMU based upon the following:

Dedicated Resource: We have a proven track record of providing Onshore Remote and Onsite Consulting Services to clients and bring a depth of expertise and strategy to successfully utilize PeopleSoft project and support.

Swift Response: JMU will be provided a single point of contact for account management who is ready to assist and available to rapidly respond to JMU's service needs.

Harmonious Staffing: Whether it's a PeopleSoft specialized skillset you require for a new module deployment or enhancement or a custom application developed to enhance your business process, we will provide JMU with the staff support needed, when needed. We are equipped with the necessary resources to seamlessly scale resources on your PeopleSoft projects, relieving the stress and worry of onboarding resources or facilities requirements.

Knowledge Mentoring: Our PeopleSoft experts become an extension of your staff and will have access to our wealth of knowledge of our Onshore Remote Services Lab resources. These tools allow them to provide knowledgeable mentoring and assist with troubleshooting all aspects of our clients' PeopleSoft and related business systems.

Advanced PeopleSoft Expertise: Our PeopleSoft experts become an extension of your staff and have a wealth of expertise that has been achieved in many different industries. In many cases, we can provide an idea or solution that has already been proven with other PeopleSoft clients that we have worked with. Our team of experts possess a wealth of knowledge in PeopleSoft and each have successfully completed our comprehensive and stringent proprietary PeopleSoft Training Course.

Innovative and Proprietary Tools: Our firm has resources dedicated to the development of emerging technologies and software tools that our team utilizes to streamline projects for our clients. Software solutions such as our HG Upgrade Toolkit and HG DataMapper are outstanding examples of applications that will significantly reduce the costs and time associated with upgrades and implementations.

Managed Services: Partnering with HyperGen for your Managed Service needs provides you with a team of PUM experts on all PeopleSoft pillars. Our team provides automatic monitoring along with notification and scheduling of software updates with impact reviews of any new functionality deployed. Keeping your software current and maximizing the benefits of PeopleSoft's new continuous delivery module, our Managed Services will also provide you with peace of mind with full application support and maintenance in a predictable and affordable payment model.

PeopleSoft Cloud Hosting: Our Cloud Hosting Service options include both the Oracle Cloud Hosting Environment as well as the HG Cloud Hosting Solution within our certified state of the art datacenter. Our Cloud Hosting clients leverage the benefits of an agile PeopleSoft cloud deployment with end-to-end migration services and full management of your PeopleSoft Cloud Infrastructure. Our cloud hosting services will help you reduce costs in capital investments as well as provide JMU with stable and seamless PeopleSoft applications, high performance, security and compliance.

Reducing Operating Costs: By allowing our team to provide PeopleSoft Consulting and Support Services to JMU, you can reduce/eliminate costs of managing resources and the associated overhead, supplement your staff during special projects, provide coverage during unexpected vacancies and provide JMU staff resources with the knowledge and expertise to meet your business goals faster!

Experience

We service clients in a vast array of industries such as Utilities, Manufacturing, Retail, Local, State and Federal Government to name a few. Below are examples of services we have performed for past and current clients. Clients with an asterisk (*) have additional detailed project summaries listed beyond this chart.

Client	Date of Service	Modules / Projects
New York State Energy Research Development & Authority	2016-Present	**FSCM Modules:** General Ledger, Commitment Control, Accounts Payable, Accounts Receivable, Billing, Customer Contracts, Asset Management, Project Casting, Purchasing and Supplier Contract Management, Supply Chain, eSupplier and Grants. • PeopleTools v8.54-v8.56 Upgrade & Yearly PUM Updates • PeopleTools v8.56-v8.57 Upgrade & Yearly PUM Updates • Database Administration • PeopleSoft Administration • Provide documentation for application configuration of NYSERDA PeopleSoft environment
Nassau County (NY): Board of Cooperative Education (Nassau BOCES)	2016-Present	**FIN Modules:** General Ledger, Accounts Payable, Purchasing, Asset Management **HCM Modules:** Human Resources, Base Benefits, Payroll for North America, Absence Management, Employee Self-Service, eRecruit. • Current FIN v9.1-v9.2 Upgrade • HR v9.1-v9.2 Upgrade • Crystal Conversions to BI Publisher • Absence Management functional Business Process Review
Savannah River Nuclear Solutions	2014-Present	**FSCM Modules:** Billing, GL, Account Payable, Project Costing, Purchasing, Receivables, Asset Management, Contracts, and ePro. • v9.2 FSCM Upgrade • Ongoing Onsite PUM & PeopleTools Support • Ongoing functional and technical FSCM and HCM support

Nassau Board of Cooperative Education Services (Nassau BOCES)

HyperGen have been providing Onsite and Onshore Remote PeopleSoft Consulting Services to Nassau BOCES since 2016 in the following areas:

HCM 9.1-9.2 Upgrade – HyperGen is assisted Nassau BOCES with a successful 9.1-9.2 HCM upgrade by providing Onsite and Onshore Remote PeopleSoft Consulting Services to upgrade all modules. This includes a PeopleTools upgrade from 8.54 to 8.55. Our functional experts provided an HCM 9.2 DEMO (Payroll, Benefits, HR, Absence Management, ACA & Reporting) for discovery of functional differences between 9.1 and 9.2 and new functionality in 9.2

Crystal to BI Publisher Conversion – HyperGen provided an onsite consultant for the entire duration of the project. The onsite consultant worked closely with Nassau BOCES' internal team and HyperGen Remote Services team to ensure the project was kept on schedule and within budget. The HyperGen team

converted a total of 120 crystal reports (110 Financials and 10 HCM) specifically 25 simple, 45 medium and 30 complex reports.

Expense Module Implementation – The scope of this engagement was to provide remote PeopleSoft consulting services for an expense module implementation. Our consultant was specifically involved with the technical design and build, Unit Test and UAT for the mileage field, expenses and travel authorization workflow and related content links on expenses and travel authorization pages.

Additional Miscellaneous Tasks – Our team has been tasked with production issues, creating new interfaces, technical and functional design documents, SQR development and testing, retrofitting of customizations and creating training and knowledge sharing documents.

New York State Energy Research Development Authority (NYSERDA)
HyperGen have been providing Onsite and Onshore Remote PeopleSoft Consulting Services to NYSERDA since 2016 in the following areas:

PeopleSoft Administration – Assist with functions, including but not limited to, role-based security, PeopleTools patches and upgrades, PeopleSoft application upgrades, maintenance packs, Web Server configuration and support, tuxedo, process scheduler and application server configuration and support, PUM, quarterly security patches, general production support, etc. in support of NYSERDA's various PeopleSoft environments.

Based on NYSERDA's unique situation and Oracle releasing new PeopleTools versions every year in the future, HyperGen provides NYSERDA a maintenance support package which includes PeopleTools upgrades every year, yearly PUM updates, quarterly critical patch updates, PeopleTools patches, regulator updates, and customization impact review and feature overview as provided by Oracle PUM Image Release documentation. The scope of this option is to perform a three-year maintenance support package. The following continuous cycle chart is NYSERDA's tailored maintenance support package for FSCM.

Database Administration – HyperGen assisted with functions related directly to NYSERDA's databases, including but not limited to, administration, security, tuning, maintenance, SQL scripting, SQL Agent job creation and support, ETL, etc.

Project Management – HyperGen provided qualified Project Management on request to provide formal Project Management techniques that allow staff to better track large projects some of which included PeopleSoft and PUM updates. We used formal management tools, such as Microsoft Project and private reports based on the information as requested. With that being said, we've recently switched to Jira for managing projects.

Business Analysis Support & Documentation – HyperGen assisted with gathering Business Requirement Documents (BRDs) for functional setup and configuration and technical customizations. In some cases, the documents were already created and needed to be cleaned up and linked to the Phire ticket, but most were created to be used as reference for future upgrades and/or updates. Our Business Analysts are providing staff augmentation support services to NYSERDA for all its FSCM modules.

Development – HyperGen completed several development projects including PeopleSoft Testing Framework (PTF) setup and configuration, creating and executing test scripts, development to fix security

concerns from Verizon audit. Since Fluid was introduced during the PeopleTools 8.56 upgrade so custom Homepages, Tiles, Navigation Collections, and Workcenters were created, tested, and migrated between environments. We will be responsible for retrofitting any customizations affected by the PUM for all future PeopleTools and PUM update projects.

Savannah River Nuclear Solutions
HyperGen has been providing U.S. Based Onsite PeopleSoft Consulting Services for the SRNS since 2014 in the following capacity:

FSCM 9.1-9.2 Upgrade - assist and provide Functional Support for their PeopleSoft Finance & Supply Chain Management System Upgrade to v9.2. We provided a Project Manager and six (6) onsite SMEs to assist with this project.

Oracle Business Intelligence Enterprise Edition Support – HyperGen provided OBIEE support so that The OBIEE analytics servlet enabled application developers to integrate with OBIEE analytics and display OBIEE reports as embedded pagelets on application pages, portal homepages, and dashboards.

Originally, SRNS had to put a hold on this project and reevaluate their system to ensure they were pursuing the right path for their benefit as well as business related requirements; however, once the review was completed, SRNS called upon HyperGen to provide Onsite Services once again in order to complete their Finance & Supply Chain Management upgrade project.

Additional Miscellaneous Tasks – HyperGen is currently providing Onsite Consulting Services to perform general and specific support for various BES software applications, functional and technical PeopleSoft FSCM and HCM support, best-in-class industry standard support and instructions to SRNS for various BES COTS software applications.

Resumes
Ms. Sherry Z. Dyer, Account Executive/Primary Contact
Ms. Dyer began working with HyperGen Inc. in 1993 and was a driving force in the establishment of the present-day corporation. She performed various roles in the development and advancement of the company. In the initial years of employment, she held positions of Corporate Manager, Technical Consultant, and Sales Representative. She led the sales team in the marketing of IT Consulting and Recruitment services. Ms. Dyer's responsibilities have steadily grown and she now holds the position of CEO and VP of Sales. Ms. Dyer continues to exhibit leadership and direction for the growing company on a daily basis.
Please see Appendix A for Ms. Dyer's complete resume.

Ms. Dana Garrett, Senior Recruiter
Ms. Garrett's broad-based background encompasses exceptional work ethic and commitment to organizational objectives within a highly competitive and rapidly changing marketplace. She is a proactive manager, team builder and tactical planner with ability to attract and secure key players in building strong and lasting business relationships. She has been recognized for decisive leadership and proven ability to face challenges head-on and execute sound decisions while fulfilling client resource needs. She has 18 years of full lifecycle recruiting expertise specializing in Engineering, Information Technology and ERP Consultation Business.
Please see Appendix B for Ms. Garrett's complete resume.

Ms. Suzanne Salzano, Recruiter
A highly motivated and experienced HR professional with a strong background in recruitment, employee engagement, and onboarding. Proven track record of creating and implementing HR policies and procedures, as well as collaborating with upper management and outside vendors to maintain CSR standards. Experienced in post-closing, customer care, and recruiting, with excellent communication and problem-solving skills. Proficient in handling complex transactions, reconciling accounts, and generating reports. Adept at working with large volumes of candidates in both blue and white-collar categories.
Please see Appendix C for Ms. Salzano's complete resume.

Mr. Ted Ouimette, Senior System Administrator
Mr. Ouimette is a dedicated and motivated Technology Systems Administrator with the keen ability to multi-task at a proficient level. He is a professional end user, technical trainer and program developer. He is a highly effective communicator with multi-dimensional experience at all levels of a business team and has the ability to tailor a company's vision with practicality with vast knowledge of industry hardware and software solutions.
Please see Appendix D for Mr. Ouimette's complete resume.

Ms. Roblyn Brand, Project Manager
Ms. Brand brings a wealth of experience as a PeopleSoft Developer, Administrator, and PeopleSoft SQL Server DBA. She has expertise as both a Project Manager and as a Technical Lead in PeopleSoft v8.9, 9.0, 9.1 and 9.2 Upgrades. She has expertise in PeopleSoft Financials, HRMS, Campus Solutions and Interaction Hub Applications including Upgrades, PeopleTools, PeopleCode, Integration Broker, SQR's, Architectural /Technical Assessment and Change Management using PUM and Change Assistant.
Please see Appendix E for Ms. Brand's complete resume.

Mr. Adey Harris, Project Manager
Mr. Harris is a Senior Program Manager and ERP/Cloud Consultant with experience in helping clients implement, upgrade and manage their enterprise and cloud applications systems. His efforts have helped clients improve and streamline their business processes enabling their employees to be more efficient and productive. He has the ability to manage and unify efforts amongst Business and IT teams. He is skilled at understanding the big picture, identifying complex business issues and translating them into system specifications and designs. This allows clients to achieve focused and successful ERP new implementations and upgrades. He is also skilled in Scope and Quality management, building a vision for delivery success and executing Strategies that generate quantifiable results.
Please see Appendix F for Mr. Harris' complete resume.

Ms. Ann Marie Mims, Functional SME
Ann Marie brings the experience of more than 35 years of HRMS including 26 years of PeopleSoft hands-on functional & technical experience, project management, lead fit-gap designer, component configuration, test lead (all phases), functional to technical liaison, implementation analyst and data conversion specialist. She considers herself to bring a broad variety of skills defined as 80% functional HRMS and 20% technical. She is specialized in information technology, focusing her software lifecycle expertise on Human Resources, Payroll, Benefits, Time and Labor, Absence Management, Stock Administration, Enterprise Learning Management, Canadian Payroll and ePerformance systems implementations and conversions. As a functional SME and business process re-engineering specialist, designed and created modifications while overseeing projects implementations, creating and testing project deliverables and documentations.
Please see Appendix G for Ms. Mims' complete resume.

Mr. Johnny Springer, Functional SME

Mr. Springer has worked with PeopleSoft clients since Release 3.0. He is a skilled consultant that has extensive experience managing project teams during the implementation of PeopleSoft as well as configuration, customization, and implementation of PeopleSoft systems. He has worked on global PeopleSoft Implementation projects as both a Team Lead and functional consultant. He has conducted training for Core Team as well as End Users.

Please see Appendix H for Mr. Springer's complete resume.

Mr. Crhistopher Lewis, Technical Developer

Over 25 years of experience in Information Technology with expertise in PeopleSoft HCM/FSCM, database, networking, Microsoft Exchange, and SharePoint administration. A dedicated and hard-working individual with excellent communication skills possessing the ability work with all levels of an organization. Highly successful in meeting new technical challenges and finding solutions to meet the needs of customers.

