



**COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT**

Contract No. UCPJMU6768

This contract entered into this 11th day of December, 2023, by KPMG, LLC, 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 15, 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 November 8, 2023, which shall govern in the event of conflict.

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

CONTRACTOR:

By: Tricia Harper
(Signature)

Tricia Harper
(Printed Name)

Title: Partner

PURCHASING AGENCY:

By: Doug Chester
(Signature)

Doug Chester
(Printed Name)

Title: Buyer Senior

**RFP # FDC-1175 Information Technology Consulting Services
Negotiation Summary for KPMG, LLP**

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. The Contractor hereby revokes the confidentiality of its proposal dated July 25, 2023, as well as any ensuing negotiations. However, this revocation excludes specific sections of the proposal that have been identified on the Proprietary/Confidential Information Form and mutually agreed upon by the University.
3. 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
Project Manager	305.00	290.00
Senior Engineer	260.00	245.00
Engineer	220.00	195.00

Change Mgmt. Training, Svcs, and Certs	Onsite	Offsite
Project Manager	305.00	290.00
Senior Engineer	260.00	245.00
Engineer	220.00	195.00

Oracle/PeopleSoft Enterprise Solutions	Onsite	Offsite
Project Manager	280.00	270.00
Senior Engineer	250.00	230.00
Engineer	200.00	185.00

Security and Federation Services	Onsite	Offsite
Project Manager	315.00	300.00
Senior Engineer	290.00	275.00
Engineer	240.00	210.00

Microsoft Azure and M365	Onsite	Offsite
Project Manager	280.00	270.00
Senior Engineer	250.00	230.00
Engineer	200.00	190.00

Cisco Tech., Infrastructure Support, and Visualization	Onsite	Offsite
Project Manager	175.00	165.00
Senior Engineer	165.00	155.00
Engineer	155.00	140.00

Okta	Onsite	Offsite
Project Manager	315.00	300.00
Senior Engineer	290.00	275.00
Engineer	240.00	210.00

Data Analytics/Visualization/Warehouse/Lake	Onsite	Offsite
Project Manager	305.00	290.00
Senior Engineer	260.00	245.00
Engineer	220.00	195.00

Other Technology	Onsite	Offsite
Project Manager	305.00	290.00
Senior Engineer	260.00	245.00
Engineer	220.00	195.00

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.
10. The following changes are mutually agreed to in regards to the exceptions, clarifications, or additions of terms and conditions of RFP# FDC-1175:

a. Section VII. General Terms and Conditions:

1. VII.Q. *Insurance* is hereby replaced with the following:

INSURANCE: By signing and submitting a proposal under this solicitation, the offeror certifies that if awarded the contract, it will have the following insurance coverage at the time the contract is awarded. 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 coverages 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.

b. Section VIII. Special Terms and Conditions:

1. VIII.A. *Audit* is hereby replaced with the following:

AUDIT: The contractor shall retain all timekeeping and expense records relating to contractor's direct performance of this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The agency, its authorized agents, and/or state auditors shall have full access to and the right to examine any of said materials during said period.

2. VIII.B. *Cancellation of Contract* is hereby replaced with the following:

CANCELLATION OF CONTRACT: James Madison University reserves the right to cancel and terminate for convenience 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 for convenience 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.

3. VIII.O. *Additional Goods and Service* is hereby replaced with the following:

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.

4. VIII.R. *Confidentiality of Personally Identifiable Information* is hereby replaced with the following:

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 disclosed to unauthorized individuals or third-parties 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.

c. VIII.S. *Additional Terms* are hereby added:

ADDITIONAL TERMS

1. **Limitation of Liability** Notwithstanding anything else in this Contract to the contrary, including all attachments, the liability of the Contractor on account of any actions, damages, claims, liabilities, costs, expenses or losses in any way arising out of or relating to the Contract or the services performed under the Contract shall be limited to the amount of fees paid to the Contractor under the specific task order, or work order from which the liability occurred. The Contractor will not be liable for consequential, special, indirect, incidental, punitive or exemplary damages, costs, expenses, or losses (including, without limitation, lost profits and opportunity costs). The provisions of this paragraph shall apply regardless of the form of action, damage, claim, liability, cost, expense, or loss asserted, whether in contract, statute, rule, regulation or tort (including but not limited to negligence) or otherwise and shall survive contract expiration or termination.
2. **CPA Disclosure** Contractor is owned by professionals who hold CPA licenses as well as by professionals who are not licensed CPAs. Depending on the services Contractor is providing, non-CPA holders may provide the services under the Contract.
3. **Ownership** Upon full and final payment to Contractor of fees owed under the Contract, Contractor (i) assigns to Client, all right, title and interest in and to the deliverables except to the extent any Contractor Property is contained therein, and (ii) grants Client a royalty-free, non-exclusive, non-transferable, non-sublicensable perpetual license, to use such Contractor Property solely in connection with Client's internal use of the deliverables. Contractor Property shall mean all intellectual property, technology, know-how, methodologies, works of authorship, and other materials pre-existing the Contract or created, acquired, or licensed separately from the Contract, or created in performance of the Contract which are not specific to Client, including any modifications, enhancements, improvements, or derivative works. Notwithstanding anything herein that may be construed to the contrary, Client

agrees that nothing in this Contract prevents Contractor from using Residual Knowledge, which includes generalized knowledge, experience, know-how, or any of the ideas, concepts, methodologies, tools or techniques derived from or discovered during the provision of the Services performed under the Contract.

4. Authorized Third Parties Contractor may engage member firms of the KPMG network of independent firms and/or affiliated third-party providers (“Contractor Resources”), which may be in or outside the United States, to assist in the performance of the services. Contractor remains responsible to Client for the performance of such Services, and adherence to obligations of confidentiality, by any Contractor Resources to the same extent Contractor is obligated under the terms of this Agreement. With the understanding that Contractor will remain responsible to Client for the Contractor Resources, Client acknowledges and agrees that the Contractor Resources will not be subject to flow-down terms set forth in the Contract.

In addition, Client acknowledges and agrees that third party service providers (“Vendors”) may have access to confidential information from offshore locations, and that the Contractor uses Vendors within and outside of the United States to provide at Contractor’s direction administrative or clerical services to Contractor. These Vendors may in the performance of such services have access to Client’s confidential information. Contractor represents to Client that with respect to each Vendor, Contractor has technical, legal and/or other safeguards, measures, and controls in place to protect Confidential Information of Client from unauthorized disclosure or use.

5. Use of Technologies Contractor’s audit technologies, software productivity tools and certain technology infrastructure and, necessarily, your confidential information, may be hosted in cloud environments operated by Contractor Resources, notwithstanding other requirements of this contract. In addition, Contractor may license certain proprietary and third-party software tools (“Enabling Tools”) for use by Client to facilitate the Services. All other use is prohibited. Client may not redistribute, reproduce (except as necessary to run), modify, commercialize, allow third parties to access (unless authorized by Contractor in writing), or reverse engineer or decompile (except where such rights cannot be limited by applicable law) Enabling Tools. Enabling Tools are not intended to be used as a system of record, repository, or hosting service, and Client access to the Deliverables and other documents will be removed from the Enabling Tools within a reasonable period of time following the conclusion of the engagement to which they relate. Client shall download such Deliverables and documents for its records. Client acknowledges that use of Enabling Tools may be used notwithstanding other requirements of this Contract, and may be subject to additional terms specified in an engagement letter or other agreement. Enabling Tools are provided on an “as is,” “as available” basis.
6. Volume Rebates Where Contractor is reimbursed for expenses, Contractor will bill for the amount Contractor paid, without any additional markup. After such expenses are incurred, Contractor may receive rebates or incentive payments based on aggregate purchases, which may include expenses reimbursed by Client in addition to other clients. Such rebates are not credited back to Client, but are used to reduce Contractor overhead.

7. Force Majeure Except for the obligation of a party to make payments required hereunder, neither party shall be responsible for any delay or failure in performance of any part of this Agreement or the Services to the extent that such delay or failure is caused by reason of acts of God, wars, revolution, civil commotion, pandemic, epidemic, terrorism, acts of public enemy, embargo, acts of government in its sovereign capacity, labor difficulties, including without limitation, strikes, slowdowns, picketing or boycotts, malicious acts of third parties, or any other circumstances beyond the reasonable control of the non-performing party (each a "Condition"). The delayed party shall be excused from such performance on a day-to-day basis during the continuance of such Condition (and the other party shall likewise be excused from performance of its obligations on a day-to-day basis during the same period); provided, however, that the delayed party shall use commercially reasonable efforts to avoid or remove such Condition, and both parties shall proceed promptly with the performance of their obligations under this Contract whenever such Condition is removed or ceases. If the Condition continues for more than ninety (90) days, then the party affected may terminate this Contract upon written notice to the delayed party.

d. VIII.T. Systems Implementation Addendum is hereby added:

This Systems Implementation Addendum ("SI Addendum") amends the appended agreement ("Contract") by and between the State and KPMG LLP ("KPMG"). In the event of a conflict between the provisions of this SI Addendum (on the one hand) and the provisions of the Contract (on the other hand), this SI Addendum will govern. Any capitalized term not defined in this SI Addendum will have the meaning ascribed to it in the Contract (as applicable).

1. **Definitions. "Deliverables"** means, for purposes of this SI Addendum, items identified in the Contract for delivery in connection with the systems implementation services described in the Contract ("SI Services"). "KPMG Property" includes, without limitation, (i) any connectors or tools created by KPMG to move data; (ii) as between KPMG and the State, any modifications, enhancements, improvements, or derivative works made to, and ideas, concepts, methodologies, tools, or techniques relating to, any Third-Party Materials that result from the SI Services, subject to the rights of the provider of such Third-Party Materials; (iii) components, programs, systems, analysis, frameworks, documentation, drawings, configuration techniques and specifications, owned by or licensed or leased to KPMG or KPMG's affiliates or related entities, and any modifications, enhancements, improvements, or derivative works made to, and ideas, concepts, methodologies, tools, or techniques relating to, the same. **"State Materials"** means any and all materials, facilities, network, hardware, systems, software, data, and other equipment and information, that in each case is owned by or licensed or leased to the State (including any Third-Party Materials), to which KPMG is provided with access in connection with the SI Services and that may be used by KPMG in providing the SI Services and Deliverables pursuant to the Contract. **"System Configuration"** means Third-Party Materials as configured by the SI Services. **"Third-Party Materials"** means third-party hardware, software, and other third-party items used by or provided to KPMG in connection with the SI Services.

2. **Use of State Materials and Acceptance.**

- a. With respect to any State Materials to which KPMG is provided with access in connection with the SI Services, the State hereby grants to KPMG a non-exclusive, transferable, sub-licensable, paid-up, royalty-free right and license to use, copy, modify,

make derivative works of, and transmit such State Materials to the extent necessary for KPMG to provide the SI Services to the State.

b. Upon delivery of a Deliverable or System Configuration to the State, the State shall review the Deliverable or System Configuration in accordance with any acceptance procedure and within any acceptance period specified in the Contract, unless no such acceptance procedure or acceptance period is specified, in which case the acceptance procedure therefor shall be as set forth in this SI Addendum and the acceptance period shall be within ten (10) business days of delivery. The State may reject the Deliverable or System Configuration within the applicable acceptance period by providing to KPMG a notice of rejection (“**Rejection Notice**”) specifying a list of material non-conformities with the specifications set forth in the Contract (the “**Specifications**”). To be effective, the Rejection Notice shall be in writing (email being acceptable) and sent to the KPMG point of contact specified in the Contract or otherwise identified to the State in writing by KPMG. KPMG shall then conform the Deliverable or System Configuration to the Specifications and resubmit it to the State for review and acceptance in accordance with this Section 2(b) (“**Work-Out Period**”). This process shall continue until the Deliverable or System Configuration is accepted; provided that, in the unlikely event the Deliverable or System Configuration has not met the Specifications after three Work-out Periods, then (unless the Parties otherwise mutually agree in writing), (i) the Contract will automatically terminate upon the expiration of the final Work-Out Period, (ii) KPMG will promptly provide the State with a refund of any amounts paid by the State for the System Configuration or Deliverables that, at the time of termination, have not met the Specifications, and (iii) the State will promptly return such Deliverables or System Configuration to KPMG. The Deliverable or System Configuration will be deemed accepted when the applicable acceptance period has expired without KPMG receiving an effective Rejection Notice, or when the State uses such Deliverable or System Configuration (notwithstanding any rejection of such Deliverable or System Configuration) in a production environment, whichever occurs first.

c. This Section 2(c) shall only apply, and in lieu of Section 2(b), if the Contract specifies that the engagement will employ an agile development methodology. Upon delivery of a Deliverable or System Configuration to the State for each sprint, the State shall review the Deliverable or System Configuration in accordance with the stakeholder feedback and work stream alignment detailed in the Contract or in writing by the parties at the sprint planning sessions and any acceptance procedure and within any acceptance period specified in the Contract, unless no such acceptance procedure or acceptance period is specified, in which case the acceptance procedure therefor shall be as set forth in this SI Addendum and the acceptance period shall be within ten (10) business days of delivery. The State will participate in sprint planning sessions at the start of each sprint to agree upon priorities of tasks in the backlog to be completed in the next sprint. The State will participate in sprint retrospective sessions at the end of each sprint to review the work that was completed and may reject the Deliverable or System Configuration within the applicable acceptance period by providing to KPMG a notice of rejection (“**Rejection Notice**”) specifying a list of material non-conformities with the specifications set forth in the Contract or as requirements agreed at the sprint planning sessions and work stream alignment (the “**Specifications**”). To be effective, the Rejection Notice shall be in writing (email being acceptable) and sent to the KPMG point of contact specified in the Contract or otherwise identified to the State in writing by KPMG. KPMG shall then conform the Deliverable or System Configuration to the Specifications before the next sprint, or during the next sprint as mutually agreed, and resubmit it to the State for review

and acceptance in accordance with this Section 2(c) (the “**Work-Out Period**”) either before the next sprint, or after the next sprint as mutually agreed. This process shall continue until the Deliverable or System Configuration is accepted; provided that, in the unlikely event the Deliverable or System Configuration has not met the Specifications after three Work-out Periods, then (unless the Parties otherwise mutually agree in writing), (i) the Contract will automatically terminate upon the expiration of the final Work-Out Period, (ii) KPMG will promptly provide the State with a refund of any amounts paid by the State for the System Configuration or Deliverables that, at the time of termination, have not met the Specifications, and (iii) the State will promptly return such Deliverables or System Configuration to KPMG. The Deliverable or System Configuration will be deemed accepted when the applicable acceptance period has expired, or the next sprint begins, without KPMG receiving an effective Rejection Notice; or when the State uses such Deliverable or System Configuration (notwithstanding any rejection of such Deliverable or System Configuration) in a production environment, whichever occurs first.

3. Warranties and Disclaimers.

a. KPMG warrants to the State that, for a period of ninety (90) days after acceptance thereof, the System Configuration as delivered by KPMG will conform to its Specifications in all material respects; provided that KPMG’s warranties and obligations under this Section 3(a) shall not apply to the extent the non-conformity arises out of (i) use of the System Configuration other than in accordance with applicable documentation or instructions, (ii) any alteration, modification, or revision of the System Configuration not expressly authorized in writing by KPMG, or (iii) the underlying State Materials (including any updates and upgrades thereto). Any claim for breach of KPMG’s warranties set forth in this section or any other claims for breach of warranty with respect to the System Configuration’s failure to conform to its Specifications in all material respects must be made by written notice to KPMG within ninety (90) days after acceptance of the System Configuration. With respect to any circumstances alleged to give rise to such a breach of warranty, the State’s exclusive remedies, and KPMG’s entire liability, shall be, at KPMG’s option, (i) the repair and replacement of the System Configuration or (ii) the refund to the State of the amount paid to KPMG for the non-conforming System Configuration; provided that the State shall promptly return to KPMG all Deliverables to which the refunded amounts relate and shall have no further right to use the System Configuration or any such Deliverables in the System Configuration or otherwise.

b. The State represents, warrants and covenants to KPMG that (i) the State has obtained all consents, permits, licenses, and other approvals required (if any) for KPMG to perform the SI Services and to use the State Materials in accordance with the license granted in Section 2(a), (ii) KPMG’s exercise of its rights under Section 2(a) with respect to State Materials, excluding Third-Party Materials, will not infringe, misappropriate, or otherwise violate the rights of any third party, or violate any applicable law, rule, regulation, or other official government release, and (iii) the State will use the System Configuration in accordance with applicable law.

c. EXCEPT AS EXPRESSLY STATED IN THIS SECTION 3, KPMG EXPRESSLY DISCLAIMS AND MAKES NO WARRANTIES OF ANY KIND OR NATURE WITH RESPECT TO THE SI SERVICES, STATE MATERIALS (INCLUDING THIRD-PARTY MATERIALS), DELIVERABLES, SYSTEM CONFIGURATION, OR

OTHERWISE, EXPRESS OR IMPLIED, INCLUDING WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR USE, OR NON-INFRINGEMENT, OR THE APPROPRIATENESS OF STATE OR THIRD-PARTY SPECIFICATIONS.

d. The SI Services may include providing assistance to the State with the State's procurement of Third-Party Materials. Unless otherwise expressly stated in the Contract, the State will license or purchase such Third-Party Materials directly from the vendor or reseller (which may be an affiliate of KPMG). The State retains sole responsibility for compliance with the license terms governing such Third-Party Materials, the selection of such Third-Party Materials, and, unless the Contract expressly specifies otherwise, the payment therefor. If KPMG agrees in the Contract to provide any Third-Party Materials, such THIRD-PARTY MATERIALS ARE PROVIDED ON AN "AS IS" "AS AVAILABLE" BASIS WITHOUT WARRANTY FROM KPMG, with the exception of any manufacturers' or licensors' warranties which KPMG is able to arrange for the State's benefit. KPMG and its subcontractors reserve the right to retain ancillary benefits, including credits, rebates, or referral fees, they may receive relating to such Third-Party Materials, regardless of whether the State pays for such Third-Party Materials directly, on a pass-through basis, or otherwise. The State agrees that the retention of such benefits shall not constitute a conflict of interest.

4. Deliverables

a. KPMG shall own all right, title and interest in and to any Deliverables or System Configuration produced under this SI Addendum, including any modifications, enhancements, improvements, or derivative works of any State Materials, whether developed by or on behalf of KPMG solely or both parties jointly, but not any State Materials as they exist prior to the performance of the SI Services (subject to the license to KPMG granted under Section 2(a) above). Upon full and final payment by the State of all amounts due under the Contract, KPMG hereby grants to the State a perpetual, non-exclusive, non-transferable, paid-up, royalty-free right and license to use, copy, modify, make derivative works of, distribute, display, and perform the Deliverables or System Configuration, solely for the State's own internal business purposes and subject to any other restrictions specifically set forth in the Contract. Except as expressly provided in this Section 4, the State may not sell or license, sublicense, assign, or transfer, in whole or in part, the Deliverables or System Configuration, including any KPMG Property contained therein.

b. Notwithstanding anything herein or in the Contract which may be construed to the contrary, the State agrees that nothing in this SI Addendum or the Contract shall prevent KPMG from using any generalized knowledge, experience, know-how, or any of the ideas, concepts, methodologies, tools or techniques derived from or that are not unique to the State (collectively, "Residual Knowledge") to perform similar services and develop similar work product, results, or technology as that performed and developed under the Contract. KPMG reserves the right to use, disclose, reproduce, sublicense, modify, prepare derivative works from, perform, and display its Residual Knowledge, subject to the obligations of confidentiality set forth in the Contract.

5. Changes and Adjustment Events

a. The parties acknowledge and agree that the occurrence of any of the following events (each, an “Adjustment Event”) may require an extension in the schedule, modification of the scope of the SI Services, and/or increase in the fees and expenses set forth in the Contract: (i) a failure by any of the State Parties and/or their vendors to perform any of their respective responsibilities in a timely manner, including the supply to KPMG of Third-Party Materials or adequate resources and information; (ii) any assumption in the Contract not being fully realized; or (iii) the State’s failure to timely obtain pursuant to Section 3(b) or (c) (as applicable) all of the consents, permits, licenses, and other approvals necessary for KPMG to provide the SI Services. In the event an Adjustment Event occurs or the parties agree to change the scope of SI Services, the parties agree to amend the Contract to reflect such change.

Notwithstanding Section 5(a) above, if any delays or deficiencies in the SI Services, or with respect to the Deliverables or System Configuration, occur as a result of an Adjustment Event, the scheduled completion date under the Contract for the affected SI Services, Deliverables, and/or System Configuration shall be extended to the extent of any such delays or deficiencies, and KPMG shall not incur any liability to the State as a result of such delays or deficiencies.

e. VIII.U. Managed Services Addendum is hereby added:

This Addendum for Managed Services - Government (“**Addendum**”) amends the appended agreement (“**Contract**”) by and between the Commonwealth of Virginia and James Madison University (“**Client**”) and KPMG LLP (“**KPMG**”). In the event of a conflict between the provisions of this Addendum (on the one hand) and the provisions of the Contract (on the other hand), this Addendum will govern. Any capitalized term not defined in this Addendum will have the meaning ascribed to it in the Contract (as applicable).

1. Definitions

a. “Authorized User” means employees or individual contractors of Client provided with user accounts in order to access and use the Solution. Other persons or parties may be given access as an Authorized User upon request and written confirmation from KPMG.

b. “Client Materials” means any and all materials, facilities, network, hardware, systems, software, data, and other equipment and information that in each case is owned by or licensed or leased to Client (including any Third-Party Materials and Client Systems), which is uploaded to the Solution or to which KPMG is provided with access in connection with the services, that may be used by KPMG in providing the services and Deliverables pursuant to the Contract.

c. “Client Systems” means any and all network, hardware, systems, software, and equipment that are hosted by Client or on Client’s behalf or remain in Client’s control (including any Third-Party Materials). For the avoidance of doubt, Client Systems are considered Client Materials.

d. “Documentation” means all documents and material (in any language, format, or medium) that are normally supplied by KPMG to its clients to aid in the use and operation of the Solution, and all modifications to such documents and material that are made by or on behalf of KPMG from time to time. For the avoidance of doubt, the Documentation is KPMG Property and not a Deliverable.

e. “Solution” means any software, tool or other product which KPMG may make available to Client, including any supporting service. For the avoidance of doubt, the Solution is KPMG Property and not a Deliverable.

f. “Third-Party Materials” means third-party hardware, software, and other third-party items used by or provided to KPMG in connection with the services.

2. The Solution

(a) During the term of the Contract, the Solution shall conform to the Documentation in all material aspects. KPMG may modify the Solution at any time. KPMG shall inform Client of any material changes in functionality that may affect Authorized Users’ use of the Solution.

(b) KPMG shall use commercially reasonable anti-malware software to scan the Solution but does not warrant that the Solution will be free from malware. Client agrees that Client, and Client’s Authorized Users, shall use commercially reasonable anti-malware software to scan Client’s systems that access the Solution and any information before it is uploaded to the Solution.

3. Termination

In the event Client terminates the Contract for any reason during the initial 12 months of the Contract, Client shall be responsible for all fees applicable to the first 12 months of the Contract.

4. Disclaimer and Limitation of Liability

EXCEPT FOR THE WARRANTIES EXPRESSLY SET FORTH IN THE CONTRACT OR THIS ADDENDUM, THE SOLUTION, SERVICES, AND DELIVERABLES ARE PROVIDED “AS IS” “AS AVAILABLE” WITHOUT REPRESENTATION OR WARRANTY OF ANY KIND, AND ALL IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND NON-INFRINGEMENT ARE EXPRESSLY EXCLUDED. KPMG DOES NOT GUARANTEE OR PROMISE ANY SPECIFIC RESULTS FROM USE OF THE SOLUTION OR DELIVERABLES. KPMG DOES NOT REPRESENT OR WARRANT THAT DATA, CONTENT OR MATERIALS MADE AVAILABLE THROUGH THE SOLUTION ARE ACCURATE, COMPLETE, RELIABLE, CURRENT, OR ERROR-FREE. KPMG EXPRESSLY DISCLAIMS AND MAKES NO WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, WITH RESPECT TO CLIENT MATERIALS (INCLUDING-THIRD PARTY MATERIALS). Notwithstanding anything to the contrary in the Contract, except for either party’s gross negligence or willful misconduct, the aggregate liability of KPMG, on account of any actions, damages, claims, liabilities, costs, expenses or losses in any way arising out of or relating to the Contract or the services provided in this engagement and arising during any 12 month period shall be limited to the amount of fees paid or owing to KPMG under the Contract for such services during such 12 month period.

5. Cooperation; Use of information and Client Materials

(a) Client shall perform the responsibilities and provide the resources set forth in the SOW. If Client does not provide KPMG with the foregoing, Client acknowledges that KPMG's ability to provide the services may be adversely affected.

(b) With respect to any Client Materials to which KPMG is provided with access in connection with the services, Client hereby grants to KPMG a non-exclusive, transferable, sublicensable, paid-up, royalty-free right and license to use, copy, modify, display, make derivative works of, host, and transmit such Client Materials to the extent necessary for KPMG to provide the services to Client. Client represents and warrants that Client has all of the necessary rights to grant the foregoing license to the Client Materials to KPMG.

(c) If applicable in connection with the services, KPMG and KPMG Resources shall access Client Systems involved in the receipt and/or use of the services through means and processes mutually agreed between the parties in writing; provided Client takes full responsibility for all security and privacy risks related to Client Systems.

6. Use of KPMG Resources

(a) KPMG, KPMG Member Firms, and third parties, which may be located in other territories (collectively, the "KPMG Resources"), may access and use Client's information to provide certain internal, administrative, and/or regulatory compliance operations and functions, including maintaining independence, performing conflict checks, and information technology support, including cloud hosting.

(b) In addition, KPMG may use KPMG Resources to directly assist in the performance of the services, for example via subcontracting or contingent workforce personnel.

(c) Finally, Client may use KPMG Resources to enhance, improve, or create KPMG's products and services (for example, by performing internal research, training cognitive systems, conducting data analytics, benchmarking, and developing thought leadership projects and whitepapers) (collectively "Ancillary Purpose").

(d) Client agrees that Client has the right to share, and KPMG may disclose, Client's Confidential Information to such KPMG Resources and these KPMG Resources may have access to and use Client's Confidential Information for the purposes described in this Paragraph 6.

(e) Client's information will be de-identified if it is used or disclosed outside of the KPMG Resources for an Ancillary Purpose. KPMG has technical, legal, and/or other safeguards, measures, and controls in place to protect Client's Confidential Information from unauthorized disclosure or use. Any services performed by a KPMG Resource shall be performed in accordance with the terms of the Contract, but KPMG shall remain responsible to Client for the performance of such services and for the use or disclosure of Client's Confidential Information in an unauthorized manner due to breach of the Contract or failure of any KPMG Resources to exercise reasonable care.

(f) Any claim relating to the services under the Contract may only be made against KPMG and not any other KPMG Firm or third party referred to above.

7. Access to the Solution

(a) Subject to this Addendum and any other restrictions set forth in the Contract and the payment of all applicable fees, KPMG hereby grants a non-exclusive, non-transferrable, limited license during the term of the Contract to Client and Client's Authorized Users to access and use the Solution. KPMG will deactivate all Authorized User accounts upon the expiration or termination of the Contract. The Solution and Documentation are the confidential and propriety information of KPMG and its licensors. Client shall hold the Solution and Documentation in confidence and not disclose such to any other party (except Authorized Users subject to obligations of confidentiality) without KPMG's prior written permission except to the extent disclosure is required by law.

(b) Authorized User passwords may not be shared or distributed. Client is responsible for any unauthorized access resulting from Client's, or Client's Authorized Users' use of, or failure to protect, their passwords. In the event Client elects to use federated user authentication, Client acknowledges and agrees that Client shall be solely responsible for verifying the identity of users and for managing user credentials. Client shall notify KPMG if an Authorized User is no longer employed, or permitted, by Client to use the Solution.

(c) KPMG may suspend access to the Solution (1) if Client fails to make any undisputed payments due for the Solution, or any related services, and fails to cure such default within 30 days following the date Client received KPMG's notice of the default and demand for payment, (2) in the event that Client, or Client's Authorized Users breach the Contract, or (3) as necessary in KPMG's sole discretion to preserve the integrity of the Solution or to perform maintenance.

(d) KPMG may offer remote desktop support for the Solution. If provided, Client shall notify Client's users that when they request remote desktop support, they should close all other applications and restrict access to any other confidential information before proceeding.

(e) KPMG grants Client and Client's employees and individual contractors a perpetual, non-transferable, worldwide, limited right and license to reproduce, display, and use any reports generated by Authorized Users during the Term of the Contract only for Client's internal business purposes. Client's auditors, agents, and contractors providing administrative or professional advice to Client may also use the reports pursuant to a confidentiality agreement with Client. For the avoidance of doubt, reports shall constitute advice provided to the Client for purposes of the Contract and KPMG reserves the right to mark the reports accordingly.

(f) Except to the extent expressly authorized or permitted herein or by applicable law without the possibility of contractual waiver, Client and Client's Authorized Users shall not, and shall not cause, facilitate, permit, or encourage a third party to (1) reproduce, reverse engineer, decompile, modify, disassemble, reverse compile the Solution, or perform any similar type of operation, in any fashion or for any purpose, (2) sublicense, transfer, or assign Client's right to use and access the Solution, (3) take any action that is

likely to adversely affect the operation of the Solution, (4) use the Solution in excess of the contractual limitations on usage or circumvent its technological measures to control access, (5) access the Solution for the purpose of developing or operating products or services intended to be offered to third parties in competition with the Solution, or (6) use the Solution to create, use, send, store, or run viruses or other harmful computer code, files, scripts, agents, or other programs or otherwise engage in a malicious act or disrupt its security, integrity, or operation. Client may not provide Client's third-party contractors or service providers with access to the Solution except with KPMG's express written permission, which shall not be unreasonably withheld.

8. Miscellaneous

Export Control. To the extent that Client and Authorized Users access the Solution from outside the United States, Client is responsible for complying with any import or export restrictions relating to such access.

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

AGENCY NAME: James Madison University

CONTRACTOR NAME: KPMG LLP

DATE: 11/8/2023

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

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

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

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


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


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

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

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

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

AGENCY by 
Title Buyer Senior
Printed Name Doug Chester

CONTRACTOR by 
Title KPMG LLP Partner
Printed Name Tricia L Harper



Experience you can trust

Proposal to serve James Madison University
Information Technology Consulting Services
RFP# FDC-1175
Redacted

August 15, 2023

Select the right professional services firm – one with the industry depth, knowledge, and insight to help clients address their most pressing issues.

kpmg.com/us





KPMG LLP
Suite 2000
1021 East Cary Street
Richmond, VA 23219-4023

Telephone +1 804 782 4200
Fax +1 804 782 4300
kpmg.com

August 15, 2023

Doug Chester
Buyer Senior, Procurement Services
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 KPMG LLP (KPMG), we are pleased to submit our proposal to the James Madison University (JMU) to assist you with the Information Technology Consulting Services described in RFP# FDC-1175.

First off, let me say that I am a proud alumnus of James Madison University where I graduated with a degree in accounting in 2000. I am very proud of the education I received at JMU and consider myself a "lifelong Duke!" As a resident of Richmond, I serve as the Lead Partner for the Commonwealth of Virginia, where I oversee all of our services to the State, Localities and Higher Education institutions.

Based on the RFP, we understand JMU is looking for a technology advisor to understand, communicate, propose solutions, that will serve as a resource of research, implementation, troubleshooting, and other technical tasks to support the efforts of JMU Information Technology (JMU IT) staff and the goals of Re-Engineering Madison. We are confident that KPMG is the right firm to work with the University. We understand the importance of this program, we are ready to deliver the services and we are passionate about your success.

Beyond the details outlined in this proposal, we would like to draw your attention to a few specific characteristics about how we are prepared to deliver to you.

Deep experience in leading change in Higher Education: Your institution is rooted in a tradition of excellence, and so are we. KPMG is one of the leading providers of professional services to public and private higher education institutions, state and local governments, and other not-for-profit organizations. In fact, to solve for the complexities, nuances, and the organizational structure of these institutions, KPMG has a dedicated Higher Education, Research, and Other Not-for-Profits (HERON) practice that is focused more effectively on serving the needs of these institutions. We bring a depth of knowledge and resources that you can tap into on both a local and national scale and we are one of the first major professional services firms to develop a HERON practice.

Smooth, seamless service approach: Change should be exciting, and we look to maintain a positive experience by making it as easy as we can. KPMG has experience and success onboarding and working seamlessly with clients, including numerous higher education institutions. We go a step beyond with an approach that learns and blends in your culture, changes as you change, grows as you grow, and that your time with us feels as beneficial and meaningful as possible. Count on us to provide a well-organized transformation.



James Madison University
August 15, 2023
Page 2 of 2

Lived experience overcoming the challenges you are facing: By working side-by-side with institutions across the world, and here in Virginia, we have come to deeply understand both global and local dynamics impacting JMU. From student retention to step-changes in the community expectations for student mental health support and security, we have been there with our clients to guide and enable strategic change.

Value based fees: As a Big Four firm, our objective has always been to keep our fees at a level that is fair and competitive for the services provided. That said, we know that a one-size-fits-all approach is not needed, and so we have added a group of like-minded SWaM partners that we believe can support a more nimble and dynamic response with lower cost blended rates per hour.

As was stated in the Reengineering Madison Summary: "Implementing Reengineering Madison is going to take all of us. A change so comprehensive will be challenging and far beyond the scale of a system implementation that IT will simply do FOR us. We will do this TOGETHER, as a community."

It would be our highest honor, to be selected as a trusted partner to work together with you on this ambitious transformation journey. We are excited about this opportunity to serve and sincerely appreciate your consideration of KPMG for this service.

Should you require any clarification or further information please feel free to contact me [REDACTED]
[REDACTED]

Very truly yours,

KPMG LLP

A handwritten signature in black ink, appearing to read 'Tricia Harper'.

Tricia L. Harper

Lead Partner – Commonwealth of Virginia

James Madison University, '00

tlharper@kpmg.com

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This proposal is made by KPMG LLP, a Delaware limited liability partnership and a member firm of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee, and is in all respects subject to our client and engagement acceptance procedures as well as the execution of a definitive engagement letter or contract. KPMG International Limited provides no client services. No member firm has any authority to obligate or bind KPMG International Limited or any other member firm vis-à-vis third parties, nor does KPMG International Limited have any such authority to obligate or bind any member firm.

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REQUEST FOR PROPOSAL

RFP# FDC-1175

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

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

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

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

All Inquiries For Information And Clarification Should Be Directed To: Doug Chester, Buyer Senior, Procurement Services, chestefd@jmu.edu; 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:

KPMG LLP

1021 E Cary Street, Suite 2000 Richmond, VA,
23219

By:



(Signature in Ink)

Name:

Tricia Harper

(Please Print)

Date: 8/15/2023

Title:

Partner

Web Address: www.kpmg.com

Phone:

[REDACTED]

Email:

[REDACTED]

Fax #:

n/a

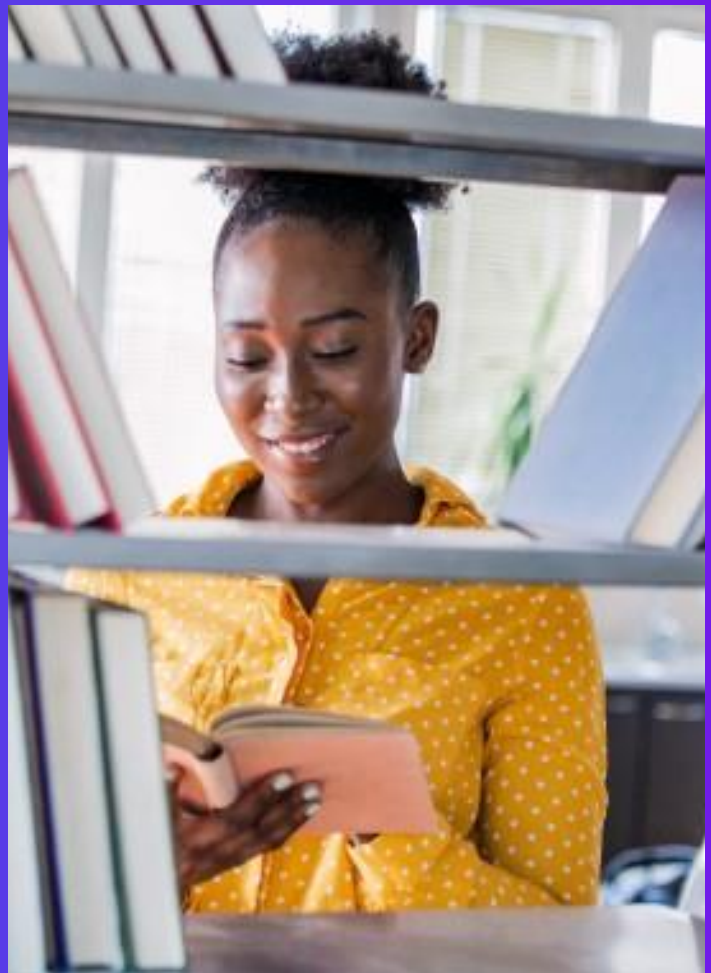
ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 TH #2 TH #3 #4 #5
(please initial)

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.

RFP response section





VASCUPP


Contract Vehicles

While KPMG has experience in responding to, and being awarded contracts with the state, we are not currently on any VASCUPP contracts specifically scoped for IT consulting services, and we are excited to be responding to these services with James Madison University.