Please see Appendix I for Mr. Lewis' complete resume.

4. Data Sheet

ATTACHMENT A

OFFEROR DATA SHEET

TO BE COMPLETED BY OFFEROR

1. <u>QUALIFICATION OF OFFEROR:</u> Offeror must have the capability and capacity in all respects to fully satisfy the contractual requirements.

2. <u>YEARS IN BUSINESS:</u> Include the length of time you have been in business providing these types of goods and services.

    Years 31   Months 2

3. <u>REFERENCES:</u> 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 #
Oklahoma Heart Hospital	July 2014 - Present	Oklahoma City, OK	Michael Grisser (405) 972-7269
Fresenius Medical Care, North America	February 2007 - Present	Nashville, TN	Tom Petznick (615) 312-1690
University of Virginia	April 2007 - Present	Charlottesville, VA	George Brudin (434) 243-0758
Rhode Island College	September 2017 - Present	Providence, RI	Bin Yu (401) 456-8160
New York State Energy Research & Development Authority	June 2016 - Present	Albany, NY	Glen Kaatz (518) 862-1090 EXT. 3203

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

    HyperGen Inc.

    7810 Carvin Street, Roanoke, VA 24019

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 [X] NO

    IF YES, EXPLAIN: _____

    _____

    _____

    _____

5. Small Business Subcontracting Plan
ATTACHMENT B

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

Offeror Name: HyperGen Inc.   **Preparer Name:** Heather Jenkins-Barnes

Date: August 11, 2023

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes X   No _____
        If yes, certification number: 650014____   Certification date: 10/2/2018

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes X   No _____
        If yes, certification number: 650014____   Certification date: 10/2/2018

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes_____   No____X_____
        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____X_____
        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 business 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 business 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 SBSD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at hggp://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 No. FDC-1175   Date Form Completed: August 11, 2023

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

Offeror / Proposer:

HyperGen Inc.   7810 Carvin Street, Roanoke, VA 24019   Sherry Z. Dyer / (800) 497-3744 EXT. 350
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)
HyperGen Inc. 7810 Carvin Street Roanoke, VA 24019	Rose Chaney (800) 497-3744 EXT. 251	650014	Information Technology Consulting Services	100%	TBD

(Form shall be submitted with proposal and if awarded, again with submission of each request for payment)
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6. VASCUPP Sales

Identify the amount of sales your company had during the last twelve months with each VASCUPP Member Institution.

During the last 12 months, HyperGen had $30,000 in sales with the University of Virginia, who is currently our only VASCUPP Member Institution.

7. Proposed Cost

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 is 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
Oracle Core Technologies			**Change Management Training, Svcs, & Cert.**		
Project Manager or Sr. Functional Lead	165.00/hr.	160.00/hr.	Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	145.00/hr.	140.00/hr.	Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	125.00/hr.	120.00/hr.	Engineer or _____	_____/hr.	_____/hr.
Oracle/PeopleSoft Enterprise Solutions			**Security and Federation Services**		
Project Manager or Sr. Functional Lead	165.00/hr.	160.00/hr.	Project Manager or _____	145.00/hr.	115.00/hr.
Senior Engineer or _____	145.00/hr.	140.00/hr.	Senior Engineer or _____	145.00/hr.	115.00/hr.
Engineer or _____	125.00/hr.	120.00/hr.	Engineer or _____	145.00/hr.	115.00/hr.
Desktop and Mobile Device Management			**Cisco Technologies, Infrastructure Support, and Virtualization**		
Project Manager or _____	145.00/hr.	115.00/hr.	Project Manager or _____	145.00/hr.	115.00/hr.
Senior Engineer or _____	145.00/hr.	115.00/hr.	Senior Engineer or _____	145.00/hr.	115.00/hr.
Engineer or _____	145.00/hr.	115.00/hr.	Engineer or _____	145.00/hr.	115.00/hr.
Microsoft Azure and M365			**Audio Visual Technologies**		
Project Manager or _____	145.00/hr.	115.00/hr.	Project Manager or _____	145.00/hr.	115.00/hr.
Senior Engineer or _____	145.00/hr.	115.00/hr.	Senior Engineer or _____	145.00/hr.	115.00/hr.
Engineer or _____	145.00/hr.	115.00/hr.	Engineer or _____	145.00/hr.	115.00/hr.
Okta			**Secure Research Enclaves**		
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.
Data Analytics/Visualization/Warehouse/Lake			**Other Technology**		
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.

Appendix A: Sherry Z. Dyer Resume

Ms. Dyer began working with HyperGen Inc. in 1993 and was a driving force in the establishment of the present-day corporation. She performed various roles in the development and advancement of the company. In the initial years of employment, she held positions of Corporate Manager, Technical Consultant, and Sales Representative. She led the sales team in the marketing of IT Consulting and Recruitment services. Ms. Dyer's responsibilities have steadily grown and she now holds the position of CEO and VP of Sales. Ms. Dyer continues to exhibit leadership and direction for the growing company on a daily basis.

EXPERIENCE:

HyperGen Inc., Roanoke, Virginia
April 2003 – Present
Chief Executive Officer and Vice President of Sales:
- Responsible for making key staffing decisions for the company leveraging a deep understanding of the company's direction and required skills for the organization's success to ensure sustained growth. Responsibilities include the hiring/firing of regular and management personnel, creation of new positions to fit developing needs and authorization of position responsibilities, salary, and schedules.
- Authority to sign and enter into legal agreements on behalf of the company including signing and co-signing of loans and lines of credit, execution of contracts with HyperGen clientele, and approval and signing of the staff's weekly paychecks.
- Lead biweekly team meetings to maintain oversight of all projects concerning the administrative, sales, and IT team and follows up on issues to ensure operations run smoothly.
- Assign task responsibility and approves work for administrative and sales teams to ensure day-to-day activities are run efficiently and effectively. Responsible for reviewing project and service proposals to ensure the scope of work is within the range of services offered and that the cost of service is estimated correctly prior to execution of contracts.
- Approval and budgets for purchase of goods and services for company operations including major equipment and property.
- Continue to manage and support Client Account Management and sales and recruitment support initiatives.

June 1998 – April 2003
Vice President of Sales:
- Develop sales to domestic and multi-national corporations by employing sound leadership, a talent for leveraging business needs and technological capabilities, and employing expertise in building top-performing information technology consultants.
- Fueled revenue growth and provided HyperGen with competitive advantages through development and technology solutions. Repeatedly increased revenues through direct sells to existing and new clients. Accredited with increases in sales through all years of service with strong achievements during fiscal year 2007, during which year the company was awarded the honor of being included in INC.com Magazine's listing of the top 5000 fastest growing privately held companies.
- Leveraged technical, business, and entrepreneurial skills in tackling complex IT challenges and linking technology with customer needs.

- Negotiated with key decision-makers and closed complex contracts. Developed a keen understanding of relevant markets and key issues coupled with technical acumen and strong leadership.
- Excellent communication skills with performance of sells done via phone and trade shows and in person client meetings.
- Responsible for the complete life cycle development of corporate response to client requests for proposals for a large range of project types including but not limited to the following:
  - o PeopleSoft® Implementations of Human Resources modules for North American and Global rollouts.
  - o PeopleSoft® Upgrade Services for Human Resources, Financials, Student Administration, Manufacturing, etc., application users.
  - o Consultant services for the rollout of Employee Self-Service and Manager Self Service.
  - o HyperGen software sells and implementations of proprietary applications created to enhance the functionality that is not available through the delivered PeopleSoft® software modules
- Trained and assisted new employees for HyperGen and to the IT or PeopleSoft® consultant services sales.
- Developed sales lead generation tools to acquire additional contact names for advancement of corporate presence in the market.
- Pioneered the Sales Forecast and Goals process for increasing market shares and to engage internal sales staff to achieve projected sales goals and to utilize the variable sales techniques for achieving a corporate presence that is knowledgeable and service oriented for long-term business relationship building.
- Reorganized sales presentation and pricing structures for adhering to economic challenges during the current economic crisis in the Information Technology industry, which began during 2000. Lead the adjustment of corporate staff roles for minimizing the corporate overhead to reduce budget requirements of the sales department.
- Registered, organized and represented HyperGen at vendor shows by assisting potential clients with answers to their questions, distribution of corporate marketing literature, and presenting corporate software solutions at conference sessions.

Marketing Director:
- Results-oriented sales and marketing management delivering state-of-the art technology to HyperGen's clients.
- Developed top-producing business relationships with clients and business partners.
- Achieved strong and sustainable revenue, market and profit contributions through expertise in business development, organizational development and performance management.
- Responsible for the following phases of corporate marketing literature preparation for various consultant services operations and numerous software applications but not limited to: conceptual design, content management and creation, presentations, strategic alliance development, brochures, and marketing literature.
- Researched and performed feasibility studies for market sectors and best methods of advertising to prospective clientele in designated market segments.
- Oversee reception and internal office staff to include prioritizing and monitoring work assignments.
- Handle human resource functions, including new employee orientation, maintaining personnel records and administering employee benefits such as group medical benefits.
- Developed corporate policy including business practices and employee manual.

- Researched and purchase of corporate facilities, equipment, autos and additional assets.
- Established legal contractual agreements for non-compete and additional regulations for stipulating the employment and vendor agreements vital to protection of corporate investments.
- Performed all phases of recruiting, interviewing and acquiring talented employees to join HyperGen Inc.
- Researched and negotiated contractual agreements for the establishment of suppliers for business needs such as freight, travel, banking, capital leases, corporate loans, etc.
- Additional areas of expertise include:
  - Customer Service
  - Budgeting
  - Strong Computer Skills
  - Multi-Tasking
  - Customer Relationship Management
  - Personnel Scheduling
  - Facilities Management
  - Project Planning
  - Problem-Solving
  - Managing Aggressive Deadlines
- Assisted in the movement of the home office to a larger business location
- Hire and train new staff members
- Researched and acquired job posting websites to be used by recruiting department

June 1993 - June 1998
Accounting Manager:
- Established corporate legal identification
- Perform complete tax accounting with the only exception being annual returns for federal and multiple state agency tax compliance.
- Perform all accounting functions necessary for Accounts Receivables, Accounts Payable, Payroll, General Ledger and Cost Accounting as required for all business requirements using Peachtree accounting software.

Recruiter:
- Emphasis on IT recruitment
- Over 9 years of staffing experience
- Creative sourcing skills using web and non-web tools
- Skilled in hiring IT consultants for strategic staffing solutions
- Manage recruiting procedures and pre-qualification of candidates for clients

Previous Corporate Experience Available upon request.

EDUCATION:
Hollins University, BS Economics with a minor in Computer Science, 1994, GPA 3.5, Omicron Delta Epsilon Honor Society Member.

PeopleSoft® Technical Professional 1999

TRAINING: PeopleSoft® v7.5 Certification Program, PS®Tools I, PS®Tools II, PeopleCode®, SQR, Process Scheduler, PS® Web Client

COMPUTER EXPERIENCE:

Software: PeopleSoft® HRMS modules, ISQL/W, PeopleSoft® Application Designer, PeopleSoft® Configuration Manager, WinEdit, Beyond Compare, Peachtree, Quicken, Microsoft Office® (Word, Excel, Access, PowerPoint, Mail) Paradox, ACT, Hijaack, WinFax Pro, Reflections, Norton Backup, WordPerfect, Corel Draw, Internet Explorer, Netscape, ABC Flowchart, VISIO

Operating Systems: Windows 3.1, Windows 95, Windows NT, DOS, VAX/VMS

Hardware: IBM PC compatible, Macintosh, DEC/VAX

Languages: Pascal, Basic, Assembler, MS VBA, PeopleCode, SQR, and Crystal Reports

Development Tools: MS ADT, ForeHelp

Databases: MS SQL Server, SQLBase, MS Access Secretary

Appendix B: Dana Garrett Resume

Professional Summary

Ms. Garrett's broad-based background encompasses exceptional work ethic and commitment to organizational objectives within a highly competitive and rapidly changing marketplace. She is a proactive manager, team builder and tactical planner with ability to attract and secure key players in building strong and lasting business relationships. She has been recognized for decisive leadership and proven ability to face challenges head-on and execute sound decisions while fulfilling client resource needs. She has 18 years of full lifecycle recruiting expertise specializing in Engineering, Information Technology and ERP Consultation Business.

Certifications

HyperGen Inc., Roanoke, Virginia   June 2002 - Present
Director, Recruiting

As a Sr. Recruiter as well as a Team Lead, Ms. Garrett has managed and developed a team of recruiters and recruiting coordinators, developed strategic plans and goals for the group, organized and implemented business processes to become more efficient and profitable for the company. Consistently recognized as a team player with a history of success in achieving results. Manages and oversees the entire placement process. Develops and negotiates teaming agreements and strategic partnerships in order to meet business objectives. Works closely with Human Resources and Executive Management to source employees while following strict guidelines providing high ethical standards. Specific skills in sourcing, screening, interviewing, and hiring. Sourced and secured client companies and candidates. Specialized in Software and Hardware Engineering. Skilled in matching client and candidate requirements resulting in successful placements. Adept in entire placement process including screening, reference checking, generating, offers, closing candidates, and negotiating, compensation packages. Responsible for contract, contract-hire & fulltime placements of IT professionals for direct clients like The University of Virginia Medical Center, On-Assignment Inc., Samsung Inc, Booz-Allen Hamilton etc. across the USA. Manage recruitment process from requisition initiation to sourcing, to acceptance of offer and final placement. Recruited hard to find candidates for all levels from all categories (US Citizens, Green Cards, H1B, TN, and W2).

Litton Network Access Systems   1994 – 2002
Supply Chain Manager

Bellsouth Communications Systems   1986 – 1994
Supply Chain Manager, Purchasing Agent

EDUCATION AND TRAINING
University of Radford 1992

Appendix C: Suzanne Salzano Resume

SUMMARY

A highly motivated and experienced HR professional with a strong background in recruitment, employee engagement, and onboarding. Proven track record of creating and implementing HR policies and procedures, as well as collaborating with upper management and outside vendors to maintain CSR standards. Experienced in post-closing, customer care, and recruiting, with excellent communication and problem-solving skills. Proficient in handling complex transactions, reconciling accounts, and generating reports. Adept at working with large volumes of candidates in both blue and white-collar categories.

Education

AAS in Communication Design, June 2007

PROFESSIONAL EXPERIENCE

HyperGen, Inc

HR Generalist, September 2021-present

- Creating a recruitment plan and calendar according to operation and sales projections
- Generating official internal documents such as offer letters, appointment letters, salary slips and warning letters
- Creating onboarding plans and educating newly hired employees on HR policies, internal procedures and regulations
- Maintaining physical and digital files for employees and their documents, benefits and attendance records
- Creating employee engagement plans, getting necessary budget approval and initiating activities
- Collaborating with outside vendors, upper management and employees to maintain CSR standards conscripted by authorities

Alcova Mortgage

Post-Closing, August 2020-September 2021

- Review closed loan packages for accuracy and completeness.
- Communicate with settlement agents, brokers, and other counterparties to obtain missing information and documentation for the closed-loan package.
- Input information into Encompass, Federal Housing Administration (FHA), Veterans Administration (VA), and Mortgage Electronic Registration System (MERS) programs.
- Contact Closing Attorneys, Underwriters, Loan Officers, Processors, and/or other applicable parties to resolve issues in loan files and obtain appropriate documentation.
- Revert to Processing Department for any missing documents needed.
- Perform Housing and Urban Development (HUD) and Closing Disclosure (CD) reviews and provide specific documents to closing agents to allow funding authorization.
- Communicate effectively with all parties involved in the process.
- Coordinate with the Lender and Escrow company/companies on final loan documents if any errors occur.
- Follow-up and manage trailing documentation within the specific timeframes provided.

Wells Fargo- Roanoke, VA

Customer Care Executive Services

September 2019-August 2020

- Responds independently to inquiries and complaints from internal and external customers (including customers, merchants, clients, and bankers), regarding financial products and services.
- Duties include conducting intake to determine appropriate course of action, conducting investigative steps to fully identify the issues, processing complex transactions on-line (including monetary and non-monetary actions), researching product information, terms, conditions, contracts, etc. and resolving complex problems and inquiries.
- Serves as an intermediary between parties to resolve disputed matters, negotiates and enacts settlements accordingly.
- Reconciles general ledger accounts to ensure balance.
- Handles incoming correspondence in accordance with external and internal policies and procedures.
- Generates and/or composes written correspondence as needed.
- Review data and reports trends to management.
- Duties may also include account maintenance, report generation, project work and work direction.

Maudlin International Trucks, LLC- Jacksonville, FL
Receptionist/Supplemental Parts Assistant, November 2018-July 2019
- Process invoices, review variances, assure payment of invoices, reconcile inventory for Parts Department.
- Tender all cash transactions, balance cash drawer and cash deposits, and deposit cash at bank weekly.
- Balance all cash and credit card transactions with open invoice reports.
- Order all office supplies for all departments.
- Open and distribute all mail to all departments.
- Answer multi line phone lines.

The Reserves Network- Jacksonville, FL
Recruiter, September 2018-October 2018
- Built a pipeline of candidates for clerical, light industrial, and professional positions. This was accomplished through strategic sourcing strategies such as online searches, cold calls, networking,
- career fairs, etc.
- Conducting skills tests, background checks, employment verifications and drug screens.
- Able to work with large volumes of candidates in both blue- and white-collar categories and directly with the public.
- Experience with high volume hiring.
- Proven understanding of supply chain, logistics, and warehouse operations.
- Comfortable marketing candidates to clients as well as selling services.
- Ability to ensure that all compliance and regulatory items are met within the hiring process.
- Capable of working in a fast paced and changing environment with rapidly changing priorities.

Scio Health Analytics-Jacksonville, FL
Office Manager (temporary), June 2018-August 2018
- Communicate with professional telephone etiquette at all times.
- Able to manage multiple tasks in a busy office environment independently.
- Able to manage and direct other employees.
- Assumes a professional, helpful style in all encounters with visitors, vendors and other professionals and represents the company in a positive manner 100% of the time.

Dominion Waiver Services-Roanoke, VA
Staffing Coordinator, March 2018-May 2018

- Participate in management meetings to brainstorm new and innovative ideas for the Waiver program across the state of Virginia.
- Coordinate with department managers to forecast future hiring needs.
- Find, schedule and participate in job fairs and career events.
- Conduct phone and in person interviews weekly for open positions.
- Execute full-cycle on-boarding including new hire orientation, CPR/First Aid certifications as well as TOVA (Therapeutic Options) training. Assuring that all hiring paperwork and electronic onboarding is delivered to HR in Richmond, VA.
- Track metrics to use for strategic analysis of recruiting campaigns.

Manpower-Roanoke, VA
Talent Acquisition Specialist, November 2016-January 2018

- Develop Recruitment plan for each branch of Manpower in my territory; including Roanoke, Wytheville, Lynchburg, Harrisonburg and Charlottesville.
- Create and implement candidate sourcing strategy using market research, prescreening, understanding client needs, resume analysis, coordinating interviews, the orientation process and effective advertisements; including job posting, job board mining, internet sourcing, social networking, employee referrals and networking events.
- Building candidate pools for branches to utilize throughout my territory.
- Actively using Digital and social networking resources. Facilitate marketing campaigns including email marketing, leadership presentations, drop offs, recognition days and seasonal campaigns.
- Creates and implements candidate attraction, campaigns/plans aligned with the business direction of the branch to ensure a consistent and plentiful database of qualified candidates.
- Create and maintain all social media and networking for each office in my territory.
- Proactively recruits passive candidates through networks, associations, social media, and other viable sources.
- Resume management and evaluates candidate qualifications for assignments/contracts through intensive profile and position analysis.
- Proactively recruits passive candidates through networks, associations, social media, and other viable sources.
- Resume management and evaluates candidate qualifications for assignments/contracts through intensive profile and position analysis.

Appendix D: Ted Ouimette Resume

Software & Network Experience:

Operating Systems: Windows XP/7/8/10, Ubuntu, CentOS, Microsoft Server 2003-2019

Server: Exchange 2010/2016/2019, SCCM, Altiris GSS and DS

Network Hardware: Cat 5 & 6 Cable, Cisco Routers, 3Com Switches, Brocade Switches, HP Switches, Ubiquiti

Cisco Hardware: Multiple Switches, ASA, Unified Phone Systems

Virtual: VMWare VSphere, Citrix Xen, Xcp-NG, Hyper-V and UCS

PBX: FreePBX, Astericks, Vertical, Avaya, Cisco Unified

Systems Admin: DHCP, DNS, Active Directory, Office 365, File/Print Services, Group Policies

Cloud Admin: Azure AD, Office 365, Backblaze, Oracle Cloud

Hardware: Intel/AMD Desktop and Laptop Class Systems, Macintosh Systems

Education

June 1998 – March 2000 – ECPI Technical College, Associate in Applied Science – Information Systems Technology

August 1993 – May 1996 – Virginia Intermont College, Bristol, VA Bachelor of Arts – Photography

Professional Experience

December 2017 - Present HyperGen Inc, Roanoke, VA

Systems/Network Administrator. Maintain Citrix Xen and VMware Virtual Server environments for HyperGen and its Clients. Create and maintain networks at local offices, Datacenter and Clients. Create and Maintain virtual server and network environments for Clients. Create and Maintain PBX environments for HyperGen and its clients. Design and build plans for virtual network/server/PBX environments for new and existing clients.

December 2014 - December 2017 American National University, Roanoke, VA

Network Administrator. Maintain Network and Wireless Cisco equipment for 30 campuses in 6 different states. Equipment ranges from Brocade 7450 and 7250 Switches, Cisco Switches and HP Switches, Cisco ASA's, Cisco Nexus Switches. Install, monitor and maintain Bitdefender Antivirus solution. Maintain Altiris imaging and software installation solution. Created and started implementation of SCCM environment.

Asst. System Administrator. Maintained Citrix environment and VMWare Esxi environment running on Cisco UCS connected to a EMC VNX 5300 and EMC DataDomain. Deploy VMWare Esxi servers to Campuses. Setup and maintained server backups with Retrospect. Maintain Servers and VMWare Environments at 30 campuses.

Phone Administrator. Maintain Avaya Phone system at central data location and multiple Campuses.

January 2001 – December 2014 Salem City Schools, Salem, VA

Computer Technician. Maintain Wireless, Network and hardware at Salem High School including but not limited to Desktops, Laptops, Chromebooks and NComputing virtual computer labs.

Assistant Network Administrator. Maintain school wide network and server infrastructure running on a 2008R2 AD. Maintain school-wide Cisco Unity Phone system as well as Cisco Switch Network. Maintain and backup VMWare server infrastructure using VEEAM. Maintain Lightspeed Internet Filter. Helped setup and maintain existing Virtual Datacenter hardware and software. Maintain Cisco ASA and VPN clients and connections.

June 2000 – December 2000 Dominion Solutions, Roanoke, VA

Computer Technician. Contracted out to Spectacle Lens Group of Johnson & Johnson. Install Windows 95/98/NT (Workstation)/2000 (Professional & Server), Microsoft Office, and other programs. Troubleshoot DLT Backup units, and involved with daily backups. Troubleshoot and solve internal and network related Windows problems. Involved with purchasing of new equipment. Work with Windows NT and 2000 Servers. Install telephones for clients.

July 1999 – June 2000 PC Coach, Roanoke, VA
Computer Technician. Installed Microsoft NT (Server & Workstation) and upgraded Novell Clients. Troubleshot and solved internal Windows problems. Troubleshot and solved PC troubles and conflicts. Created and installed Microsoft Access Databases. Install Windows 95/98 Clients on a Novell or Microsoft NT Network.

August 1998 – June 2000 First Union National Bank, Roanoke, VA
Service Center Associate. Enter data into a Microsoft Access Database.
Access Database Administrator. Enacted changes and updates to Microsoft Access Database. Improved Database efficiency. Troubleshooting Database problems and then solved them. Created databases using Microsoft Access and Access' internal Visual Basic Programming.
Client Site Installer/Updater. Update Access Database on 14 PC's.

April 1998 – May 1998 Summit Computer Center, Roanoke, VA
Computer Technician/Sales. Repaired and assembled Pentium I/II PC's. Install Microsoft Windows 95/98; and, Windows NT Workstation and Server. Install Microsoft Exchange for internal Electronic mail communications and scheduling. In charge of stocking and ordering of new stock.
Network Administrator/Installer. Install and Administer internal Windows NT Network utilizing CAT 5 cabling, Ethernet Type Network Design and TCP/IP Protocols. Connected 3 impact printers to one computer for use with the internal sales program. Taught basic Microsoft Windows courses to classes or individual customers. Troubleshot and solved network communication problems.

January 1998 – April 1998 TEC Support, Verona, VA
Computer Technician. Install and configure Cable Modem network cards in computers located in the Blacksburg area for Adelphia Cable. Troubleshot and solved various computer problems. Install Microsoft Windows 95 on customer computers.
Network Technician. Install small peer-to-peer network in the main office.

Submitted on a Company Fee Basis

Appendix E: Roblyn Brand Resume

SUMMARY

Ms. Brand brings a wealth of experience as a PeopleSoft Developer, Administrator, and PeopleSoft SQL Server DBA. She has expertise as both a Project Manager and as a Technical Lead in PeopleSoft v8.9, 9.0, 9.1 and 9.2 Upgrades. She has expertise in PeopleSoft Financials, HRMS, Campus Solutions and Interaction Hub Applications including Upgrades, PeopleTools, PeopleCode, Integration Broker, SQR's, Architectural /Technical Assessment and Change Management using PUM and Change Assistant.

FUNCTIONAL / TECHNICAL SKILLS SUMMARY

PeopleSoft Skills:

- Change Assistant, PeopleSoft Update Manager (PUM), Integration Broker, PeopleCode, PeopleTools, Application Designer, Testing Framework (PTF), BI Publisher, Application Engine, File Layout, SQR, Cobol

Other Skills:

- RDBMS (Architecture, Design, & Development): SQL Server, Oracle, MS Access, DB2 ZOS
- WebLogic
- Microsoft IIS
- JAVA
- JavaScript
- JSP/Servlet using Apache Tomcat
- VB.NET (ADO, Excel programming with VBA)
- XML
- Linux
- MS Project

EDUCATION AND TRAINING

SQL Server Certification

Virginia Tech, Blacksburg, VA - Masters of Information Technology

- Phi Kappa Phi Honor Society
- Emphasis on Business Information Systems, Decision Support Systems, and Software Development

Virginia Western Community College, Roanoke, VA

- Career Studies in E-Commerce Application Development

Franklin and Marshall College, Lancaster, PA

- BA in Chemistry

University of Pennsylvania, Philadelphia, PA

- Chemical Engineering Courses at the College of Engineering and Applied Science

PROFESSIONAL EXPERIENCE

HyperGen Inc.   May 2006—Present

Onshore Remote Lab Services Manager/ PeopleSoft Consultant

Onshore Remote Services Projects

Clients: Accuride, Advance Auto, AFNI, ANH, Booz Allen Hamilton, Carey, Community Transit, CRA, Dartmouth-Hitchcock, Emerson Process, Fresenius, ICC, ICF, Larson Manufacturing, Lord, STP, Mattel, Mitsubishi, Olin, Radian, Regus, Rhode Island College, Tufts, University of Virginia

- Upgrade (9.0 to 9.2) FSCM
  - Project Manager
  - Technical Lead
- Upgrade (8.9 to 9.2) HCM
  - Project Manager
  - Technical Lead
- Upgrade (9.1 to 9.2) HCM
  - Project Manager
  - Technical Lead
- Upgrade (8.4 to 9.1) HCM
  - Performed upgrade from First Pass through Go-Live
    - Implemented Unicode/all languages
    - Customize/troubleshoot upgrade scripts
- Upgrade (8.8 to 9.1 FP1) HCM
  - Project Manger
  - Technical Lead
  - Customize/troubleshoot upgrade scripts
- Upgrade (8.4 to 9.1) FSCM
  - Project Manger
  - Technical Lead
  - Customize/troubleshoot upgrade scripts
- Upgrade (8.8 to 9.1) FSCM
  - Project Manger
  - Technical Lead
  - Customize/troubleshoot upgrade scripts
- Upgrade (9.1 bundle 8 to 9.1 PI 6) Interaction Hub (iHub)
  - Project Manger
  - Technical Lead
  - Customize/troubleshoot upgrade scripts
- Upgrade (8.9 to 9.1) Portal
  - Performed upgrade from First Pass through Go-Live
    - Implemented Unicode/all languages
- Upgrade (8.9 to 9.1) EPM
  - Project Manager
  - Technical Lead
  - Customize/troubleshoot upgrade scripts
- Upgrade (8.9 to 9.1) HRMS
  - Project Manager
  - Technical Lead
  - Customize/troubleshoot upgrade scripts
- Upgrade (8.3 to 9.0) HRMS
  - Performed upgrade from First Pass through Go-Live including upgrading MS SQL Server 2000 to MS SQL Server 2005.
    - Corrected collation issues with 8.3 database prior to upgrade
- Upgrade (8.8 to 9.0) FSCM
  - Assisted as Technical Specialist
- Upgrade (8.3 to 8.9) HRMS

- o Upgrade custom and modified SQR's from 8.3 to 8.9 requirements
- o Utilize Application Designer to research changes to 8.3 table structures
- o Upgrade modified Cobols
- Apply Maintenance Packs to EPM 8.9
- Configure Integration Broker communication between various PeopleTools/application versions
- PeopleSoft Support
    - o HRMS 8.3, 8.9,9.0, 9.1, 9.2
    - o FSCM 8.4,9.0,9.2
    - o IH 9.1 PI 09
    - o CS 9.2
    - o EPM 8.9, 9.1
    - o PeopleTools 8.22,8.47,8.49,8.50,8.51,8.52,8.53,8.54.8.55,8.56,8.57
- Resolve issues with Cobol processing
- Setup/Configure IIS as reverse proxy and load balancer for PeopleSoft applications
- Write Custom SQR's
- Install DPKs and Configure Change Assistant to apply PUM updates
    - o Implemented Change Management process to use Change Assistant to promote customizations through the client's environments.
    - o Create custom change packages
- Create Custom Documentation and perform Architectural Assessment for PeopleSoft Financials and HRMS Applications
- Create/Modify Custom Training Documentation for PeopleTools & PeopleCode
- Test custom PeopleSoft Applications
- Providing analysis and technical assistance for deployment of TAM module
- Assist in implementing TAM for creating separate SiteIds to use different resume templates for external and internal applicants. Also assisted in setting up notifications.