				
Academic & Business Consulting Services	Financial Consulting & Advisory Services	Organizational Consulting Services	Strategic Support Services (Gen3)	Tax Consulting Services
GMU-1827-23-13	GMU-1593-19-03	VTS-1081-2019	UVA-AGR-SVC-00294-KPMG	VTP-1774-2022

VASCUPP Past 12 Month Sales

Institution	Sales Amount
University of Virginia	\$820,000
George Mason University	\$8,625
Virginia Commonwealth University	\$50,920

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



Our understanding is that James Madison University (JMU) seeks firms with the competencies/experience providing IT consulting services listed in the table below and have indicated where KPMG and our SWAM partners can best support the universities transformation efforts. In the pages that follow we have provided an overview of why we are qualified.

IT consulting services	Interest
Oracle Core Technologies	✓



IT consulting services	Interest
Oracle/PeopleSoft Enterprise Solutions	✓
Desktop and mobile device management	X
Microsoft Azure and M365	✓
Okta	✓
Data analytics/Visualization/Warehouse/Lake	✓
Change Management Training, Services, & Certification	✓
Security and Federation Services	✓
Cisco Technologies, infrastructure support, and virtualization	✓
Audio Visual Technologies	X
Secure Research Enclaves	X
Other technology	✓

1

1.a/b. Oracle core technologies & Oracle/PeopleSoft Enterprise Solutions

1a/b

KPMG Capabilities

KPMG is one of the highest status designees that Oracle offers and has Advanced Specializations in Financials Cloud. With more than 500 Oracle Cloud implementations completed to date, 25 Oracle specializations, and 7,800 Oracle-based professionals dedicated to Oracle Cloud, KPMG has evolved into one of the world's premier leaders in Oracle Cloud solutions.

KPMG has been partnering with Oracle to implement transformative solutions for over 30 years. We have experience in implementing all of Oracle's business application solutions for governments and educational institutions. As a result of our close relationship, the KPMG Powered Enterprise (as noted on the next page), our Oracle Cloud-enabled approach, methodology, and enabling toolkit, has evolved significantly—along with our capabilities specific to Oracle's Financial, Human Capital Management and Procurement Cloud Services—to become a market-leading solution that expedites client time-to-value. Our Powered methodology has helped 500+ clients go live on Oracle cloud in the past decade.



[illegible]



State	2010	2011	2012
Alabama	10.1	10.2	10.3
Alaska	10.4	10.5	10.6
Arizona	10.7	10.8	10.9
Arkansas	10.10	10.11	10.12
California	10.13	10.14	10.15
Colorado	10.16	10.17	10.18
Connecticut	10.19	10.20	10.21
Delaware	10.22	10.23	10.24
District of Columbia	10.25	10.26	10.27
Florida	10.28	10.29	10.30
Georgia	10.31	10.32	10.33
Hawaii	10.34	10.35	10.36
Idaho	10.37	10.38	10.39
Illinois	10.40	10.41	10.42
Indiana	10.43	10.44	10.45
Iowa	10.46	10.47	10.48
Kansas	10.49	10.50	10.51
Kentucky	10.52	10.53	10.54
Louisiana	10.55	10.56	10.57
Maine	10.58	10.59	10.60
Maryland	10.61	10.62	10.63
Massachusetts	10.64	10.65	10.66
Michigan	10.67	10.68	10.69
Minnesota	10.70	10.71	10.72
Mississippi	10.73	10.74	10.75
Missouri	10.76	10.77	10.78
Montana	10.79	10.80	10.81
Nebraska	10.82	10.83	10.84
Nevada	10.85	10.86	10.87
New Hampshire	10.88	10.89	10.90
New Jersey	10.91	10.92	10.93
New Mexico	10.94	10.95	10.96
New York	10.97	10.98	10.99
North Carolina	10.100	10.101	10.102
North Dakota	10.103	10.104	10.105
Ohio	10.106	10.107	10.108
Oklahoma	10.109	10.110	10.111
Oregon	10.112	10.113	10.114
Pennsylvania	10.115	10.116	10.117
Rhode Island	10.118	10.119	10.120
South Carolina	10.121	10.122	10.123
South Dakota	10.124	10.125	10.126
Tennessee	10.127	10.128	10.129
Texas	10.130	10.131	10.132
Utah	10.133	10.134	10.135
Vermont	10.136	10.137	10.138
Virginia	10.139	10.140	10.141
Washington	10.142	10.143	10.144
West Virginia	10.145	10.146	10.147
Wisconsin	10.148	10.149	10.150
Wyoming	10.151	10.152	10.153

Why KPMG?

Our team helps clients translate business strategies into viable technology-enabled outcomes through time-tested methodologies, distinct insights, and the ability to see around corners. We offer:

- A long history of enhancements and inaugural implementation successes in Oracle Cloud; Oracle Business Intelligence; Hyperion Enterprise Performance Management suites; Oracle E-Business suite (EBS); Oracle Governance, Risk and Compliance (GRC); PeopleSoft Financials and Supply Chain Management (FSCM); and Master Data Management.
- Continuous learning is a critical aspect of our KPMG's culture, and we support our professionals in ensuring they are up to date on the latest and most advanced certifications. Our team has more than 1,400 Oracle advanced and certified specialists across Oracle Cloud, Hyperion, PeopleSoft, Oracle E-Business, and Business Intelligence and Analytics application suites.





- We have developed what we call the KPMG “Powered Enterprise”, which includes accelerators and tools providing fully configured Oracle Financials Cloud, Supply Chain, HCM, and Planning and Budgeting Cloud Services reference environments.

KPMG Powered Enterprise, enabled by Oracle: Our leading, approach, methodology, and toolkit

KPMG has made a significant and ongoing investment in developing our Oracle Cloud-enabled Powered Enterprise approach, methodology, and toolkit, which delivers—**on Day One**—an out-of-the-box, preconfigured solution based on a leading business practice target operating model for government and educational entities ERP and transformational change across Financial Management, Supply Chain, Human Resource Management, and Business Intelligence, Analytics and Reporting. Our experience shows that this approach, methodology, and toolkit can help accelerate the transformation and change process while substantially reducing risk by providing an immediate starting point to begin validation sessions so that attention can be focused on configuration in the areas unique to JMU.

Powered Enterprise has set the bar for how value is derived from an Oracle Cloud implementation. As a testament to our methodology, it has been leveraged on more than 500 successful Oracle Cloud implementations to date—including our state and local government and educational institutional implementations of the Oracle Cloud solution.

The Value of Powered

By leveraging government and education institution focused leading practices, our Oracle experience and capabilities, and our innovative target operating model assets, our Powered Enterprise solution allows organizations to achieve efficient modernizations informed by early exposure to the solution to accelerate decisions through the pre-built business process validations in the Oracle Cloud solution. Within the first eight (8) weeks (not months) of the project, KPMG can start working with JMU project team in the Oracle solution demonstrating base configurations.

Traditional Implementation



KPMG Powered Enterprise Implementation



	No wasted time spent mapping current as-is and to-be processes		Validate starting with KPMG pre-built standard “to be” processes and then determine what needs to be tailored
	Faster delivery with pre-configured processes enabled by Cloud technology		Reduce project duration as much as 30% from traditional business transformation
	Review vs. create avoiding lengthy workshops and time to decision		Shorter process workshops with key decision makers to agree on pre-configured processes, more focused on your high value process areas
	Interactive validation of processes through cloud technology		KPE approach seeks to demystify the technology and highlight how it can support the business strategy based on KPMG leading practices



Powered is an Oracle Cloud solution specific for state and local governments that is ready to be validated by unique business requirements. Our pre-configured solution and related functional deliverables will be tailored and modified when necessary to quickly scale and implement for JMU. A typical methodology focuses on the functional process and supporting technology, whereas Powered Enterprise provides the full complement of target operating model components (all layers within an organization, not just people, processes and technology) to achieve your desired business transformation.

1.a/b

1.d

1.d. Microsoft Azure and M365

KPMG Capabilities

KPMG is one of Microsoft's largest services providers, delivering Microsoft transformational solutions to clients across an extensive range of Microsoft Gold Competency capabilities. With more than 2,495 implementations across the Microsoft stack, 5,600 Microsoft-based professionals, and 10,270 certifications. KPMG recently announced a landmark investment with this important alliance partner, where we plan to invest US\$2 billion in Microsoft cloud and AI services over the next five years. Numerous external accolades speak to our strength in this important area. We will highlight specifically experience with Azure and M365 in the pages that follow, as we know these are key focus areas for JMU. KPMG was recently awarded the awarded the 2023 Global Defense & Intelligence Partner of the Year, and dozens of others as shown in this graphic to the right.

As part of our investment, KPMG employs Microsoft Azure and Azure services as the backbone of a common, global cloud-based platform to strengthen our range of digital offerings in a more consistent, continuous way. Together with Microsoft, KPMG has invested in the development of several key assets for Azure Cloud Transformation based on our experience and implementation of cloud solutions and common uses cases (such as data lakes and data warehouses).



2023 Microsoft Global Defense & Intelligence Partner of the Year
2023 Microsoft Partner of the Year — Israel
2022/2023 Microsoft Business Applications Inner Circle
2022 Retail Industry Partner of the Year — Norway
2022 Sustainability Partner of the Year — Sweden
2022 Microsoft Supplier Prestige Award – Response & Representation
2022 Microsoft Dynamics 365 Finance Partner of the Year
2022 Microsoft Vietnam Partner of the Year – Dynamics 365 Customer Services
2022 Microsoft Spain Partner of the Year – Advisory Services
2022 Microsoft Canada Modernizing Applications Impact Award
2021/2022 Inner Circle for Microsoft Business Applications
2021 Microsoft Impact Award for Community Response — Canada
2021 Microsoft Partner of the Year Security Award — Japan
2021 Best Advisory Services Partner — Spain
2021 Microsoft Asia Pacific and Singapore Partner of the Year — Intelligent Line of Business
2020 Global SI Digital Transformation Partner of the Year



Our Azure and M365 capability groups are focused on delivering cloud value to clients configuring and deploying Microsoft services. We provide the following:

1.d

Data Platform, Data & AI	Cloud & software engineering		Security	Modern Work
<ul style="list-style-type: none"> Azure AI/ML Azure Cognitive Microsoft Purview Azure Databricks (Delta Lake) Power BI KPMG environmental data hub & ESG KPMG Advisory GPT & GenAI for industry* KPMG Modern Data Platform & ignite <ul style="list-style-type: none"> Microsoft Fabric Azure Data Factory 	<ul style="list-style-type: none"> SAP on Azure Cloud Monitoring (Azure Arc) KPMG App Modernization & Migration factory (KAMM) KPMG Cloud strategy & operations 	<ul style="list-style-type: none"> Developer productivity/GitHub Containerization (AKS, etc.) Emerging Technologies <ul style="list-style-type: none"> Microsoft fabric Azure Quantum Azure Mission Critical Azure Multi-Edge Cloud KPMG 5G smart technology 	<ul style="list-style-type: none"> Microsoft defender Microsoft sentinel Microsoft purview Microsoft Endpoint manager Github advanced security (DevSecOps) KPMG Managed Detection & Response (MDR) 	<ul style="list-style-type: none"> Microsoft 365 Microsoft Teams (Voice) Microsoft Viva Document & Records management with SharePoint KPMG modern delivery Maturity Assessment
Quality engineering				
Azure			M365	
Data & AI	Azure Infrastructure	Digital & App Innovation	Security	Modern Work
<ul style="list-style-type: none"> Azure AI/ML Azure cognitive Azure SQL Azure Data Lake Azure Data Factory Microsoft Fabric Azure Synapse Microsoft Purview Azure databricks (Delta Lake) Power BI Azure OpenAI 	<ul style="list-style-type: none"> Windows server on azure SQL server on Azure Linux on Azure SAP on Azure Azure VMware Solution Azure virtual desktop Azure Arc 	<ul style="list-style-type: none"> Visual Studio GitHub Azure App Service Azure Container Apps/Azure Kubometers Services Power Apps Azure Mission Computing Azure mission critical Azure Multi-Edge Cloud (MEC) 	<ul style="list-style-type: none"> Microsoft Defender Microsoft Sentinel Microsoft Entra (IAM) Microsoft purview Microsoft Priva (Privacy Mgmt.) Microsoft Endpoint Manager 	<ul style="list-style-type: none"> Microsoft Windows 11 Microsoft 365 Microsoft Teams Windows 365 Microsoft Viva

M365 – Modern Work

M365 – Goes beyond communication, we define it as Modern Work

KPMG has implemented Microsoft Teams as the foundation for services creating a dynamic platform that can scale based on your needs. Established across a communications backbone, Teams is part of the daily patterns of employee work, creating and increasing momentum of adoption. Our Teams capability supports delivery across US and global organizations allowing KPMG to provide pre-built and configurable, integrated unified communications solutions that ultimately drive greater collaboration.

Here are some of the accelerators we have developed:



1.d

**Information Management**

Surface both proprietary and thirdparty content from or display existing tools as aniframe within Teams, integrating tools used throughout the engagement management lifecycle without leaving Teams

**Bots**

Inform teams and help them get tasks done through conversation from a customer Advisory branded bot

**Notifications**

Send notifications and messages from your services to teams

**Knowledge Sharing**

Create spaces to share content by Service Line including, client specific artifacts, applicable templates and research in one space

**Message Extensions**

Allow teams to send rich messages using content from your service to inform others or create call to actions

**Search**

Search an external data source and insert the content in a wellformatted message

**Actions**

Craft messages that support actions and user inputs that are aligned to Customer's Values and engagement specific tasks

**Service-specific templates**

Create rich UI by service line that includes both shared content applicable to Engagement Management across Advisory as well asbespoke Engagement Delivery and L&D user experiences

**Customer-Specific branding**

Integrate branding associated to Firm Values, History and culture into the user experience (e.g. branded chatbot, utilizing firm values when giving praise and embedding firm-wide initiatives into templates)

**Power apps**

Create custom applications, specific to Engagement Management use cases that provide rich business logic and workflow capabilities to transform current, manual business operations into digital, automated processes. What's more, apps built using Power Apps have a responsive design and can run seamlessly in browser and on mobile devices (phone or tablet)

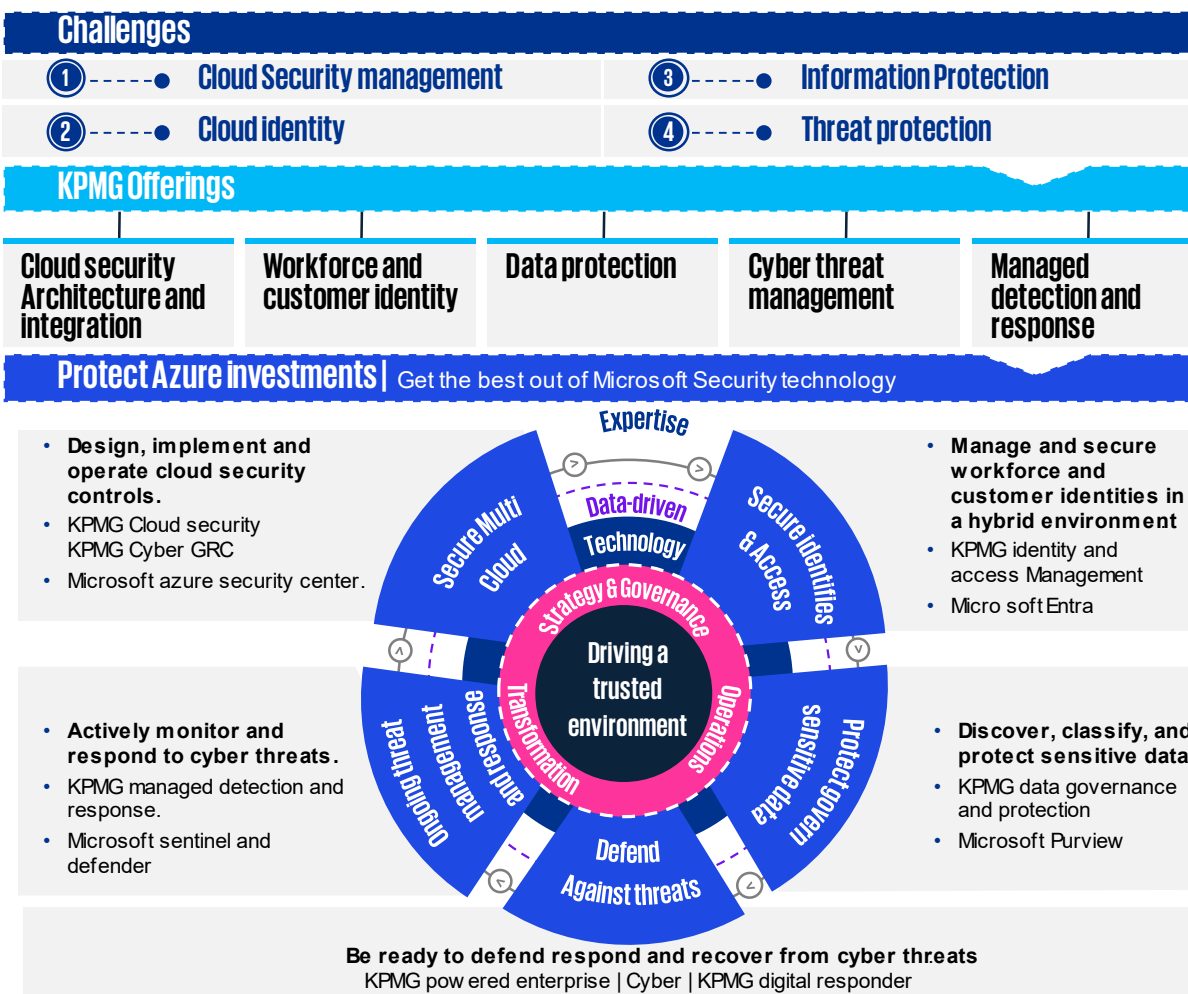
M365 – Identity & Security

KPMG helps our clients “assessment through implementation” to help define a target state for cloud security controls environments. With a proper cloud security strategy in place, KPMG can work together with our clients to help transform their approach to talent, process, and technical capabilities to achieve secure Azure and hybrid-cloud security objectives.

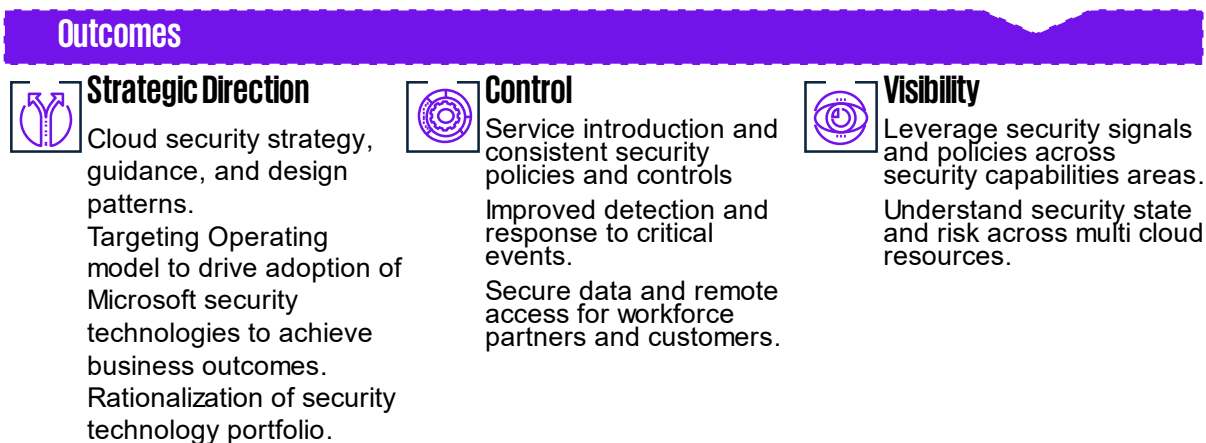
We help clients design, build, and operate identity and access management capabilities built to secure Azure cloud and hybrid operating environments. Our investments in solutions, adoption accelerators and target operating models help our clients manage digital risk in the cloud. Leveraging products from the Microsoft Entra family and other third-party solutions, we help our clients define and achieve a holistic identity security program.



Enable Zero-Trust Security Outcomes Together



Cyber in digital Transformation | Leverage Microsoft security technology | Build on Azure

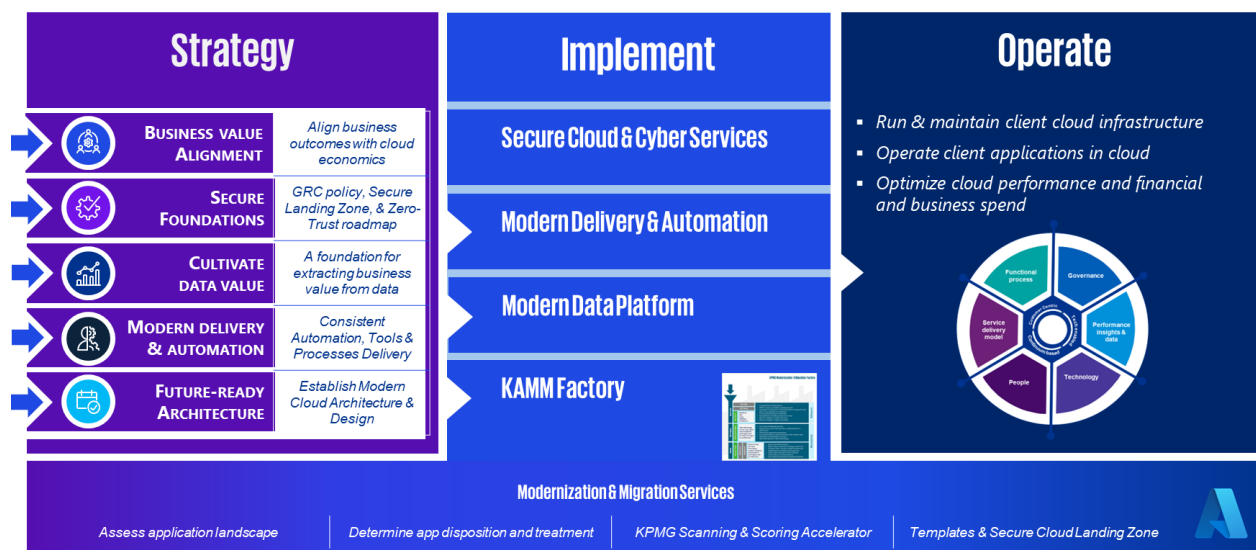




Azure Services – Digital & App Innovation

1.d

KPMG has comprehensive Cloud Engineering and Modernization services built on Azure. Our Strategic Pillars for Cloud Modernization encompass the breadth of our services across Business Value Alignment, Secure Cloud Foundations, Cultivating Data Value, Modern Delivery & Automation and Future-Ready Cloud Architectures. The figure below outlines our Cloud Modernization approach.

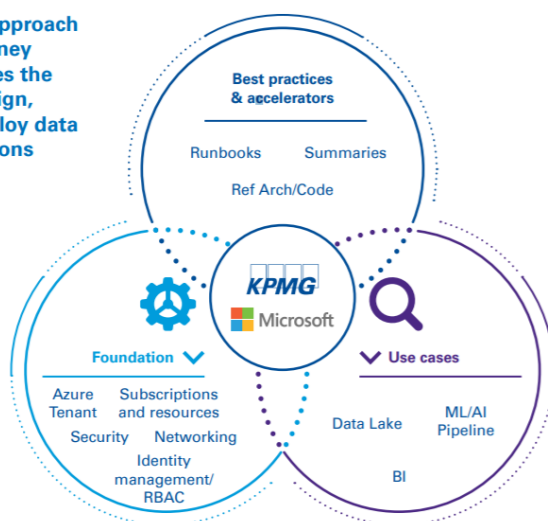


KPMG has experience accelerating our client's Cloud Journeys using pre-built and customer configurable assets including our Modern Data Platform, Ignite for AI, the KPMG App Modernization and Migration factory, Engine for Cloud Landing Zones, Azure Learning solutions and our Environmental Data Hub for ESG as just a few.

We have developed runbooks for Azure cloud transformation based on our years of experience helping other clients that accelerate our design and implementation of foundational cloud infrastructure and common uses cases such as data lakes and data warehouses implemented in Azure.

Azure Runbooks help provide a guide to foundational security and a serverless infrastructure set up, along with accelerators to implement data and analytics use cases built upon the foundations in Azure.

This standardized approach expedites your journey to Azure and reduces the time needed to design, implement and deploy data and analytics solutions in the Cloud.





Our Experience

1.d

While KPMG has deployed over 2,000 implementations, there are some very recent ones we think are relevant to JMU. We recently designed and developed data digital transformation and cloud-based solutions for other clients in higher education (Boston College), the Virginia Commonwealth (Virginia Department of Transportation, Department of General Services, Virginia Courts), and a number of clients in a wide selection of industries. JMU will benefit from KPMG's partnership with Microsoft in digital transformation, cloud-based services, artificial intelligence, machine learning, cyber security, business analytics, and other digital offerings, as we leverage our experiences to provide JMU a strategy and implementation of their future IT services leveraging Microsoft technology.

Why KPMG?

You will see a common thread in all of these RFP sections, where we highlight leading with the business objectives and outcomes. Technology then becomes the enabler, and we are unbiased in advising our clients on the tools and products that will best meet your needs, while also ensuring we help you make decisions based on what investments you have already made within your core infrastructure. We help our client's achieve the following outcomes:



Business challenge
"I want to..."

- 1 Enable **greater innovation and agility** without disrupting my business operations
- 2 Actively **address weakness of legacy applications** and update security risks.
- 3 Proactively **prevent security breaches and compliance** concerns
- 4 Integrate normalize and transform data to **ensure data sources are safe** from security breaches or loss

We are able to offer these broad insights, as we have built a center of excellence, known as KPMG Lighthouse, that specializes in data strategy, engineering, platform modernization as well as advanced analytics and AI. In addition, we have created a foundational asset: the KPMG Modern Data Platform, which is the tool, built using Microsoft product stack, that helps our practitioners bridge the gap between technical innovation and business needs.



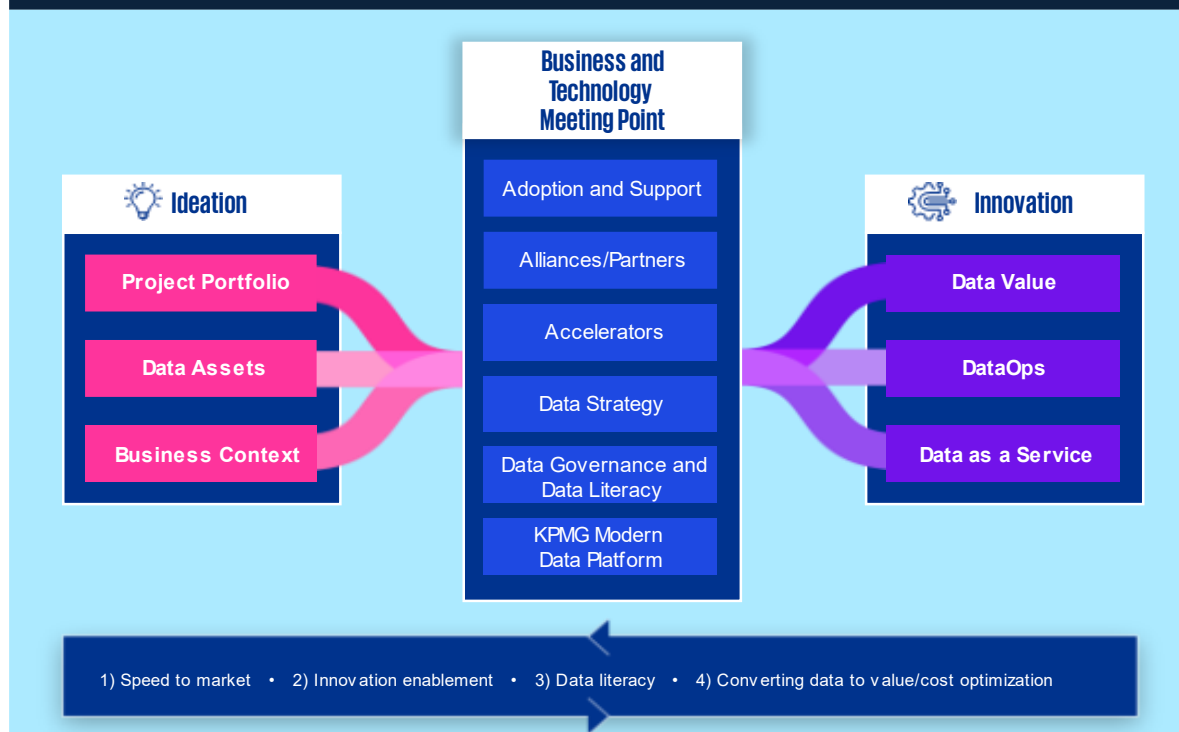
KPMG Modern Data Platform: Bridging the gap

KPMG Modern Data Platform is the bridge where business and technology teams meet. It creates a data community for ideation and innovation to culminate.

MDP is a curated cloud-native technology stack, where core services provide an expedited deployment plane, in your cloud environment

MDP integrates and harmonizes data from systems of record, optimizes a unified data model, and supports business process improvements through artificial intelligence (AI)-enabled insights.

MDP is Infrastructure as Code (IAC)—it includes Data Connect, Ambient Data Management, KPMG Accelerators and APIs as a blueprinted service catalog.



Ensuring your data is accurate, reliable, consistent, secure, valid, complete and current—these are the KPMG Data Principles—and the goal of every Modern Data platform implementation. Our approach includes deployment of a fully automated, foundational, to-be-configured platform based on one of our industry-specific common data models. Additionally, the MDP brings data governance forward as a primary, consistent and required element for each step of the modern data journey.

1.e/h Okta & Security and Federation Services



KPMG Capabilities

Identity Services is at the core of our Cyber practice

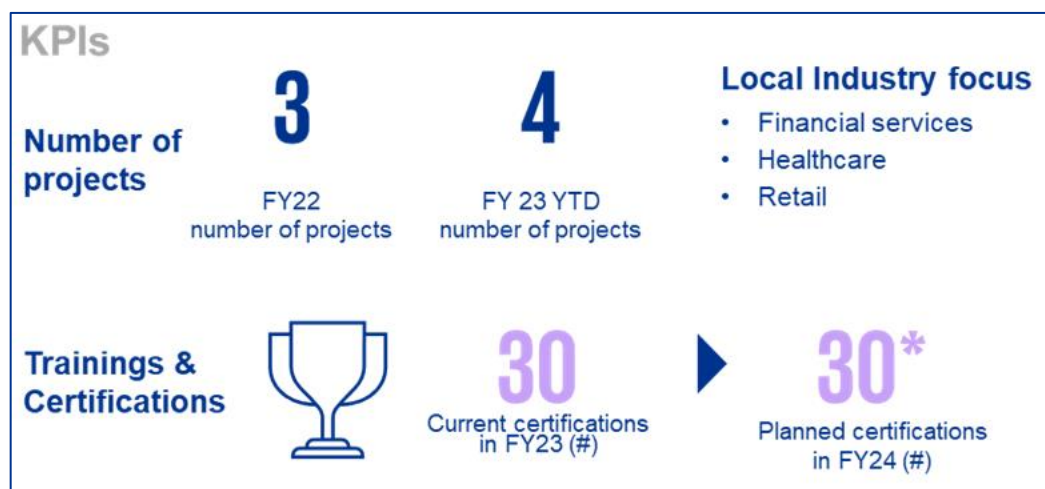
KPMG has been a leader in the Cyber security space for over a decade, and our Identity services are a core pillar within this broader service area. As it relates to our overall practice, KPMG was named leader in Cyber security and privacy by Forrester and ALM Intelligence and is a leading independent advisor. KPMG has 4,000+ cyber security & privacy specialists across 110 countries. Our team will has 30 certifications today, and plans to double that in the next 12 months. We have experience and expertise in Data Security and Privacy and have conducted various similar types of engagements related to data



privacy & protection tool implementation. Our team is highly qualified with CIPP/E, CIPM, CIPT, ISO 27701, CISSP, CISM, CISA, ISO 20000 LA.



Our Experience



In the US, we have recently deployed nearly a dozen successful Okta implementations, across all industries including California Secretary of State, Cigna Health, T-Mobile and others. We have successfully assisted numerous organizations in migrating their legacy systems to modern solutions, including Okta and other leading vendors. As an Okta Alliance Partner, we have established ourselves as a trusted authority in implementing and optimizing Okta's robust identity and access management platform. Our team of consultants has collaborated with clients across various industries, including higher education, state and local government, finance, healthcare, insurance, and retail. We understand the unique challenges and regulatory frameworks within each vertical, enabling us to deliver Okta solutions that meet stringent compliance requirements while enhancing security and user experience. From single sign-on (SSO) and multi-factor authentication (MFA) to provisioning, governance, and lifecycle management, we cover the entire spectrum of Okta's capabilities to ensure seamless integration and optimized access management processes.

As it relates to Oracle, our consultants are well-versed in Oracle Access Manager, Oracle Identity Manager, Oracle Identity Governance, and Oracle Adaptive Access Manager, among others. They possess an in-depth understanding of the intricacies and capabilities of these products, allowing them to provide tailored solutions that align with our clients' specific business requirements.

Furthermore, our strategic partnerships with Ping and Microsoft further enhance our ability to provide comprehensive federation technology solutions to our clients. Leveraging our expertise in these vendors' offerings, we deliver seamless integration and interoperability across various access management systems. Whether it's PingFederate, PingAccess, Microsoft Azure Active Directory, or Azure AD B2C, our consultants possess the knowledge and skills to architect, implement, and support these solutions, empowering our clients with a broad range of options when it comes to federated access management.

Why KPMG?

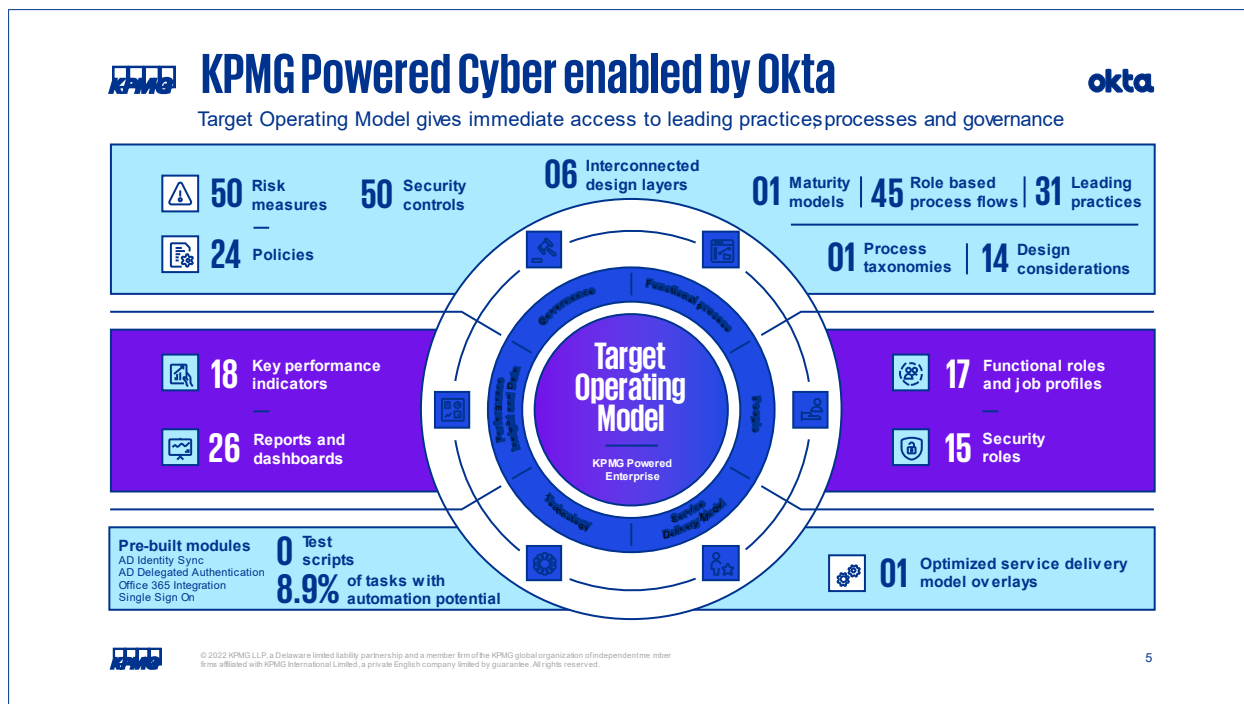
In addition to our specialized expertise with Oracle, Okta, Ping, and Microsoft, our team has hands-on experience with various other vendors who offer federated access management solutions. This diverse experience allows us to navigate the ever-evolving landscape of federation technologies and recommend



the most suitable solution for our clients based on their specific needs, organizational structure, and IT environment.

1.e/h

Below is a graphic that illustrates our pre-built tools and approach, leveraging Okta:



1.f. Data analytics/visualization/warehouse/lake

1.f

KPMG Capabilities

Data science must be tied to clear business objectives, so selecting a partner that helps you identify the right questions to ask, and then align the tools and data needed to answer those questions is critical. Our Data sciences practice is grounded in three imperatives that we believe are necessary for sustainable and scalable capabilities: 1) Tied to clear business objectives; 2) focus on building digital literacy within the team; and 3) focus on production vs. just experimentation. KPMG has over 17,000 Data & analytics professionals, with 1,700 data scientists, 7,000+ successful projects annually and 600+ pre-built solutions.

Specifically, JMU can benefit from our experience in the following data analytics, data visualization, data warehouse/data lake, data management, data governance, data operating model, and data strategy needs. This needs can all be accommodated through our "Lighthouse Practice" with services including:

- **Data Analytics:** KPMG offers a range of services to help clients leverage their data through advanced analytics techniques, including data mining, machine learning, and predictive modeling. KPMG can help James Madison University's IT department design and implement analytics solutions that can provide valuable insights from its data, including student retention, enrollment trends and faculty performance metrics.
- **Data Visualization:** KPMG provides expert consulting services to help clients design and implement effective data visualizations. KPMG can help James Madison University to create interactive



dashboards, charts, graphs and other visualizations that can provide a comprehensive view of university data and key performance indicators.