Functional Skills:
Debugging/Issue Resolution, Documentation, Regression Testing, Writing HRMS test scripts
Technical Skills:
SQR, Cobol, PeopleTools, PeopleCode, App Engine, Application Designer, HP-UX, Linux, SQL Server, Oracle, DB2 ZOS, SQL-Plus, Change Management, App Server Installation/Config, Batch Server Installation/Config, PIA Installation/Config, WebLogic Install/Config, Integration Broker, Change Assistant, Test Framework, PUM, BI Publisher

Remote Database and PeopleSoft Administration Service
SQL Server
Clients: ACE
- SQL Server DBA
    - o Monitor and tune database
        - ▪ Script to monitor database connectivity, disk space and errors 24x7
        - ▪ Resolve database issues
- Scheduled backups, jobs and database maintenance
- Scheduled database refreshes
- Apply Tax Updates, Maintenance Packs, Patches
- PeopleTools Upgrade

Technical Skills:
SQL, Enterprise Manager, Application Designer, App Server Installation/Config, Batch Server Installation/Config, PIA Installation/Config, WebLogic Install/Config, Change Assistant Install/Config

Onsite Projects
HyperGen E-Learning / Business Analyst
Functional Skills:
Gathering System Requirements, System Design and Testing, Project Team Management

Java Programming /Development
Java Programming Work/Study for City of Roanoke
Functional Skills:
Development and Java Programming of intranet self-service application using WebSphere

Submitted on a company fee paid basis

Appendix F: Adey Harris Resume

Adey is a Senior Program Manager and ERP/Cloud Consultant with experience in helping clients implement, upgrade and manage their enterprise and cloud applications systems. His efforts have helped clients improve and streamline their business processes enabling their employees to be more efficient and productive. He has the ability to manage and unify efforts amongst Business and IT teams. He is skilled at understanding the big picture, identifying complex business issues and translating them into system specifications and designs. This allows clients to achieve focused and successful ERP new implementations and upgrades. He is also skilled in Scope and Quality management, building a vision for delivery success and executing Strategies that generate quantifiable results.

Adey's a seasoned hands-on approach to team leadership and direction, excellent communication and relationship building, aligning business processes with leading technologies, achieving buy-ins on key directives. He has excellent skills in innovating, problem-solving, coaching team members, supporting client resources, contract negotiation, scheduling and management of deliverables, comprehension and, analysis, connecting and communicating the big picture ideas to others.

Adey has been recognized for helping clients reduce the total cost of ownership based on his ability to deliver complex and save at-risk projects.

CORE COMPETENCIES

PMP
Processes – Initiating, Planning, Executing, Monitoring & Control and Closing
Management – Project Integration, Scope, Time, Cost, Quality, Human Resources, Risk, Procurement
Agile methodology
DevOps
Culture, Automation, Measurement and Sharing (CAMS)
Oracle Cloud
HCM Cloud Rel 12-13 (Core HR, Benefits, Workforce Compensation, Talent Management)
PeopleSoft
7.5 – 9.2 Functional FSCM, HCM, CRM, CS, EPM, Enterprise Portal/ Integrated Hub and Security
Tools 7.5-8.59 PUM 41
SAP
Project Systems (PS)
Software
MS Project, MS Office Suite, Visio, Winstall, FrontPage, Pvcs, Mercury Testdirector, SQR, HEAT, Quality Center, STAT, Cognos, Authoria, SUN Identity mgmt, ASP.NET, Shibboleth
Languages
SQL, HTML, XML, JavaScript
Databases
Oracle, DB2, SQL

Skills

- Multiple Large and Complex enterprise Project Management experiences
- Managing implementation Business Process Improvement, Project Scheduling, Sales Analysis, Strategic Planning, Communication, Facilitation, Presentation, Negotiation, Team, Cost and Risk.
- Oracle HCM Cloud Rel 12-13 (Core HR, Benefits, Workforce Compensation, Talent Management)
- Oracle PeopleSoft 7.5 – 9.2 Functional FMS, HCM, CRM, CS, EPM, Enterprise Portal/ Integrated Hub and Security, Tools 7.5-8.59 PUM 41
- DevOps principles- Culture, Automation, Measurement and Sharing (CAMS)
- SDLC Waterfall, Agile and Scrum methods
- Working in a team environment and coordinated with colleagues and provide leadership in preparing for presentations and responding to client's questions.
- Comfortable with the realities of consulting- writing requirements and specifications, tight schedules, meetings with management at customer sites, handling tough questions, strong negotiation and influencing skills and committee-situations

EDUCATION AND TRAINING

Education BS, Information Systems
American Sentinel University; Aurora, Colorado

AOS, Computer Systems Technology
MTI College of Business; Houston, TX

Certifications Project Management Professional
Project Management Institute

PROFESSIONAL EXPERIENCE

Client: New York State Energy and Development Authority (NYSERDA)– Public Sector
Senior Program Manager
Projects and applications: Oracle PeopleSoft Financials & SCM projects, Jira, Confluence, Jira4Test

- Successfully leading, managing, delivering, and rolling out of multiple PeopleSoft Financials and Supply Chain Management systems including Critical PeopleSoft Updates, PeopleSoft Update Manager (PUM), upgrades and enhancements - design strategy, roadmap, and operating plan.
- Responsibility includes fostering collaboration and teamwork between business clients and consulting team.
- Working closely with consultants and client's leadership and staff to understand the specifications set forth custom process, confirm system requirements, unit testing and troubleshooting to insure the application functions correctly in the client's operating environment.
- Working closely with clients and project consultants using data matrix to identify, drive and resolve issues and verify work.
- Ensuring that project estimates and completion dates are documented and maintained. Adjustments are reviewed, analyzed, documented and communicated as appropriate.
- Managing and producing project documentation and reports on an ongoing basis – schedule, risk, financials, resources, scope, goals and project management
- Managing day-to-day business leadership interaction, identifying needs, expectations, and evaluating alternative business solutions including Managed bi-weekly change control management sessions which includes sponsors, leads and subject matter experts

- Providing leadership and a day-to-day oversight of project team, consultants and system implementers assigned to the project and communicate work status to direct leadership, appropriate sponsors and stakeholders.
- Managing, developing and ensuring that appropriate status reporting was prepared on a weekly and monthly basis to track project matrix - progress, issues, budget, risk, milestones and decisions
- Managing and escalating employees, consultants and vendor issues and risks as appropriate
- Responsible for managing working and solutioning sessions to facilitate prompt resolutions when needed
- Managing, developing and reviewing budgets for consultants, cost of projects, and cost of contracts
- Providing direct leadership to functional and business Analysts, Solution Developers to ensure that the systems meet business expectations and documented business requirements and supported.
- Providing HG service center and client leadership to ascertain and justify value for IT initiatives, recommending best practices, develop strategic timelines, and determine overall budget and resource requirements
- Responsible for facilitating change control board meetings for programs, enhancements and updates
- Ensured that the project team is aware of key deliverables and project milestones and raising issues/concerns if/when milestones or deliverables are behind
- Monitoring performance, quality assurance and maintaining NEIS deliverables in conjunction with IT team
- Leading, partnering and working with IT, troubleshoot issues and outages as needed and, ensuring security through access controls, backups and firewalls
- Supporting the sales team in support of the SDLC and migration methodology during sales pursuits and opportunities.
- Participated and developed RFI/RFP responses and create proposals including pricing/margin analysis for projects opportunities
- Continue participating in financial management of client engagements with oversight on employee allocations, utilization levels, and margins obtained through out engagement and project delivery.

Client: Exterran and Electric Power Board of Chattanooga (EPB) (01/2020 – 1/2021)
Sr. Oracle Cloud HCM Advisor – Public Sector
Projects: Benefits Reimplementation and Payroll Implementation
- Providing architectural solutions for business organizations to address structural issues that hinder achievement of company and client goals.
- Aligned the I.T. initiatives with their business processes and employed internal and external resources in the development of business strategies that guide the operation and management of the company.
- Liaising with senior business executives to design an operating model that integrates business processes and organization with technical solutions and draws up an evaluation system that considers essential contextual parameters during the analysis of an organization's problem.
- Assessed the capacity of a business to meet its targets and objectives using value stream tools and capability map analysis and conducted evaluation of available company assets to generate results which is helpful in identifying capability gaps that needed to be filled in order to achieve set goals.

- Managing offshore conversion and digital transformation team
- Partnering with consultants, and offshore resources to resolve configuration, Fast Formulas and conversion issues
- Configuring and setup benefits administration objects such as Programs, Plans, Plan types, Rates and coverages, eligibility profiles, life events and derive factors
- Configure and setup my client groups objects such as Person management, hire an employee, contingent worker and pending worker
- Responsible for writing HR and Benefits test scripts, and capturing configuration workbook
- Resolved CoreHR and Benefits testing and production support issues in DEV1, DEV2, TEST and Prod
- Participated in RFI/RFP responses and created proposals including pricing/margin analysis for projects opportunities
- Support the sales team in support of the SDLC and migration methodology during sales pursuits and opportunities.

Client: City of Fort Worth – Public Sector (07/2019 - 03/2020)
Project Manager: Oracle PeopleSoft Human Capital Management
- Led and managed ERP implementation from initial concept to completion.
- Responsible for tracking project progression to ensure the City's expectations are met.
- Managed project scope, identify potential crisis, devise contingency plans, budget and resource planning.
- Developed detailed work plans, schedules, project estimates, resource plans, and status reports.
- Coordinated with all external vendors and secured all outside vendors for Open Enrollment
- Coordinated and identified needed changes and tracking/assigning from identified to resolved
- Laid out timelines, identified priority items for critical path, created, managed and tracked project plan
- Responsible for prompting technical and functional personal on task accomplishments to keep project updated and moving forward
- Responsible for setting up, conducted and documented informational/status meetings using technologies available
- Identified specific roles and responsibilities for all team members for configurations, setups, testing, interfaces, processes and reports
- Facilitated client meeting minutes, outlining what was discussed, issues, concerns, new assignments, and delivery dates and, tracking project progression to ensure the City's expectations are met
- Produced project documentation ongoing basis and required gate opening and closures
- Responsible for project estimates and completion dates were documented and maintained. All adjustments were documented and dates relayed to consulting company's Account Manager, and City's project sponsors.
- Managed project's consolidated status report of work performed and secured internal resources and identified team leads from functional areas
- Reviewed project plan, documentation and led lesions learnt sessions from previously rolled out projects
- Facilitated setting up teams on boarding and remote access to environment
- Created test strategy and plan, and identified test database and servers needed for delivery
- Tracked team hours to ensure hours worked are adhered too, report and escalate issues as appropriate

- Coordinate with all external vendors, their needed setup, configuration, integration and interfaces
- Identified needed changes and tracked/assigned from identified to resolved
- Laid out timeline identifying priority items for critical path and prioritizing approved change items in order of criticality
- Responsible for production planning strategy and implementation
- Facilitated standups and coordinate testing activities and, managed test cycles, tracked defects and solutions
- Managed validation of interfaces and interactions with Financial and Supply Chain team and external vendor environment.
- Responsible for managing functional requirements gathering, fit/gap analysis, testing and production
- Responsible for prompting technical and functional personal on task accomplishments to keep project updated and moving forward
- Setup and conduct informational/status meetings using technologies availability test database and web servers needed for eBenefits
- Validated that development to production migrations are following appropriate migration paths
- Ensured adherence to quality standards and reviewed project deliverables.

Client: US Army Caraway Project (07/2019 - 01/2020)
Sr. Oracle Cloud Benefits Conversion Lead – Defense industry
Projects: HR implementation – HR, Benefits, Pension
- Developed functional design document from gathered requirement
- Worked with team to configure Benefits Cloud programs, plans, plan types, options based on legacy system and gathered requirements
- Reviewed and updated person, worker, benefits, rates and life event data elements
- Created Crosswalk spreadsheet mappings for HR, Benefits and Payroll objects and elements with their expected values
- Reviewed John Hancock Pension legacy system and mapped its objects and fields to Oracle Cloud business entity and data fields.
- Responsible for reviewing and analyzing legacy benefits and HR data, and loading the worker, participant, dependent beneficiary data using HSDL and HDL tools.
- Analyzed associated data and worked on loading the worker data, Salary data and calculation card data using HDL and created knowledge transfer documentations
- Created unit test scripts and worked with testers on expected navigations and outputs

Client: Mattel, Inc. - American multinational toy manufacturing company (09/2018/2019)
Sr. Project Lead Consultant

Client: Metro Transportation Authority, NY - Public Private Partnership (08/2015 - 08/2018)
Program Manager –Financials and Supply Chain, Human Capital Management, Enterprise Learning, Integrated Hub
Projects: PeopleSoft Upgrade/PUM upgrade (full end-to-end)

Client: AICAM | Offshore (08/2014 - 08/2015)
Program Director – Cloud Solutions - Financial Software as a Service (New Implementation) – project policy, client, sponsor and stakeholder, and vendor relationship building.

Client: Access Midstream - Oil & Gas (02/2014-08/2014)
Sr. Project Manager - Enterprise Learning Management and Human Capital Management integrated with Enterprise Hub. Projects: PeopleSoft Upgrade (middle-to-end)

Client: Central Washington University - Higher Education (08/2013-02/2014)
Sr. Lead Consultant- Oracle PeopleSoft Integration Hub (portal) implementation 9.1 with integration with Campus Solution Upgrades to 9.2/ 8.53 Tools

Client: The Methodist Hospital System – Healthcare (07/2012-09/2013)
Project Manager and Lead **–** Oracle *PeopleSoft Enterprise Portal Hub 9.1 Tools 8.52. (Upgrade) Integrated with HCM 9.1, ELM 9.1 (Implementation), FSCM 9.0, OBIEE*

Client: Maricopa College - Higher Education (03/2012-11/2012)
Sr. Project Lead - Upgrade: Oracle PeopleSoft HCM and *Campus Solution v9.1*

Client: TMHS / PwC - Healthcare (02/2011-03/2012)
Sr. Lead & Integration Consultant - New Implementation: Oracle PeopleSoft v9.1 Portal, FSCM, OBIEE Implementation, integrated with Active Directory

Client: Giant Eagle, Inc. - Retail (12/2010-02/2011)
Sr. PeopleSoft Project Consultant – Oracle PeopleSoft Enterprise Portal 9.0, HCM 9.0 and CRM .9.0, PeopleTools 8.49, OIM, OID

Client: University of North Carolina (03/2010-12/2010)
PeopleSoft Project Manager - New Implementation: Enterprise Portal 9.1, HCM 9.1, FSCM 9.1, EPM 9.1 and Campus Solution 9.0, PeopleTools 8.51, OBIEE, Shibboleth integration, third party web applications

Client: Battelle Memorial Institute - Global Research and Development (10/2009-04/2010)
Sr. PeopleSoft Project Lead Consultant - New Implementation: Oracle PeopleSoft Enterprise Portal 9.1, FIN 9.0, HCM 8.9 and CRM .9.0, PeopleTools 8.50, Active Directory

Client: HSBC - Banking and Finance (01/2008-10/2009)
Sr. PeopleSoft Project Manager - Global Implementation Release I/II: PS Portal 8.9, FMS 8.9, EPM 8.9, PeopleTools 8.48 – 8.49, Active Directory, ADAM

Client: Freddie Mac - Government and Finance (10/07-12/07)
Sr. Project Manager - Upgrade: PeopleSoft Security/Enterprise Portal8.9 and HRMS 8.9, PeopleTools 8.47, Active Directory

Client: Artesian Water Company - Utilities (06/07-09/07)
Sr. Project Manager - Prototype Implementation: PeopleSoft Enterprise Portal 8.9, FMS 8.9, CIS8.8 and People Tools 8.48

Client: Lockheed Martin - Government and Defense (11/05-09/07)
Sr. Project Manager Lead - New Implementation & Support: PeopleSoft FSCM (BI, AR, AP, GL, PC, CA) 8.8, PeopleTools 8.48, Active Directory, COGNOS, SUN Identity management, Stat (Implementation and Support)

Client: Kaiser Permanente - Healthcare (08/05-11/05)
Project Manager - Implementation Release II: PeopleSoft HCM, PeopleSoft EPM, PeopleSoft CRM, Cognos, Authoria

Client: Amegy Bank - Banking and Finance (09/04-08/05)
Sr. Project Consultant - New Implementation: Enterprise Portal and Security and Sarbanes-Oxley (SOX) project
PeopleSoft Human Capital Management (HCM) – ePay, Payroll, eProfile, eBenefits, Benefit Administration, Time & Labor, Human Resources, Self Service, Manager Self Service, eCompensation, eLearning, Recruit Workforce, Position Management (Upgrade/implementation) PeopleSoft Enterprise Portal (EP), PeopleSoft Enterprise Learning Management (ELM)

Client: Waste Management – Utilities (11/03-08/04)
Sr. Lead Consultant - Upgrade: PeopleSoft Enterprise Portal; Netegrity – SiteMinder; eDirectory; Active Directory
Integrated Applications – Project Costing, HRMS, Supply Chain, Finance

Client: WorldRes – Internet (08/03-11/03)
Project Manager - New Implementation: PeopleSoft Enterprise Portal, CRM, Billing

Client: Waste Management - Utilities   (11/01-08/03)
Site Staff Manager and Consultant - New Implementation: PeopleSoft CRM/CIS and Portal 8.0/8.4 – SiteMinder; eDirectory; Active Directory

Client: **UnumProvident - Insurance (**08/01-11/01)
Security Consultant - New Implementation: PeopleSoft HRMS – Manger Self Service and Employee Self Service 8.0

Additional Project Experience Prior to 2000 Available Upon Request
Submitted on a company fee paid basis

Appendix G: Ann Marie Mims Resume

Ann Marie brings the experience of more than 35 years of HRMS including 26 years of PeopleSoft hands-on functional & technical experience, project management, lead fit-gap designer, component configuration, test lead (all phases), functional to technical liaison, implementation analyst and data conversion specialist. She considers herself to bring a broad variety of skills defined as 80% functional HRMS and 20% technical.

She is specialized in information technology, focusing her software lifecycle expertise on Human Resources, Payroll, Benefits, Time and Labor, Absence Management, Stock Administration, Enterprise Learning Management, Canadian Payroll and ePerformance systems implementations and conversions. As a functional SME and business process re-engineering specialist, designed and created modifications while overseeing projects implementations, creating and testing project deliverables and documentations.

Ann Marie has served as project manager and senior functional analyst on multiple engagements. Her responsibilities have included building and maintaining the project plan, working with project owners, identifying user functional requirements, developing functional and technical specifications, designing and crafting modifications, coaching internal project managers and teams in sound implementation methodologies, designing and delivering documentation and training, and creating detailed test plans, test scenarios and step-by-step test scripts.

Module Experience

Workforce Administration	3.2-9.2	Global Workforce Administration	3.2-9.2
Basic Benefits	3.2-9.2	Benefits Administration	4.0-9.2
North American Payroll	3.2-9.2	Global Payroll	7.5-9.1
Payroll Interface	7.0-9.2	Tax Reporting	7.5-9.2
Garnishment Processing	6.0-9.2	Off Cycle Check Processing	6.0-9.2
Multiple Components of Pay	6.0-9.2	Manage Leave Accrual	7.5-9.2
Year End Tax Processing	3.2-9.2	Stock Administration	6.0-9.0
Compensation Management	6.0-9.2	Position Management	6.0-9.2
Workforce Monitoring	5.0-9.2	GL Interface	4.0-9.2
Recruiting	6.0-8.9	Learning Management	6.0-8.8
Manager Desktop	8.3-9.2	Health & Safety	8.8-9.2
E-Pay	8.3-9.2	E-Profile	8.3-9.2
E-Benefits	8.0-9.2	E-Compensation	8.8-9.2
E-Performance	8.8-9.2	E-Recruiting	8.0-8.9
Canadian Payroll	6.0-9.2	Performance Management	6.0-9.2
Absence Management	8.9-9.1	(ELM) Enterprise Learning Mgmt.	8.9-9.2

Project Experience
Commonwealth of Virginia (May 2021 – May 2022)
Senior Payroll Functional Consultant: Participate in Payroll testing for pre go live and providing solution for company specific issues. Responsible for the documentation and testing of the year-end tax processing. Participate in the Conversion processing and validation of information from the legacy system to PeopleSoft 9.2 HCM and Finance. Work with the trainers, reviewing the training documentation for accuracy. Provide post go live support to the end user, resolving incident tickets.

Tampa General Hospital (May 2020 – May 2021)
Senior HCM Functional Consultant: Implementation of Position Management and Budgeting in Oracle 9.2. Implementation of Employee Self Service and Manager Self Service with the use of Manager Dashboard. Work with the TALEO Team creating interface of recruiting and Onboarding process between Oracle and TALEO. Troubleshooting payroll manual issues and providing automated solutions to reduce processing time.

Sava Senior Care Senior HCM Functional Consultant Jan 2019 – April 2020
HCM upgrade from 9.0 to 9.2. Responsibility includes, leading the upgrade for workforce administration and consolidating all related customization into delivered functionality. Implementing position management, adding multiple jobs and contingent workers. Consolidating an external job board with the position management to create a custom recruiting process and implementing the on-boarding process.

Universite de Montreal Senior Functional Consultant Oct 2018 – Dec 2018
Testing of HCM upgrade from 9.1 to 9.2 PUM 27. Trouble shooting issues found in the unit and integration testing. Work with Oracle to escalate issue resolution for bug fixes found in the testing. Documenting workaround solutions to be used in the testing. Working with the developers in implementing and testing these workarounds. Preparing and presenting new features to the management team for planning decisions on future implementations of new modules.

Sava Senior Care Senior HCM Functional Consultant Feb 2018 to Sept 2018
Responsible for assessment of highly customizes 9.0 to be upgraded to 9.2. Make recommendations on removing customizations and utilizing delivered functionalities. I lead sessions on HR, benefits, Payroll, Base Compensation, Multiple Jobs, Person Profile, ELM, ESS and MSS. I also worked on design documentation for payroll interface.

Giant Eagle Senior Functional Payroll Consultant Dec 2017 – Feb 2018
For the last five years Giant Eagle has requested that I return and prepare their Year-end taxes.

Canon Canada International Senior Functional Consultant Feb 2017 – Dec 2017
Manage Canadian PeopleSoft HCM upgrade from version from 9.1 to 9.2. Responsible for the Canadian side of the upgrade, Workforce Administration, Position Management, Performance Management with, Manager Self-service with Manager Dash Board, Employment self-service and Payroll Processing.

Giant Eagle Senior Functional Payroll Consultant Aug. 2016 – Feb 2017
Manage and review documentation and testing of the tax update. Led the conversion of employee ID from social security to a seven-digit employee ID. Facilitated the year-end processing activities, test and make recommendations for changes. Provide knowledge transfer to the HRIS and Payroll team on year-end processing. Review current payroll processes and provide feedback on process improvements. Convert employee ID from nine digits to seven digits ID.

Time Warner Cable Senior Functional Payroll Consultant May 2016 – July 2016
Provide functional leadership and coordinate activities for the PeopleSoft Payroll module implementation. Work closely with the client functional area SMEs to understand the current business processes and system configuration. Partner with the client functional area SMEs to complete the project documentation and define the future business processes and system configuration. Lead the client functional area SMEs through the project tasks. Communicate PeopleSoft and payroll leading practices to the project team. Identify and communicate/escalate risks across phases of the project

Canon USA Senior Functional Payroll Consultant April 2015 –Feb. 2016
Manage the Payroll for North America and Benefits upgrade from PeopleSoft 9.0 to PeopleSoft 9.2. Lead the implementation of employee self-service and workflow for ePay and eBenefits. Responsible for the utilization of delivered processes to replace previously used custom process with delivered functionality. Led the conversion of employee ID and modification of interfaces to support the new employee IDs. Responsible for the requirement modification documentation of benefits interface SQRs to utilize the new employee IDs and testing the results. Configuration of new payroll and benefits processes used by Canon. Led the modification of security to support the new delivered 9.2. Functionality

Giant Eagle: Senior Functional Payroll North America Consultant October 2014 to March 2015
For this food retail company, I managed and review, documentation and testing of the tax update. I participated in the year-end processing activities, testing and making recommendations for changes. I provided knowledge transfer to the HRIS and Payroll team on year-end processing. I was also responsible for reviewing current payroll processes and providing feedback on process improvements. After year end processing my contract was extended to work on the Benefits Administration ACA processing.

Hartford Hospital: Senior Functional Consultant February 2014 to September 2014
For this Health Service Provider, I am assigned to multiple projects. I worked on the implementation of retro pay processing. I also work on the cleanup of payroll tax data and quarterly tax reporting. I developed and manage the payroll conversion for the first payroll of the year processed in legacy. As part of the payroll conversion project, I was responsible for the development of the functional requirement document and the conversion-mapping template. I created test plan and test scripts and executing the test script. I facilitated meetings to resolve and track open issues and resolve open issue on the GL interface. I developed query reports and generated business requirement documentation for the creation of more complex reports to support the business reporting needs. I am currently leading the team involved in the data cleanup and testing of tax updates and year-end processing.

Giant Eagle: Senior Functional Payroll North America Consultant August 2013 to February 2014
For this food retail company, I managed and review, documentation and testing of the tax update. I participated in the year-end processing activities, testing and making recommendations for changes. I provided knowledge transfer to the HRIS and Payroll team on year-end processing. I was also responsible for reviewing current payroll processes and providing feedback on process improvements.

University of Alberta Canada: Senior Functional Payroll and Base Benefit Consultant Jan 2013 - Aug 2013
For this public sector, Higher Education, I was the Senior Payroll Functional Lead Analyst. I was responsible for planning and delivery of the Business Process, conducting workshops for Fit/Gap analysis and Business Process Design and Re-Engineering recommendations for Canadian payroll processing. I worked on defining the functional specifications for the implementation of off-cycle pay processing with mandatory direct deposit business process. I worked on custom enhancements to GL interface and automated batch processing used in the nightly processing of all payroll jobs. I worked on developing process for reporting on off-cycle check statistics. Developed and maintained templates for client approved configuration and design. Maintained and updated configuration documentation.

I lead the de-customization of Base Benefits Leave accrual process to delivered functionality for union employees. To accomplish this task, I conducted workshops to gather information, developing design documentation and work with developers testing the development of the designs. Delivered detailed Test Plans and test scenarios for, Unit Testing, System Integration, Parallel Testing and User Acceptance Testing

to include System Load, Test Script development, test execution oversight and tracking test resolution and defects.