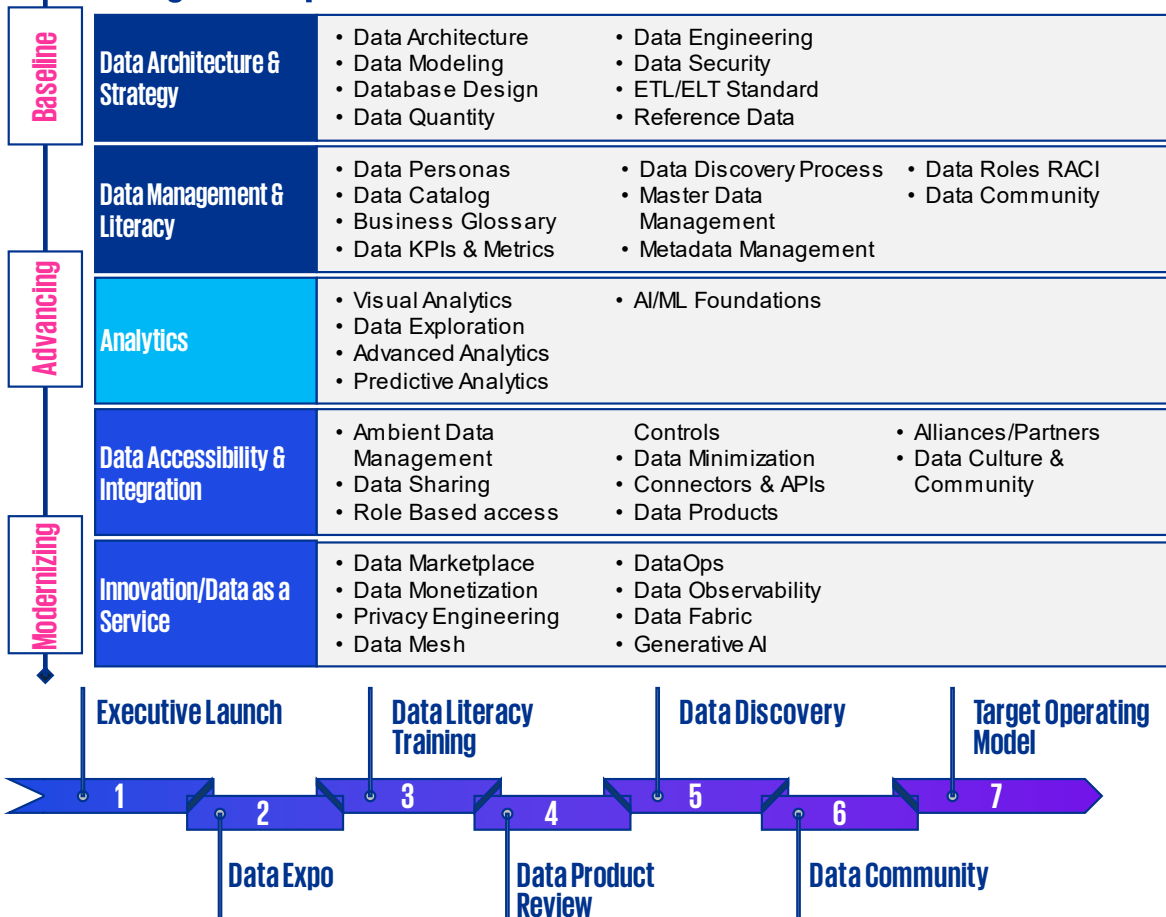
- **Data Warehouse/Data Lake:** KPMG can assist James Madison University in designing and implementing a data warehouse and/or data lake solution. KPMG can work with the IT department to design a platform that can securely integrate and store data from multiple sources, with consideration of scalability, performance, and data governance.
- **Data Management:** KPMG can help James Madison University to design and implement data management processes and tools that provide visibility, control, and governance of data throughout its lifecycle. KPMG can also assist in the oversight and monitoring of critical data management systems and procedures such as data quality management, metadata management, and master data management.
- **Data Governance:** KPMG can provide guidance for developing and implementing data governance frameworks and policies that will help to establish clear roles, responsibilities, and accountability for data management, aligning business objectives with regulatory and compliance requirements.
- **Data Operating Model:** KPMG can help James Madison University to develop a target operating model for its data management capabilities, including defining processes, tools, and organizational design that are aligned with its business objectives.
- **Data Strategy:** KPMG can assist James Madison University in developing a comprehensive data strategy that can help them achieve their institutional goals. This will help to ensure that the University's data management programs are designed and organized to support its strategy and meet the needs of all university stakeholders including students, faculty, staff, administrators and alumni.

Overall, the KPMG services can play an integral role in empowering JMU's IT department to harness the value of its data assets and processes in a way that benefit both its operational and strategic objectives.

The process flow below summarizes the journey we perform with many of our clients. Meeting them where they are in terms of their personal data management journey and helping them achieve their organizational objective to harness data effectively and drive data literacy and insights to propel them forward.



Data Management spectrum



Data Analytics and Visualization

KPMG can help JMU with their data analytics and visualization and AI needs by offering the following services:

- Data Analytics Strategy:** KPMG can engage with James Madison University to help develop a data analytics strategy aligned with the institution's overall objectives. This can involve identifying the types of data assets that need to be included, as well as assessing current analytics maturity levels. Once the strategy is defined, KPMG can assist in the implementation of the analytics program, from data collection to insights.
- Advanced Analytics:** KPMG can assist James Madison University in leveraging advanced analytics solutions such as artificial intelligence (AI), machine learning, and robotic process automation (RPA) to extract insights and automate processes across the institution.
- Data Visualization:** KPMG can help James Madison University develop visualizations that allow stakeholders to gain insights from the institution's data more easily and intuitively. KPMG can create interactive dashboards, data-rich reports, and other visualizations that can help monitor performance indicators, make data-informed decisions and institute preventative measures.
- AI Readiness Assessment and Planning:** KPMG can conduct a comprehensive AI readiness assessment that examines key business needs, data availability, ethics and bias considerations, security and privacy concerns, and resource requirements. Based on the outcomes of the

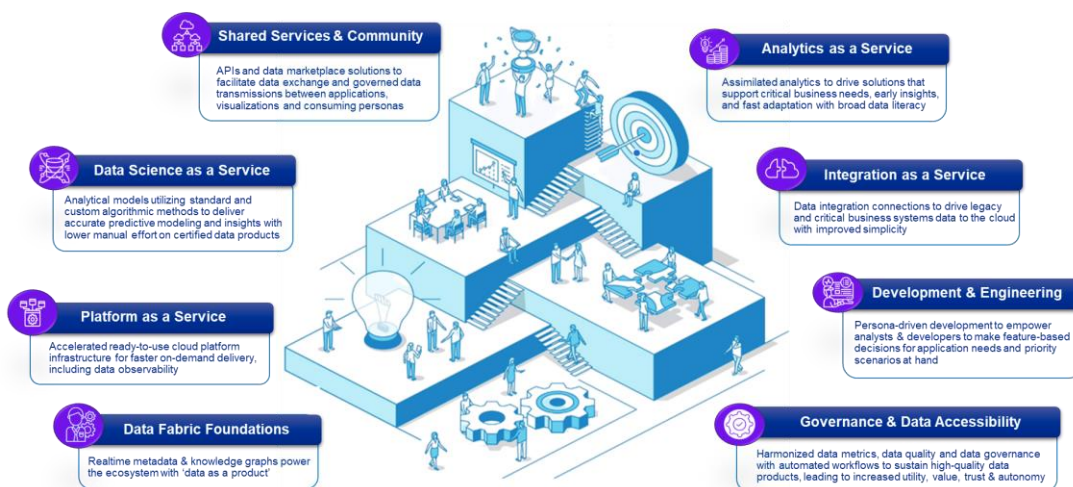


assessment, KPMG can develop a customized AI implementation plan that is tailored to the university's needs and objectives.

- **AI Solution Development:** KPMG can also assist James Madison University with developing and implementing an AI solution. KPMG can support the design and development of the solution, including developing the data architecture, models, algorithms and integrating the AI solution into existing IT infrastructure.
- **AI Governance:** KPMG can help establish an AI governance framework to ensure transparency, accountability, and ethical considerations are taken into account while developing an AI solution. KPMG can offer guidelines that outline the policies, rules, and procedures required to develop, deploy, and maintain an AI solution.

Overall, the KPMG services can support James Madison University in the successful implementation of data analytics and visualization and AI by providing customized strategic advisory and implementation services that will address institution-wide objectives and goals.

Data



KPMG can help James Madison University with developing a data warehouse and data lake by offering a range of services that encompass the full project lifecycle. These services may include:

- **Assessment and Strategy Development:** KPMG can conduct an assessment of the University's current data environment and propose a strategy to design and implement the data warehouse/data lake solution. This will include an analysis of the existing data sources, data quality, data lineage, and metadata requirements, as well as a review of the current data governance structure and regulatory compliance requirements.
- **Data Modeling and Solution Design:** KPMG can work with the IT department to develop the data models and overall solution design for the data warehouse/data lake. This will involve defining the storage, processing, and management capabilities of the solution, outlining the hardware and software requirements, and developing plans for data migration, data integration, and data modeling.
- **Data Integration and Migration:** KPMG can assist with the data integration and migration process, including the development of ETL (Extract, Transform, Load) processes, data mapping and conversion, and data quality monitoring and control.
- **Data Quality Management:** KPMG can establish data quality management processes that will ensure the accuracy, completeness, and consistency of data in the data warehouse and data lake.



This will include defining data quality rules, implementing data profiling tools, and developing data validation processes.

- **Data Governance and Security:** KPMG can help establish a data governance framework to manage the University's data assets in the data warehouse and data lake. This includes developing a set of data policies, procedures, and guidelines, establishing access and control mechanisms, and identifying key data stewards responsible for the management of the data. Furthermore, data security and privacy measures will be developed to ensure that the appropriate safeguards are put in place to protect the University data.

These services offered by KPMG can help James Madison University in designing and implementing a data warehouse and data lake that has a strong foundation for success and provides actionable insights by becoming a single source of truth for data.

Our Experience

KPMG has developed data management/analytics solutions for other clients in higher education, the Virginia Commonwealth (Virginia Department of Transportation, Department of General Services, Virginia Courts), and a number of clients in a wide selection of industries. KPMG is a leading partner with Microsoft in digital transformation, cloud-based services, artificial intelligence, machine learning, cyber security, business analytics, and other digital offerings. We will leverage this experience to benefit JMU as we partner in developing and executing their future IT roadmap.



Market recognized leader in data & analytics



17,300+

KPMG D&A professionals globally across:

- AI, analytics, & engineering
- User experience design
- Big data architecture
- Supervised techniques
- Decision science / ops research
- Cognitive
- Natural language processing (NLP)
- Native cloud applications
- Unsupervised learning & clustering
- Data mining & machine learning



1,700+

Data scientists



7,000+

Engagements annually



600+

Pre-built solutions

Why KPMG?

KPMG over the last 125 years has gathered millions upon millions of insights that are embedded into the way we solve problems. More specifically to AI, we average 7,000 AI-enabled engagements annually across various industry sectors including Life Sciences. As a result, we have been recognized as leaders by many clients and analyst – one of the most recent being named a worldwide Leader in the IDC MarketScape: Worldwide Artificial Intelligence Services 2023.



Our team understands the full spectrum of data analysis, feature engineering; model selection and integration; interpretation of outputs; and continuous monitoring of models. We also have deep skills in econometrics, optimization and natural language processing (NLP). The literacy program we have established has trained over 1,200 data scientists last year and used hackathons to identify over 800 professionals.

Our technical data scientists are supported by over 5,600 data engineers and architects combined, and over 8,900 developers. Our data engineers configure, implement, validate, manage DevOps frameworks (integration/deployment); lead code reviews, and CI/CD functions. They have a strong understanding of mainstream IaaS + PaaS offerings, D&A microservices, data lakes. Our developers and engineers help customize AI models and integrate them from and into applications. We also supplement our on-shore resources with our KPMG Global Delivery Network (KDN) to help us address the complex global market needs and achieve its growth ambition.

We also have a growing portfolio of 600+ AI (incl ML and NLP) enablers that allow us to develop and deliver AI solutions for clients on an accelerated basis.

- **KPMG Ignite** is our patented AI suite of capabilities with a robust portfolio of prebuilt, industry-tested AI-enabled solutions—all backed by our deep industry and domain expertise.
- **KPMG Signals** utility is an active listening platform that continuously harvests both structured and unstructured data from more than 250 public and private sources, transformed into over 100,000 signals that power ML-based analytics and drive market moving decisions in real time.
- **KPMG Modern Data Platform (MDP)** is a scalable, cloud-native Infrastructure As Code service catalog. MDP integrates and harmonizes data from systems of record, optimizes a unified data model & supports business process improvements through AI-enabled insights and accelerators.
- **KPMG Ambient Data Management** augments traditional, rules-based, data quality tools by performing automated anomaly detection and ML-based data quality checks to monitor data as it flows through analytics pipelines, maximizing data hygiene and helping to keep data AI-ready.

1.f

Strategic alliances enhance our integrated capabilities and help clients seize more value from strategy and technology investments. KPMG's alliance partnerships give us early access and opportunities for joint experimentation - for example, KPMG is an early access partner for Microsoft 365 Copilot. KPMG and Microsoft recently announced a \$2B+ investment in Microsoft cloud & AI services over the next 5 years. KPMG and Google are expanding our alliance to collaborate on practical applications of GenAI

Our global pool of IT and engineering professionals have the ability to execute from strategy through delivery of value with robust skills across AI, analytics, automation and low code including multi-clouds. In terms of the specific GenAI implementations over the last few months, we have led eleven (11) engagements and deployments. We have also adopted Generative AI within KPMG and have rolled out a range of secure and safe Gen AI based apps and solutions including AdvisoryGPT. All of these make us well suited to help Amgen transform using Generative AI and other technologies in a safe, responsible and scalable manner.

1.g. Change management training, services, & certification

1.g

KPMG Capabilities & Approach

Change management and people - Orchestrating the people experience

A well-crafted people journey is equally as important to the outcome as the orchestration of the technology transformation. Our approach brings the technology, program, and change teams together to

Proposal to serve **James Madison University**



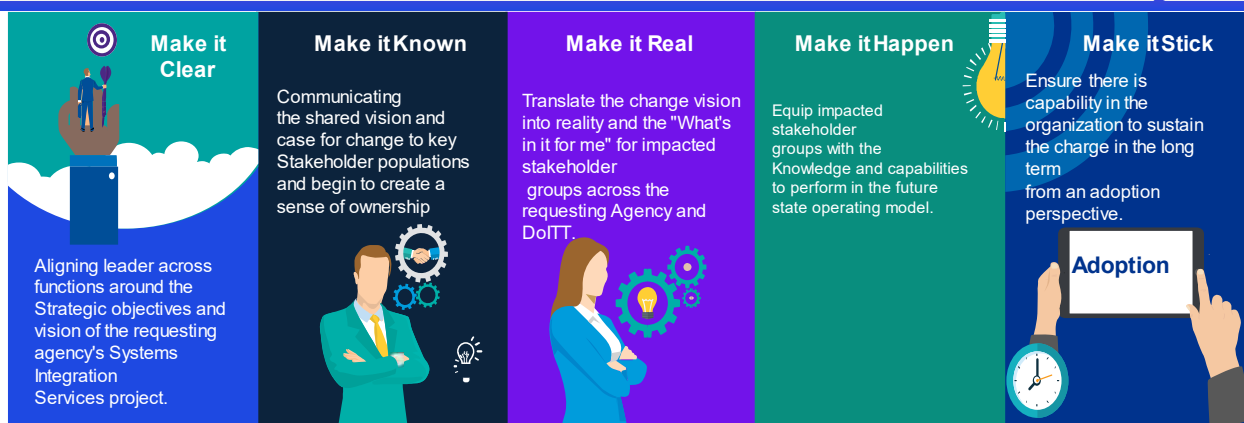
ensure the planning activities provide an integrated business and people journey. This human-centered approach is proven to increase engagement, reduce costs, and increase satisfaction.

We believe any transformation journey should always start with experience in mind. We put change management and human-centered design to put the employees and clients voice at the center of the transformation, from designing the right future state experience to building a personalized change journey for all impacted groups. By understanding the motivations and behaviors of a particular stakeholder group we can design with the future state experience in mind. And by iterating and refining the design based on stakeholder feedback we can build a sense of ownership and understanding that will maximize adoption, buy in, and business outcomes.

The human-centered approach starts with research, interviews and assessments to develop an informed and empathic view of people's perceptions of the transformation, gaps and opportunities for the future. This helps us to develop personas that captures sentiment, values and motivations for key groups which in turn informs targeted change management activities and messaging.

Our approach to orchestrating the people journey evolves as follows:

- **Make it Clear:** We start the journey by understanding and gaining alignment on the future vision for your technology transformation. This involves aligning leaders around the strategic aims, ambition, and scale of change so they sponsor the change early. This engagement ensures we have a well-articulated vision and strategic narrative to be continuously communicated throughout the project.
- **Make it Known:** Once we have clarity on the vision and the case for change, we will engage with key stakeholders to provide input on the transformation to ensure they will understand how it will impact their role and how they fit into the larger vision. This will begin to create ownership around the transformation. To help people consume change, we build personas for the most impacted stakeholders to help us tailor the experience. In parallel, we will begin to understand the impacts to each role and process to provide a true picture of the impact to determine how much change can be absorbed.
- **Make it Real:** The next stage in the journey involves translating the change into reality for the people impacted. This involves co-creating tailored change journeys based on the level of change and utilizing the right communication and engagement channels, while continually iterating on our approach based on our readiness data and analysis. We will partner with you to design creative engagement approaches to help these messages resonate with your stakeholders.
- **Make it Happen;** As the deployment of change approaches, we turn our focus towards targeted engagement and learning for those impacted to equip them with the skills and tools to adopt the new way of working. Measurement of readiness, including user sentiment, is a key feedback loop at this stage to help continue to shape the individual change journeys.
- **Make it Stick:** After the initial deployment of business and technology capabilities we continue to monitor readiness and adoption metrics to determine the effectiveness of the change. We analyze the adoption metrics to understand the drivers and refine engagement tactics further.



1.i Cisco technologies, infrastructure support, and virtualization

1.i

KPMG Capabilities

KPMG provides a wide range of advisory, consulting services to support various networking and infrastructure technology solutions, including use of Cisco:

- **Advisory services:** KPMG assists clients in choosing the right Cisco solutions and developing a technology strategy to align with their business goals and requirements.
- **Implementation support:** They will help JMU with the design, planning, and deployment of Cisco infrastructure and related technologies, ensuring optimal performance, security, and scalability.
- **Optimization:** KPMG's team of experts can work with JMU to assess, optimize, and enhance their existing Cisco deployments to meet current and future demands.
- **Security and compliance:** KPMG helps clients ensure that their Cisco deployments adhere to industry best practices and regulatory requirements to minimize security risks and maintain compliance.
- **Training and change management:** KPMG can assist with organizational change management, including training staff on new technologies and processes related to Cisco infrastructure and virtualization.

1.i

Our Experience

KPMG has the experience helping other higher education clients (Morehouse) with strategizing, designing and implementing networking and infrastructure services that will allow KPMG to quickly assess and implement future networking and infrastructure services that will benefit JMU's modernization roadmap.

Why KPMG?

KPMG offers a few accelerators and proven approaches to managing networking and infrastructure services for higher education clients like JMU. Below describes our "Connected Campus" and "KPMG Network Architecture and Network Infrastructure Services" which can be leveraged to benefit JMU's future IT service capabilities.



KPMG Higher Education Connected Campus

KPMG developed a research-based consumer-centric enterprise-wide framework for the digital transformation of higher education institutions. The KPMG framework is intended to assist the educational institutes in better positioning themselves to create higher value and returns by structuring and aligning different aspects of the education system in order to offer seamless, consumer-centric service and experience. KPMG calls this framework “a blueprint for digital transformation in universities”. The framework has six organizational elements namely, customers, channels, enterprise strategy, core businesses practices, advanced data and analytics, and enabling business practices.



1.i

“Customers” in this framework include existing and potential students, alumni students, educational communities, government, and various partnering institutions. Channels entail all kinds of communication channels as mentioned in the above image. Enterprise strategy entails all the strategic objectives, goals and planning. Core business practices entail all the practices associated with curriculum, student experience, research, and other academic areas. Visualizations and insights, scenario planning and modelling, data management and governance are all covered in data and analytics. Lastly, technology and operations are considered as enablers for business practices.

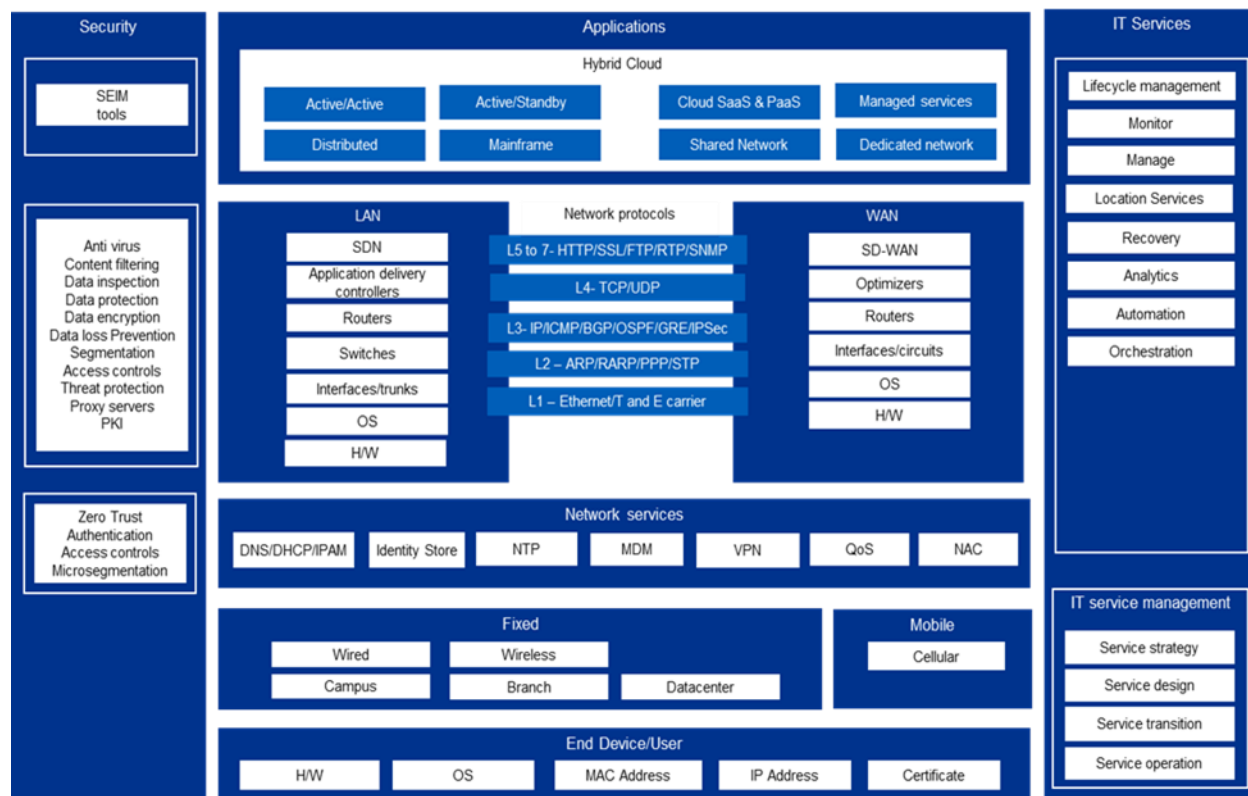
Enhancing the experience of both students and faculty while improving overall service efficiency, a smart and connected campus is critical. The Connected Campus ecosystem comprises four key aspects: Things, Strategy/Operations, Data, and Users.

- Things such as sensors and devices connect the physical campus to the virtual campus
- The sensors and devices also collect relevant data to drive new, actionable insights.
- Strategy / Operations defines how everything integrates and operates together.

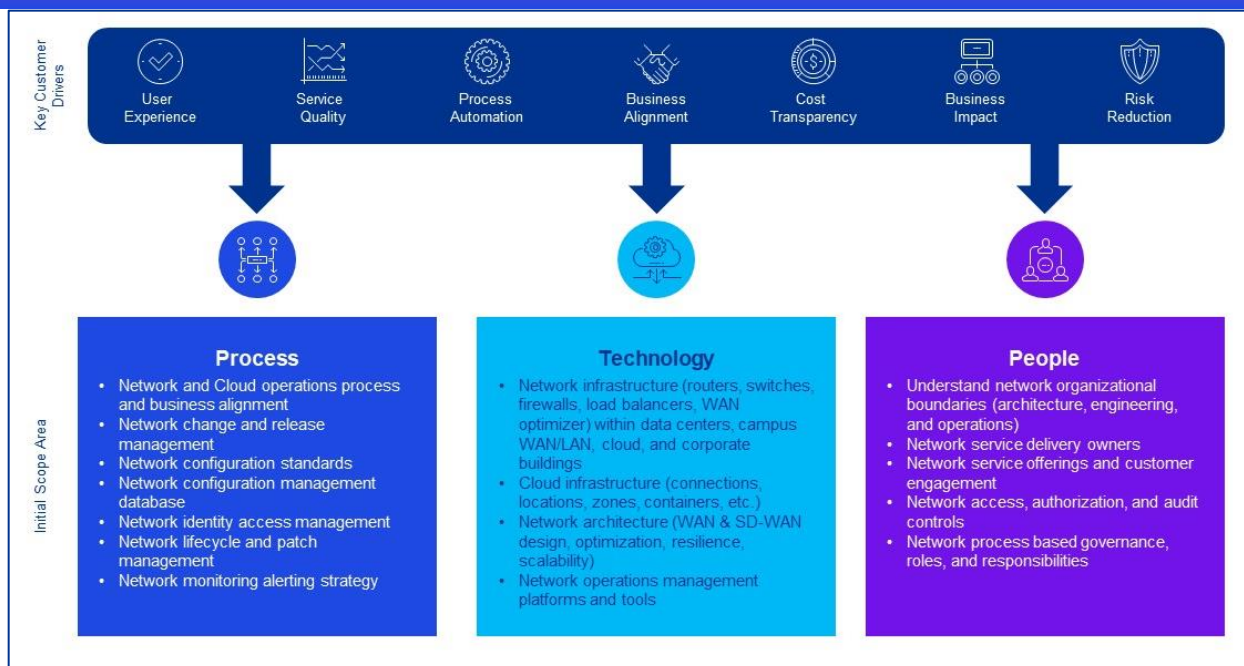


KPMG Network Architecture and Network Infrastructure Services

Leveraging the KPMG framework for Network Architecture and Network Infrastructure Services, we assess the maturity of existing operations and networks and conduct a current-to-target state gap analysis. This framework-based current state assessment enables us to identify architectural complexity, security weaknesses, opportunities for network modernization, key risks, and areas of concern while helping you achieve a unified secure more performant network. Our KPMG Network Architecture Framework will also underpin our target state network recommendations.



We have a depth and breadth of technical knowledge and experience that enable us to bring the right people and right insights at the right times to deliver a successful network unification. The proposed KPMG team of experienced network technologists and security architects understand key network unification drivers in the areas of process, technology, and people.



1.1 Other technology



Technology Transformation Advisory

Our Technology Strategy & Transformation advisory services combines deep business and industry knowledge, technical expertise, and a collaborative approach, to help clients build a future-ready business. We know that the actions our clients take today will impact their tomorrow. Our professionals help companies navigate the new reality, while quickly delivering tangible results, and bringing practical solutions to the issues that matter. Our goal is to improve the strategic value of our clients' investments in technology by cutting through the complexity of today's dynamic technology environment to support the business agenda through enabling technologies and addressing issues of risk, governance, and data security.

We provide assistance to our clients in order to:

- Use IT to advance the business, not just support it.
- Advance IT maturity to provide efficient and effective IT services.
- Position the IT organization to be a strategic business partner.
- Rationalize complex application portfolios to cut duplicative spending and increase business agility.
- Manage risk and compliance through supplier management, data integrity, security, privacy, governance, and controls.

Solution Offerings





Business of IT

Our community focuses on helping Technology organizations design and implement leading practices on how to “run IT as a business” more effectively. Critical aspects of running IT as a business include Modern delivery - agile & dev ops, IT service management, IT asset management, IT portfolio management, and IT financial management. We also help clients identify uncaptured revenue from over-deployed software and non-compliant software use and develop business practices that join financial, contractual and inventory functions to support software lifecycle management.

- **IT Service Management** - ITSM practice provides services in primarily four areas: Technology implementation, ITSM Capability Assessment, Modern ITSM Enablement, and ITSM Target Operating Model Design.
- **Technology Portfolio & Financial Optimization** - We assist organizations as they grapple with increasing technology demand and complexity by increasing transparency into the cost of technology debt and the value of new technology adoption, at the speed of business growth.
- **Software License Review and IT Asset Management** - Increase customer awareness of their entitlements and license terms and enhance understanding of common challenges customers face in complying with license terms.

IT Strategy

Our community focuses on the full slate of IT business strategy and operating model services from capability assessments to strategy / operating model ideation to implementation management. Our offerings include digital transformation for IT, technology strategy & selection (TSS), IT integration and separation management, and business & technology resilience. We also assist clients with post-close IT integration and separation management activities resulting from an acquisition or divestiture with our IT integration & separation management offering. Lastly, we deliver the full lifecycle of business continuity & disaster recovery services with our business & technology resilience offering.

- **Digital Transformation for IT** - KPMG's Digital Transformation for IT offering helps organizations improve their success in digital business transformation through the visioning, design, and implementation of a new IT operating model.
- **IT Integration and Separation** - The IT separation and integration management service offering helps our clients assess the IT component of a merger, acquisition, or divestiture, focusing on the most critical aspect of a transaction after financial and operational due diligence.
- **Business and Tech Resilience** - We enable business to offer resilient and reliable services by addressing a wide range of threats to the business process and supporting technology throughout the lifecycle.

Modern Technology

Our community focuses on an outcome-driven strategic approach to planning, design, and building modern solution architectures, foundation technical platforms and Agile delivery models, including hybrid multi-cloud, cloud native, and DevSecOps. We help IT leaders make the technology and ways of working transformative shift to a more flexible, reliable, resilient, and available IT ecosystem needed to deliver business value today and tomorrow.

- **Modern Delivery / Modern Platforms** - Modern Delivery helps Clients improve delivery speed, cost and quality by adopting modern delivery practices, streamlining the value delivery chain, unifying the pipeline, and securing the application development. The offering enables the future IT function that will break down the traditional silos limiting IT's agility by integrating engineering, testing, and operations into full stack teams, automating large portions of the value chain, and creating a culture of collaboration focused on customer outcomes (DevOps).



- **Modern Architecture** - Modern Architecture supports client adoption and utilization of disruptive technologies, such as AI, automation, blockchain, and augmented reality, and the architecture needed to support these technologies like Cloud.

Security & Controls

With large-scale and complex system implementation projects, we have found that “Security and controls” can sometimes be an after-thought, and one that really complicates the University’s ability to comply with internal and external audits. Leveraging KPMG’s 125 year audit heritage, we have built a robust Compliance practice that specializes in helping our clients secure their new modern platforms and ensure all of the appropriate access and financial reporting controls are in place.

Our Security & Controls approach is focused on helping organizations understand the risk associated with moving to the cloud and defining the appropriate security and controls solution to mitigate risk. The three pillars described below are the foundation of this approach:

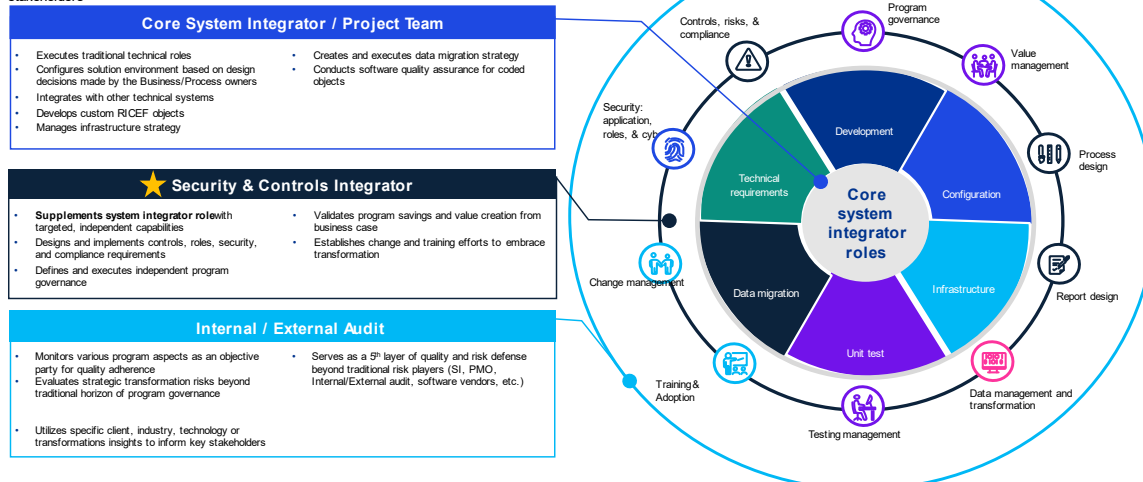
- **Intelligent Controls Automation:** We will work with Business Process and IT leads to evaluate opportunities to strengthen the control environment by moving detective/manual controls to preventative/automated controls in an intelligent way. Assessing control execution and testing automation options to reduce the cost of compliance.
- **Application Security:** Our Application Security approach allows us to empower business users while simultaneously protecting sensitive data and transactions. KPMG has developed a security strategy based on the principle of least privilege using Roles Based Access Control (RBAC) and Attribute Based Access Controls (ABAC) to reduce risk exposure.
- **Continuous Monitoring:** We will focus not only on the implementation at hand, but on the sustainability of the controls environment after go-live. Considering tools to facilitate ongoing monitoring and automation, implementing exception based reporting and streamlining the access certification process to support continuous controls monitoring.

Our approach supplements the Integrator role, by providing a Security & Controls Integrator role:

Embedding Trust in your Transformation Journey

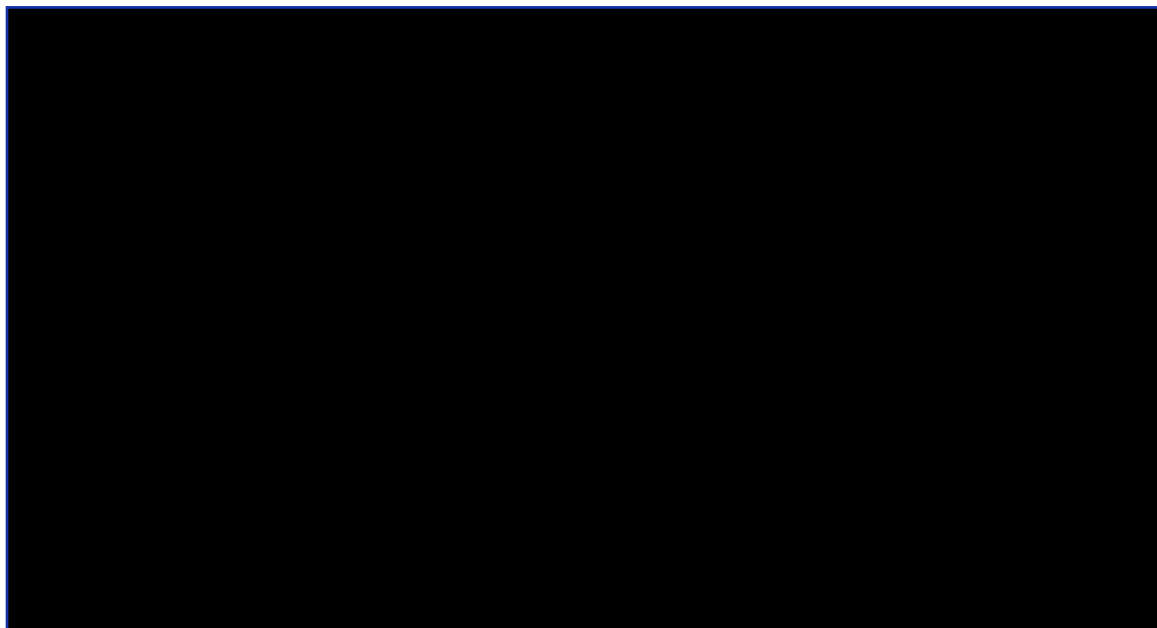
Value we bring ...

We empower your enterprise, safeguarding your data and transactions to provide a comprehensive view of risk. Our goal is to elevate your business, fortifying trust with your stakeholders





The following is a list of recent clients where we have provided Security & Compliance support:



KPMG Alliances

The KPMG strategy is to partner with best in breed technology companies, as we are not a product company, but a services provider. It is with this approach, we are able to stay ahead of the market, and align with those companies that outpace their competitors and remain innovative.

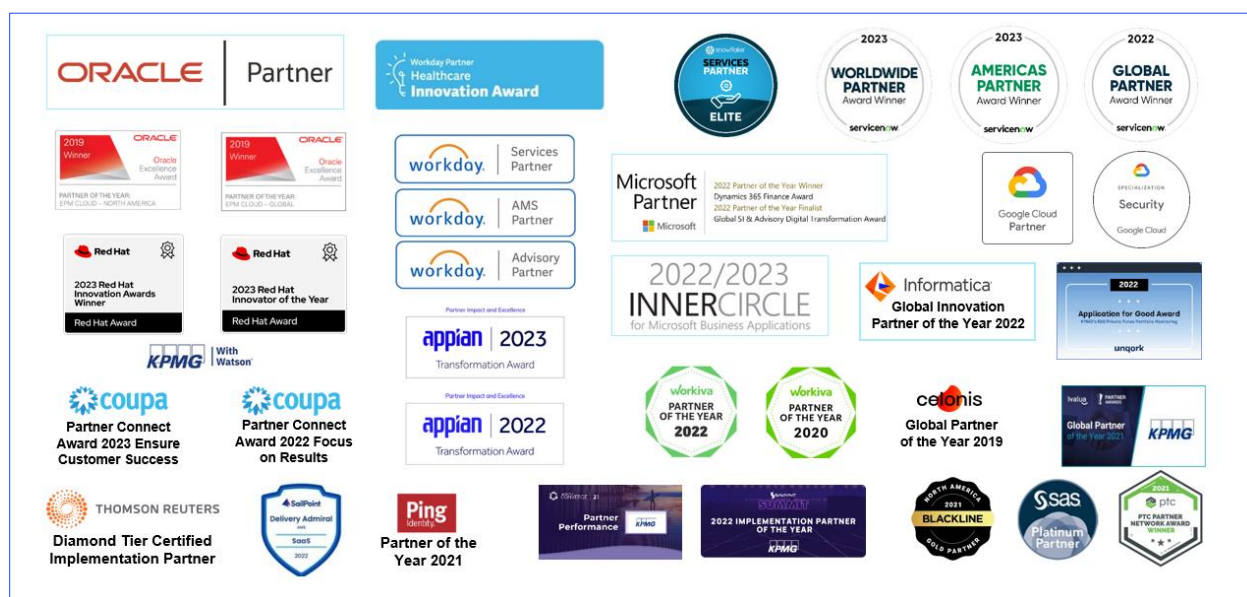
We have built an incredibly strong network of alliances as you will see below. KPMG has received numerous external awards and accolades from the alliance partners showcased in the graphic below – a testament to the value and impact of our collaborations. In addition, the strength and depth of our global ecosystem has been noted in several analyst recognitions.

“KPMG’s digital framework enables end-to-end management from strategy to implementation. It follows a business-first perspective to solve a client’s challenges to deliver business value around growth, risk, quality, and efficiency, creating an enhanced customer experience.”

– HFS Top 10 Triple-A Trifecta Services 2020

KPMG's Strategic Alliance Portfolio

1.






While we have many alliances, in light of where JMU is in their transformation journey, we wanted to showcase a few of our larger alliances and practice areas:



As a global system integrator, KPMG is a clear industry leader in providing Workday services. Our Powered approach enables HR & Finance strategy to align, process, structure, and technology with the



needs of the business to increase implementation and operational efficiency, and add value to the enterprise. KPMG is recognized as a leader in technology consulting and implementations of small to large across simple to complex solutions by our alliance partners, illustrated below:

Workday ecosystem	Innovation approach	Our clients
<p>The most experienced Workday implementation team</p>  <p>800+ Workday Certified Resources</p>	<p>14+ Years of Workday enabled transformation</p>  <p>2000+ Total Workday Certifications</p>	<p>Large, complex & dynamic companies</p>  <p>230+ Total Workday Clients Around the World</p>
Workday solutions for HR, Finance, and Technology Executives Across Financial Services		



To ensure our clients are scaling for the future, KPMG emphasizes our industry expertise and focus within the entire Workday ecosystem, to include:

- Consumer & Retail
- Healthcare
- Technology & Media
- Financial Services
- Higher Education
- Government



KPMG is also committed to growing alongside of Workday in the following ways:

- **Workday Extend Early Adopter:** Continued collaboration and innovation with the Workday Extend team enabling clients to leverage Workday in new and innovative ways.
- **Supply Chain Pilot Partner:** One of only four partners who participated in the SCM Training Pilot and bringing deep healthcare procurement expertise to our clients – one of three partners who are able to prime deployments.
- **Workday Banking Tenant:** Workday tenant that demonstrates how Workday Financials can support key financial services industry requirements for potential banking/capital markets customers.
- **Accounting Center Partner:** Selected as one of the first partners to be enabled on Workday's Accounting Center product.
- **LDTI & IFRS17 Compliance:** Leveraging our regulatory expertise to create solutions for our clients underpinned by Workday technology.
- **Workday People Experience:** Exploring the re-imagination of enterprise service management with Workday.
- **Prism & Adaptive Planning:** Investing in building industry specific enterprise reporting solutions leveraging Prism and Adaptive Planning.





Please see the VCUHS successful workday implementation in the qualifications section.



KPMG is a fast-growing Salesforce System Integrator, eager to provide an innovative approach that harmonizes technological prowess with a rich 125-year heritage. While KPMG's Salesforce practice is young, when compared to our 125-year-old heritage, it leverages the power of our Global firm, allowing us to invest in new solutions, innovate and tap into resources other small boutiques would struggle to provide. In addition, KPMG has rich history in ensuring oversight, compliance and governance for the world's largest organizations is embedded in our DNA, and evident in our service delivery. The ability to balance risk with innovation is where KPMG leads, and we'd like to share why we believe this is one of the most important qualities should JMU need support with Salesforce services.

Salesforce Certified Professionals

Experienced Salesforce certified consulting partner with continued investment in talent: As a **certified CREST partner**, KPMG invests in a highly skilled, certified team that goes beyond the basic requirements. Quality training and mentorship are key elements of our internal Salesforce Academy, fostering a collaborative environment for staff and clients alike. We currently boast over **850 professionals with Salesforce certifications**, and KPMG is taking steps to become a **Summit certified partner** in the next year, by investing in additional resources and solutions, as well as expanding on the app exchange.

Salesforce Experience

Proven track record in delivering Top-Quality Implementations: KPMG consistently demonstrates exceptional delivery with a **5-star Salesforce Consultant rating**, and **over 230 implementations**. Our quality first focus is the DNA that resulted in KPMG being selected for some of the major Salesforce implementations for public agencies worldwide, including the largest **Department of Defense Salesforce implementation for the U.S. Air Force (USAF)**. The platform created for the U.S. Air Force was awarded the **2022 DOD CIO Award for excellence**, highlighting the KPMG commitment to outstanding project delivery. Our commitment to quality leads to fewer defects, and rigorous deployment processes and support.

Our teams can deploy forward-thinking solutions, with a degree of flexibility and agility, based on the industry insights we have gained working in over 33 states. We have helped clients realize the transformative potential in their agencies, and then continue in varying execution roles to help them achieve that potential.



Salesforce Services – From Strategy to Managed Services



The KPMG System Integrator (SI) role begins with a holistic approach to Design:

- Ability to cut through complexity, with a focus on design:** we have seen transformations from every angle, as strategic planning advisors, technologists, business process redesign specialists, in PMQA roles and as an IV&V provider supporting federal certification requirements. As such, we bring things like unparalleled insights into what works, an ability to proactively foresee risks and offer mitigation strategies to stay on schedule and on budget. For example, our recent design work in California's child welfare modernization has led to numerous configuration vs. customization decisions, optimizing resources and systems; assessing 900+ locality based systems to determine scope inclusion and early identification of data conversion impacts; and, developing user stories, business rules, data modeling, and most importantly validating these proposed designs to ensure the child and family needs were not just designed initially, but were developed and implemented by the SI as intended. Our design approach is rooted in deep research and analysis of leading practices across localities, as well as nationally, as ensuring sound designs from the very beginning will drive greater adoption and realization of the tools' full benefits.
- Investing in innovative solutions, and cutting-edge technologies:** KPMG is dedicated to developing state-of-the-art technologies and innovative solutions that enhance our service offerings. By continuously improving our capabilities and leveraging the latest advancements within the Salesforce platform, we can meet the evolving needs of clients. We have the ability to harnessing pre-built Salesforce accelerator components, automation, data analytics, artificial intelligence, and user-centered design tools. Our goal is to make it easier for families to apply for and receive assistance, while also decreasing the administrative burden on agencies, and enhancing data sharing and coordination.

1.1



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*

2

Our Approach

To serve JMU, we have built a team that leverages the right skill sets, people, and the appropriate protocols for execution (specific methodologies) so that we can obtain answers that will provide a strong combination of insight and value for JMU leadership.

Our approach to providing IT consulting services tailored to JMU's needs is comprehensive and structured. We begin by developing a thorough understanding of specific business objectives by working closely with you to gain an understanding of your unique requirements. We will conduct an initial consultation to establish the details of your project and identify all stakeholders. We then develop a roadmap that outlines the key deliverables, timelines, and resources required to complete the project. This roadmap is a living document that evolves throughout the project lifecycle as we adapt to new challenges or feedback.

We understand the importance of adhering to scope and combatting unexpected project cost overrun. To ensure we continually deliver projects on time and on budget, we have developed a robust change management process that includes a clear change request process, rigorous project tracking, and an effective escalation process when necessary. Our approach to change management is collaborative, and we work closely with your team to ensure that any changes are documented and controlled. We maintain clear records of all changes, ensuring that the project remains aligned with the original project scope. We also proactively monitor project progress by conducting regular status meetings with your team to ensure that we are on track to deliver the expected results.

As we explain in this response, our approach to IT consulting services is comprehensive, structured, and focused on understanding your unique business needs and objectives. Our methodology is designed to deliver tailored solutions that best meet your specific needs. We tightly manage projects to ensure that we meet deadlines, budgets, and deliverables, while maintaining transparency and clear communication throughout all stages of the project. And finally, our focus on transformation is designed to help higher education institutions remain relevant in an ever-changing landscape.



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*

3

At KPMG, we believe our commitment to building a long-term trusted relationship with JMU is clearly demonstrated by the strength of the leadership and the engagement delivery team we have selected to serve JMU. We understand that although the requirements of individual projects might differ, leading to the involvement of various professionals, we have formed a senior leadership team that will serve as the primary points of contact for JMU.



Our proposed leadership team of **Tricia L. Harper** and **Chad D Bandy** who have successfully led multiple higher education and Commonwealth of Virginia engagements, will serve to your needs.

Tricia L. Harper is our Partner in the KPMG Consulting Services practice and supports the largest accounts in the Richmond, Virginia marketplace. With more than 20 years of experience, she currently leads KPMG's work across the Commonwealth of Virginia, including oversight of all service delivery for the Executive Level branches, major localities (across all 9 Regions), as well as the major public universities, Virginia Community College System, and the academic medical centers. Based in Richmond, Tricia has an extensive local network and serves as the KPMG key point of contact to national and global initiatives. While she works closely with every team that is delivering across the state, the localities, and within higher education, she is also very focused on helping ensure KPMG brings the absolute top talent and insights from across the firm.

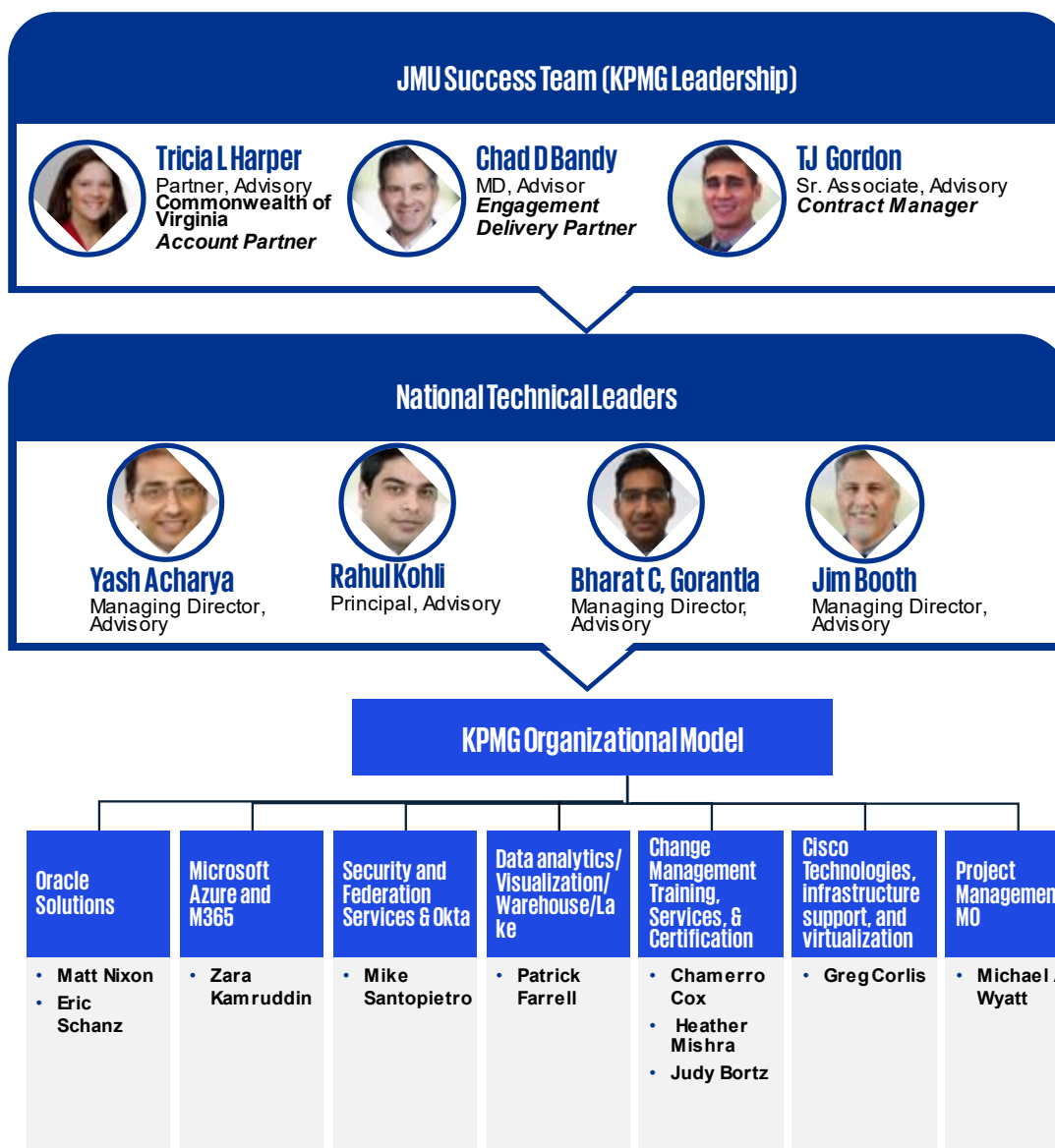
Chad D Bandy is our Managing Director in the KPMG Consulting Services practice with more than 25 years of higher education strategy and operations experience. Chad is an operational strategist with experience as a university administrator as well as an executive leader delivering outsourced solutions to university clients. He has partnered with R1 Carnegie institutions, community colleges, public institutions, as well as private, liberal arts institutions.

Depending on the specific future needs of JMU, under the leadership of Tricia and Chad, the below subject matter experts may be brought in to advise on their respective areas of expertise.




Organizational Chart

3



Short Bios

Resource	High-Level Bio
 <p>Tricia L. Harper</p>	<p>Tricia is a Partner in the KPMG Consulting Services practice and supports the largest accounts in the Richmond, Virginia marketplace. With more than 20 years of experience, she currently leads KPMGs work across the Commonwealth of Virginia, including oversight of all service delivery for the Executive Level branches, major localities (across all 9 Regions), as well as the major public universities, Virginia Community College System, and the academic medical centers. Based in Richmond, Tricia has an extensive local network and serves as the KPMG key point of contact to national and global initiatives.</p>



Resource		High-Level Bio	
Partner, Advisory KPMG LLP Role: Account Partner and Primary Contact for JMU	 Chad D. Bandy <i>Managing Director, Advisory</i> <i>KPMG LLP</i>	Qualification	Experience
		<ul style="list-style-type: none"> BA, James Madison University Certified Public Accountant (CPA), Commonwealth of Virginia 	20+ years
Role: Engagement Delivery Partner	 TJ. Gordon <i>Senior Associate, Account Relations</i> <i>KPMG LLP</i>	Qualification	Experience
		<p>Chad has more than 25 years of higher education strategy and operations experience. Prior to KPMG, he served as the Chief Growth Officer for Bisk Education, an online learning services company that provided market research, enrollment and marketing, technology services and program management for some of the country's leading institutions.</p> <p>Chad is an operational strategist with experience as a university administrator as well as an executive leader delivering outsourced solutions to university clients. He has partnered with R1 Carnegie institutions, community colleges, public institutions, as well as private, liberal arts institutions.</p> <ul style="list-style-type: none"> Eastern Illinois University, Bachelor of Arts in Economics Executive Certificate in Leadership, University of Notre Dame – Mendoza College of Business 	25+ years
Role: Contract Manager		Qualification	Experience
		<p>TJ is responsible for marketing and supporting the delivery of KPMG's advisory services to Commonwealth of Virginia Government agencies and for overall client satisfaction. TJ has been dedicated to the Virginia market working for KPMG for over 3 years. As such he thoroughly understands the process of gathering client needs, navigating to identify ideal resources to address those needs both within and outside of KPMG (business partners) and helping prepare proposals and client presentations to help communicate how KPMG can help clients achieve their goals. TJ brings a solid understanding of the government contracting process and he also works collaboratively with alliance partners, subcontractors and our clients to structure agreements that are mutually beneficial. TJ's responsibilities include serving as a customer relationship representative to KPMG's clients and proactively working with the KPMG delivery teams and our clients to remove obstacles and help insure project success.</p> <ul style="list-style-type: none"> BA Johns Hopkins University 	5+ years



Resource	High-Level Bio				
 <p>Yash Acharya Managing Director, Advisory KPMG LLP</p> <p>Role: National Technical Leader</p>	<p>Yash is a Managing Director in the KPMG State & Local Consulting Services practice with more than 20 years of management consulting experience in Oracle, PeopleSoft, Workday, and CGI ERP systems implementations, software development, enterprise architecture, IT strategy, project management, requirements analysis, business process transformation, and quality assurance. He has delivered several full system implementation life cycles for public & private sector clients. Yash's current and past clients include some of the leading entities including the Commonwealth of Virginia, City of New York, State of Ohio, State of New York, State of North Carolina, State of CT, State of Nebraska, among others. Yash is a Certified Project Management Professional (PMP), and a Certified Scrum Master (CSM).</p> <p>Yash has substantial experience in managing, leading, and executing, operational and IT engagements for state and local government clients. He has served as the lead for assisting clients in assessing, planning, developing roadmaps, supporting and implementing large solutions and COTS package implementations, IT Strategy, requirements and business process, technical, functional, and project leads with responsibilities for planning, budgeting, execution, and delivery of IT projects; quality assurance services; risk management consulting and IT General Controls review, and project management consulting engagements. He has led and managed several functional and technical engagement teams impacting large scale and complex IT infrastructures and architectures.</p> <table> <tr> <th>Qualification</th><th>Experience</th></tr> <tr> <td> <ul style="list-style-type: none"> BS, Computer Engineering. Project Management Professional (PMP) </td><td>20+ years</td></tr> </table>	Qualification	Experience	<ul style="list-style-type: none"> BS, Computer Engineering. Project Management Professional (PMP) 	20+ years
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<ul style="list-style-type: none"> BS, Computer Engineering. Project Management Professional (PMP) 	20+ years				
 <p>Jim Booth Managing Director, Advisory KPMG LLP</p> <p>Role: National Technical Leader</p>	<p>Jim is focused on delivering business solutions for the KPMG SLG clients across the entire Microsoft platform stack. He has specific depth of knowledge in full life cycle application system design and development, business process engineering, enterprise architecture strategic planning, integration of business process engineering with technical development, project management methodologies, and organizational change management.</p> <table> <tr> <th>Qualification</th><th>Experience</th></tr> <tr> <td> <ul style="list-style-type: none"> BBA, Management Information Systems </td><td>30+ years</td></tr> </table>	Qualification	Experience	<ul style="list-style-type: none"> BBA, Management Information Systems 	30+ years
Qualification	Experience				
<ul style="list-style-type: none"> BBA, Management Information Systems 	30+ years				



Resource	High-Level Bio				
 <p>Rahul Kohli <i>Principal, Advisory</i> <i>KPMG LLP</i></p> <p>Role: National Technical Leader</p>	<p>Rahul is a principal in the KPMG Cyber Security Services practice and located in the Detroit office. He has more than 22 years of experience providing information security and identity and access management assistance to clients across a variety of industry verticals. Rahul has assisted with several large multi-disciplinary Citizens IAM projects for the State government client while complying with the applicable regulations, improving operational efficiency, and securely enhancing the end-user experience.</p> <table> <tr> <th>Qualification</th><th>Experience</th></tr> <tr> <td> <ul style="list-style-type: none"> BE degree, mechanical engineering Certified Information Systems Security Professional (CISSP) Harvard cybersecurity: managing risk in the information age </td><td>20+ years</td></tr> </table>	Qualification	Experience	<ul style="list-style-type: none"> BE degree, mechanical engineering Certified Information Systems Security Professional (CISSP) Harvard cybersecurity: managing risk in the information age 	20+ years
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<ul style="list-style-type: none"> BE degree, mechanical engineering Certified Information Systems Security Professional (CISSP) Harvard cybersecurity: managing risk in the information age 	20+ years				
 <p>Bharat C Gorantla <i>Managing Director, Advisory</i> <i>KPMG LLP</i></p> <p>Role: National Technical Leader</p>	<p>Bharat is an experienced and versatile director in the KPMG Healthcare Lifesciences Data & Analytics group. He is experienced in both product development and R&D as well as business development, consulting, and service delivery to healthcare providers, payers and life sciences clients. He currently manages all deliveries in value-based care and reimbursement applications. He has led, and developed products/applications in the Healthcare, Education and Building Architecture domain for over 100+ clients.</p> <table> <tr> <th>Qualification</th><th>Experience</th></tr> <tr> <td> <ul style="list-style-type: none"> MBA, Penn State University MSC, Carnegie Mellon University BS, Ryerson University </td><td>12+ years</td></tr> </table>	Qualification	Experience	<ul style="list-style-type: none"> MBA, Penn State University MSC, Carnegie Mellon University BS, Ryerson University 	12+ years
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 <p>Matthew D. Nixon <i>Director, Advisory</i> <i>KPMG LLP</i></p> <p>Role: Oracle Solutions</p>	<p>Matthew can help you transform your organization to help achieve enhanced organizational and operational structures and processes with a focus on public sector and local government focused Enterprise Resource Planning (ERP) and Enterprise Asset Management (EAM) system implementations, including process enhancement and automation</p> <table> <tr> <th>Qualification</th><th>Experience</th></tr> <tr> <td> <ul style="list-style-type: none"> B.A. Ursinus College Project Management Professional, PMP </td><td>12+ years</td></tr> </table>	Qualification	Experience	<ul style="list-style-type: none"> B.A. Ursinus College Project Management Professional, PMP 	12+ years
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Resource	High-Level Bio				
 <p>Eric J Schanz Manager, Advisory KPMG LLP</p> <p>Role: Oracle Solutions</p>	<p>Eric is a Manager in the KPMG Advisory practice with almost a decade of experience in business process assessment, software implementation, quality assurance services, project management and technical support. Eric has specialized in the State and Local government section of the public sector for the majority of his career.</p> <p>Eric has significant experience providing financial process assessments to government clients that improve their current state processes and identify future state opportunities for improvement. These assessments have been completed at various points throughout the project lifecycle with a focus on financial business processes, procurement processes, grants lifecycle processes, stakeholder requirements, and process controls / governance. He is also a certified Project Management Professional and Certified Scrum Master</p> <table> <tr> <th>Qualification</th><th>Experience</th></tr> <tr> <td> <ul style="list-style-type: none"> Bachelor of Science in Economics, Siena College Project Management Professional Certified Scrum Master Alteryx Designer Core Certified </td><td>9+ years</td></tr> </table>	Qualification	Experience	<ul style="list-style-type: none"> Bachelor of Science in Economics, Siena College Project Management Professional Certified Scrum Master Alteryx Designer Core Certified 	9+ years
Qualification	Experience				
<ul style="list-style-type: none"> Bachelor of Science in Economics, Siena College Project Management Professional Certified Scrum Master Alteryx Designer Core Certified 	9+ years				
 <p>Zara J. Kamruddin Director, Advisory KPMG LLP</p> <p>Role: Microsoft Azure and M365</p>	<p>Zara is a Director in KPMG's Advisory practice focused on State and Local Government with more than 15 years of experience delivering enterprise solutions. She has a strong background delivering global Microsoft Dynamics CRM business transformations for leading entities in the state and local government, technology, manufacturing, and financial services industries.</p> <p>Zara has strong experience leading CRM business transformations across multiple industries with a focus on technology, financial services, and manufacturing clients. She has helped clients to modernize their processes and achieve substantial efficiencies and savings in order to achieve their goals. She has also provided subject matter knowledge and guidance to organizations related to technology, vendor selection, and strategy.</p> <table> <tr> <th>Qualification</th><th>Experience</th></tr> <tr> <td> <ul style="list-style-type: none"> BA, Ouachita Baptist University BA, Ouachita Baptist University Microsoft Certified Technical Specialist (MCTS) </td><td>15+ years</td></tr> </table>	Qualification	Experience	<ul style="list-style-type: none"> BA, Ouachita Baptist University BA, Ouachita Baptist University Microsoft Certified Technical Specialist (MCTS) 	15+ years
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Resource	High-Level Bio			
 <p>Michael Santopietro <i>Director, Advisory</i> <i>KPMG LLP</i></p> <p>Role: SMP for Security and Federation Services & Okta</p>	<p>Michael is a Cyber Security Solutions Architect in the KPMG Advisory practice with more than 20 years of industry experience in technology and assisting State and Local Government entities. He is skilled in all identity and access management areas, including identity governance, authentication, authorization, single sign-on, and directory services</p>			
	<table> <tr> <th>Qualification</th><th>Experience</th></tr> <tr> <td> <ul style="list-style-type: none"> AZFUND-Connecticut CCSP-Connecticut CISSP-Connecticut PMP-Connecticut Bachelor of Science </td><td>20+ years</td></tr> </table>	Qualification	Experience	<ul style="list-style-type: none"> AZFUND-Connecticut CCSP-Connecticut CISSP-Connecticut PMP-Connecticut Bachelor of Science
Qualification	Experience			
<ul style="list-style-type: none"> AZFUND-Connecticut CCSP-Connecticut CISSP-Connecticut PMP-Connecticut Bachelor of Science 	20+ years			
 <p>Patrick Farrell <i>Director, Advisory</i> <i>KPMG LLP</i></p> <p>Role: SMP for Data analytics/ Visualization/Warehouse/Lake</p>	<p>Patrick Farrell is a Data and Cloud Director in KPMG's Lighthouse practice. He has experience developing strategy and roadmaps, data analytics and visualization and modern data platforms for higher education institutions as well as state and local government in the Commonwealth of Virginia (VDOT, VDH, Department of General Services, Virginia Courts). He has over 25 years' experience in working with organizations harness value from data and technology, including 8 years of experience helping higher education institutions and 3 years of experience helping organizations in the Commonwealth of Virginia. He will support James Madison in leading data analytics and data warehouse/lake strategy, operating model, architecture, design and implementation</p>			
	<table> <tr> <th>Qualification</th><th>Experience</th></tr> <tr> <td> <ul style="list-style-type: none"> Master's in Computer and Information Science, Penn State University Bachelor's in Electrical Engineering, Villanova University IAM Experience </td><td>25+ years</td></tr> </table>	Qualification	Experience	<ul style="list-style-type: none"> Master's in Computer and Information Science, Penn State University Bachelor's in Electrical Engineering, Villanova University IAM Experience
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Resource		High-Level Bio	
 <p>Judy Bortz Manager, Advisory KPMG LLP</p> <p>Role: SMP for Change Management Training, Services, & Certification</p>		<p>With over 30 years of versatile communications, training, and management experience primarily supporting information technology implementation projects, Judy can help to move an organization's staff and external stakeholders through the change journey from awareness to adoption by providing timely, relevant, informative, and accurate information. Her industry experience includes state government human services and transportation agencies for 19 years, a public school system and a private higher education institution, financial institutions, manufacturing and health care companies.</p>	
		Qualification	Experience
		<ul style="list-style-type: none"> Master's in Education, Training and Development, Pennsylvania State University Bachelor's in Business Administration - Marketing, California State University, Long Beach Mager and Pipe's Criterion-Referenced Instruction Mager's Instructional Module Development 	30+ years
 <p>Chamerro L Cox Manager, Advisory KPMG LLP</p> <p>Role: Change Management Training, Services, & Certification</p>		<p>With more than 10 years of experience in management consulting, Chamerro has leveraged her skills and experience to provide high impact change management, communication, and process improvement solutions to clients. She has worked with local and federal government agencies to implement robust transformation strategies that enable cultural and operational changes to support effectively and efficiently achieving organizational goals.</p>	
		Qualification	Experience
		<ul style="list-style-type: none"> MS degree, Trinity University BA degree, George Washington University Certified Project Management Professional (PMP) Certified Change Management Professional, Prosci ADKAR Certified ScrumMaster (CSM) Lean Six Sigma Greenbelt (LSSGB) 	10+ years



Resource	High-Level Bio				
 <p>Heather Mishra <i>Director, Transformation Delivery Advisory</i> <i>KPMG LLP</i></p> <p>Role: SMP for Change Management Training, Services, & Certification</p>	<p>Heather is a Director in KPMG's Transformation Delivery practice. She brings 25 years of experience in research, Research Administration and ERP implementations. She has a deep background in establishing, delivering, and managing complex technology programs. She has also led change and transformation change associated with technology and process in large research institutions. Heather has held leadership roles at private and public Academic Medical Centers and R1 Research Institutions. Heather works to combine the processes of "how work gets done" with innovative solutions and technology. We then creatively drive the adoption of those by faculty and research staff to rapidly accelerate value and realize human centered benefits as quickly as possible. Heather is certified in ProSci Change Management.</p> <table> <tr> <th>Qualification</th><th>Experience</th></tr> <tr> <td> <ul style="list-style-type: none"> BS in Biology, University of Texas Dallas MBA, University of Texas at Dallas Certified ProSci Practitioner </td><td>25 years</td></tr> </table>	Qualification	Experience	<ul style="list-style-type: none"> BS in Biology, University of Texas Dallas MBA, University of Texas at Dallas Certified ProSci Practitioner 	25 years
Qualification	Experience				
<ul style="list-style-type: none"> BS in Biology, University of Texas Dallas MBA, University of Texas at Dallas Certified ProSci Practitioner 	25 years				
 <p>Greg A Corlis <i>Principal, Advisory</i> <i>KPMG LLP</i></p> <p>Role: SMP for Cisco Technologies, Infrastructure Support, and Virtualization</p>	<p>Greg functions as KPMG US Emerging Technologies Leader. Through this role, Greg is responsible for defining business operating models, establishing strategic alliances and driving Emerging Technologies innovations across advisory practices through the use of innovative technology solutions such as 5G, IoT, Edge Computing, Computer Vision, Digital Twins, Industry 4.0, LPWA, Intelligent Automation, Cloud Solution and Advanced Analytics.</p> <table> <tr> <th>Qualification</th><th>Experience</th></tr> <tr> <td> <ul style="list-style-type: none"> BSC, East Carolina University Certified Information System Security Professional Certified Information Security Manager </td><td>30+ years</td></tr> </table>	Qualification	Experience	<ul style="list-style-type: none"> BSC, East Carolina University Certified Information System Security Professional Certified Information Security Manager 	30+ years
Qualification	Experience				
<ul style="list-style-type: none"> BSC, East Carolina University Certified Information System Security Professional Certified Information Security Manager 	30+ years				
	<p>Michael is a Director in KPMG's Digital Advisory practice with over 20 years of advisory and delivery experience. He is an experienced executive with a strong technical foundation and a proven track record of managing large-scale technology driven programs and improving company performance using a digital and transformational lens.</p> <table> <tr> <th>Qualification</th><th>Experience</th></tr> </table>	Qualification	Experience		
Qualification	Experience				



Resource		High-Level Bio	
 Michael A Wyatt <i>Director Advisory</i> <i>KPMG LLP</i> Role: SMP for Project Management/PMO		<ul style="list-style-type: none">• Bachelor of Business Administration, Information Systems, Radford University• Six Sigma Green Belt• Certified Scrum Master• PROSCI Change Management for Agile Transformation	20+ years





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

4

KPMG understands the importance of continued sourcing of consistent and reliable skilled professionals for the JMU IT consulting services and recognizes that the success of the IT consulting services depends on the knowledge, expertise, and dedication of our consultants. KPMG will implement measures to ensure the continuity of our consultants' involvement throughout the project by following the below steps:

- **Resource management:** Our resource management (part of Program Management Office-PMO) will be responsible for assigning the right skilled consultants to the project as they will analyze the project requirements and match the suitable consultants to ensure a seamless fit to the project. Consultants assigned to the project will not be removed from the project without prior approval from JMU xexcept for situations outside the KPMG control such as illness, resignation, and other unforeseen circumstances. JMU will also have the right of refusal for any consultant assigned to the project. During the project, KPMG shall secure written approval from JMU prior to making any changes in the team. The qualifications of the new consultant should be equal to or exceed those of the replaced consultant. After the project award, KPMG may request a replacement of team personnel (Refer to Section- 3 Proposed team). Such requests will be in writing.
- **Collaboration with knowledge transfer and documentation:** KPMG understands that documentation and knowledge transfer is crucial for maintaining project continuity. Our consultants follow best practices for documentation, creating comprehensive project plans, process manuals, and knowledge repositories based on guidelines set by PMO and training team. By systematically capturing project-related information and sharing it across the team, we can ensure that no knowledge is lost when a consultant transitions, holidays, or unforeseen circumstances. (Refer to Sec-8 for details on knowledge transfer).



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

5

5.a

5.a. Implementation

KPMG is a leader in technology consulting and implementations of small to large and simple to complex solutions across the entire framework of technology solutions and applications. KPMG primarily provides professional services with a focus on Business Led, Technology enabled projects where the key technologies and related technology integrations and frameworks are base Commercial Off The Shelf (COTS) solutions – on-premise and Cloud such as Oracle, Workday, Salesforce, Microsoft, Okta, IBM, Google, Apple based solutions. Our directional focus around COTS solutions is driven by our purpose to enable and transform business operations, applications, and enabling processes with a “Future Of” lens.

Over the following sections, we will discuss our implementation approach, which we describe holistically as our “Powered Approach”. We sought to follow the areas you have specified in the RFP, but understand these are fluid and all part of a full life-cycle implementation. The following illustrate the core components of our Implementation approach and the various methods/frameworks we utilize:



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5.b

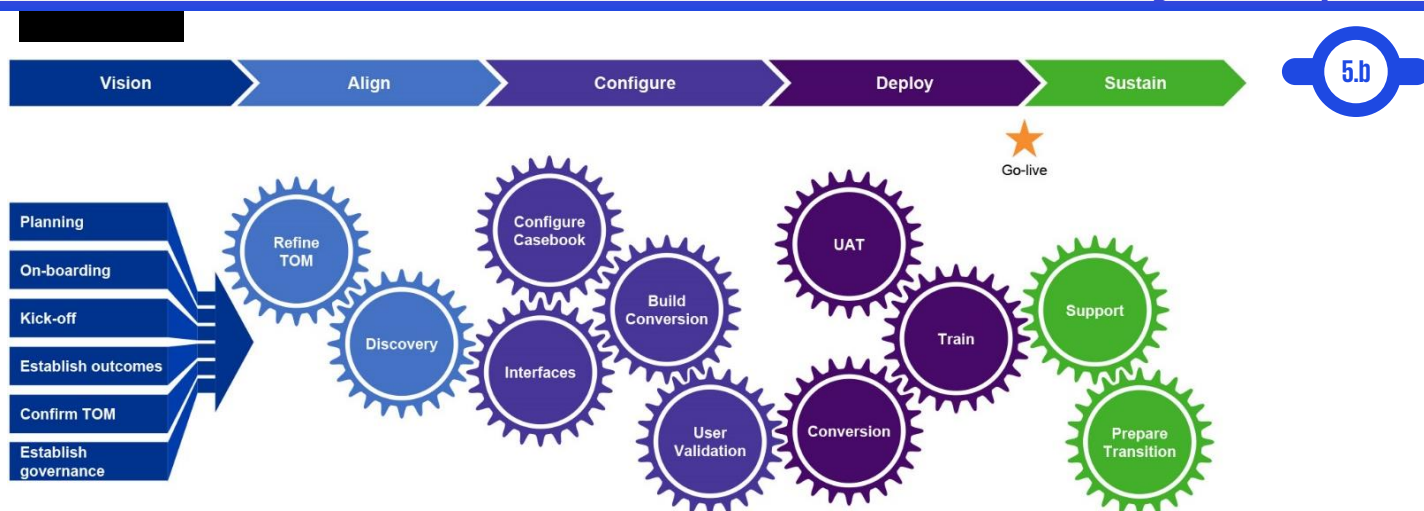
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5.c. Project management

Please refer to Section 9 for detailed project management approach.