AON Hewitt Canada: Senior Functional Payroll Consultant Nov 2012 - Jan 2013
For this Human Resources Consulting Company, Responsibilities included Payroll for North American USA Tax update testing. Payroll for North American - Canada Tax Update testing. Coordination of payroll year-end processing cleanup and testing of North American Payroll for USA Payroll, in version 9.1. Developing reports used in audit and validation of data. Development of templates used in the collection of data to be corrected in the employee balances. I participated in the balance cleanup of the employee tax related data for W4 processing.

Canon Canada: Project Manager and Senior Functional Payroll Consultant July 2012 – Nov 2012
For this Global Photographic Equipment Supply Company, I managed the upgrade of Canadian HR, Benefits and Payroll from v8.9 to v9.1. I developed test scripts and tracking and reporting all testing issues. I coordinated the testing of the heavenly customized system, coordinating and scheduling the testing of all inbound and outbound payroll and benefit interfaces.

At the end of the initial contract, I was extended to train end users on HR, Canadian Payroll process and how to create and run Query. I developed Job Aid for PeopleSoft HR, Benefits and Canadian payroll task. I conducted business process reviews of current manual processes and identify ways to utilize PeopleSoft. I developed Canadian Year end processing project plan and identify other annual task. I conducted current business process flows and make recommendation for process improvement.

Kal Tire Canada: Senior Functional HRMS Consultant April 2012 – July 2012
For this Global tire manufacturing company with corporate office in Canada, I was responsible for preparing business requirement documentation for HR, Benefits, Talent Acquisition, Position Management, Compensation, Variable Compensation, Career and Succession planning, Performance Management, Time & Labor Manager and Employee Self Service. My responsibility was to make recommendations for future implementation of these modules. I prepared staffing recommendation for fulltime permanent and temporary contractor staff. I was also responsible for preparing short-term and long-term goals for implementing these modules and detail project plan for the first phase of the project.

Ascension Health Ministry: - Functional Consultant Payroll Practice September 2011 – March 2012
For the Charity Health organization, responsibilities were gathering payroll and Kronos requirements and understanding how they were used across the company. Traveled to the various Health ministries' leading workshops to gather information on how the current pay practices work. I developed workbooks, which identified differences among ministries and made recommendations for changes in companywide policies. I was responsible for taking recommendations to the steering committee and getting their approval.

Worked on the development of the function design documentations used for the customization of processes developed in PeopleSoft payroll. I also worked with the Kronos developer on creating configuration between Kronos and PeopleSoft. Additional responsibility also includes payroll configuration to support the changes. I worked on the development of testing workbooks and unit and integration testing. I was also responsible for the documentation of the payroll relates company policy.

Maverick Solutions Inc. – Training Solutions Company June 2011 – December 2011

For this Training Solutions Company, I developed the course ware and provide super-user and end user PeopleSoft Training for the following modules, PeopleSoft Core Human Resources, Base Benefits, Position Management, e-Performance, Payroll for North America, Absence Management, Time and Labor and Query Reporting.

Scott and White - Hospital System July 2011 – Sept 2011

For this private - Hospital System who were on PS version 8.9 upgrading to version 9.1, as Senior Functional analyst working on the Fit/Gap assessment for HR, Benefits Administration, Time and Labor, Enterprise learning Management (ELM), and e-Performance, Variable Compensation Management. Lead workshop sessions to gather requirements and make recommendation on using delivered functionality to support previously customized process. Reviewed more than two hundred system customizations and made recommendation for elimination fifty percent of the customization and using delivered functionality. Also, reviewed manual processes and made recommendation to eliminate more the eighty percent of these processes.

Ingersoll-Rand -**Senior Functional Global HR & Global Payroll Consultant   May 2011 – June 2011**

For this manufacturing entity as the PeopleSoft HCM Functional Lead provided Phase III functional support for PeopleSoft 9.0 HCM to deploy multiple foreign countries hourly and salaried employees. Gathered, and defined country specific requirements, for Mexico and Chili. Provide functional and technical design specification documentations for China and Mexico. Provide payroll data mapping for Mexico and Chili employees paid on PeopleSoft Global Payroll. Test development, system integration and prepared and provided test scripts for all testing phases SIT, UAT and parallel testing.

NYC Health and Hospital Corporation May 2010 – May 2011

For this Public Sector -Hospital System, as functional analyst working on the 9.0 implementation for, Performance Management, e-Performance, Manager Self Service and Enterprise Learning Management (ELM). Provide go live and production support and also worked with training administrators entering training completion in PS. Participated in the development of training materials and classes and was the subject matter expert in delivery of the user training classes.

Telecom System of Trinidad and Tobago (TSTT) Sr. Functional Global Payroll GL Interface Consultant June 2010 – Aug 2010

For this Telecommunication Company, I was responsible for the upgrade of GL interface from version 8.8 to 9.1.

Ropes & Gray May 2009 – May 2010

For this Law Firm, I was responsible for the end-to-end implementation of Time and Labor, ADP interface and Manager Self Service.

BAE Systems Mar 2009-May 2009

For this Global Company, I was responsible for fixing outstanding Absence Management issues for the international offices.

Apollo Management May 2008 - Nov 2008

For this Global financial company, I was the functional lead on the implementation of Stock Administration and Commitment Accounting in PS version 9.0.

Financial Security Assurance Mar 2008 - April 2008
For this financial company, I was a Senior Functional Lead responsible for the preparation of the 9.0 fit-gap analysis for the implementation of Core HR, Benefits and Payroll.

Campbell's Company Dec 2007 - Mar 2008
For this food services company, I was Project Manager/functional lead, responsible for system separation of data for the North American and Canadian, employees who were part of the company sold. I was responsible for reviewing and approving the revision of the functional specifications, preparing test scripts and testing to be sure only the data for the sold company go to the buyer.

Cincinnati Children's Hospital Jul 2007 - Nov 2007
For this hospital, I was the Project Manager for PeopleSoft upgrade from 8.3 to 8.9 and the External Learning Management implementation project.

Bahamas Telecom Company LTD (Bahamas) Sr. Global Absence Management Consultant Jan 2007 - Jun 2007
For this public-sector communication company, I was assigned to the role of Senior Function Lead on Oracle PeopleSoft Version 8.9. I provided production support for Global Payroll and Absence Management.

Hoffmann La Roche Ltd Sep 2006 - Jan 2007
For this pharmaceutical company, I was assigned to the role of Project Manager and Functional lead, on the Position Management 8.9 implementation.

VHA Inc Jun 2006 - Sep 2006
For this medical supply company, I was responsible for the implementation of Position Management, Global Absence Management and Time and Labor for North American Payroll on Version 8.9.

Bahamas Telecom Company LTD (Bahamas) Feb 2006 - Jun 2006
For this public-sector communication company, I was assigned to the role of Senior Function Lead on PeopleSoft Version 8.9. for Global Absence Management, Global Retiree Pay processing, Mass Update Processing, Retro Payroll Processing and Position Management.

Saint Gobain Performance Plastics Apr 2006 - May 2006
For this manufacturing company, I was assigned to the role of Senior Functional Position Management Lead on an Oracle PeopleSoft Version 8.9 project. I also provided production support for North American Payroll and Query for end users.

American International Group (Bermuda) Sep 2005 - Feb 2006
For this international financial company, I was assigned to the role of Senior Functional Payroll Developer working on cleanup of issues resulting from implementation. I worked on the Global payroll, Core Human Resources, Base Benefits configuration, Commitment Accounting, Interface and year-end tax reporting issue. I worked on preparing and administering training in HR, Benefits, Global Payroll and Year End Processing end user documentation.

City of Springfield and Butterfield Oct 2005 - Oct 2005
For these Government agencies, I was responsible for delivering classroom training on version 8.8. I delivered training on Core HR configuration and Processing, Benefits configuration and processing, Payroll

configuration and processing and Query reporting. I was also responsible for researching existing problems and providing solutions.

SimplexGrinnell Mar 2005 - Sep 2005

For this Safety and Security Company, I was assigned to the role of HRIT Senior Production Support Analyst for PeopleSoft version 8.8. I provided support and issue resolution for third party interfaces, PS HR, Payroll and Benefit table maintenance, Security Administration, payroll mass change processing for annual salary review and vacation accrual change processing. I was also responsible for creating and maintaining all company HR executive management reports, using Query, Crystal, RWIZ and Excel reporting tools.

AXA Money Financial Group Oct 2004 - Jan 2005

For this international Financial Company, I was assigned to the role of Senior Lead Functional Payroll. I worked on converting the existing SAP payroll to PeopleSoft version 8.8. In this role, I worked on configuration design, documentation and testing of Functional Designs for new inbound and outbound interfaces, which included General Ledger and outsourced benefit interfaces. I also worked on the retro benefit/deduction processing.

American Intl Group (USA, Bermuda) Sr. Functional Global HR and Payroll Consultant Aug 2003 - Sep 2004

For this international financial company, I was assigned to the role of Senior Functional Human Resources/Payroll lead for the version 8.8 implementation.

The Boeing Company Jan 2003 - Jul 2003

For this manufacturing company, as Senior Functional Payroll lead for version 8.3. I was worked on the configuration, testing and troubleshooting. I used the PayMatch payroll-testing tool to identify and test all conversion and interface issues for North America Payroll, which included US, Canadian, Global pay processing. I was responsible for documenting programming requirement, business process, issue resolutions and payroll end user training. I was also responsible for production support and building the queries to support the production processes after Go-Live.

The Boeing Company Oct 2000 - Nov 2002

For this Federal contractor, I was assigned to work on three separate phases of the project. On the phase one I was assigned the role of Senior Functional test lead for version 7.5, Senior Functional Lead on the implementation of Human Resources, Benefits, Payroll and the integration of an in-house Time and Labor system. On the second phase of the project, I was assigned to the team responsible for developing an hourly workforce custom module, which managed the complicated union rules used to surplus and acquisition process.

Eli Lilly Mar 2000 - Sep 2000

For this leading provider of health services and pharmaceuticals, I served as the Senior Functional Lead for the upgrade from PS 6.02 to 7.5 and changing the payroll to in-house payroll processing. I also worked on changing a heavenly customized version of 6.02 to a more vanilla version of PS 7.5. Human Resources. I created and delivered end user for the following modules Position Management, Administer Workforce, Benefits Administration, Global Payroll, Garnishment Processing, Off-Cycle check processing, Reversals and Adjustments, On-line checks, retro processing, Year-end Processing and Global pay processing.

Wells Fargo Bank Dec 1999 - Mar 2000

For this Financial Institution, I served in the Human Resources Project Lead role for a team responsible for the fit/gap analysis between the PS 6.11 and 7.5. In the following modules, Administer Workforce, Salary Administration, Position Management, Health and Safety, Plan Compensation, and Recruiting Workforce Modules.

Franklin Mint: Oct 1999 - Nov 1999

For this Manufacturing Company, I was assigned to the PeopleSoft Functional expert as trainer for PS Query and Crystal, PeopleSoft 7.5 HCM

Whirlpool Corp Mar 1998 - Aug 1999

For this Manufacturing Company, I was simultaneously responsible for coaching and managing successive different internal implementation teams with roll out implementation to ten divisions, some of which were union shops. I organized and conducted the Concept Design (fit/gap) analysis for each division's current process and future process maps for Human Resources, Benefits and Payroll, PeopleSoft 5.12, 7.0 and 7.5.

First Data Corp. (FDC) Oct 1997 - Feb 1998

For this Data Management Company, I managed the PS version 7.0 acceptance testing for Human Resources, Benefits Administration and Payroll PeopleSoft training for FDC's end users on the implementation team.

First Union Bank (FU) Aug 1997 - Sep 1997

For this Financial Institution, I served in the Human Resources Project Lead role for PeopleSoft HRMS version 4.1 to version 6.0. I was also a Project Management Coach to the internal Project Manager.

Consolidated Stores: May 1997 - Jul 1997

For this retail company, I served as the Training Designer responsible for developing the step-by-step PeopleSoft User Guide for Human Resources, Benefits and Payroll.

Genuine Parts Company (GPC) Feb 1997 - Apr 1997

For this distributor of automotive replacement parts, I served as the Project Management, Process Design, Fit/Gap, Testing, and Training activities for the implementation of the Training and Recruiting Module of the PeopleSoft HR version 5.11.

America's Favorite Chicken Company (AFC) Jun 1996 - Jun 1997

For this fast-food restaurant chain, I served as the functional HR Project Manager/Lead. PeopleSoft version 5.11 HR for user Acceptance and System Integration testing, User Documentation, Training, and parallel testing phases of the project

Federal Reserve Bank of Atlanta Feb 1996 - May 1996

For this regional member of the Nation's Central Banking system, I provided consulting in security in HRMS version 4.0.

Glaxo-Wellcome Oct 1995 - Jan 1996

For this leading provider of health services and pharmaceuticals, I served as the functional Project/Knowledge for Human Resources; Benefits Administration and Payroll.

Countrywide Funding Corp HRIS Manager Aug 1989 - Apr 1995

For this mortgage finance company, I was the Project Manager for PeopleSoft HRMS version 3.2 implementation.

Submitted on a Company Fee Basis

Appendix H: Johnny Springer Resume

Johnny has worked with PeopleSoft clients since Release 3.0. He is a skilled consultant that has extensive experience managing project teams during the implementation of PeopleSoft as well as configuration, customization, and implementation of PeopleSoft systems. He has worked on global PeopleSoft Implementation projects as both a Team Lead and functional consultant. He has conducted training for Core Team as well as End Users.

Johnny has maintained his PeopleSoft Strong Functional and Technical training by utilizing PeopleSoft University. He has done Multiple Implementation on Peoplesoft HR HelpDesk 9.2. Most recent training includes HRMS, Talent Acquisition Manager, Benefits and Benefits Administration on PeopleSoft Release 9.2.

Johnny is a graduate of Peoplesoft Project Management Academy and a certified Project Manager (PMP) through PMI.