5.c

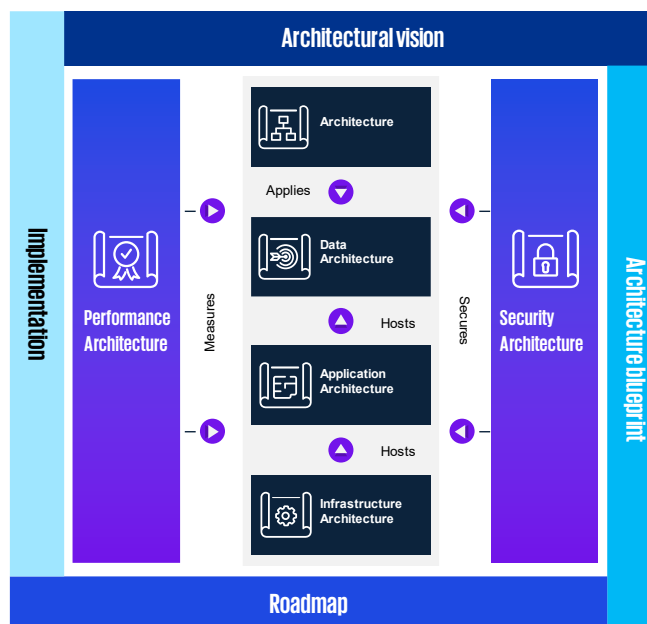
5.d. Architecture and design

A successful IT-enabled business transformation requires a tested approach and strong accelerators that leverage embedded knowledge from across the domain and that apply industry leading practices for planning and design. Implementing a complex program such as the transformation requires a structured approach to harmonizing business designs and integrating multiple technologies in order achieve its objectives in an acceptable time and budget.

5.d

KPMG's approach to Enterprise Architecture, as depicted in figure below, is consistent with The Open Group Architecture Framework (TOGAF) and the Federal Enterprise Architecture framework (FEAF). It provides the structure and discipline needed to balance between expressing business needs and implementing IT systems that achieve the desired business and programmatic outcomes. The breadth of business and systems integration services requested by JMU requires more than just a set of independent siloed artifacts, but a comprehensive method which ties all architectural domains together.

KPMG'S APPROACH TO ENTERPRISE ARCHITECTURE



To produce an architecture that truly guides complex technical decisions, JMU requires a systems integration partner who has and can leverage a comprehensive suite of enterprise architectural methods. KPMG's approach embeds and enhances MITA 3.0 architecture requirements, supporting the broad scope from high level strategic visioning to detailed design, technical oversight, and testing for the SIP. KPMG's Global Enterprise Architecture methodology applies industry leading practices for documenting architectural views as defined by TOGAF and uses industry modeling standards. The KPMG Team will provide the discipline, clarity and coordination needed across the various work-streams, vendors, and technologies contributing to JMU transformation efforts.



Accelerated transformations with KPMG Enterprise Reference Architecture (KERA)

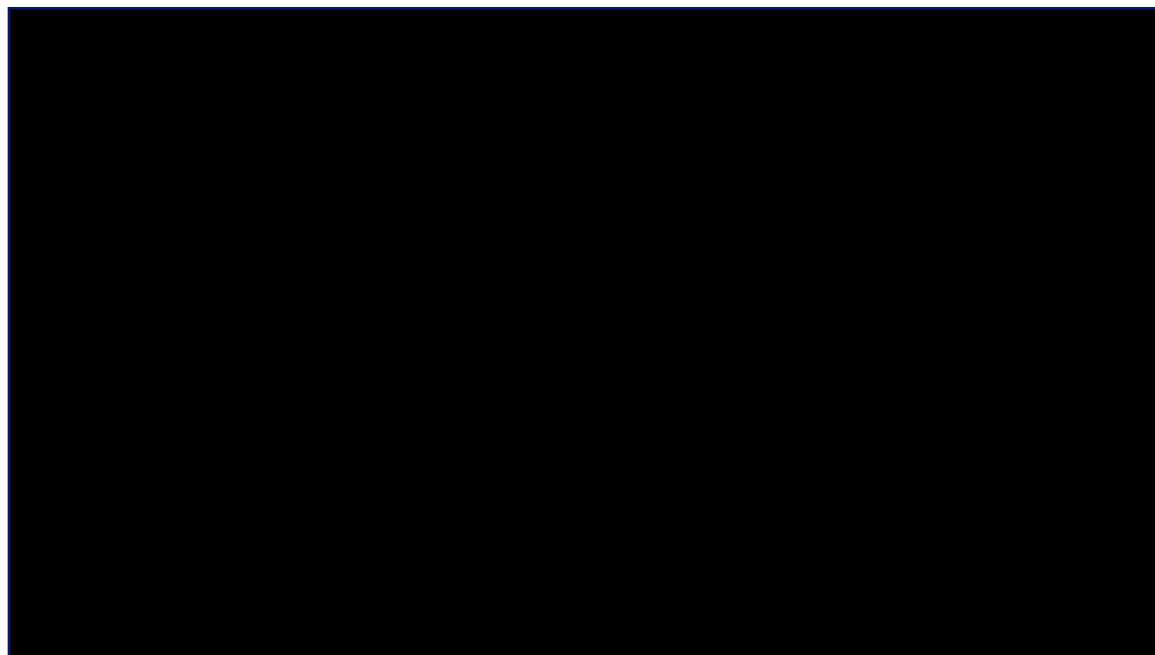
KPMG brings an integrated and holistic approach to business transformation. We will utilize a leading set of accelerators, known to rapidly understand stakeholder expectations and coordinate efforts across the continuum to the end goal of delivering coherently on the program priorities on time and on budget. The KPMG Enterprise Reference Architecture (KERA) is a set of methods, content, and tools we use to accelerate each phase of the transformation life cycle. We will draw upon this accelerator and our extensive experience with large-scale business transformation initiatives as we advise JMU.

Testing

Testing Services Methodology

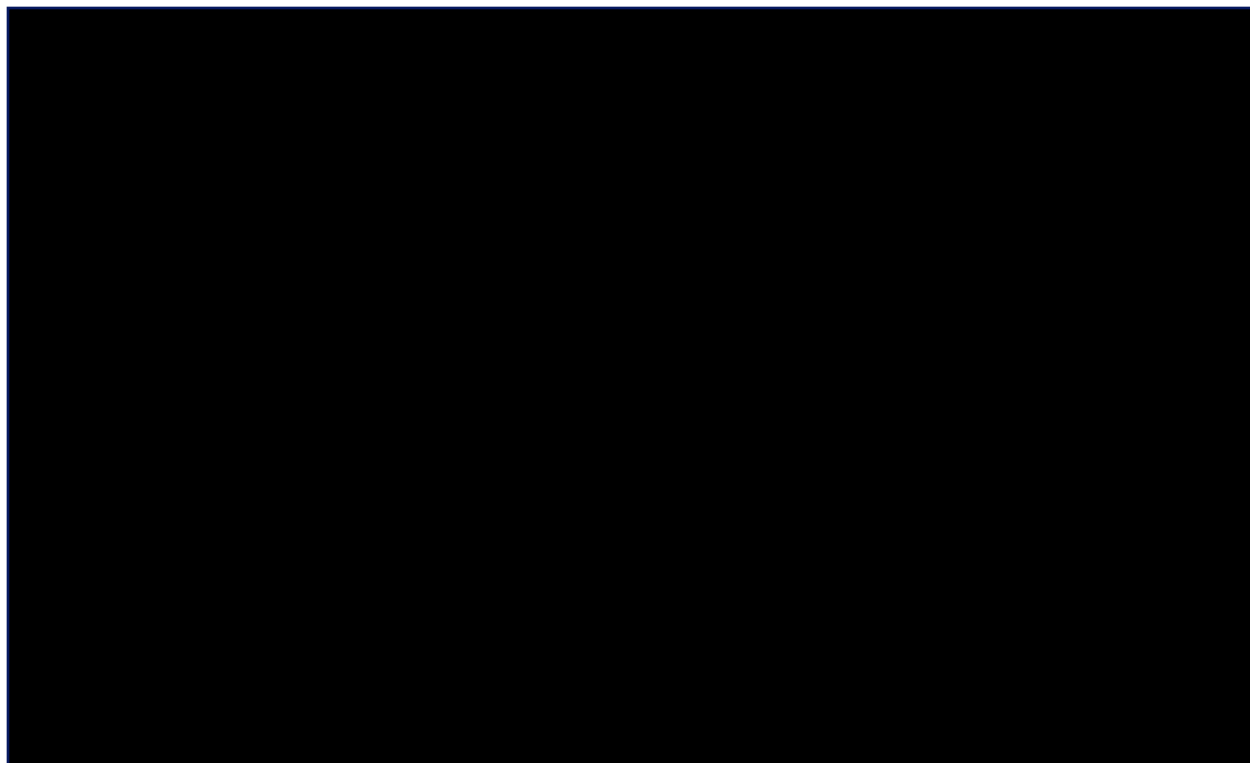
Testing – stress, system, security, and user acceptance

KPMG understands the importance of facilitating the planning, tracking, management, execution and reporting of test progress and test results. We will leverage our resources and accelerators, methodologies, tools, and templates to deliver high quality testing services for you. We will leverage our software testing methodology depicted in the figure below.





5.d



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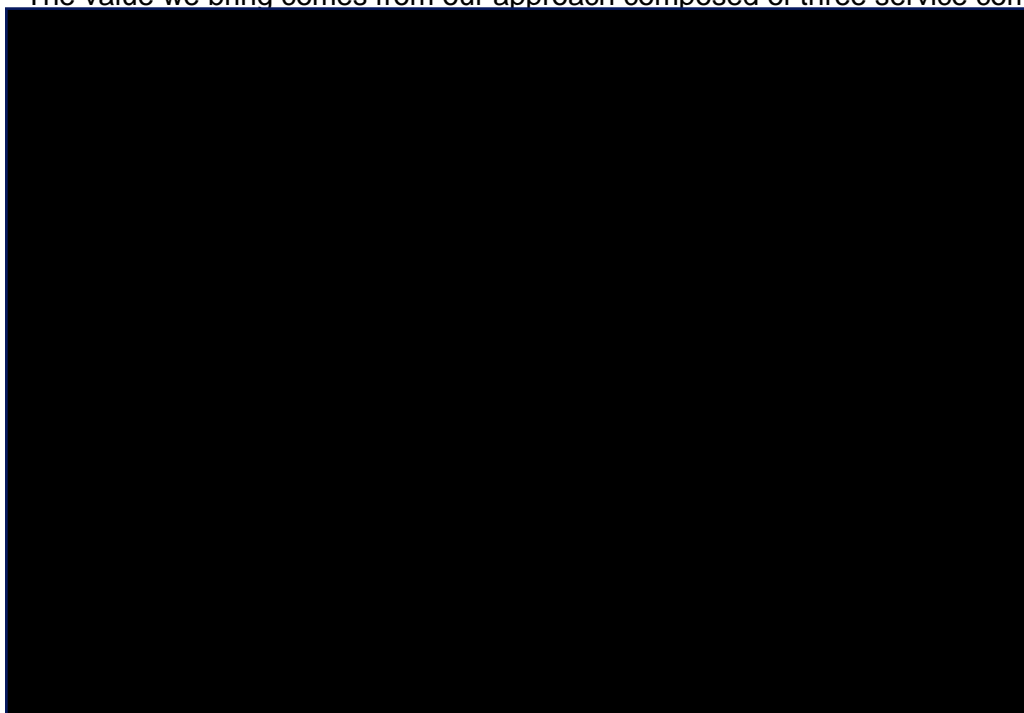


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Managed Services Methodology

KPMG provides post-implementation support via our managed services offering, which we call Powered Evolution. Powered Evolution is a balanced service offering designed to fulfill comprehensive support needs but also to help address ongoing business challenges and continuous improvement.

The value we bring comes from our approach composed of three service components.







[REDACTED]



Base services

The Base Services include fulfilling catalog service requests, triaging functional issues, assisting with the usage and navigation of features and functions, troubleshooting technical issues, assisting with data quality efforts, coordinating with third-party support organizations to resolve incidents impeding business operations, update support and planning, regression testing, maintaining configuration documentation, maintaining standard operating procedures, report writing, data load support, configuration changes, up-taking new functionality, governance, management reporting and change management.

The support team's responsibilities include:

	Case management	The single point of contact for all requests and queries. The KPMG Service Desk will provide Case Management support at L2/L3 level for JMU Power Users via tickets raised through JMU's ticketing system based on L1 support as provided by JMU.
	Environment management	Management of JMU's environments supporting on-going development, configuration changes, minor updates and regular functional updates.
	Functional update support	<p>Keeping pace with service updates and bi-annual releases can be a daunting task. We would provide continuous support throughout periodical releases to verify your solution is aligned with your initiatives. Preparing for release readiness, KPMG would evaluate the Feature Release Guidebook and determine how updates would impact your environment and confirm which features are opt-in or automatically delivered.</p> <p>The Powered Evolution team would make recommendations to improve functionality and performance against your current roadmap, gaps and system needs.</p> <p>Finally, our Powered Evolution team would perform regression testing using KPMG's automated testing tool with audit report details culminating in the implementation of any configuration changes JMU decides to implement.</p>
	Knowledge management	Document JMU-specific knowledge content as issues are resolved. Integration with the Customer Service Portal lets JMU quickly find solutions that boost satisfaction and reduce service costs. Content consists of documenting answers to provide consistent, established resolutions. Solution design documentation from implementation team, configuration guides, training materials, service delivery process and procedures, etc.

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Governance

The Governance service component provides ongoing and rigorous customer satisfaction management and continual service improvement, while keeping the different levels aligned.



1. **Strategic (quarterly):** Set strategy, business priorities, and shape services
2. **Tactical (monthly):** Service performance, release planning, demand planning
3. **Operation (weekly):** Service delivery, change management, reporting

Frequency and purpose

Quarterly

- Align business strategy with Empowered Evolution
- Guide execution of Powered Evolution
- Continuous improvement and innovation
- Review annual strategic themes, priorities, and budget
- Support adequate risk mitigation and controls
- Program sponsorship and scorecard review

Monthly

- Present management reporting
- Conduct business review of service performance
- Review issues log and risk mitigation
- Review and approve release plans, priorities, and change requests
- Forecasting and demand management

Weekly/as needed

- Manage operations and escalations
- Review development velocity and backlog

Attendance

Client: CIO, IT executives, Governance representative, Business representatives (as needed)
KPMG: Lead partner and CSM




Client: Platform lead and key stakeholders
KPMG: CSM and platform lead

Client: Platform admin and product owners (as needed)
KPMG: Platform lead and specialists





Governance is focused on:

 Change management	Management of any changes required to maintain the service alongside release planning, testing, packaging, and scheduling and provision of input into the Change Management process.
 Feature adoption blueprint	Functional update planning services provide a forward-looking plan outlining when specific system functionality is expected to be available and implemented in the target solution. The plan will be the basis for establishing an updated schedule.
 Service review	Provide critical oversight and account management to help ensure that the right policies, procedures and processes are compliant and accurate financial and management reports are produced. The Service Review reporting pack will cover performance against agreed SLA targets and will cover major cases, incidents, service requests and problems. It will also cover changes for the period as well as regression testing and service requests.

5.d

5.e. Capacity planning

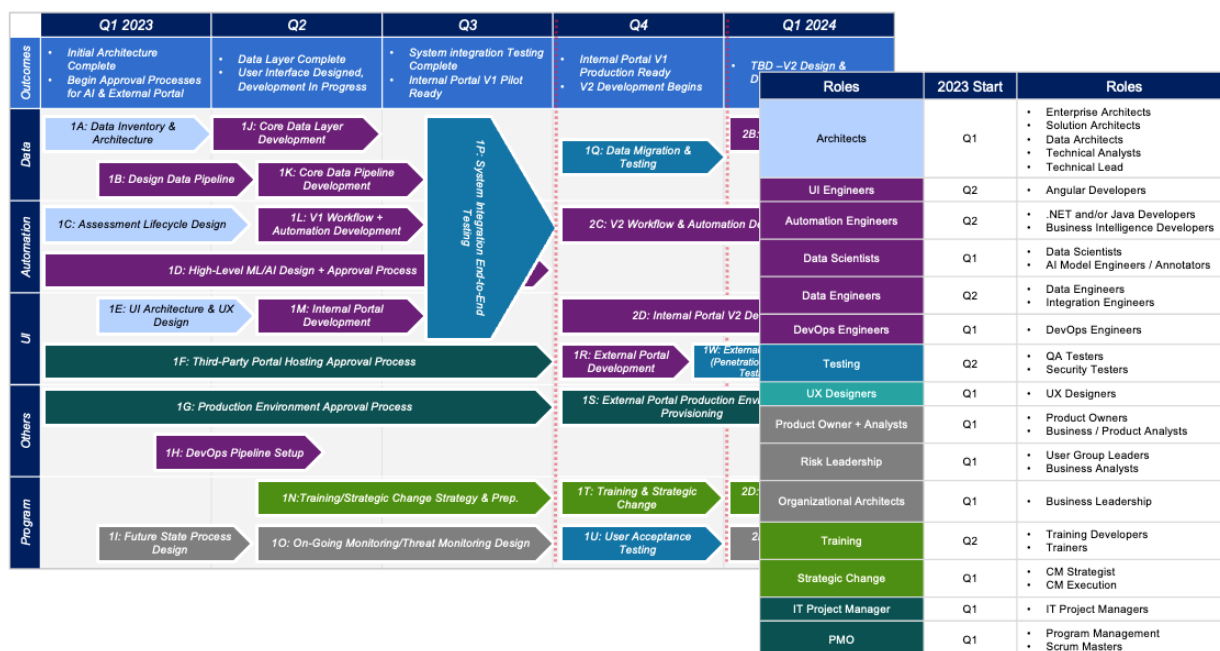
KPMG can provide extensive capacity planning support by determining the correct balance to meet changing needs of an organization's resource demands. Careful assessments are conducted on the problem statement, expected outcomes, deliverables, and dependencies. Based on these findings, KPMG proceeds with the following capacity planning exercises:

- **Capacity Forecasting:** Understanding the demand is followed by planning the capacity to meet those demands. Key stakeholders, historical data and a multitude of other factors may be considered to forecast the required capacity of a project.
- **Capacity Scheduling:** Once forecasting is completed, generating a schedule around those resources is the next crucial step. This is done through outlining an overview of the capacity needs over time based on ensuring successful completion of individual features, resolving dependencies and meeting go-to-market target dates.
- **Capacity Tracking:** Following scheduling exercises, resources should be tracked as the team begins the implementation phase of the delivering the solution. Availability of resources must be closely monitored to redirect to higher priority tasks or adjust the start and end dates.
- **Capacity Reporting:** The final step is to report updates on capacity to stakeholders and keep them informed on progress. The report should provide insights into the capacity to deliver on any new work and compare the initially planned capacity with actual capacity.

5.e



EXAMPLE OF KPMG CAPACITY PLANNING



KPMG can accommodate the three major capacity planning strategies:

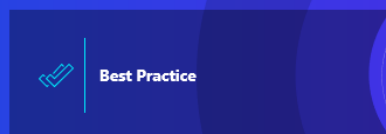
- **Lag Strategy:** The focus is primarily on fulfilling current capacity demands using known estimates of tasks and deliverables, and not projected future demands. This strategy is recommended for smaller teams with limited expected variation to capacity demands.
- **Lead Strategy:** This capacity planning strategy considers forecasted demand based on historical data as well as current capacity demands. This strategy is beneficial for larger teams and/or teams with historical data supporting variation in capacity demands in the past.
- **Match Strategy:** This strategy requires monitoring of current demands, forecasted demand and market trends to scale capacity based on need.

5.f. Installation and configuration

KPMG have a depth of experience designing, architecting, deploying and configuring solution architectures, infrastructure and environments across a major cloud hosting platforms. The KPMG Engine for Cloud Landing zones provides a configurable accelerator that we tailor to client needs to speed to market cloud environment landing zones for faster success in the public cloud.



KPMG Engine for Cloud Landing Zones



On-premises architecture isn't a one to one mapping with cloud. This approach can lead to friction & difficulty in translating requirements into Cloud concepts, configuration, capabilities, structure and security.



- Organisational Readiness
- Architecture Complexity
- Trust, Control, Risk & Compliance
- Deployment
- Operations
- Identity
- Cost Optimisation

5.e

5.g. Performance and Scalability

5.g

KPMG is committed to providing the level of quality service that JMU needs for a successful technology project. Below, we've provided an initial draft of Service Level Metrics to support Performance & Scalability requirements, that we will work with JMU to finalize and include as a part of our projects once awarded. These Service Level Metrics will provide JMU with a peace of mind that recourse is contractually obligated. KPMG is committed to working with the JMU to meet its requirements for service levels and establish the right SLAs to meet your needs.

1. Deliverable / Sprint Acceptance

Acceptance of sprints based on the timeliness and quality of submissions.

Measurement period	Data source	Collection frequency	SL formula	SL measure GYR		
Monthly, During Contract	Monthly Project Status Report	Monthly for completed sprints	% Submission Acceptance (Expressed as %) = Total Submissions that are both Accepted and On-Time (Sprints / Deliverables) divided by Total Submissions (Sprints)	>= 75%	> 60% and <75%	<= 60%

Measurement: KPMG will finalize "sprints" or "deliverables" at the start of the projects / phases as a part of each phase with JMU in keeping with agreed levels of completeness, content quality, content topic coverage, delivery schedule, and otherwise achieve the agreed purpose of the sprint / deliverable between JMU and KPMG with clear entry and exit criteria. The basis for rejection of a sprint / deliverable will be that it is late or of poor quality. The documentation established as a part of each phase, will represent the criteria for this SLA.



2. SIT & UAT Severity 1&2 Issues Resolution – Mean Time to Repair

Description	Time period	Data source	Collection frequency	SL formula	SL measure GYR*		
SIT / UAT Severity 1 Issues Resolution – Mean Time to Repair	Reporting Month	Monthly Service Report	Per Issue	Mean Time to Repair (Severity 1 Issues) = (Total elapsed business days for all resolved Severity 1 Issues) divided by (Total number of all resolved Severity 1 Issues)	<= 3 business days	<= 7 business days and > 3 business days	> 7 business days
SIT / UAT Severity 2 Issues Resolution – Mean Time to Repair	Reporting Month	Monthly Service Report	Per Issue	Mean Time to Repair (Severity 2 Issues) = (Total elapsed business days for all resolved Severity 2 Issues) divided by (Total number of all resolved Severity 2 Issues)	<= 5 business days	<= 10 business days and > 5 business days	> 10 business days

* Does not apply to issues and defects determined to be product and environment level functionality issues; Applies to KPMG configuration items only

This Service Level begins upon first migration of Solution functionality into the System Integration Testing (SIT) and User Acceptance Testing (UAT) environment and measures the resolution timeframe of SIT & UAT issues identified as part of KPMG's SIT and JMU's UAT. JMU and KPMG will mutually determine the Severity of each issue identified during SIT and UAT based on the Test plan.

Measurement: Issue "Time to Repair" will be measured from the time KPMG and JMU confirms that the issue as Severity 1&2 until the point in time when KPMG provides either a resolution or workaround to JMU for verification and acceptance.

In the case where the resolution or workaround is determined by JMU to be unacceptable the tracking of the "Time to Repair" will restart. In the case of a workaround, JMU may accept the workaround as a short-term solution, allowing the functionality to move to Production, but still need the issue resolved at a lower Severity. In these circumstances, JMU will consider the associated Severity 1&2 issue resolved and KPMG will establish a new issue at JMU determined Severity for management and tracking as a part of post-production operations.

The "Mean Time to Repair" for the reporting month will be measured by assessing the elapsed time in business days (expressed as a decimal number, to two positions after the decimal point, that reflects the hours and minutes) of all resolved Severity 1&2 issues to determine the statistical mean.



3. UAT Readiness Availability

5.g

Measureme nt period	Data source	Collection frequency	SL formula	SL measure GYR*		
Reporting Month	Monthly Service Report	Each UAT release migration	UAT Readiness (Expressed in Business Days) = the greater value of the following two calculations: (UAT Release Scheduled Date – Test Script Submission Date) OR (Actual UAT Release Migration Date – Scheduled UAT Release Migration Date)	<= 3 business days	> 3 business days and <= 6 business days	> 6 business days

* Does not apply to readiness issues and defects determined to be product and environment level functionality issues; Applies to KPMG configuration items only

ERP Solution UAT preparations are complete for scheduled UAT activities. UAT Readiness means that Test Cases are provided by KPMG to JMU and that the functionality to be tested is migrated to the UAT environment, per the project plan.

Measurement: Monitoring compliance will be determined by tracking the following key performance indicators (KPIs):

- Submission of Test Cases: the number of business days prior to the scheduled migration date of the associated UAT release that test cases are submitted to JMU. The baseline is 10 business days.
- On-time Migration of UAT functionality: the number of business days after the scheduled UAT release migration date that the release is actually migrated.

5.h. Conversion

5.h

KPMG has developed an innovative approach for solving cloud conversion problems based on our experience helping organizations of all sizes move to the cloud.

KPMG has invested in building several reusable Alteryx workflows (leading ETL tool) based on pre-defined data mapping templates. The Alteryx workflows include transformation logic that encompasses various data scenarios for various modules from a cloud perspective. The tool expects non-transformed raw source data in KPMG prescribed format. The tool profiles the data received from legacy and recommends necessary cleanup to be performed in legacy production to avoid repetitive data corrections or cleanup during subsequent iterations. The tool's pre-built workflows are highly configurable to client specific transformation needs, avoiding hard-coding and saves a lot of effort.



5.h

Capabilities

- Fully automated tool to stage, map, validate, correct, and load converted data to Oracle Cloud
- Seeded validation rules and option to define custom rules to ensure source data referential integrity
- Eliminates the need to hard-code transformation rules in legacy extract routines and ability define the transformations in the tool
- A cross-walk utility to map old values to the new accounting structure
- Built for Oracle PaaS

Benefits

- Once configured can be used for all Mock data conversions and the cutover
- Handles all employee data scenarios like new hires, employment data updates, personal data updates, rehires, transfers, terminations, etc.
- Reduces conversion development effort and time by focusing the effort only on data mapping and the transformation logic specific to client

Data Sources

Database

Data Files



Errors



Data Cleanup

KPMG Cloud Conversion Tool**Alteryx/DBCS**

- Stage
- Profile
- Map
- Transform
- Validate
- Load

Alteryx

Error Fix

Cloud Ready Files



Errors

**Oracle Cloud HCM**

Load data to Interface Tables

Load data to Base Tables

Data Successfully Loaded

Data Errors



Reconciliation Reports

Pre-built Data Mapping templates for all modules
Pre-Data Validation to reduce load errors
Cloud Extract templates in HDL format
Error Book/RCA Conversion Statistics**70+** library of data conversions

Our library allows us to jump start the data conversion process



Our data migration approach

Our aim is to provide a thorough data migration process for applications based on the Powered Enterprise for Government method. The method is defined by a wide-ranging set of defined activities and deliverables.

The data migration process is built around seven workflows that comprise multiple steps to create work products and complete customer reviews and obtain approvals.

Each iteration of the workflow revises and refines the deliverables of the associated activities. For example, data mapping specifications are initiated at the start of the workflow process and then elaborated during the internal and customer reviews before they are finally approved.



Data mapping



Test plan



Technical design



Build and unit test



QA



Data validation test



Mock migration

5.h

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At a high level, our data conversion approach is reflected in the diagram below:





5.j. Training development

By putting employees at the center, the KPMG team partners with you to develop strategies and build the capabilities for catalyzing productivity and growth. We support digital acceleration, transforming technology along with the workforce to focus on an integrated digital service experience that connects with an organization's strategic business priorities. Supporting digitization and new ways of working, our team fosters the creation of an immersive digital learning environment that helps propel employee performance and delivers measurable outcomes.

Workforce performance through learner engagement

With an increased focus on workforce upskilling, we help organizations design and implement learning/training strategies, enabled by technology, that drive performance and learner engagement.

- **Learning Strategy:** Taking an employee-centric approach, we work with you to design a learning strategy that aligns with the business strategy. This will guide you in equipping teams with the right skills, knowledge, and competencies to fulfill the organizations future workforce needs.
- **Digital Learning:** Adopt, transform, and personalize the learning experience for your employees – providing the right learning, to the right people, at the right time. Using digital learning tools, we deliver a modern learning experience in the flow of work, scalable to your organization.
- **Learning Managed Solutions:** Deliver connected learning in the flow of work by leveraging empathy, AI, automation, and process efficiencies at scale to create a more agile and skilled workforce of the future, while also reducing costs.

Our approach to learning is simple, equipping the right people, at the right time, with the right information. This is rooted in years of experience delivering complex technology projects for our higher education, state government, and commercial industry clients, and their various stakeholders and business partners, many of which are also undergoing large-scale transformation.

KPMG training approach

At KPMG, we view training as an active, continual adoption of knowledge and skills into an individual's way of working. As such, the foundation of our overall approach is our proprietary five-phased “Make-It” methodology as previously discussed in Section 1.g. Our recommended approach to training includes the following key activities:

- **Define the Training Needs for Each Unique Stakeholder Group:** Building upon information gathered for the broader organizational change management analysis, the KPMG training team will complete a thorough training needs and audience analysis to assess training capabilities and learners' needs at each phase of each technology project that is part of the Reengineering Madison initiative, always considering changes to process, technology, and people. We do this by considering and mapping the skills and knowledge gaps and overall impact of the planned technology changes to the ways of working for the identified stakeholders. Findings are then coupled with the appropriate training tools to create a comprehensive training program with tailored training

Training needs are identified by assessing changes to Process, Technology, and People	
Process	Training on the business process impacts , for instance: <ul style="list-style-type: none">— Process steps and sequence of steps— Inputs / outputs and handoffs— Automation
Technology	Training on the system impacts , for instance: <ul style="list-style-type: none">— Changes to system workflow— New screens— New data required
People	Training on the human impacts , for instance: <ul style="list-style-type: none">— Ways of working— Roles and responsibilities— New stakeholder interactions



experiences to the perspective of each unique stakeholder group. We do this for every client engagement—when the training audience is a few hundred or thousands of individuals.

- **Define the Training Plan per Phase/Project:** Using the overall organizational change management plan and the training needs analysis as a foundation, we will develop phase and/or project-specific training plans that include details regarding the proposed training approach, materials to be developed, the proposed training delivery schedule and logistics, and staffing requirements. This includes developing a plan at the end of each technology implementation, or the overall contract, to transition the training support to either University staff or another contractor.
- **Offer a Digital Learning Experience:** We recommend that the University use a Digital Adoption Platform (DAP), to create a training delivery experience that includes documentation, hands-on, video, and classroom training for required participants. This allows for streamlined content creation and enhanced collaboration between instructional designers and subject matter experts.

Using a single editing tool, instructional designers can develop multiple learning outputs (e.g., simulations, job aids and demos) from a single recording, greatly reducing the amount of time your subject-matter professionals devote to process guidance and content validation. The value extends to learners, as well. Context-sensitive learning is available at one's fingertips while using the new software/application. Employees can choose an output—job aid, video, or simulation—that meets their learning style.

Key benefits of digital learning

- Provide contextual help without having to log into LMS, attend a class, or navigate to another application
- Solve end user adoption hurdles via robust performance support.
- Enable users to troubleshoot problems and complete tasks independently
- Link to other learning channels to shorten traditional training delivery

- **Deliver Blended Training:** Blended learning is a combination of synchronous and asynchronous learning activities; allowing learners to learn at their own pace on their terms. This is critically important to this program as it is anticipated that all users will be accessing several new software solutions and corresponding learning on both a programmed and ad-hoc basis. We will offer a blended training experience for university staff and other impacted stakeholders of the technology changes that incorporates self-paced, eLearning, train-the-trainer, and instructor-led training with supplemental training materials (e.g., FAQs, user manuals, and quick reference guides). Our blended approach uses a series of training opportunities putting each unique stakeholder group at the center of the training experience instead of following a “one-size-fits-all” model. This blended approach supports a consistent, high-quality training experience and provides users with a mix of training opportunities that drive acceptance and mastery of the significant changes (technology, ways of working, procedures, etc.) occurring within the University and the Reengineering Madison initiatives. All training materials, management artifacts such as attendee lists, FAQs, training content with version controls, etc. will be owned, saved, and stored in the University's document repository.
- **Sustain Learning Efforts and Evaluate Training Effectiveness:** After training has been delivered, we will distribute a training evaluation survey to measure participant feedback, the effectiveness of the training program, and end user knowledge. The survey will measure the impacts and effectiveness of training based on levels one and two of the Kirkpatrick training evaluation model. Level one measures the participant's reaction to the training; did they find the training to be favorable, engaging, and relevant to their job. Level two measures if the intended learning (knowledge and skills) occurred based on participation in the training event. The post-training surveys may consist of a combination of open-ended questions, yes/no questions, and Likert scaled questions (five-point scale with choices such as strongly agree, agree, neutral, disagree, and strongly disagree). The survey results provide information to evaluate learner competency, the effectiveness of the training program, and to make continuous improvements to the training program and materials.



We acknowledge the scale, breadth, and number of projects that are part of JMU's vision for the Reengineering Madison initiative and appreciate the University's recognition of how important a well-designed OCM and training strategy is to the overall and long-term success of such a transformation.

5.j

5

5. Other:

Transformation Advisory Services (TAS)

While we know the RFP requested specifically an implementation and development approach, we have seen some trends in major system implementation projects over the last decade, and wanted to provide one additional item for consideration as you move towards large-scale implementations, including the one you have underway with your CRM.

Traditionally, systems integration services have been provided by a single vendor who fulfilled all activities associated with the system design, development, and implementation (DDI) from requirements definition, system design, system development, testing, training, implementation, rollout and subsequent maintenance and operations (M&O) of the system. This “eggs in one basket” strategy has changed recently, largely driven by federal requirements for states and local governments, and universities to focus on program outcomes and modularity. It is from this driver, that KPMG designed our Transformation Advisory Services (TAS) offering. Based on our experience as a transformation advisor, we've identified six key client challenges that prevent transformation success within the government and education space. The holistic TAS approach is aimed at supporting our clients to overcome each of these challenges.



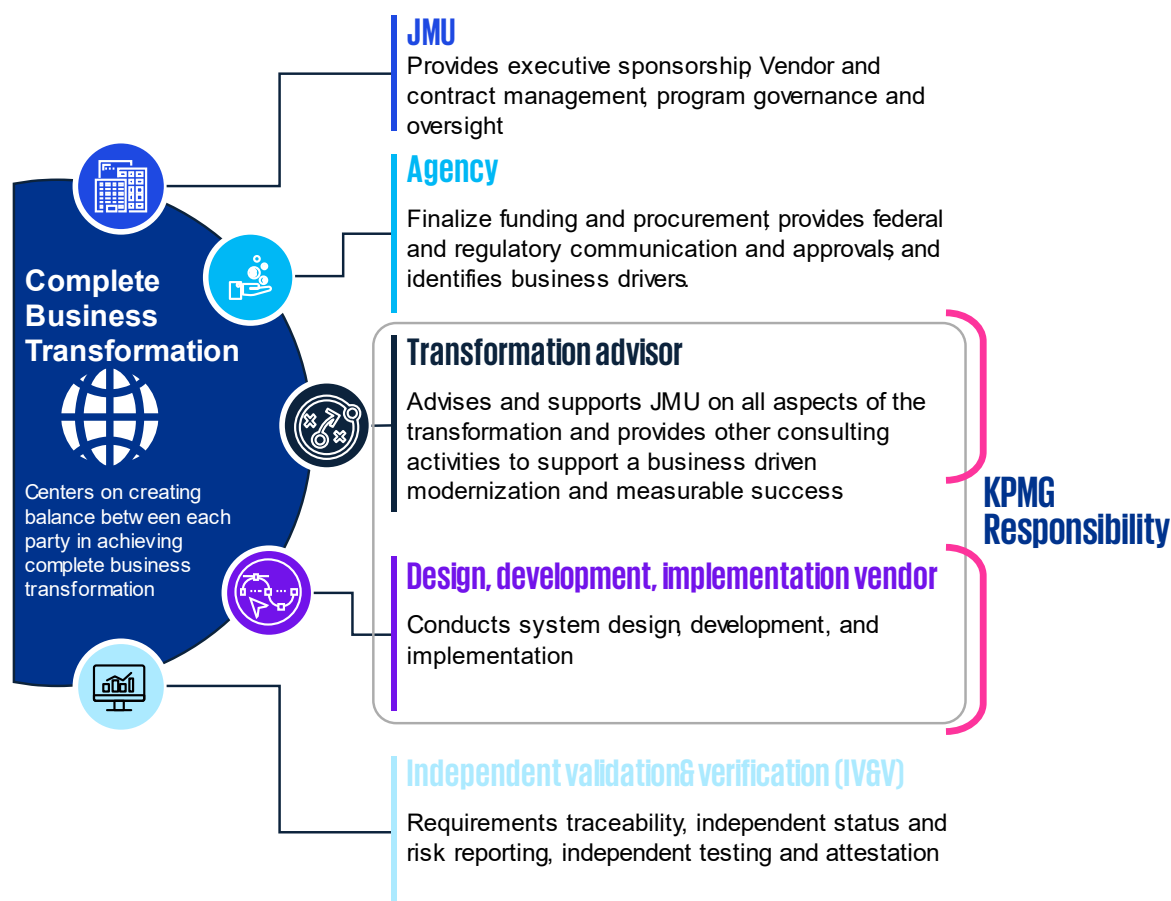
Challenges of the Traditional Approach

The KPMG TAS approach offers our government and educational clients a fresh perspective to empower them to view systems integration activities holistically and to relentlessly focus on people throughout the project lifecycle. It inherently creates a checks and balances system to help ensure program goals are at the forefront of all decision-making. The strategic framework of TAS encourages a disciplined application of four critical transition principles to support decisions and establish priorities:

- Human Centric: Always focus on people first, modernize business processes and then align technology to support users in their delivery of services to citizens
- Accelerate Speed to Value: Expedite delivery while helping minimize disruption to people and program operations
- Mitigate Risk: Aggressively manage scope and cost while anticipating implications of program and policy changes
- Deliver Outcomes: Realize impactful results for the constituents served



TAS delivers successful business transformation in a collaborative, relevant, engaged, consistent, and objective manner. Our approach, as illustrated in the below figure, allows our clients to unite on shared goals and realize measurable success that drives holistic change in multi-vendor environments that we've seen typically followed for modern system integration projects within the United States.