PeopleSoft Tools Experience:	SQR, SQL, PeopleCode, PeopleSoft Conversion, PeopleSoft Upgrades, PeopleTools
Certifications	Project Management Institute (PMP), PeopleSoft Project Management Certification

EDUCATION AND TRAINING
Athens State University
Bachelor of Science Business Administration, Minor Computer Science 1982

PROFESSIONAL EXPERIENCE
Samaritan Purse April 2022 through Current
HRIS Analyst
Responsibilities:
- Support of HRIS help desk providing level 2 support for HCM applications.
- Facilitated sessions discussing new functionality the business needed
- Developed queries as needed
- Documented workflow requirements and configured PS as needed
- Performed Fit / Gap during upgrade PUM 32 to PUM 42
- Developed test scripts to test the HCM System
- Executed test scripts and documented issues.
- Worked with developers to resolve issues
- Updated Help Desk documents to reflect new functionality

State of Washington March 2021 through 4/1/2022
HRIS Analyst
Responsibilities:
- Support of HRIS help desk providing level 2 support for HCM applications.
- Facilitated sessions discussing new functionality the business needed
- Developed queries as needed
- Documented workflow requirements and configured PS as needed

- Developed functional specifications and worked with development team to understand what is needed and help them write technical specifications
- Supported all year end activities for all modules
- Worked closely with business owners to ensure all work was done to their level of satisfactory
- Performed testing of all PUMs and worked with other team members to make sure the PUMs were thoroughly tested and clean before move to production

Mecklenburg County, Charlotte, NC October 2019 through Current

PeopleSoft Consultant/Production Support for HCM, Benefits Administration, TAM / CG and outside vendors on PeopleSoft 9.2 PUM 34

Responsibilities:

- Developed functional specifications for Fluid ESS / MSS functionality.
- Worked with developer to understand the requirement and test.
- Developed functional specifications for Fluid MSS transactions and worked with developer to test
- Documented manual processes and redesigned them to work within PeopleSoft in an automation fashion.
- Cleaned up Benefits Administration configuration to work within the business rules.
- Addressed issues as they come up in production for all HCM, Base Benefits, HR, TAM, Benefits Administration, Workflow and other HCM modules
- Support of 1095 process for yearend reporting
- Open Enrollment for 2020 and 2021 support and design of customizations as needed by business
- Work with employee support center to resolve day to day issues that arise
- Design and test of customizations that stream line business processes
- Implementation of the delivered 834 interfaces for BCBS of NC
- Developed queries as needed by the business to support day to day operations

Scana Corporation January 2018 through October 2019

PeopleSoft Lead- Benefits Administration, TAM / CG, Payroll and outside vendors on PeopleSoft 9.2 PUM 26

- Addressed issues as they come up in production for TAM and Benefits Administration.
- Cleaned up Retiree benefit elections
- Worked with COBRA vendor to automate the interface between customer and Wage Works
- Developed reports as needed
- Used delivered PS functionality to create 1095's and the outbound file to IRS.
- Worked with business owners to clean up 1095 data issues reported by IRS.
- Support of Open Enrollment by modifying the configuration to new business requirements for the new year.
- Supported inbound and outbound files to third party vendors for COBRA, Disability payment systems and BCBS.

USG November 2017 through January 2018

HR / Benefits Functional Role

- Provided testing of customizations that had been developed that was identified during fit / gap.
- HR and Benefits business leads identified a series of customizations that were needed during Fit / Gap.
- The gap had a functional spec created for it and turned over to the development team.

- Unit testing was needed for the spec and this required working with developer to clarify the requirement and at times change the customization.

City of Raleigh August 2017 through December 2017
Open Enrollment / Self-Service
- Worked with business to document business requirements
- Modified configuration of Benefits Administration to meet business requirements
- Modified Self Service to accommodate City of Raleigh requirements
- Cleaned up Benefits Administration transactions
- Monitored OE while it is open to look for issues
- Conducted Post OE Audits
- Documented requirements for outbound interface to H&W vendors
- Modified the configuration for the 834 interfaces
- Worked with vendors to test the interface

Miami Dade College May 2017 thru September 2017
TAM / Candidate Gateway
- Trouble shooting production issues
- Working with developers to understand issue and alternatives
- Tested PUM 20 for TAM / CG
- Reviewed enhancements and wrote functional spec's

Regional Medical Center September 2016 until August 2017
Benefits Administration Implementation
- Documented business requirements for all benefit plans
- Configured the plans in PeopleSoft Base Benefits
- Worked with developer to map the legacy data to PS Base Benefits
- Documented the requirements for Benefits Administration
- Implemented Life Events, OE and event maintenance and trained end users.
- Configured Benefits Administration to execute business processes for the hospital
- Performed Unit Testing
- SIT Testing
- Parallel Testing
- Created documentation to support configuration
- Wrote functional specifications to create the outbound interface files to interface PeopleSoft benefits to Benefits Connect.
- Create test scenarios that would trigger all the situations needed by Benefits Connect.
- Entered the test transactions, explained the scenarios to the business owners for validation
- Transferred the output files to Benefits Connect and once the files were loaded, examined and resolved data issues.
- Documented the business requirements for the EDI 834. Worked with the vendor for their unique requirements and changed the configuration to accommodate and tested the outbound.
- Tested the 834 outbound files to ensure it contained the transactions needed for each vendor. Worked with the business to clean up data on business side and vendor side.

UT Rio Grande Valley June 2016 – September 2016

Business Process work

- Facilitated sessions with business owners to review current business processes and map to PeopleSoft delivered processes for HR, Benefits, T/L, Payroll, Absence Management, Recruiting (TAM) and Commitment Accounting.
- Documented the processes and worked with business owners to adopt delivered processes
- Worked on final documents to Senior Management to explain the findings and documented issues, challenges

Alfa Insurance May 2016 – June 2016 April 2016

Implemented delivered functionality for ACA reporting and produce 1095.

- Met with business owners to determine scope and requirements for ACA reporting
- Worked with Technical team to ensure all fixes from PUM's were installed
- Worked with technical team to convert existing employee's new ACA records.
- Worked with technical team to convert existing JOB Codes with default values used by ACA online process
- Set up the configuration for ACA
- Worked with the batch load processes to produce the extract file
- Reviewed the Box 14 and Box 16 output to ensure it was correct

Baptist Medical Center January 2016 – April 2016

Functional Lead Talent Acquisition Manager / Candidate Gateway (TAM / CG) and Workforce Administration

- Reviewed customizations to see if they are needed in 9.2 PUM 16 and Peopletools 8.55
- Worked with developers to remove customizations and take advantage of new functionality to replace them
- Removed customizations to reflect business process changes
- Tested the system when all customizations were applied to ensure it worked properly for the Recruiter, Applicants and Employees via self service
- Documented new functionality that was being brought into scope and updated test scripts

City of Raleigh October 2015 – January 2016

Functional Lead Benefits Administration

- Clean up benefit administration transactions for past that was not processed correctly
- Reviewed current configuration of benefits and made changes
- Cleaned up coverage codes and made changes
- Fit / Gap on Life Events and changed configuration to accommodate current requirements
- Testing lead for new configuration of Benefits Administration and Life Events

Olin Chemical November 2015 – January 2016

Functional Lead Affordable Care Act

- Worked with developers to understand data requirements for producing ACA file requirements
- Mapped data from base benefits to flat file requirements for ACA file
- Developed test scripts for testing outbound ACA file
- Tested file to ensure it contained correct mappings for 1094 and 1095

Specialty Care August 2015 – October 2015
Functional Lead Self Service eBenefits
- Conducted demonstrations of all new functionality delivered from 9.0 to 9.2.
- Worked with IT staff and business owners to establish time line and project plan to implement selected new features and functionality
- Captured requirements for Affordable Care Act. Worked with business team to map their requirements to delivered ACA functionality.
- Worked with business owners and Time and Labor team to configure the delivered TRC codes that represent hours worked.
- Worked with developer to write conversion to load ACA data needs.

Healthways Healthcare February 2015 – August 2015
Functional Lead
- Conducted fit/gap for delivered functionality of 9.0 to 9.2 with specific emphasis on Self Service – Life Events
- Documented requirements for Life Events
- Performed configuration for Life Events
- Modified content on self-service pages for Life Events
- Documented requirements for ACA
- Performed data mapping of new HR tables used to tract ACA data needs
- Developed requirements for locating employees that are crossing the threshold for ACA.
- Worked with Developer to write conversion for converting ACA data needed

Progress Rail August 2014 – May 2015
Functional Lead Benefits Administration
- Performed fit / gap on Benefits Administration.
- Documented all eligibility rules and event rule needs for 19 different benefit programs.
- Developed training materials for end users on Benefit Administration transactions
- Developed test scripts and scenarios for each of the programs.
- Taught classes to end users on Benefits Administration
- Worked with developers on customization requirements
- Worked with developers to clear up base benefit data
- Cleaned up errors from Snap Shot
- Supported UAT working with users
- Worked on cut over plan and with developers working on DMS scripts
- Production support that included OE 2015 and Event Maintenance

Erlanger Hospital October 2013 – June 2014
Production Support
- Performed production support of PS 9.2 for HR, Benefits Administration and TAM / Candidate Gateway
- Documented current business processes and how those processes will be performed in PS for each functional area
- Conducted a RFP process to get vendors for Resume Parsing tool. Implemented the resume parsing tool.
- Taught classes to end users on 9.2 and the differences from 9.0

- Resolved issues with PS and supported help desk taking phone calls
- Implemented additional Savings Plan types for new savings benefits to be offered
- Implemented additional plan type for Smoker Premium when employee or family member covered smoked.
- Worked with developers to get SES searches to work properly
- Documented and cleaned up LOA and Retirement business process.

Lacrosse Hospital August 2013 – December 2014
Open Enrollment Support
- Documented additional business requirements of new plans, deletion of plans that will go into effect for OE.
- Designed the new plans in a PeopleSoft 9.1 environment
- Modified test plans, steps involved for OE at LHI.
- Performed unit testing on new configuration
- Modified Content of eBenefits Self Service for new plans
- Worked with business owners to system test new design
- Participated with technical team to cut over new configuration to production
- Post OE Support and Audit.
- Documented the requirements for ACA
- Changed the configuration to accommodate the requirements
- Wrote test plans for ACA functionality
- Worked with development team to convert employee data

Hospital of Central Connecticut September 2013 – December 2013
Open Enrollment Support
- Worked with Business Owners to document requirements for Open Enrollment.
- Modified the existing configuration to add additional plan types, to include new medical plans, LTD Buy up plans, Life Insurance plans and special consideration for senior management on life insurance.
- Performed unit testing of configuration to ensure the new plans as well as the eligibility and event rules worked as per business requirements.
- Made modification to the content on eBenefits Self Service to reflect content of new plans.
- Participated in System testing, resolving issues that were discovered.
- Modified OE Task list to reflect new steps that was required for configuration changes.
- Worked on cut over to production DMS scripts.
- Supported OE through the OE window and then closed out OE.
- Performed post OE audits.
- Developed functional specifications and mapping for new COBRA vendor.
- Worked with technical team to develop and test the new COBRA outbound file.
- Supported the implementation of AON Hewitt outbound and inbound for deduction changes.

The Limited July 2013 – December 2013
- Developed functional requirements and performed configuration for Health Care Reform 2014(ACA) laws to enable client to be comply. These new requirements were in preparation for OE.

- Developed functional requirements and performed configuration for new plan offerings. Customer is changing health care vendors and offering for options for domestic partner coverage. Configured new plans, coverage codes, changed translate tables.
- Wrote functional requirements and configuration for employees that do not make an election, that the default of their current coverage and plan type will map to new plan and coverage
- Developed test scripts to be used for Open Enrollment that encompass all HCR 2014 requirements.
- Developed requirements and functional specifications for customer changing COBRA vendor. Customer currently outsources COBRA administration. They have changed vendors from UHC to CONEXIS. This required a completed new outbound interface that needed the requirements developed and functional requirements developed.
- Customer is offering coverage to a lower tier employee. This is being done to be comply with the new laws. Wrote functional requirement and functional design to enable PS to store and report on this data and this be used in Benefits Administration.

Federal Agency October 2012 – May 2013
HCM HR, Benefits Administration / Base Benefits Functional Consultant Upgrade from 9.0 to 9.1
- Worked with business to determine new requirements for Open Enrollment for 2011
- Made configuration changes to accommodate plan changes for OE
- Performed production support during OE
- Implemented Total Rewards and for Self Service and rolled out to employee population
- Modified configuration changes to accommodate new functionality that was delivered for the new release
- Modified configuration that reflected lots of clean up in Job Code, Action Reason and Leave plans were consolidated
- Wrote functional specifications for new features that were brought into scope
- Wrote test scripts for testing new functionality as well as functionality from 8.9
- Worked with Upgrade team on changes that were brought in scope

Health Care November 2010 – April 2011
HCM Talent Acquisition Manager 9.1
- Reviewed current business processes and made recommendation
- Redesign business processes to streamline and remove redundant data entry
- Performed detail fit / gap of current recruiting processes
- Documented each gap, along with solution to close the gap and redesigned the business process
- Wrote functional specifications for all processes
- Taught TAM classes to core team
- Worked with Core Team to design the customer's business processes into TAM
- Wrote Test Scripts
- Worked with developers to map legacy data to PeopleSoft TAM

Major University March 2010 - November 2010
HCM Functional Consultant
- Taught Base Benefits and Benefits Administration classes to end users prior to detail Fit / Gap
- Conducted fit / gap of all current processes and mapped PeopleSoft to processes
- Designed current business requirements into PeopleSoft Benefits Administration, Base Benefits and Benefits Billing

- Designed and configured eBenefits for Open Enrollment only
- Performed a demo of HR, Base Benefits, Benefits Administration and Talent Acquisition Manager / CG in 9.1 environment.
- Developed Test scripts for System and UAT phases of the project
- Worked with customer to clean up errors from running SNAP Shot process

University of Louisville August 2009 to February 2010
HCM Functional Lead Upgrading from 8.9 to 9.0

- Responsible for Fit / Gap on HR, Base Benefits, Benefits Administration, Position Management, Talent Acquisition Manager / Candidate Gateway and Payroll.
- Reviewed the compare reports to ensure all enhancements were captured.
- Reviewed current enhancements and documented them to gain an understanding of their functionality in order to see if delivered functionality could replace.
- Demonstrated to the business community the functionality in the delivered system that could replace the enhancement documented during the fit / gap.
- Reviewed custom reports to see if new reporting could remove the customization.
- Wrote test scripts to compliment the new functionality that will replace customizations. Also wrote test scripts to thoroughly test enhancements that were to be brought forward.
- Worked with developers to analyze the Compare reports before applying bundles to ensure customer's enhancements were not overlaid. Reviewed documentation with bundles and patches to understand what objects were affected. Demonstrated other features in the delivered system that could be implemented and deliver business value to each functional area.
- Conducted a proof of concept for Commitment Accounting for the University. The Proof of Concept was successful in all business processes, from the ability to store budget amounts, posting of actual, check reversals. It created the expense transactions into GL.