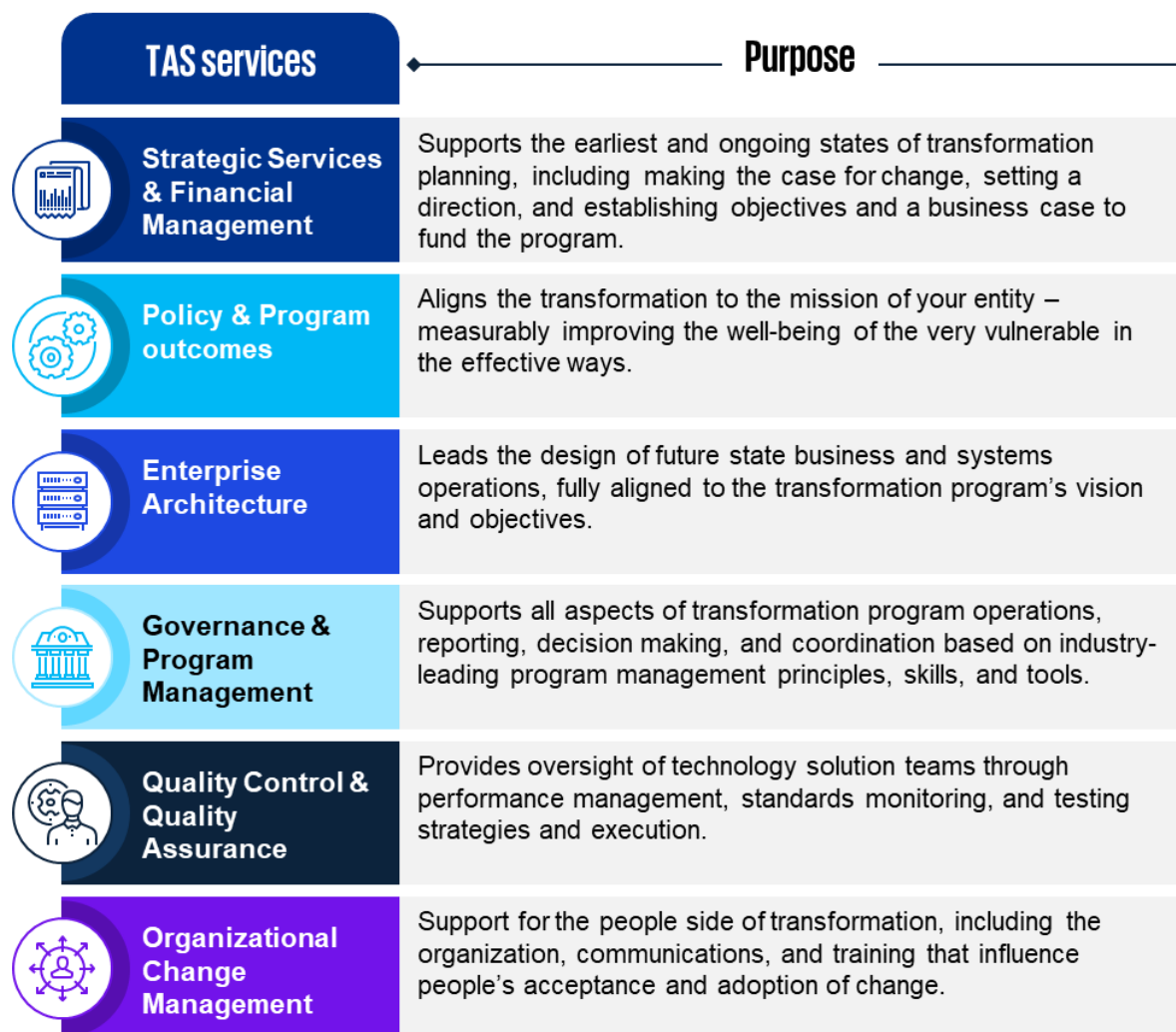
TAS is designed with a fresh perspective creating an intentional strategy that establishes “checks and balances” to create a more rounded approach to a complete business transformation and help you focus on our core capabilities to help meet its goals and success criteria.

This modern approach to successful and complete business transformation considers impacts to all aspects of an organization, not just the standard project lifecycle. Our holistic approach includes a set of services that balances each of these factors so that the relationships between activities are understood in a meaningful way. Each service has a specific purpose that is intended to maintain alignment with the mission of the organization and the goals of the given project to achieve a successful implementation. The purposes of each of the categories is as summarized in the below table:



KPMG Transformation Advisory Services

5



Within each category is an inclusive set of activities, as shown in the below figure, that are typically needed to be accomplished in large-scale business and system transformations. Some of these occur up front, before an RFP is released when the strategy for a modernization is taking shape, while other services occur during the subsequent phases of the project lifecycle. Regardless of timing, these key representative activities play critical roles, and are necessary, for a successful implementation.

We understand that not all departments will require all the services, nor does this need to be a linear path. Technology is always changing and at any given time multiple phases or projects can be inflight. The key is to identify the right array of services to help maximize the technology investments for your organization.

Beyond that, and perhaps even more important is that the use of these activities can assist you in better understanding the needs of the broader universe of stakeholders. KPMG brings a fresh perspective to the planning, design and implementation of systems through an intense focus on culture and business, we establish the foundation for buy-in, acceptance, and sustainability.



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.*

6

KPMG has deep knowledge with many enterprise technology solutions, such as Oracle, Microsoft, Okta, Workday, and Salesforce, and years of experience assisting clients in all industry sectors and business functions such as finance and human resources with successfully implementing technology solutions that transform how a client's organization and business is done. Building upon our team's deep knowledge and vast experiences, we bring a foundational set of training materials for many of the larger enterprise technology solutions. However, we strongly believe that training is not a "one size fits all" solution so we view our foundational training materials as an "accelerator" upon which we build to reflect a client's unique system configuration, workflows, and processes for each user role. Customizing the training materials for each role within a client's organization helps to ensure the appropriate and relevant knowledge and skills are presented to the user base, which in turn should increase their rate of adoption and productivity using a new technology solution.

From our experience, a client's technical staff typically attends training courses offered by the software vendor to gain both a general and, in some cases, a detailed understanding of the application. KPMG staff then provide additional knowledge sharing sessions with the client's technical staff to review the specific configurations and workflow changes that have been made as well as specifics related to system development, operations, and maintenance. KPMG does offer boot camps to clients as an alternative to the training program and courses offered by the software vendor.

End-user training is most effective when the content reflects the role the individual will have within the software application. Examples of roles include clerk, supervisor, help desk analyst, etc. For all roles, the training will include a general overview of the software application, navigation, available help, and possibly reporting options. Based upon the role, specific, functional training will be offered that includes the system navigation and workflows and the business logic, policies and procedures related to the function being performed.



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

7

Some of the leading indicators of our success as a professional services provider are the clients we serve and what these organizations' perspectives are about their experience with us. We take pride in the services we provide and the number of satisfied clients we have assisted over the years. By engaging with KPMG, JMU can potentially benefit from a high level of technical experience, service quality, and responsiveness that sets KPMG apart from competitors. The references provide merit towards our technical skills and highlight our experience of having executed similar engagements before.



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- 87 -



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

8

Our recommended approach to knowledge transfer includes a blend of skills building, job shadowing, and formal knowledge transfer. In our experience, going beyond the classroom for the technical team and aiding them to learn in the flow of their work has helped to provide the skill training and knowledge needed to take on a role of system administrator or help desk support staff. The technical staff training program will include functional training foundations provided by the software vendor, as well as training that KPMG will provide on the process and system functionality tailored to the needs of the University's technical staff. It will also cover advanced topics such as reporting and dashboard creation, queries, and system analytics for appropriate audiences who will have access to these features. In addition to a learning toolkit geared to these teams, we can provide troubleshooting guides and frequently asked questions (FAQs) that can serve as standalone literature or integrated with a service management system. Taking this comprehensive approach builds knowledge among key technical and administrative staff over the course of the project and promotes confidence with the system.

At the conclusion of end-user, system administrator, and help desk training, KPMG will execute a detailed Knowledge Transfer and Sustainment Plan that will smoothly transition ownership of training materials, documentation manuals, and other key project knowledge to the appropriate JMU teams. As part of this plan, KPMG will collaborate with JMU staff, as required, to determine the scope of any necessary supplemental training materials and documentation that need to be developed to address any knowledge gaps.



9. Describe your approach to project management.

9

Program/Project Management (PPM) Framework

Projects often require the management of multiple parallel workstreams including functional, technical, and organizational change management. In order to keep the project on track, manage parallel workstreams and successfully achieve the objectives, KPMG teams will deploy our proprietary program/project management (PPM) framework. Our PPM framework comes from years of experience in a variety of situations and circumstances. This framework covers the program from idea/initiation all the way through delivery and potential benefits realization. Our professional practitioners apply this pragmatic, business-centric, disciplined and integrated framework to systems integration programs and projects, driving rigor through clear phases and project milestones. Working within your environment, we practically leverage this cross-functional perspective to help ensure that all the right resources are engaged as appropriate, focused on the right thing at the right time.

Our PPM framework includes the following:

- Method guides: Includes method guides for PPM. Each methodology guide provides an activity list that serves as the backbone for each approach and discipline.



- Guidance area documents and technique papers: Includes a multitude of guidance area documents and technique papers. Guidance area documents address central, conceptual, and general subject areas for PPM.
- Templates: Include well-established templates based on leading practices and aligned to the methodologies. Our practitioners can accelerate start-up of an engagement and modify them to meet specific needs.

Our PPM framework will help accelerate your IT initiative activities by providing pre-defined program/project management processes, templates, and guidelines that can be quickly customized to support your specific needs. Program management as the application of knowledge, skills, tools, and techniques to a program to meet the organization's requirements and obtain potential benefits and control not available by individually managing projects/workstreams. It involves aligning multiple components to achieve goals and help optimize integrated cost, schedule, and effort, which can be easily applied and tailored to fit your needs.

Project management methodology

A well-established methodology for planning through deployment and beyond, supported by strong program and project management practices, is critical for a successful implementation. We have a demonstrated track record for successfully delivering complex technology implementations which leverage our Program and Project Management (PPM) Methodology. Our PPM framework—as shown below—illustrates our approach to unify and realize the synergies necessary to drive value within the program and manage the project delivery.





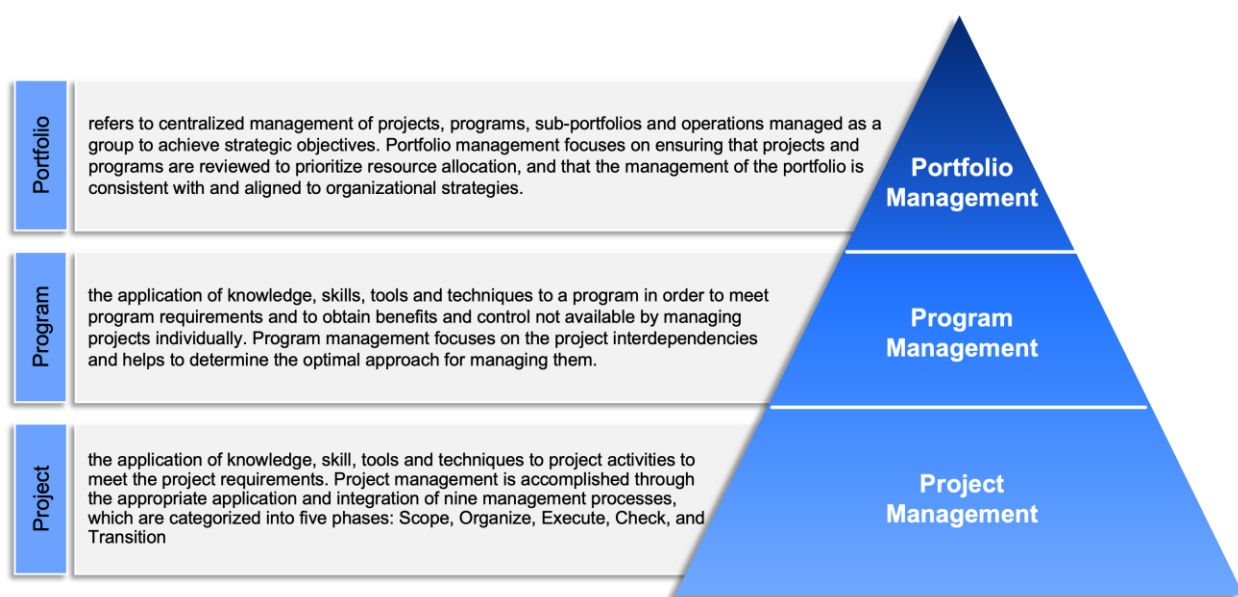
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We also understand the importance of standing up a robust project infrastructure to ensure that JMU meets their strategic objectives. KPMG is prepared to deploy a targeted version of our 3PM Methodology in a manner that is tailored to JMU's strategic goals and is comprised of three separate but interlinked management disciplines, seen below:



KPMG 3PM methodology benefits

- Provide a framework for effective **governance**, roles, and responsibilities
- Identifies the stakeholder and ensures the appropriate **stakeholder are fully engaged**
- **Reduce risk** of program failure by effectively managing the risk issues
- Manages **scope** and Changes Via effective integration management
- Manages **control** of schedule, costs, and quality
- Effective leadership and management of transparency across the program
- Proven method that has been distilled from over three decades of experience gained across the globe
- Scalable, structured but flexible to manage large transformational programs . The Program Management method can be applied to new, existing, or problematic programs
- Provides approach for a **smooth transition** from current to future business operation



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

10

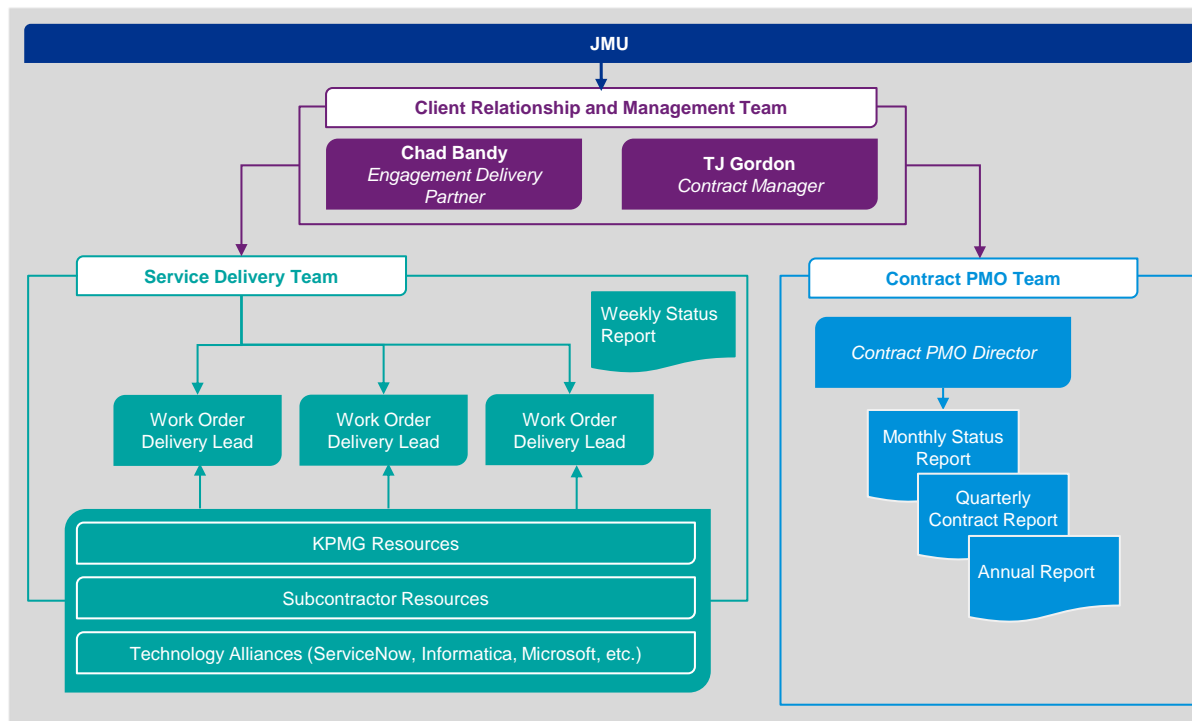
As you have shared, “Implementing Reengineering Madison is going to take all of us. A change so comprehensive will be challenging and far beyond the scale of a system implementation that IT will simply do FOR us. We will do this TOGETHER, as a community.”

KPMG understands this complex multi-year journey is going to require a partner that is flexible and nimble enough to answer the call of needs, that will likely come in all shapes and sizes. It is with this need to be adaptive in mind that we have structured a team that goes beyond our four walls and includes our technology alliance partners and most importantly our SWaM partners. These partners are not just check-the-box companies we have selected ad hoc, but trusted partners that we have known for years and share our same core values and commitment to excellence. They allow our team to flex up and down quickly and provide lower cost opportunities for small or niche needs that may arise.

KPMG will follow a formal, yet rapid response process to ensure we meet your goals on time, efficiently and with precision.

Our team structure

The following illustration presents our proposed team structure for proposing and managing JMU’s needs over the life of the contract. Key to our proposed approach is the assignment of an experienced Contract PMO Director (Contract Lead) and highly qualified Delivery teams.





Client relationship and management team

The Client Relationship and Management Team, who is based in Virginia, and full-time dedicated to Higher Education, will work closely with our dedicated Contract Lead to provide rapid response to JMU, and track all disparate projects that may be deployed over the life of the contract.

Service delivery team

A Delivery Lead will be assigned to each new task order, depending on size and scope. The Delivery Lead will be responsible for preparing the appropriate functional staffing plan, project management plans and project controls. He or she will be responsible for managing the work of the delivery teams and coordinating activities with JMU. Delivery Leads are responsible for successful completion of the projects. They will prepare weekly status reports for use by JMU executives and professionals associated with the task order.

KPMG resources

Based on the size and scope of the task order, a team of KPMG resources will be identified. KPMG has a wide range of consulting resources located in offices throughout the United States. KPMG offers your projects multiple avenues for resource acquisition that include:

- Staffing requisitions for available resources within KPMG by job level, experience, and skills
- Recruiting through KPMG social media to locate resources with specialized skills and experience with a particular technology or specific industry.
- External recruiting is done by KPMG Human Resources when there are unmet skill needs that can be filled through direct hires from the database of resumes maintained by KPMG.

KPMG will provide detailed resumes and capability statements for each candidate to ensure proper approval by JMU prior to commencement of task orders.

Subcontractor resources

Our subcontractor resources bring experience in higher education and technology. KPMG recognizes the value of diversity, and the benefits which diverse businesses can bring as suppliers and subcontractors to the Firm, our clients, and our communities. We work with our existing subcontractors to help them build a new or enhanced business resource model to support work that may require short and part time resources.



Technology alliances

KPMG will leverage our technology alliances (TA) and up to date knowledge of the products/platforms to help improve the efficiency of JMU solutions. Through our TA relationship KPMG has significant knowledge and insights of the technology product roadmaps.

Our standard approach for managing your task orders

KPMG's approach to managing incoming projects requests will employ a Program Management Office (PMO). Our PMO approach will provide JMU with a single point of contact and accountability. We know that effective work order management is essential for the success of your projects, and our process will accomplish the following:

- Expeditious response to JMU's requests or expressions of need
- Timely deployment of resources as dictated by the work order schedule
- Active engagement and communication with JMU's stakeholders
- High-quality production of deliverables that are tailored to the requirements of the work order
- Continuous improvement through lessons learned and feedback loops for the benefit of future work
- Adherence to JMU's standards, policies and procedures

Our Client Relationship and Management Team will work closely with the Contract PMO Team to provide oversight and **support to the Service Delivery Team.**

Deliverables based response

Once a task order is received, our Contract Lead will review and organize a response. If clarity around scope is needed, a brief call to discuss needs will be coordinated by the Contract Lead. The response will be sent via email in a timely manner according to JMU's requirements. The tasks include:

KPMG will leverage KPMG's core service network and all of our subcontractor's service capabilities. The following are our standard tasks for responding the staff augmentation work orders:

- The Contract Lead will evaluate the requirements of the request and determine a response team from KPMG and our subcontractor firms if applicable
- The response team will assess the request and prepare questions
- The Contract Lead and key response team will drive a brief Q&A, if needed
- If the KPMG team including our subcontractor firms has relevant experience and qualified resources, the response team will develop the response.
- The response team will develop the response content
- When the response is complete, the Contract Lead will conduct a QA review and submit the response to JMU in a timely manner
- If KPMG team does not have adequate experience and qualified resources, the Contract Lead will communicate an intent to "no-bid" via email, and follow-up call, if needed in a timely manner



Staff augmentation work order response

KPMG will fully leverage our subcontractor network to fulfill JMU's staff augmentation requests. The following are our standard tasks for responding the staff augmentation work orders:

- Review the request and determine which of our subcontractor firms may have interests and may have qualified resource, and then send the request inquiries to these firms.
- Prepare questions with subcontractors and attend any Q&A sessions
- If the potential qualified candidates are identified, the subcontractor firm(s) and KPMG may conduct a pre-screen interview to validate candidates qualifications.
- The response will be developed based on the requirements of the request.
- When the response is complete, the PMO team will submit the response to JMU in a timely manner
- If KPMG team including our subcontractors does not have qualified resources, the PMO will send no-bid email to JMU in a timely manner.
- During JMU's candidate selection process (interviews), KPMG will coordinate communications between JMU and the selected candidate interviews.

In responding the staff augmentation work order requests, KPMG will put our subcontractors in priority. KPMG has strategically built a long-term relationship with several of local leading small business firms

10



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

11

Fahrenheit advisors overview

Fahrenheit Advisors is a middle-market advisory, consulting, and search firm that helps organizations overcome challenges and find the straightest path to growth.

Founded in 2010, we have been consistently recognized as a best place to work in Virginia.

We won the Greater Richmond

Virginia Chamber Community Impact Award, and we are a certified small business with the Virginia Department of Small Business and Supplier Diversity.

	01 Business advisory Overcome operational and market obstacles to growth	<ul style="list-style-type: none"> • Strategy • Business Process Automation • Restructuring • Transaction Support
	02 Finance and accounting Maximize back-office efficiencies for faster growth	<ul style="list-style-type: none"> • Fractional/Interim CFO & Controller • Process Management Improvement • Financial Planning & Analysis • Financial Systems & Automation
	03 Human capital Developing Talent to maintain growth mindset	<ul style="list-style-type: none"> • Outsourced HR • Talent Management • Leadership Coaching • Diversity, Equity & Inclusion • Total Rewards

Fahrenheit is a unique business partner. We provide consulting, fractional, interim, and direct hire services across several key practice areas: Business advisory, finance & accounting, human capital consulting, sales advisory, and executive search & recruiting services.



Our team of seasoned, C-level executives and consultants collaborate with management to define strategy, build roadmaps, execute initiatives, and deliver measurable results. We serve clients across all industries focusing on emerging growth and middle-market companies, as well as nonprofit organizations and state agencies.

Headquartered in Richmond, Fahrenheit serves clients nationally with resources across Virginia and in Raleigh-Durham, North Carolina, and Phoenix, Arizona.

State contracts

The Fahrenheit Group, LLC holds several existing Virginia state contracts, which are available for use. Our active contracts are as follows:

- University of Virginia – UVA-AGR-SVC-00154 - Strategic Support Services/Consulting
- Department of Human Resource Management – DHRM20-01 expires 9/30/2022 – Search and Recruiting
- University of Virginia – UVA053115 expires 5/31/2027 – Search and Recruiting

Swam status

The Fahrenheit Group, LLC is a certified small business. Its SWAM number is 719696 with a current renewal date of March 15, 2024.

Salem InfoTech Inc. Overview

Salem InfoTech Inc. (SIT), a small business - TIN# 450489107, DUNS# 014366953, e-VA # VS0000171891 and SWaM# 716981, formed in 2002 providing technical solutions for Public and Private sector customers including Higher education and State agencies. Salem Infotech Inc is proud to associate with Salesforce, as an ISV and Implementation Partner. Salem Infotech Inc is associated with Salesforce, as being one of the App Exchange, Cloud alliance partners and consulting partners.

SIT has supported numerous programs, which include hardware/software development, maintenance, service, integration, installation, testing, and cyber certification. SIT currently supports Maryland Health Benefit Exchange as Master Contractor, University of Maryland on a State of Maryland Department of information technology CATS+ Contract vehicle, University of Maryland Global Campus (UMGC) in Salesforce based SMS campaign contract, William & Mary, Internal Revenue Service (IRS), Marriott and Fannie Mae as teaming partner and subcontractor with various PRIME Vendors.

SIT Capabilities

- Established since 2002
- 20+ years of IT experience
- 11 years of Salesforce ISV & Implementation Partner
- 8 Years of MuleSoft Integration Experience
- 30+ Salesforce Consultants
- 10+ years of Higher Education Domain experience
- SIT management and technical team has extensive experience providing higher education solution SaaS platforms with various external data sources/systems integration options. As part of this



proposal, SIT team will provide our proven records and demonstrated experience with various Public and Private Higher Education institutes related to employee, faculty, students LMS and course management experience.

Salesforce Consulting Services

Salem Infotech's expertise in Salesforce platform has enabled us to provide premium consulting services for organizations seeking to either automate their CRM processes or replace their legacy systems with Salesforce. Salem InfoTech is currently Ridge (Silver) level partner with salesforce for both ISV and SI. Salem Infotech works with the customers in determining their vision and pain points. Salem Infotech recommends the products available on Salesforce platform and lays the product roadmap to transform customer organizations in the most cost-effective way. SIT team has extensive experience in Salesforce, MuleSoft and providing SaaS solutions. SIT team provides innovative solutions to overcome business challenges, reduce cost and meet project deadlines without compromising on implementation standards. Our team follows Hybrid-Agile process to Design, develop (configure), Implement ("DDI"), test, UAT, deployment and post deployment support(O&M) services. Our O&M support includes Helpdesk and incident management.

Salem Infotech has developed custom Salesforce solutions on Salesforce platforms and implemented Salesforce for various state agencies and state universities. In addition to Salesforce Services, Salem Infotech also offers services in the field of Infrastructure Management, mobile application development and website development and deployment.

State Contracts

- William & Mary - Consultant Services
- ARLINGTON COUNTY, VIRGINIA Office of the Purchasing Agent- IT Staff Augmentation

SWaM Status

Salem infotech Inc is a certified VA DBE and MD MBE available for non-competitive directed awards, holding a SWAM registration (ID 716981)

UDig Overview

UDig is a SWAM certified technology consulting firm focused on providing expertise in Software Engineering, Data Transformation and Strategy Services. We have delivered a wide variety of tailored solutions to our clients to enable their business objectives – our clients range from Fortune 500 enterprise-level corporations, small, mid-sized, and government businesses. In all our partnerships, our compass is co-creating tailored technical solutions that are purpose-built, deliver on the business's needs and provide lasting impact. We are committed to innovation and collaboration within our team and in our partnerships and maintain a customer-centric focus on delivery.

Data Capabilities

Our Data Transformation team focuses on delivering solutions that form the backbone of our client's business and enable informed decision making, regardless of data maturity.

- Dashboards & Analytics – Our dashboards provide for exploration of data by adding a visual element to decision making and allowing for easier consumption.



- Data Advisory – Our experts ensure data strategy aligns to business goals and that our clients are positioned to gain maximum ROI on the data accumulated.
- Data Platforms – We advise businesses in the selection of, migration to and acceleration of the data platform that will be most effective in meeting their objectives.
- Integration & Quality – We bring disparate sources of data together to enable business processes and decision making and leverage tools with business rules to clean data.

Awards

- Inc 5000 – 2008, 2011, 2015, 2016
- Best Places to Work in Virginia – 2016, 2017, 2021, 2022, 2023

SWaM Certification

- Small Business Certification Number: 650061
- SWaM Expiration Date: 12-02-2027

Attachments





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 120 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
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

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



Offeror name	Address	Branch office
Tricia Harper	1021 E Cary St # 2000, Richmond, VA 23219	Richmond, Tysons, Norfolk

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: KPMG LLP

Preparer Name: Tricia Harper

Date: August 3, 2023

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes____ No__R__

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__R__

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__R__

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__R__

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).



ATTACHMENT B (CNT'D)

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

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

Date Form Completed: 8/15/2023

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

Offeror / Proposer:

KPMG LLP

Firm

1021 E Cary St # 2000, Richmond, VA 23219

Address

Tricia Harper / 804-651-3434

Contact Person/No.

Sub-contractor's name and address	Contact person & phone No	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)
Salem Infotech 4561 RONA PLACE FAIRFAX, VA, 22030	[REDACTED]	716981	IT Consulting Services	20% estimated	N/A
UDig Technologies LLC 4461 Cox Road Suite 115 Glen Allen, VA, 23060	[REDACTED]	650061	IT Consulting Services	15% estimated	N/A
The Fahrenheit Group LLC 1500 Mactavish Ave Richmond, VA 23230-4414	[REDACTED]	719696	IT Consulting Services	15% Estimated	N/A



ATTACHMENT C



COMMONWEALTH OF VIRGINIA STANDARD CONTRACT

Contract No. _____

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

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

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

PERIOD OF PERFORMANCE: From _____ through _____

The contract documents shall consist of:

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

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

CONTRACTOR:

PURCHASING AGENCY:

By: _____
(Signature)

By: _____
(Signature)

(Printed Name)

(Printed Name)

Title: _____ Title: _____



Attachment D – Pricing Schedule

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

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

	Onsite	Offsite		Onsite	Offsite
Oracle Core Technologies			Change Management Training, Svcs, & Cert.		
Project Manager or _____	\$305/hr. \$290/hr.		Project Manager or _____	\$305/hr.	\$290/hr.
Senior Engineer or _____	\$260/hr. \$245/hr.		Senior Engineer or _____	\$260/hr.	\$245/hr.
Engineer or _____	\$220/hr. \$195/hr.		Engineer or _____	\$220/hr.	\$195/hr.
Oracle/PeopleSoft Enterprise Solutions			Security and Federation Services		
Project Manager or _____	\$280/hr. \$270/hr.		Project Manager or _____	\$315/hr.	\$300/hr.
Senior Engineer or _____	\$250/hr. \$230/hr.		Senior Engineer or _____	\$290/hr.	\$275/hr.
Engineer or _____	\$200/hr. \$185/hr.		Engineer or _____	\$240/hr.	\$210/hr.
Desktop and Mobile Device Management			Cisco Technologies, Infrastructure Support, and Virtualization		
Project Manager or _____	____/hr. ____/hr.		Project Manager or _____	\$175/hr.	\$165/hr.
Senior Engineer or _____	____/hr. ____/hr.		Senior Engineer or _____	\$165/hr.	\$155/hr.
Engineer or _____	____/hr. ____/hr.		Engineer or _____	\$155/hr.	\$145/hr.
Microsoft Azure and M365			Audio Visual Technologies		
Project Manager or _____	\$280/hr. \$270/hr.		Project Manager or _____	____/hr.	____/hr.
Senior Engineer or _____	\$250/hr. \$230/hr.		Senior Engineer or _____	____/hr.	____/hr.
Engineer or _____	\$200/hr. \$190/hr.		Engineer or _____	____/hr.	____/hr.
Okta			Secure Research Enclaves		
Project Manager or _____	\$315/hr. \$300/hr.		Project Manager or _____	____/hr.	____/hr.
Senior Engineer or _____	\$290/hr. \$275/hr.		Senior Engineer or _____	____/hr.	____/hr.
Engineer or _____	\$240/hr. \$210/hr.		Engineer or _____	____/hr.	____/hr.
Data Analytics/Visualization/Warehouse/Lake			Other Technology**		
Project Manager or _____	\$305/hr. \$290/hr.		Project Manager or _____	\$305/hr.	\$290/hr.
Senior Engineer or _____	\$260/hr. \$245/hr.		Senior Engineer or _____	\$260/hr.	\$245/hr.
Engineer or _____	\$220/hr. \$195/hr.		Engineer or _____	\$220/hr.	\$195/hr.



**In addition to the above roles, based on the type of services and the types of projects that will get executed under this contract, we've included a list of roles and rates (Onsite and Offsite) that we recommend as part of our future delivery to JMU. With the growing number of niche certifications, years of experience and other skill factors (demand, geo, etc.), we have provided additional labor categories with broader ranges than the three roles provided in the template.

Project Role	Onsite Rate	Offsite Rate
Project Management Analyst	\$125.00	\$105.00
Project Management Senior Analyst	\$150.00	\$135.00
Program Manager	\$340.00	\$325.00
Senior Program Manager	\$355.00	\$340.00
Program Management Executive	\$400.00	\$390.00
Development Analyst	\$110.00	\$95.00
Development Senior Analyst	\$160.00	\$145.00
Development Lead	\$195.00	\$180.00
Development Manager	\$255.00	\$240.00
Development Senior Manager	\$290.00	\$275.00
Development Executive	\$400.00	\$390.00
Business Analyst	\$100.00	\$90.00
Business Senior Analyst	\$130.00	\$115.00
Business Consultant	\$145.00	\$130.00
Business Senior Consultant	\$160.00	\$140.00
Business Lead	\$250.00	\$235.00
Business Manager	\$295.00	\$280.00
Business Senior Manager	\$350.00	\$330.00



Project Role	Onsite Rate	Offsite Rate
Business Executive	\$400.00	\$380.00
Testing Analyst	\$110.00	\$95.00
Testing Senior Analyst	\$160.00	\$145.00
Testing Consultant	\$195.00	\$180.00
Testing Senior Consultant	\$260.00	\$240.00
Testing Lead / Manager	\$290.00	\$275.00
Training & Change Management Analyst	\$125.00	\$105.00
Training & Change Management Senior Analyst	\$150.00	\$135.00
Training & Change Management Manager	\$340.00	\$325.00
Training & Change Management Executive	\$400.00	\$380.00
Security Analyst	\$140.00	\$130.00
Security Senior Analyst	\$175.00	\$155.00
Security Lead	\$275.00	\$255.00
Security Manager	\$305.00	\$295.00
Security Executive	\$410.00	\$395.00

Additional material: Contract Exceptions





















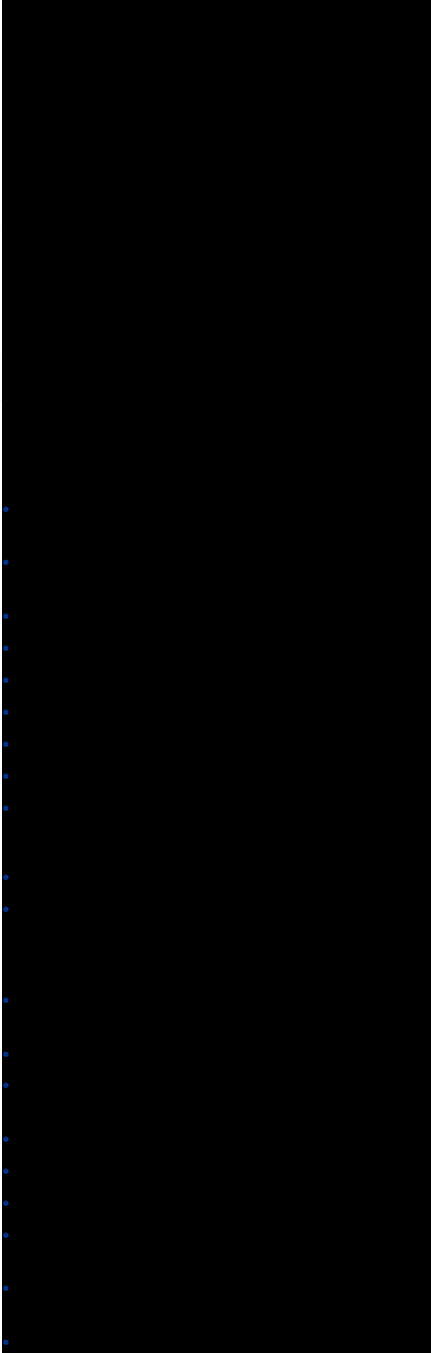
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Additional material: Résumés



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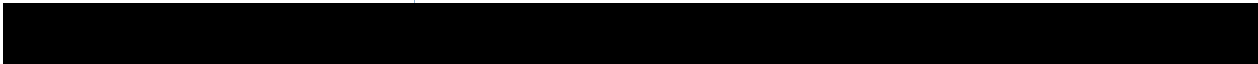
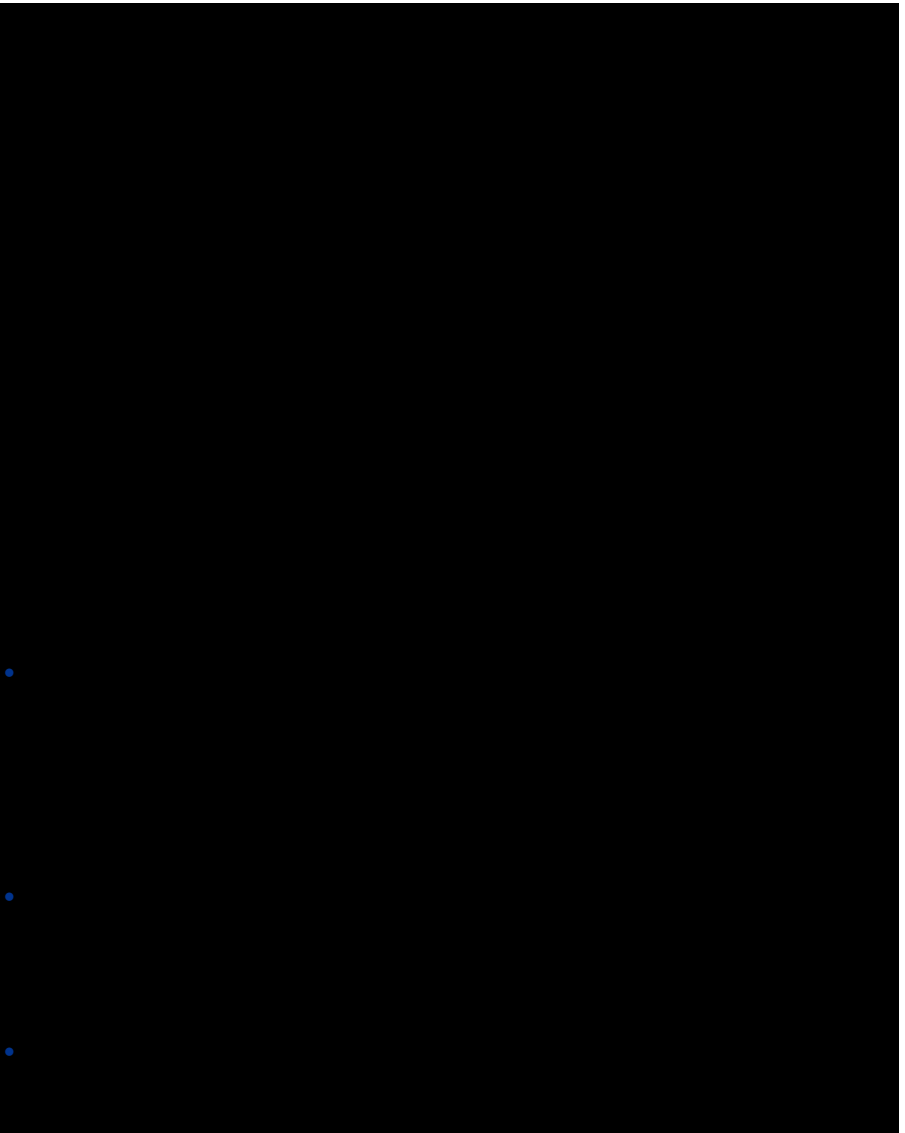
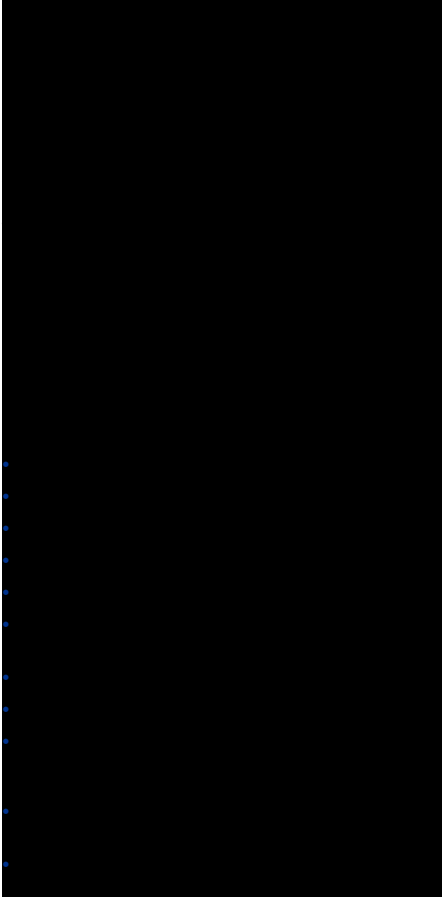
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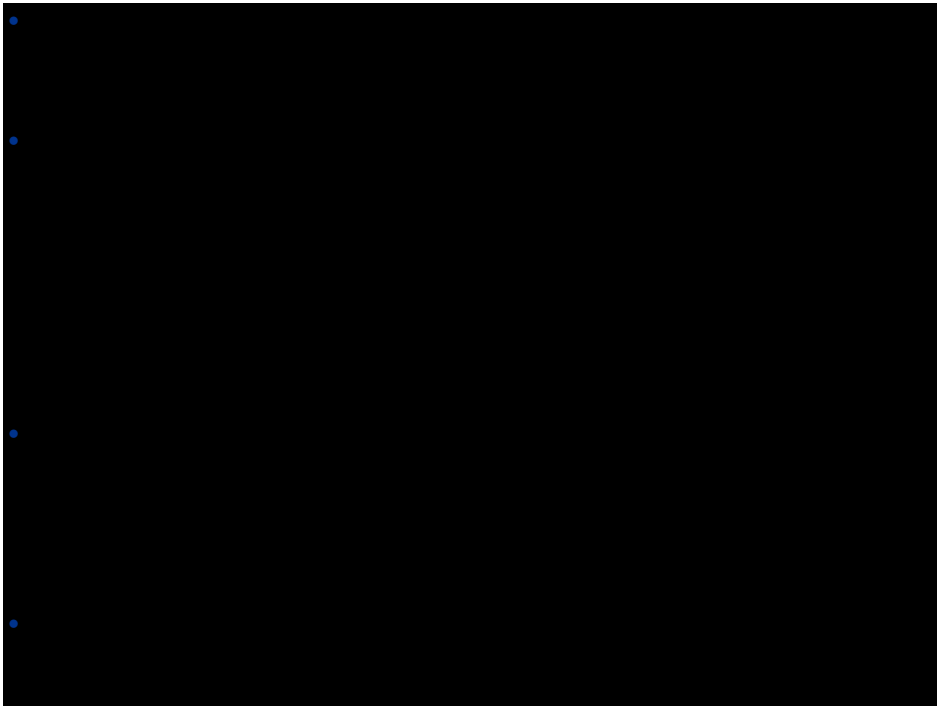
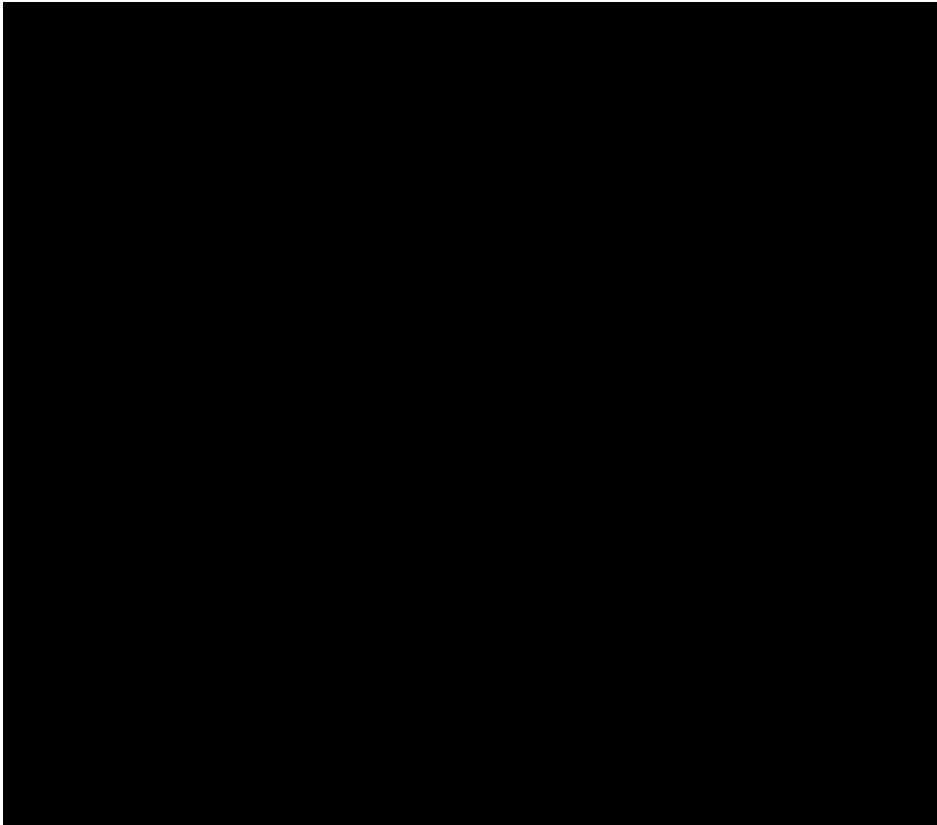
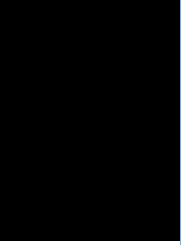
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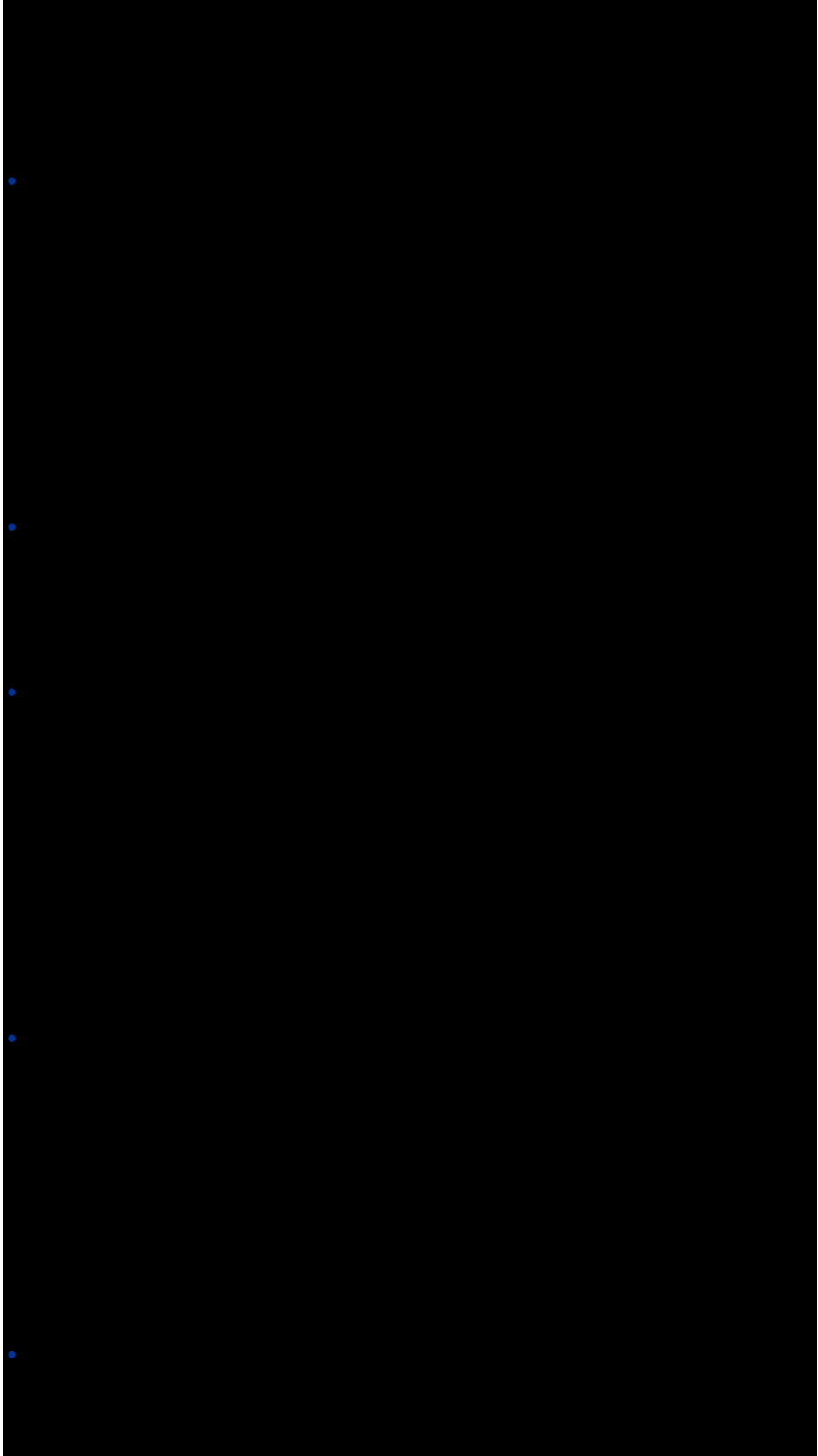
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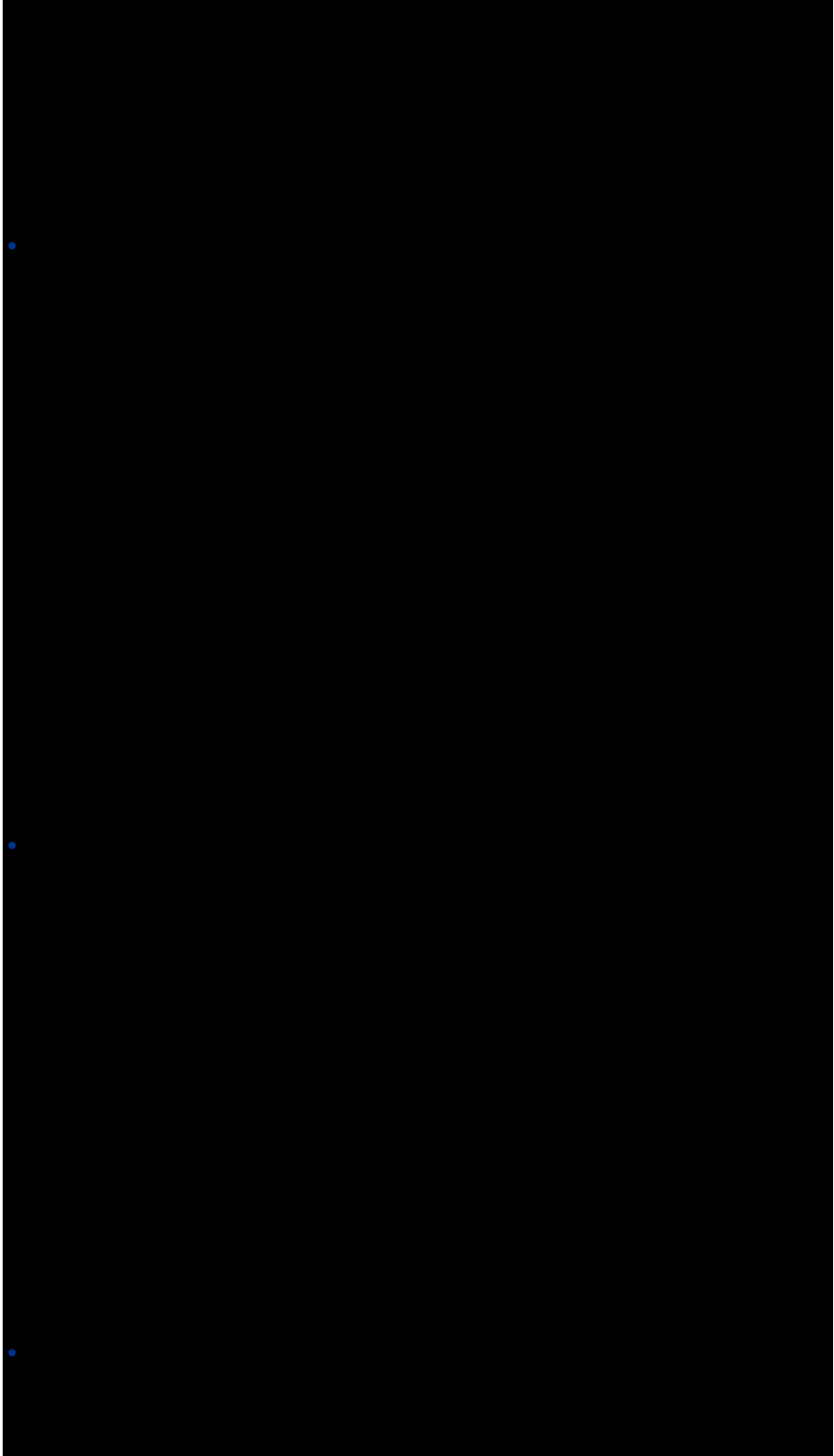
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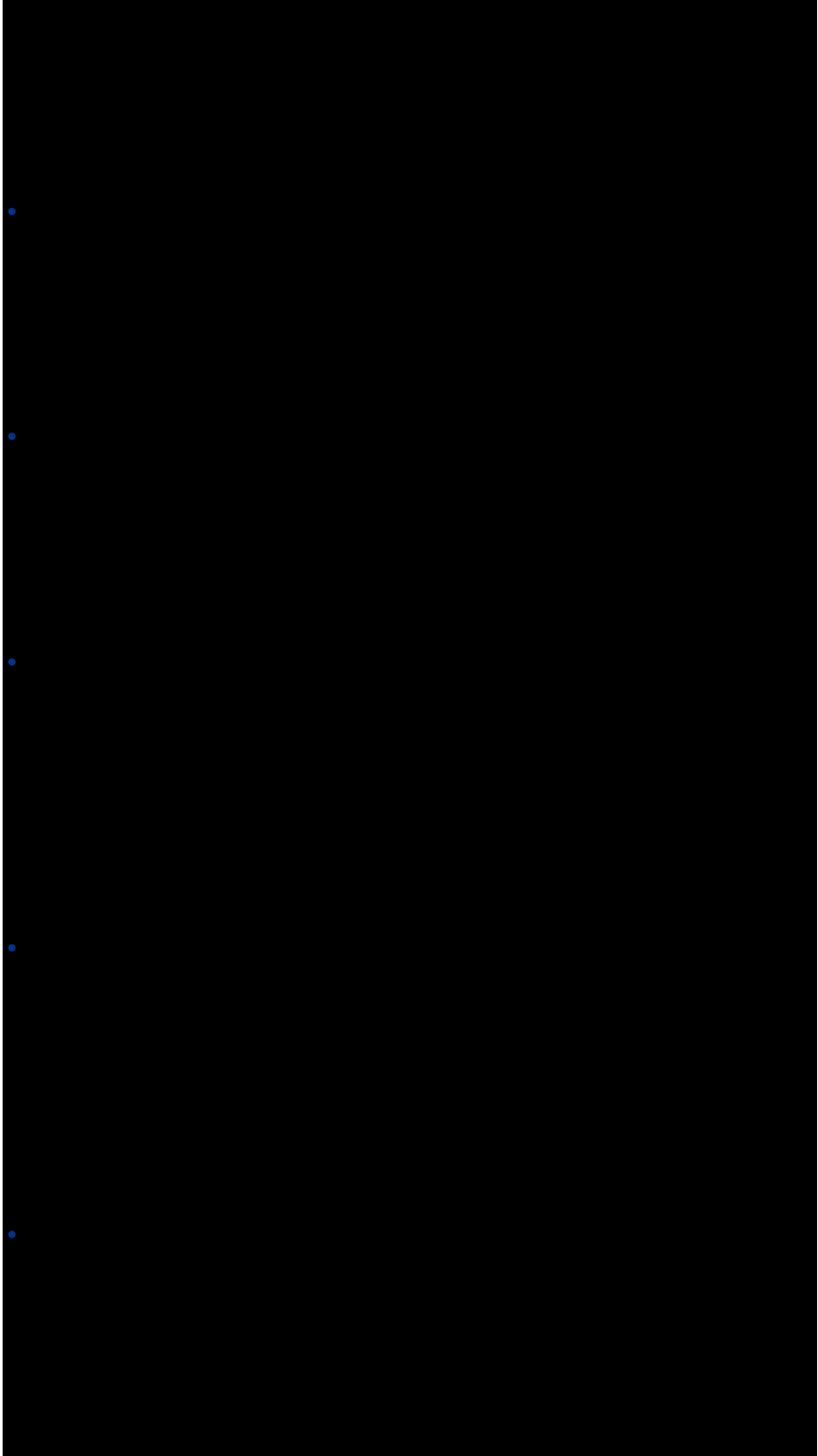
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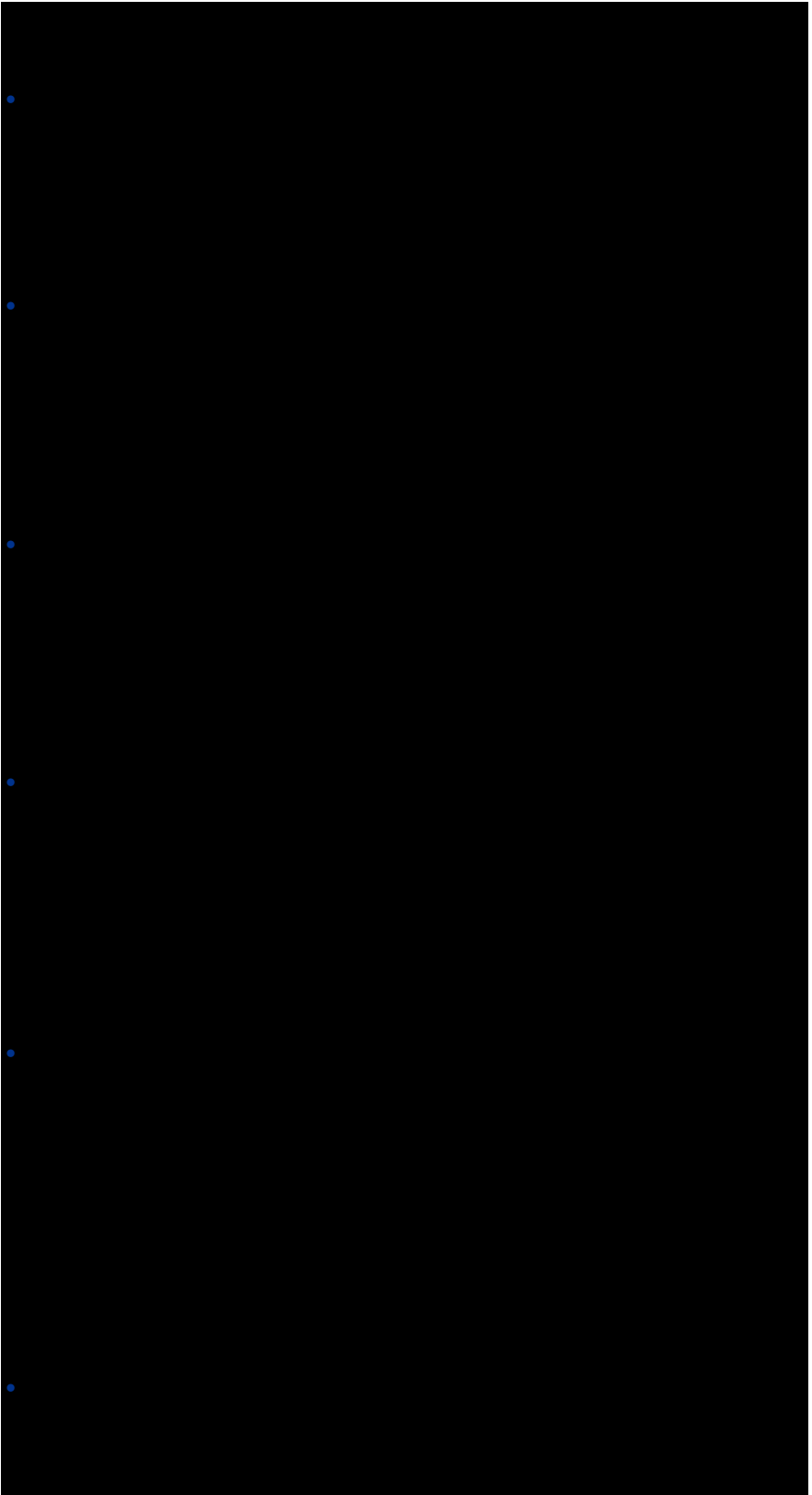
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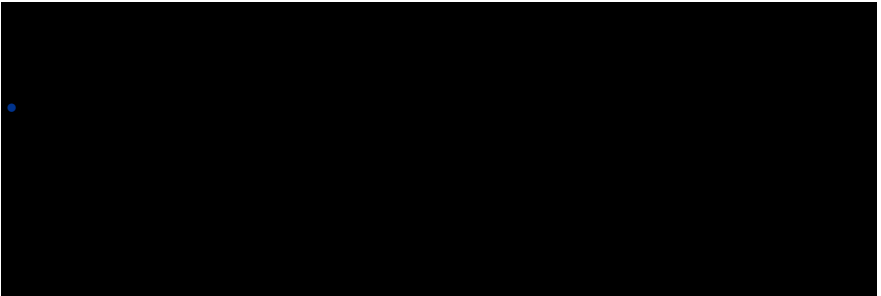
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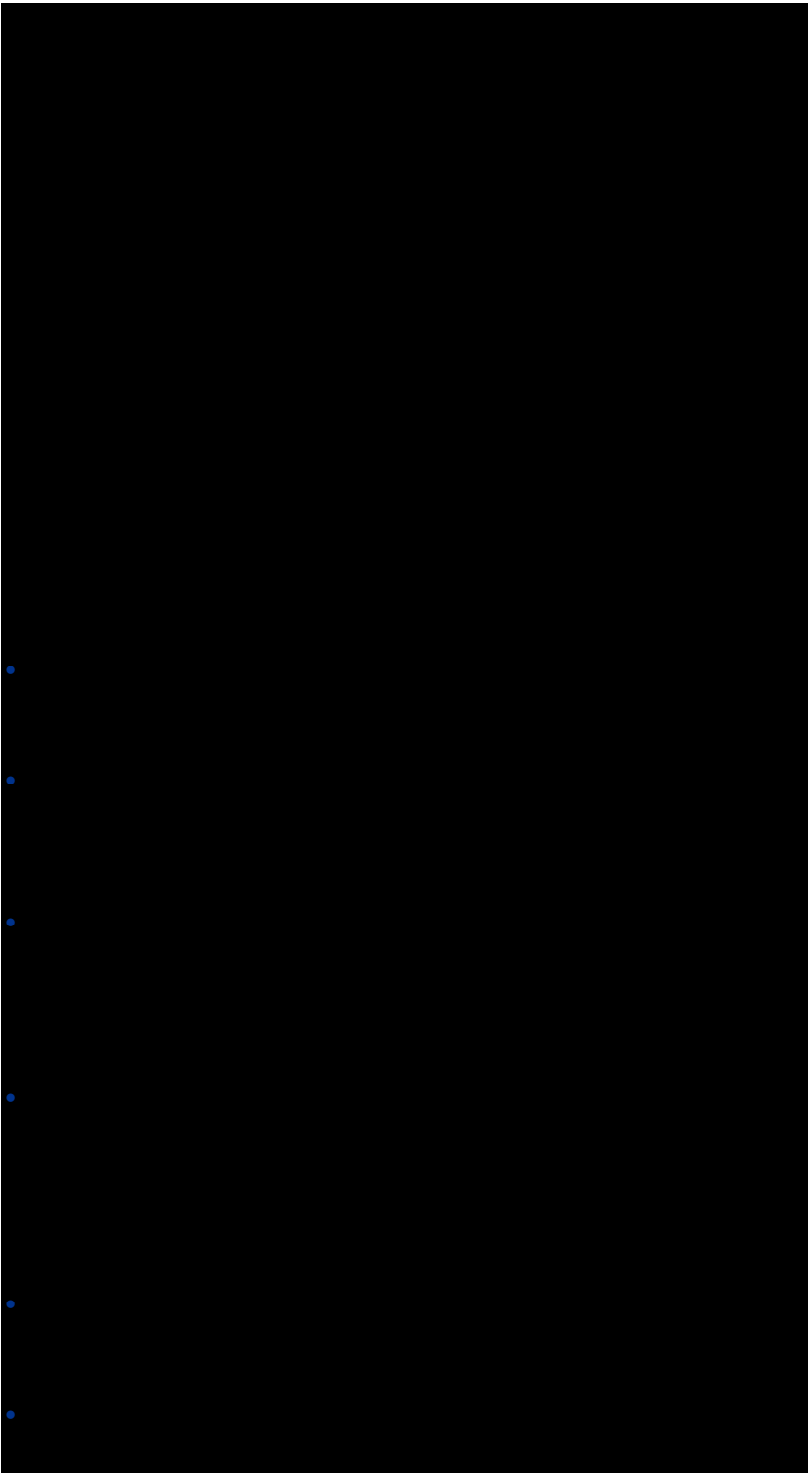
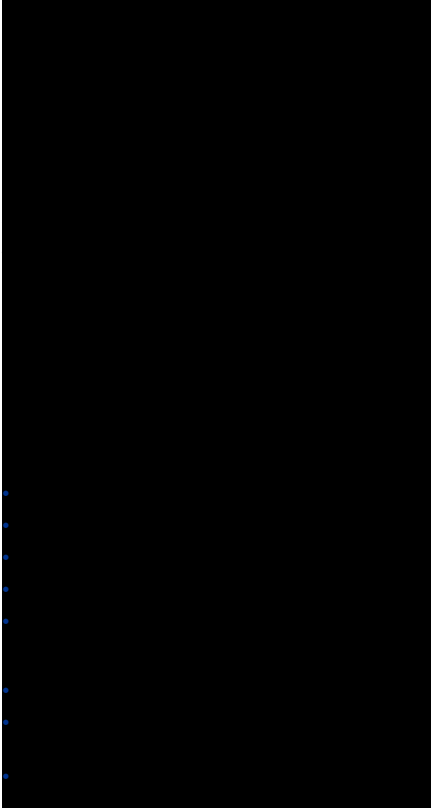


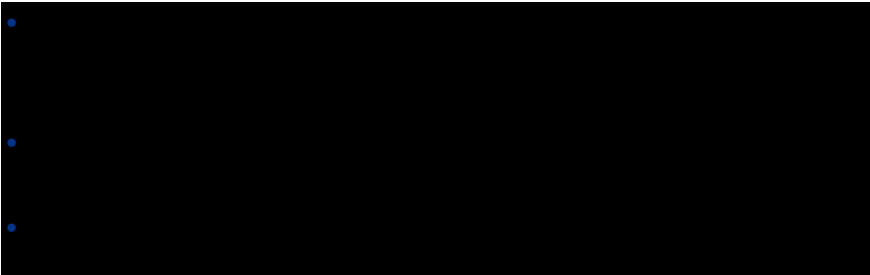
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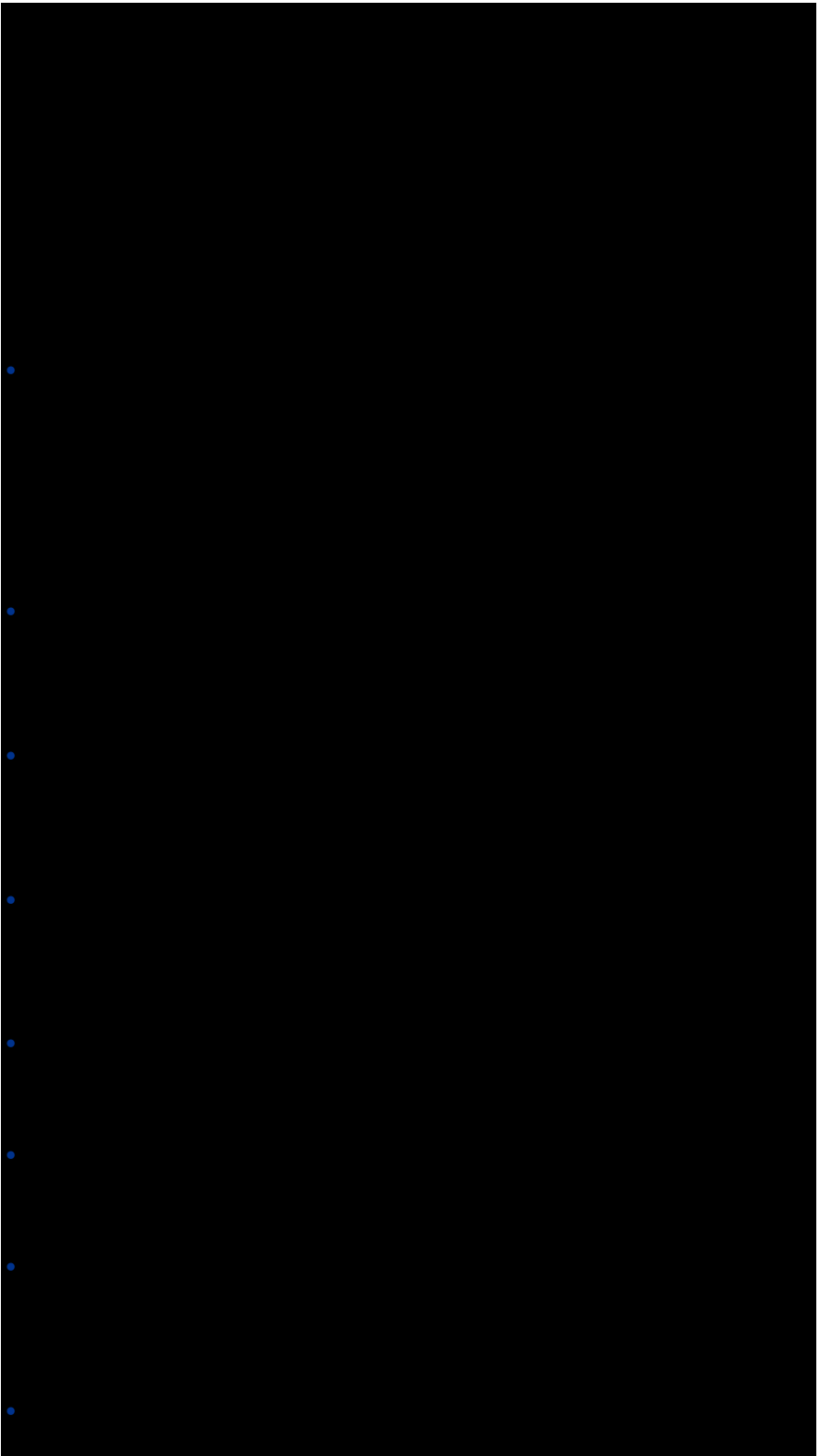
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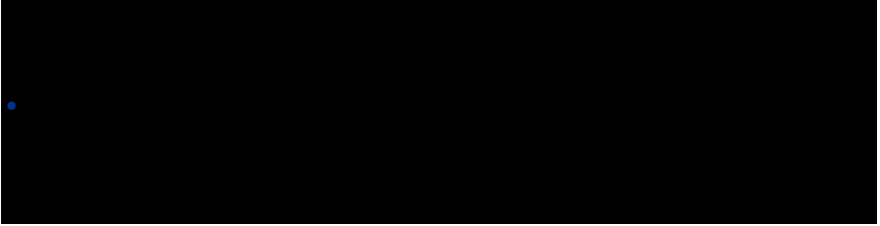