Additional Projects Prior to 2010 Available Upon Request
Submitted on a company fee paid basis

Appendix I: Christopher Lewis Resume

SUMMARY

Proven IT Professional with Experience in Management

Over 25 years of experience in Information Technology with expertise in PeopleSoft HCM/FSCM, database, networking, Microsoft Exchange, and SharePoint administration. A dedicated and hard-working individual with excellent communication skills possessing the ability work with all levels of an organization. Highly successful in meeting new technical challenges and finding solutions to meet the needs of customers.

Certifications

- Oracle Business Intelligence Foundation Suite 11g Certified Implementation Specialist

Active Security Clearance

Oracle Skills

- PeopleSoft Human Capital Management 8.8 – 9.2 (HR, Benefits, Compensation, ELM, Payroll for North America, Time and Labor, Enterprise Learning)
- PeopleSoft Financials 9.1, 9.2 (GL, Grants, Budgets, Commitment Control, AP, AR, Billing, Inventory)
- PeopleSoft Campus Solutions 9.0 – 9.2
- PeopleSoft ELM 9.2
- Oracle HCM Cloud (HCM Data loader, Payroll Batch Loader, Interfaces)
- Oracle Application Express (APEX): 21.1.3 and above
- Application Designer, Data Mover, Query, PeopleCode (including App package), SQR, Application Engine, Component Interfaces and Excel to CI, Integration Broker, Web Services, Tree Manager, Security, Activity Guide Composer, Page and Field Configurator, BI Publisher, Approvals Framework, Related Content Framework, Event and Notification Framework
- Portal (Fluid, Branding, Navigation Pages and Collections, WorkCenters and Dashboards, Pagelets, Guided Processes)
- PeopleTools: 8.44 - 8.59
- Languages: SQL, XML/XSLT, PL/SQL, T/SQL.
- Databases: MS SQL Server, Oracle
- OBIEE Reporting Technology: Data Models, Reports, Dashboards, Analyses

Skills Summary

• HP Agile Manager	• STAT Version Control	• SQL Server Management
• SharePoint Designer	• Crystal Reports	• Studio
	• Business Objects Enterprise	• Microsoft Excel
• Service Now	• Microsoft Word	• Microsoft PowerPoint
• Remedy	• Microsoft Access	
• Zendesk	• Microsoft Planner	• Microsoft Visio
• Zoho	• SmartSheet	• Microsoft Project
• Phire	• TOAD	
	• SQL Developer	

- Crystal Reporting for Developers
- Introduction to PeopleSoft HR/Benefits
- SharePoint Site Design
- PeopleTools I
- PeopleTools II
- Agile Project Management

Education

GEORGIA SOUTHERN UNIVERSITY, Statesboro, GA
Bachelor of Business Administration, Management Information Systems, 1994

Professional Experience 2018 – Present
PROJECT: Resolution Life (Australia)
PeopleSoft Technical Developer – FSCM / APEX Developer
March 2022 – September 2022

- Worked with a team of developers using PeopleTools 8.58 and 8.59 to identify, review, and document over 100 current interfaces/processes (App Engines, SQRs, etc.) in the current production PeopleSoft FSCM system. As part of the documentation process, I would work with Functional SME's to fully understand the process and ensure the details were concise and complete for the cloud development team to replicate.
- Also reviewed and documented over 100 PeopleSoft Bolt-Ons requiring rebuild in the new Cloud product.
- As part of this review/documentation effort one critical Bolt-On was unable to be replicated in the new Cloud system before go-live. This custom application was earmarked for post go-live development but would take at least 1 year to complete. The business reviewed other avenues and took a chance using Oracle Application Express (APEX) for their solution. I was asked to be the lead developer for this initiative and built a working solution for their business need. This solution was completed in about two months and the company stated it will save them over $700,000 in special licensing for the first year of usage.

PROJECT: US Army - Integrated Personnel and Pay System (IPPS-A)
Sr. PeopleSoft Developer - HCM / Solutions Architect
June 2020 – January 2021

- Work with the functional SMEs from the Army to demonstrate the functionality of the PeopleSoft HCM 9.2 system to ensure requirements were gathered and potential solutions could be attained based on current regulations.
- Using PeopleTools 8.57 I built technical solutions for the Army's IPPS-A system (PeopleSoft HCM 9.2) while accommodating the requirements of each component (Active, Reserve, Guard).
- Conducted unit testing and worked with system testers to ensure all possible scenarios were captured as each solution progressed through the migration stages.

PROJECT: Department of State – Integrated Logistics and Management System (ILMS) Sr. PeopleSoft
Developer **March 2019 – March 2020**

- Provided production support for all modules on an as needed basis.

- Served as a member of the FSCM 9.2 Upgrade o Helped retrofit various custom objects and supported functional users during testing.
- Provided guidance on and conversion of various bolt-on solutions to Fluid.
- Implemented various Branding features and custom tiles using theme macro sets and style sheets.
- Designed custom clipart to create a uniform look for the system.
- Revamped the loanable property custom inventory module.
- Conducted unit testing and worked with system testers to ensure all scenarios were tested as each solution progressed through the migration stages.
- Assisted with technical interviews for various PeopleSoft development needs.
- Supported the GEC with their SharePoint development needs.

PROJECT: US Army - Integrated Personnel and Pay System (IPPS-A)
Sr. PeopleSoft Developer - HCM / Solutions Architect
August 2018 – February 2019
- Worked on the HCM PUM upgrade team conducting fit gap analysis and retrofits in preparations for golive.
- Worked on the promotions team working with functional analysts and SMEs to gather requirements based on regulations.
- Built technical solutions for the Army's promotion process while accommodating the requirements of each component (Active, Reserve, Guard).
- Conducted system testing and worked with testers to account for all scenarios as each solution progressed in its migration stages.
- Worked with the functional SMEs from the Army to demonstrate the functionality of the system to ensure appropriate requirements could be reached based on current regulations.
- Responsible for updating Agile reports daily for project management team.

New Resources Consulting (NRC), Winston-Salem, NC February 2015 – August 2018
Development Team Manager / Sr. PeopleSoft Developer (HCM, FSCM, ELM, Campus Solutions)
June 2016 – August 2018
- Conducted quarterly and yearly performance reviews for team of 6 developers.
- Collaborated with business analysts and business users to conduct needs analysis for requirements gathering.
- Responsible for conducting Business requirements technical reviews and delegate each development effort to the appropriate developer.
- Responsible for conducting all development code reviews before released for testing.
- Supported and mentored the junior developers and business analysts in troubleshooting PeopleSoft production issues and provide timely resolution to end-users.
- Conducted fit gap analyses for PeopleSoft upgrades and performed retrofits as required.
- Provided project management updates to leadership on a weekly basis.
- Maintained corporate SharePoint security and site development.

PROJECTS:
Wake Forest Baptist Medical Center, Campus Solutions 9.2 Upgrade
Sr. Developer / Solution Architect
- Provided top level support for Campus system upgrade retrofits.
- Converted deprecated student tuition payment system to new Hosted Payment processing using Integration Broker to third-party payment processor for student payments.

Wake Forest Baptist Medical Center, Oracle HCM Cloud Implementation
Sr. Developer / Solution Architect
- Worked with Oracle Consulting Services during configuration and conversions.
- Developed PeopleSoft conversion programs for extracting HCM employee data for load into HCM Cloud environments.
- Loaded employee data to HCM Cloud using HCM Data Loader (HDL) and Payroll Batch Loader Excel utilities.

Wake Forest Baptist Medical Center Production Support (PeopleSoft HCM/FSCM 9.1, Campus Solutions 9.0, ELM 9.2) / Mergers & Acquisitions Development Lead
HCM
- Provided 24/7 top level support for HR, Benefits, Payroll, Time and Labor, and Learning Management
- Supported client's various inbound and outbound interfaces (HIPAA 834, Retirement, Flexible Spending Accounts, Identity Management, EPIC EMR, etc.)
- Provided ongoing support for the Kronos to PeopleSoft interface for employee time punches.
- Developed new inbound and outbound interfaces for new mergers and acquisitions.
- Top level support for Payroll and Labor Distribution issues.
- Developed various solutions for loading employee data for testing and production cutover while onboarding new entities.
- Financials / Supply Chain Management
- Provided 24/7 top level support for GL, AP, AR, Billing, Grants Management, Commitment Control, Budgets, Supply Chain, Purchasing, eProcurement, Inventory.
- Supported Payroll for North America to Financials GL interface.
- Supported InfoEd to PeopleSoft interface for Grants.
- Developed EPIC to PeopleSoft Interface to trigger Inventory adjustments for each patient case once closed.
- Developed SOAP based integration for Supply Chain inventory labeling software.
- Campus Solutions / Enterprise Learning Management
- Provided 24/7 top level support
- Worked with functional analysts and SMEs to gather requirements and develop solutions
- Developed, tested, and deployed various solutions to meet the requirements.

University of Wisconsin-Madison, PeopleSoft HCM/FSCM 9.1-9.2 Support
Development Lead
- Member of the project management team for onboarding client.
- Worked client tickets in their Remedy ticketing system to resolve Production issues.

Beth Israel Deaconess Medical Center, PeopleSoft Upgrade Support
Development Lead
- Served as a member of the project management
- Provided development support for tools and PUM updates.

The Manitowoc Company, Oracle HCM Cloud Support
Sr. Technical Resource
- Supported the client's Oracle on premise HCM Fusion system.
- Supported existing SQL Server interfaces to and from the HCM system using SSIS and OBIEE.

Sr. PeopleSoft Developer (HCM, FSCM, ELM, Campus)
February 2015 – June 2016

- Collaborated with business analysts and business users to conduct needs analysis for requirements gathering.
- Developed essential solutions to fit the needs of the client based on functional requirements.
- Supported and mentored junior developers and business analysts in troubleshooting PeopleSoft production issues and provide timely resolution to end-users.
- Conducted fit gap analysis and retrofits for PeopleSoft upgrades.
- Implemented and supported Integration Broker transactional messaging for cross-platform communications between PeopleSoft environments and external systems.
- Provided project management updates to leadership on a weekly basis.

Wake Forest Baptist Medical Center, Winston-Salem, NC June 2013 – February 2015

SCANA Corporation, Columbia, SC 2006 – 2013

PRC, INC., Beaufort, SC 1995-1999

Submitted on a company fee paid basis

Request for Proposal

RFP# FDC-1175

Information Technology Consulting Services

June 15, 2023

ANSWER/INQUIRY SUBMISSION FORM
DEADLINE FOR SUBMISSION OF QUESTIONS: <u>Thursday, July 20, 2023 @ 5:00 p.m.</u>

PROCEDURE FOR SUBMITTING QUESTIONS

All questions and inquiries shall be formally submitted on this document. Questions shall be submitted in writing and shall reference, whenever possible, the Page, Section, Item number within the Statement of Needs specifications of this document that the question is in reference to.

Questions shall be submitted to: Doug Chester at the following e-mail address: chestefd@jmu.edu.

Answers to all questions received will be issued through a written addendum (if applicable) and become a part of the permanent record of this solicitation.

Date: _____

Project Location: James Madison University
Project # & Title: FDC-1175 Information Technology Consulting Services

The following question concerns: (indicate)

RFP Document: Section (number) _____, Page _____, Paragraph _____,

_____

_____

_____

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_____

Question submitted by:

_____
        Name   Organization   E-mail Address

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 <u>2:00 PM on August 3, 2023</u> 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, <u>chestefd@jmu.edu</u>; 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

TABLE OF CONTENTS

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.

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.   <u>GENERAL INSTRUCTIONS</u>

   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** <u>and</u> **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' 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.   <u>SPECIFIC PROPOSAL INSTRUCTIONS</u>

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.

7. Proposed Cost. See Section X. Pricing Schedule of this Request for Proposal.

VI.   EVALUATION AND AWARD CRITERIA

A. <u>EVALUATION CRITERIA</u>

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. <u>ETHICS IN PUBLIC CONTRACTING</u>: 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. <u>IMMIGRATION REFORM AND CONTROL ACT OF 1986</u>: 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. <u>DEBARMENT STATUS</u>: 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. <u>ANTITRUST</u>: 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. <u>MANDATORY USE OF STATE FORM AND TERMS AND CONDITIONS RFPs</u>: 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

<blockquote>
<blockquote>

(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.

</blockquote>

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.

</blockquote>

K. <u>PRECENDENCE OF TERMS</u>: 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. <u>QUALIFICATIONS OF OFFERORS</u>: 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. <u>TESTING AND INSPECTION</u>: The Commonwealth reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.

N. <u>ASSIGNMENT OF CONTRACT</u>: A contract shall not be assignable by the contractor in whole or in part without the written consent of the Commonwealth.

O. <u>CHANGES TO THE CONTRACT</u>: 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. <u>DEFAULT</u>: 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. <u>INSURANCE</u>: 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) 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, 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.

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. <u>AUDIT</u>: 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. <u>CANCELLATION OF CONTRACT</u>: 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. <u>IDENTIFICATION OF PROPOSAL ENVELOPE</u>: 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; 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 SBSD-certified small businesses. This shall not exclude SBSD-certified women-owned and minority-owned businesses when they have received SBSD 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 SBSD 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. <u>AUTHORIZATION TO CONDUCT BUSINESS IN THE COMMONWEALTH</u>: 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. <u>PUBLIC POSTING OF COOPERATIVE CONTRACTS:</u> 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. <u>CRIMINAL BACKGROUND CHECKS OF PERSONNEL ASSIGNED BY CONTRACTOR TO PERFORM WORK ON JMU PROPERTY</u>: 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 #

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

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:_____

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 SBSD 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

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

JMU

JAMES MADISON
U N I V E R S I T Y.

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:_____   By:_____
            (Signature)   (Signature)

_____   _____
        (Printed Name)   (Printed Name)

Title:_____   Title:_____

23

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
Oracle Core Technologies			**Change Management Training, Svcs, & Cert.**		
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.
Oracle/PeopleSoft Enterprise Solutions			**Security and Federation Services**		
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.
Desktop and Mobile Device Management			**Cisco Technologies, Infrastructure Support, and Virtualization**		
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.
Microsoft Azure and M365			**Audio Visual Technologies**		
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.
Okta			**Secure Research Enclaves**		
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.
Data Analytics/Visualization/Warehouse/Lake			**Other Technology**		
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 3rd 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

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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. 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.

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-stie 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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Wine Price Building
Harrisonburg, VA 22807
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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, Fusinon 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 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