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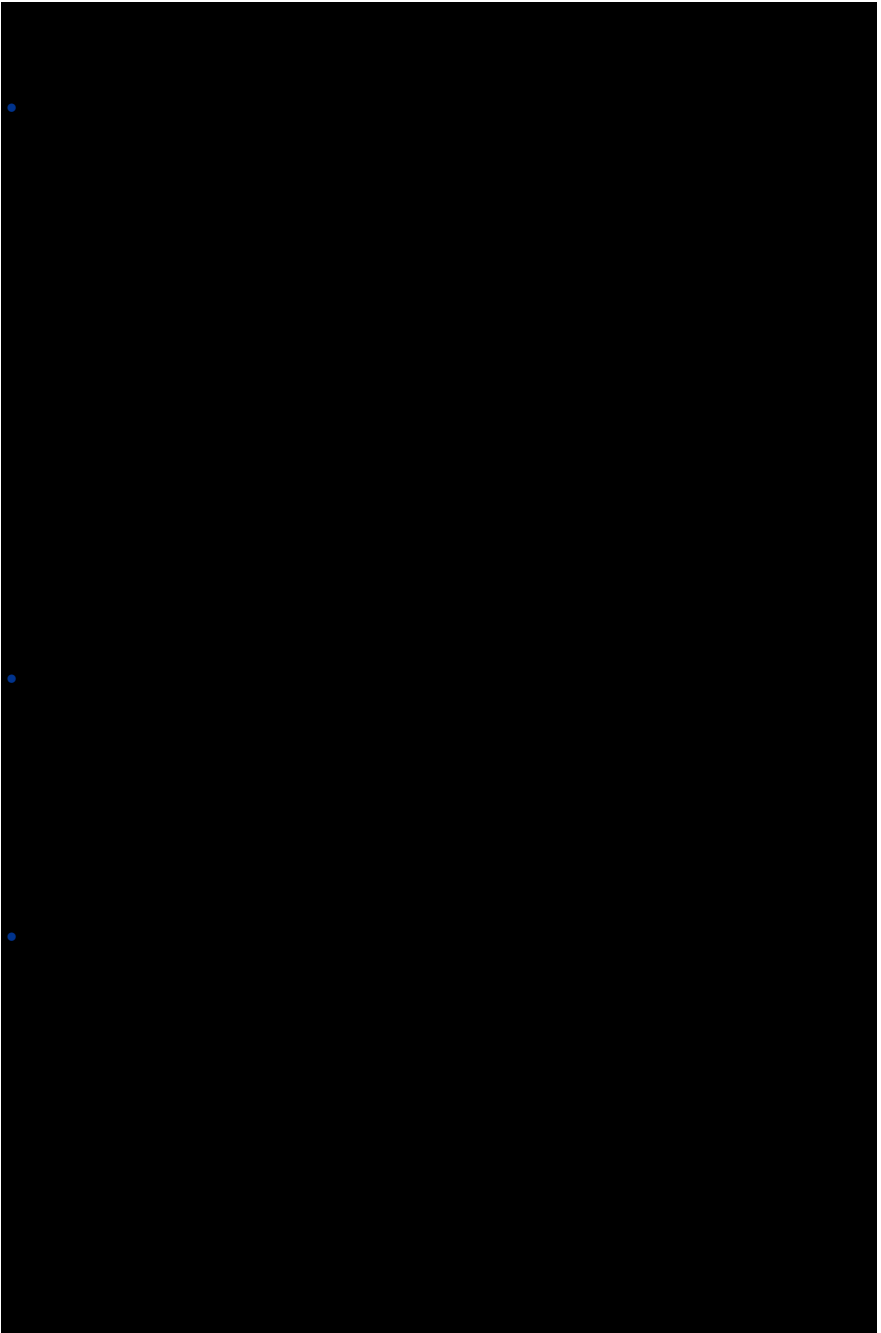
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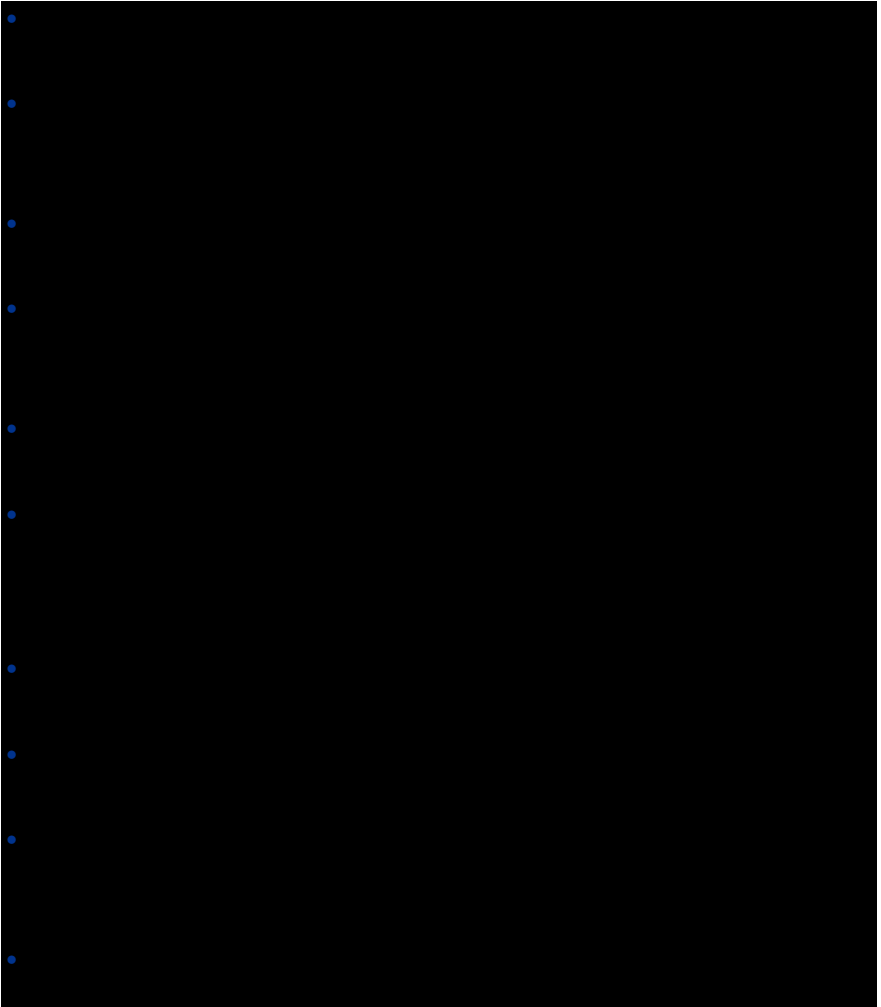
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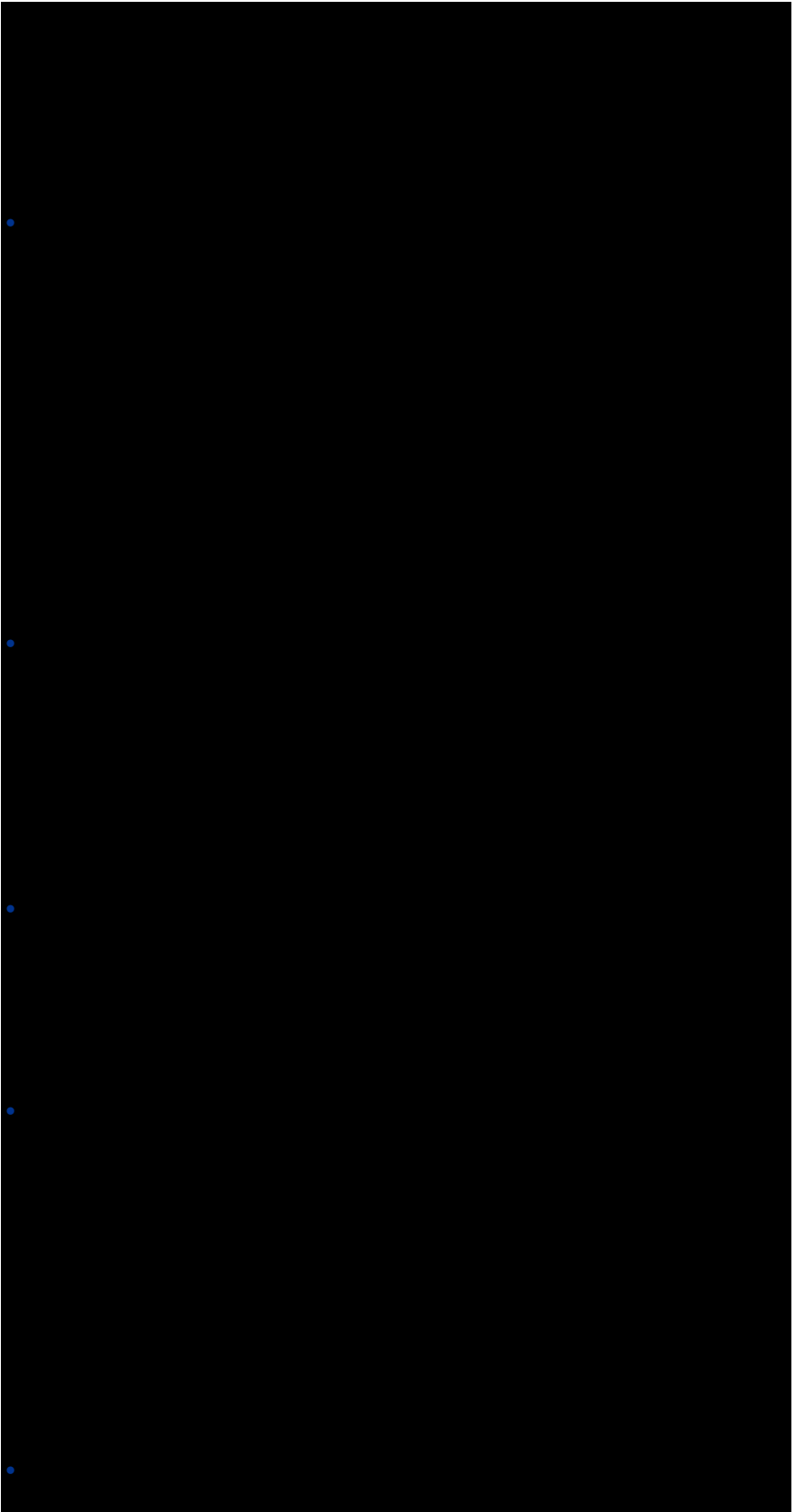
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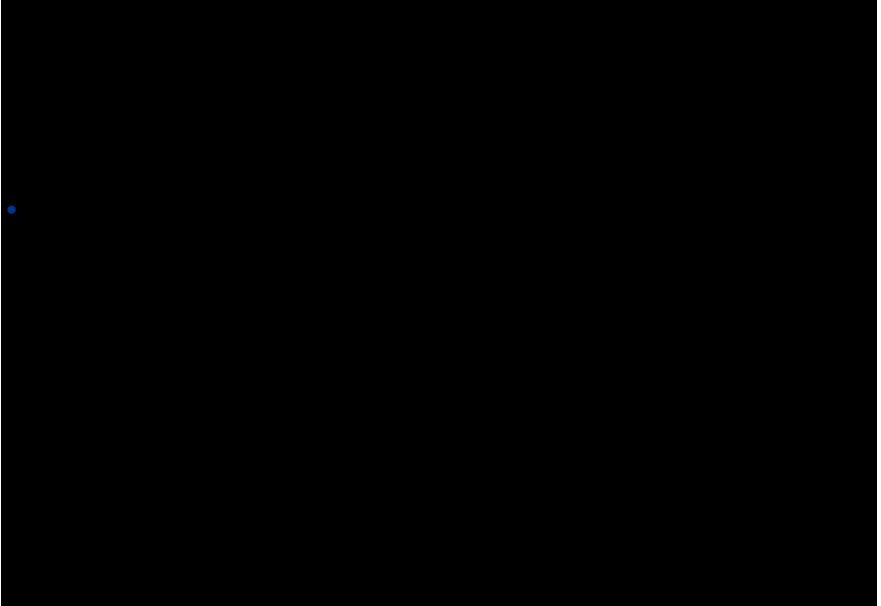
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Chamorro has broad experience in the government sector including change management, process improvement, program monitoring and assessment, internal audit, and grants management.





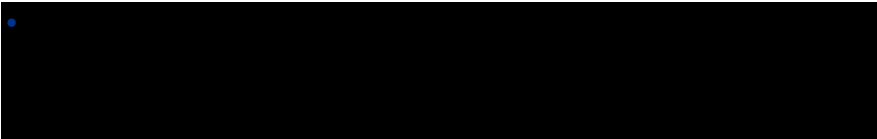
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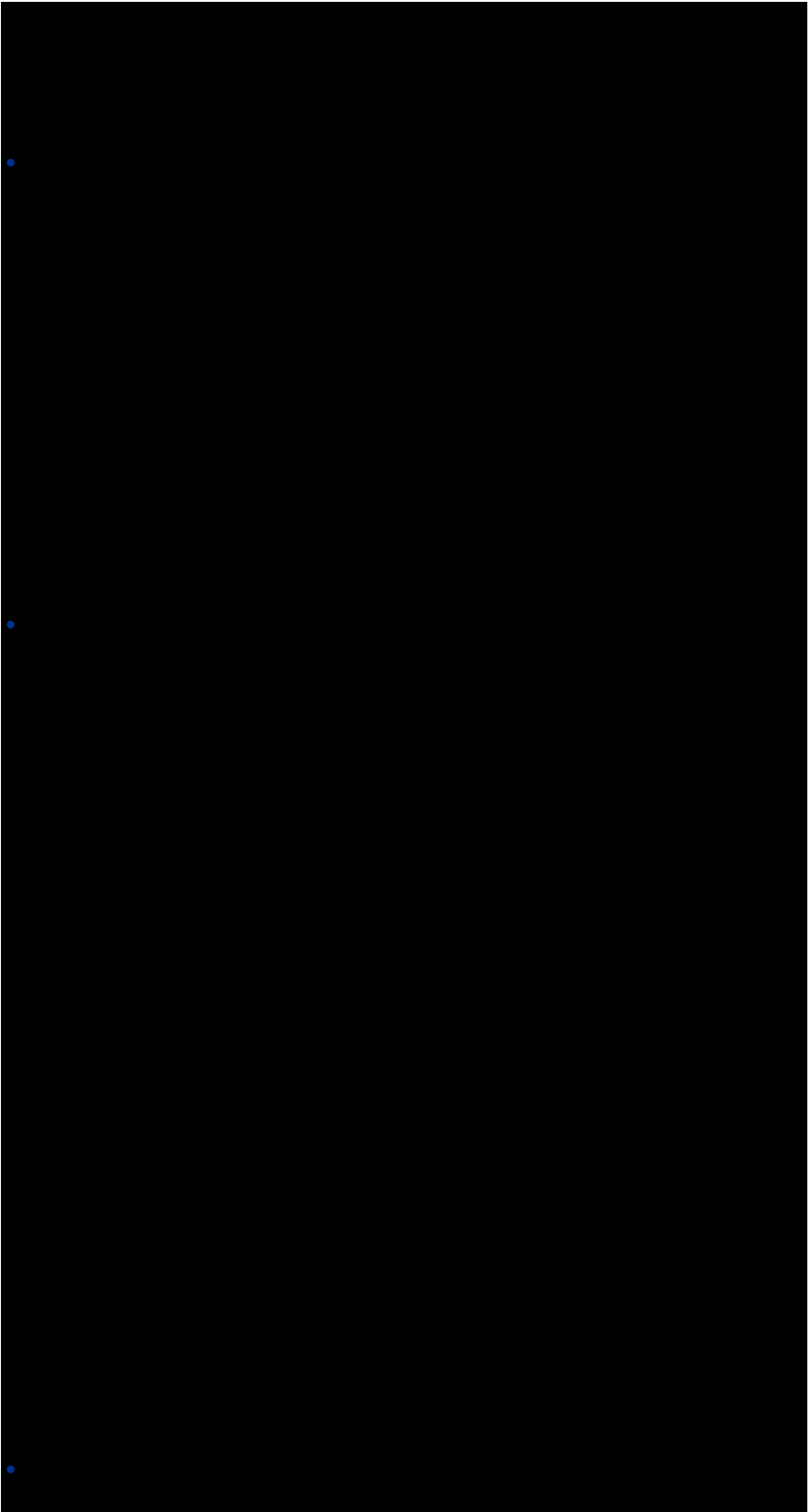


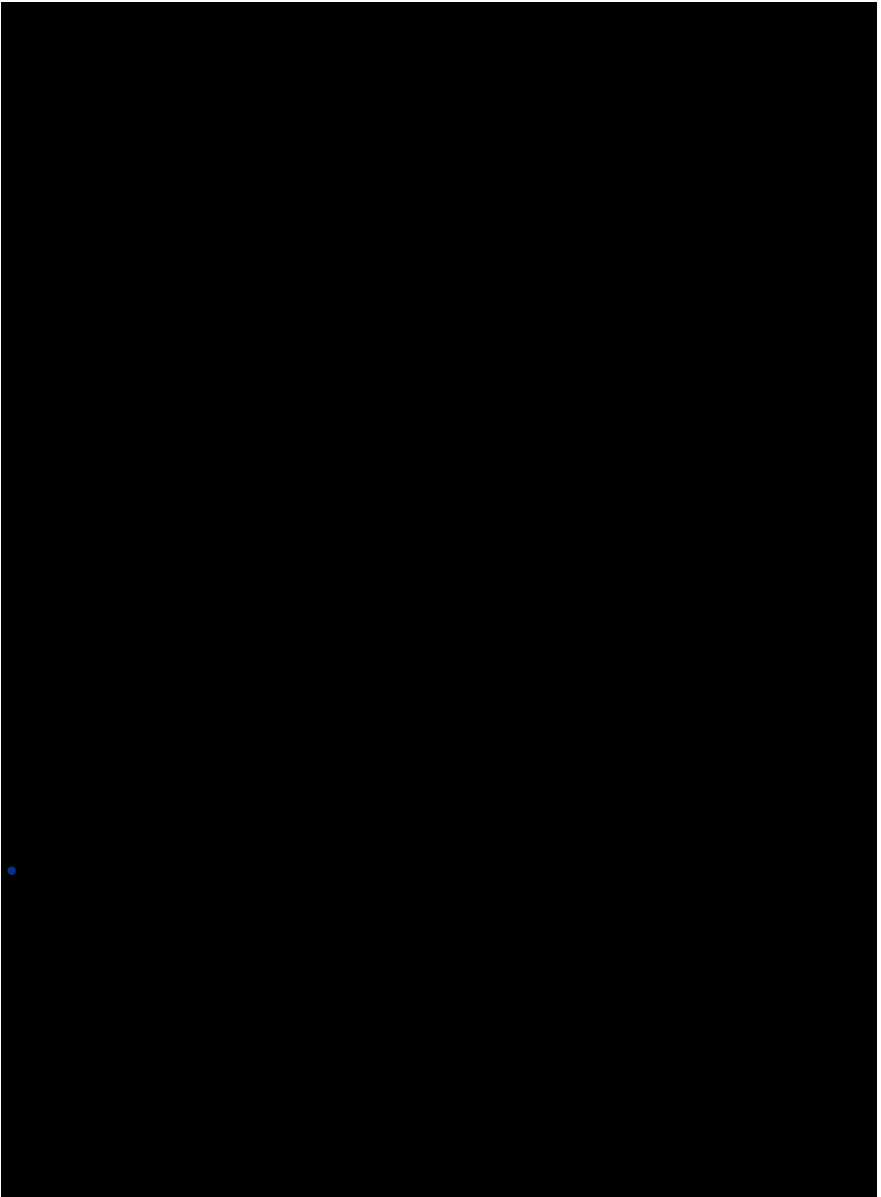


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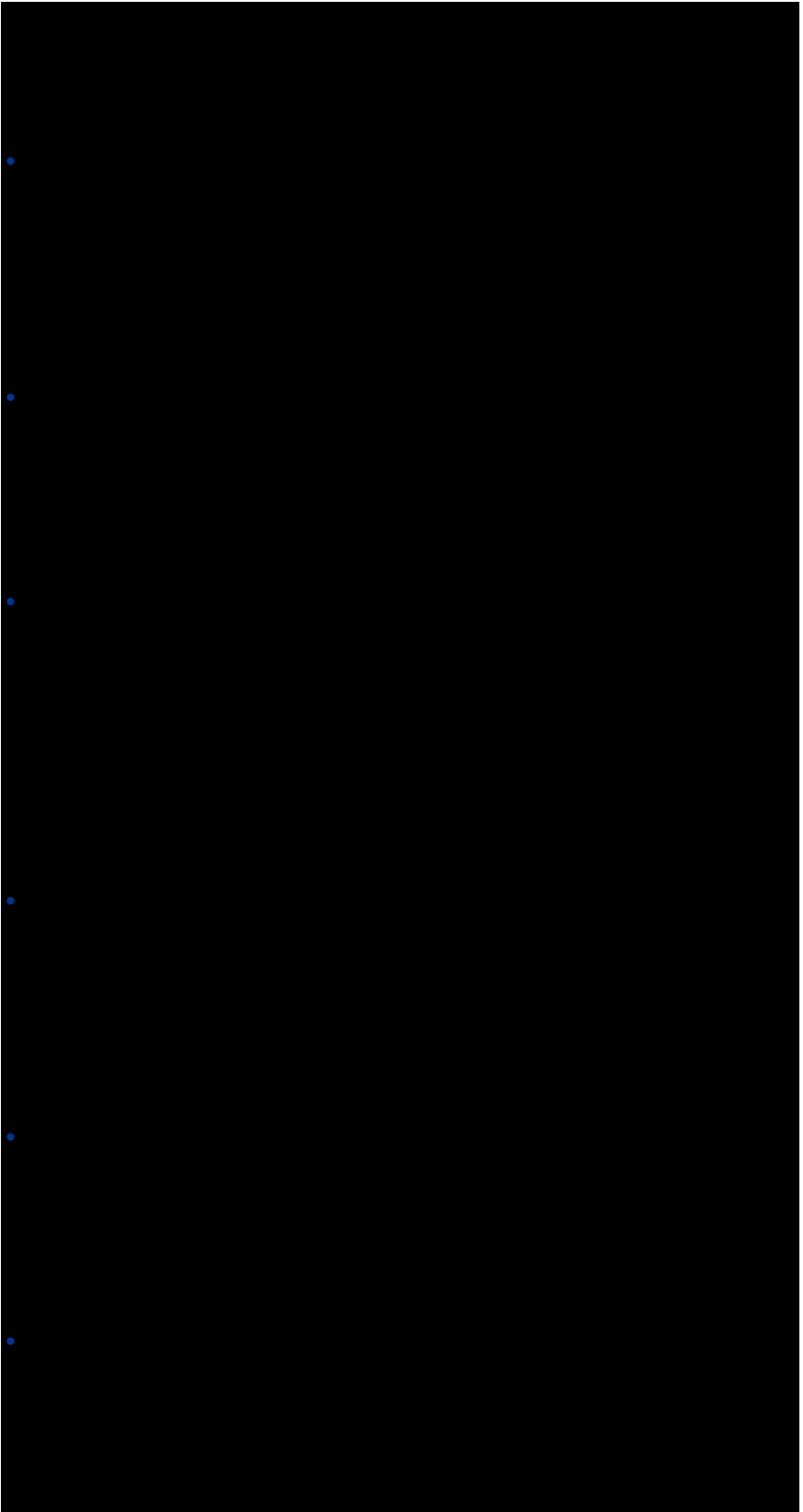
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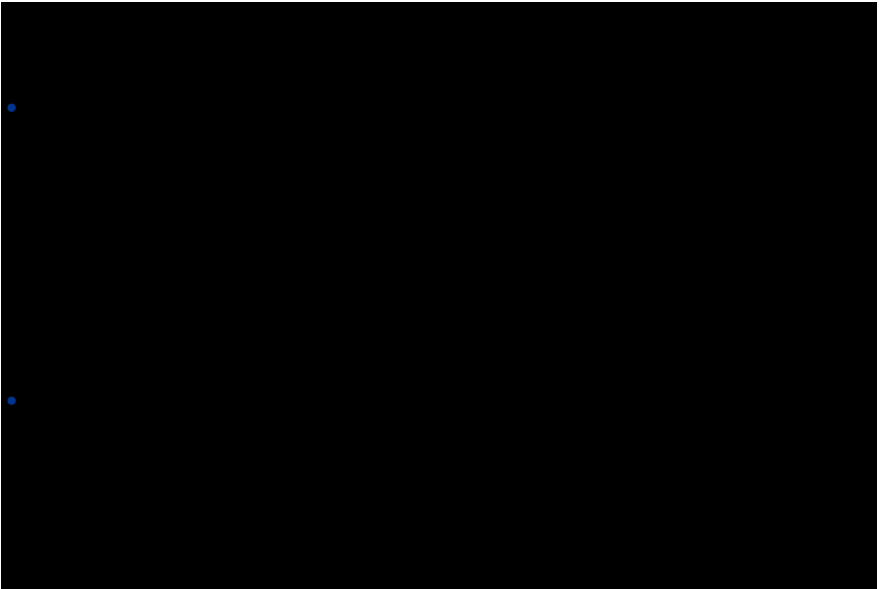
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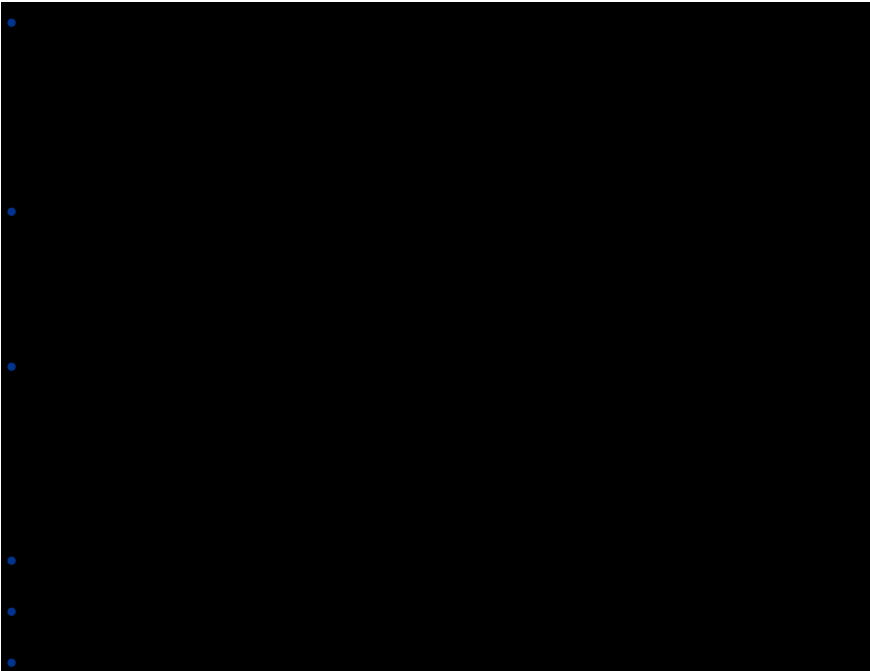


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Contact:

Tricia L. Harper
Lead engagement partner
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tlharper@kpmg.com

kpmg.com/socialmedia



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Request for Proposal

RFP# FDC-1175

Information Technology Consulting Services

June 15, 2023



Name	Organization	E-mail Address
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REQUEST FOR PROPOSAL

RFP# FDC-1175

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

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

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

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

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

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

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

Name and Address of Firm:

By: _____
(Signature in Ink)

Name: _____
(Please Print)

Date: _____

Title: _____

Web Address: _____

Phone: _____

Email: _____

Fax #: _____

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

SMALL, WOMAN OR MINORITY OWNED BUSINESS:

☐ YES; ☐ NO; *IF YES* ⇒ ☐ SMALL; ☐ WOMAN; ☐ MINORITY ***IF MINORITY:*** ☐ AA; ☐ HA; ☐ AsA; ☐ NW; ☐ Micro

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

REQUEST FOR PROPOSAL

RFP # FDC-1175

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I. PURPOSE

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

II. BACKGROUND

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

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

James Madison University is currently utilizing the following technologies:

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

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

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

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

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

III. SMALL, WOMAN-OWNED AND MINORITY PARTICIPATION

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

IV. STATEMENT OF NEEDS

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

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

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

V. PROPOSAL PREPARATION AND SUBMISSION

A. GENERAL INSTRUCTIONS

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

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

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

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

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

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

B. SPECIFIC PROPOSAL INSTRUCTIONS

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

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

VI. EVALUATION AND AWARD CRITERIA

A. EVALUATION CRITERIA

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

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

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

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

VII. GENERAL TERMS AND CONDITIONS

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

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

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

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

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

J. PAYMENT:

1. To Prime Contractor:

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

2. To Subcontractors:

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

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

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

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

MINIMUM INSURANCE COVERAGES AND LIMITS REQUIRED FOR MOST CONTRACTS:

1. Workers' Compensation: Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Commonwealth of increases in the number of employees that change their workers' compensation requirement under the Code of Virginia during the course of the contract shall be in noncompliance with the contract.
 2. Employer's Liability: \$100,000
 3. Commercial General Liability: \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The Commonwealth of Virginia must be named as an additional insured and so endorsed on the policy.
 4. Automobile Liability: \$1,000,000 combined single limit. *(Required only if a motor vehicle not owned by the Commonwealth is to be used in the contract. Contractor must assure that the required coverage is maintained by the Contractor (or third party owner of such motor vehicle.)*
- R. ANNOUNCEMENT OF AWARD: Upon the award or the announcement of the decision to award a contract over \$100,000, as a result of this solicitation, the purchasing agency will publicly post such notice on the DGS/DPS eVA web site (www.eva.virginia.gov) 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. **AUDIT:** The Contractor hereby agrees to retain all books, records, systems, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The Commonwealth of Virginia, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
- B. **CANCELLATION OF CONTRACT:** James Madison University reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
- C. **IDENTIFICATION OF PROPOSAL ENVELOPE:** The signed proposal should be returned in a separate envelope or package, sealed and identified as follows:

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

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

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

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

sidewalks, plazas, and areas heavily used by pedestrians, the driver must yield to pedestrians. For a complete list of parking regulations, please go to www.jmu.edu/parking; 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. AUTHORIZATION TO CONDUCT BUSINESS IN THE COMMONWEALTH: A contractor organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the Code of Virginia or as otherwise required by law. Any business entity described above that enters into a contract with a public body shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the contract. A public body may void any contract with a business entity if the business entity fails to remain in compliance with the provisions of this section.
- L. PUBLIC POSTING OF COOPERATIVE CONTRACTS: James Madison University maintains a web-based contracts database with a public gateway access. Any resulting cooperative contract/s to this solicitation will be posted to the publicly accessible website. Contents identified as proprietary information will not be made public.
- M. CRIMINAL BACKGROUND CHECKS OF PERSONNEL ASSIGNED BY CONTRACTOR TO PERFORM WORK ON JMU PROPERTY: The Contractor shall obtain criminal background checks on all of their contracted employees who will be assigned to perform services on James Madison University property. The results of the background checks will be directed solely to the Contractor. The Contractor bears responsibility for confirming to the University contract administrator that the background checks have been completed prior to work being performed by their employees or subcontractors. The Contractor shall only assign to work on the University campus those individuals whom it deems qualified and permissible

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

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

IX. METHOD OF PAYMENT

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

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

X. PRICING SCHEDULE

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

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

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

XI. ATTACHMENTS

Attachment A: Offeror Data Sheet

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

Attachment C: Standard Contract Sample

Attachment D: Pricing Schedule

ATTACHMENT A

OFFEROR DATA SHEET

TO BE COMPLETED BY OFFEROR

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

Years _____ Months _____

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

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

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

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

Procurement Name and Number: _____

Date Form Completed: _____

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

Offeror / Proposer:

Firm

Address

Contact Person/No.

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

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

RETURN OF THIS PAGE IS REQUIRED

ATTACHMENT C



**COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT**

Contract No. _____

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

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

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

PERIOD OF PERFORMANCE: From _____ through _____

The contract documents shall consist of:

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

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

CONTRACTOR:

PURCHASING AGENCY:

By: _____
(Signature)

By: _____
(Signature)

(Printed Name)

(Printed Name)

Title: _____

Title: _____

Attachment D – Pricing Schedule

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

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

	Onsite	Offsite		Onsite	Offsite
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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Office of
PROCUREMENT SERVICES

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-site or remote in Harrisonburg, VA? Given the skill sets, we’re assuming it’s fully remote, but wanted to verify
Answer – Remote is usually acceptable; however, it would depend on the nature of the engagement.
31. Question - How many users are on Office 365? What license do they have? Provide a license count.
Answer – Approximately 30,000 accounts. The majority have A5 licenses with a few having A3 licenses.
32. Question - Are the licenses being purchased directly with Microsoft or through a Microsoft Partner?
Answer – SHI.
33. Question - Do you currently use Microsoft Teams and/or Microsoft SharePoint?
Answer – Yes.
34. Question - Is there a software in place currently to manage endpoints remotely? If so, what product(s) are being used?
Answer - JAMF Pro, Microsoft Intune, and Microsoft Endpoint Configuration Manager are used.
35. Question - How often are the devices and endpoints being updated? Monthly/quarterly/etc. basis?
Answer – Endpoint patches are deployed typically the same month they become available.
36. Question - Do you have employees working remotely that use a company device?
Answer – Yes.
37. Question - Do you offer Bring Your Own Device (BYOD) to employees?
Answer – No.
38. Question - Is there a Mobile Device Management (MDM) solution deployed?
Answer – Yes, for JMU owned devices.

39. Question - How many desktops/laptops/mobile devices are you supporting?
Answer – JMU IT actively manages roughly 4,500 Windows devices, 2,500 Mac devices, and 1,000 mobile devices.
40. Question - Which version of Windows are the desktops/laptops running on?
Answer – Primarily Windows 10 22H2.
41. Question - Are user devices being backed up? If so, how often, and do you have retention policies in place?
Answer – User devices are not centrally backed up.
42. Question – Are the servers on-site or on the cloud? Hybrid?
Answer - Servers are onsite.
43. If you have a cloud environment, is it Azure/AWS/other?
Answer – The University has applications in both Azure and AWS.
44. Question - How many servers do you have? What operating system are they on? Do you have any Windows Server 2012/2012R2? Any Linux Servers? Microsoft is sunsetting Windows 2012 servers in October. Is there a plan to upgrade/replace your current 2012 servers? Please provide details.
Answer – The University has approximately 500 servers. Windows and Linux.
- **2012R2 (26 servers - all slated to decom by October, with the potential exception of 3 belonging to Card Services, which they handle on their own and are in discussions with IT-Sec about)**
 - **2016 (89 servers)**
 - **2019 (93 servers)**
 - **2022 (7 servers)**
 - **Linux (210 Servers) primarily running RHEL 7 & 8**
 - **16 - VMware Host servers, and 3 management servers, running VMWare version 7. (13 normal hosts, 3 VDI hosts, 2 VCenter servers and the VRealize server)**
 - **54 - additional servers are being tracked, but are either security servers (OS not maintained by us), Other Linux (CentOS) or OVAs (Virtual appliances)**
45. Question - Is there a Disaster Recovery plan in place? What is the infrastructure at the fail over location?
Answer - Yes. Disaster Recovery plans exist for critical systems. There is geographical, power, and HVAC redundancy at the failover location, as well as off-site backups in the event of whole data center loss.
46. Question - How many databases are you using? Please specify which ones.
Answer – See RFP Section II. Background.
47. Question - What are some of the critical applications being used today? Any ERP applications?
Answer – See RFP Section II. Background.
48. Question - What is the network topology currently used, and how are these locations communicating to each other?
Answer - On campus locations are serviced via single mode fiber. Off campus locations are a combination of DIA circuits and wireless bridges.

49. Question - Is there a VPN in place for remote access? Is there a firewall?
Answer - Yes to both.
50. Question - What is the speed of the network connection to the internet? Do you have a backup connection?
Answer - Two 8Gbs pipes in active/active state.
51. Question - How many Routers, Switches, and Firewalls are in your network?
**Answer - L2 switches: 855
L3 switches/routers: 10
Firewalls: 4**
52. Question - How many buildings/locations?
Answer – The University has approximately 185 buildings on 750 acres. The campus is divided by interstate 81 and the C&P railroad.
53. Question - How big is your current IT department, if any?
Answer - Approximately 150 employees
54. Question - Please provide the brand for the switches, network devices, laptops, desktops, and printers.
**Answer - Cisco Routers and switches for the wired network. The wireless network is Aruba.
Laptop/Desktops are a mix of Dell and Apple. Printers vary, but a significant number are leased KM Bizhub devices.**
55. Question - Do you have any cameras to support?
Answer: Yes. Cameras are managed by Facilities Management.
56. Question - Do you currently have a VOIP solution? Who is your VOIP provider? What is the brand of your desktop phones? How many extensions/DID numbers?
Answer – The University is currently deploying an NEC VoIP solution with Black Box Network Services, and have approximately 8,000 user and service type extensions. Phones are NEC.
57. Question - Do you have ticketing system in place? Estimate of tickets per month/quarter?
Answer - Yes. The University uses Cherwell as its ITSM ticketing system and receives approximately 49,189 tickets per year.
58. Question - Do you require someone to be on-site all the time?
Answer - That would depend on the nature of the engagement.
59. Question - Is this a multi-vendor or single vendor award?
Answer – This is anticipated to be a multi-award contract.
60. Question - Is there Change Management system in place?
Answer - Technical hardware or software changes are managed through the University's ITSM.
61. Question - Is there an Information Technology Asset Management (ITAM) solution in place?
Answer – Not as such. The University uses Cherwell ITSM for CMDB, and JAMF Pro and Intune for MDM.

62. Question - What applications are currently in use?

Answer – See RFP Section II. Background.

63. Question - The RFP has some focus on Salesforce in the opening. But I see that Huron was awarded a contract for Salesforce work less than 6 months ago. Is JMU looking to understand other options that can support the Salesforce deployment if needed?

Answer – Yes, the University is interested in other Salesforce resources and skillset augmentation options.

64. Question – Are there any pain points of issues with the current vendor(s)?

Answer – No.

Signify receipt of this addendum by initialing “*Addendum #1* _____” on the signature page of your proposal.

Sincerely,

Doug Chester
Buyer Senior
Phone: 540-568-4272



August 3, 2023

ADDENDUM NO.: Two

TO ALL OFFERORS:

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

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

1. Question - How far along is the Reengineering Madison project? When is the new system expected to go live?
Answer - See RFP Section II. Background.
2. Question - Can you please share the portfolio of projects/initiatives that will be executed under the Reengineering Madison program?
Answer - See RFP Section II. Background.
3. Question - Can you provide ticket volumes that you are currently experiencing for PeopleSoft for the last one year, preferably by severity?
Answer - No. Ticket volume alone is not a good indicator.
4. Question - What is the size of the existing support team supporting PeopleSoft?
Answer - 10 people.
5. Question - Will existing support team members be moved to the Reengineering Madison project?
Answer - Yes, in part.
6. Question - Can you provide the architecture diagram for your PeopleSoft application and its deployment?
Answer - This information may be provided depending on the engagement and after the execution of a SOW.
7. Question - What is the current PUM level for each of the PeopleSoft application pillar?
Answer - This information may be provided depending on the engagement and after the execution of a SOW.
8. Question - What is the number of environments that exist for each PeopleSoft application pillar (example - DEV, TEST, DMO, UAT etc.)?
Answer - 4 environments.

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PROCUREMENT SERVICES 540.568.7935 Fax

9. Question - What is the size of the production database for each of the PeopleSoft application pillar?
Answer - This information may be provided depending on the engagement and after the execution of a SOW.
10. Question - Does Oracle Core Technologies mean the Oracle DBA skill set? If not, please provide more details.
Answer - Yes.
11. Question - What skills are required in Desktop and Mobile Device Management?
Answer - Required skills, certifications, or qualifications will vary based on the specific project. Offerors should include the qualifications and experience of the personnel who may be assigned to perform work for the University in their proposals (See RFP Section IV.3.).
12. Question - Please provide details of the services expected in the following technologies:
a. Security and Federation Services
b. Microsoft 365 (M365)
c. Audio and Visual Technologies
d. Secure Research Enclaves
Answer - Services may vary depending on the nature of the engagement.
13. Question - What is expected from Svcs and Cert in Change Management? What are the roles of Senior Engineer/Engineer in Change Management?
Answer - See RFP Section IV. Statement of Needs and Section D. Pricing Schedule. If your firm refers to a specific role by a different name, list it in the space provided next to the corresponding role.
14. Question - Does onsite pricing refer to work specifically performed on campus (in person), and does offsite work pertain to work conducted within the US but off-campus, remote?
Answer - Yes.
15. Question - What positions are you looking to fill immediately? Is there current or future project you are expecting?
Answer - See RFP Section II. Background.
16. Question - For onsite services, we find that a base billable rate is suitable for most of our clients, and hotel/travel expenses charged as actuals later. Would you still like a single blended hourly charge for these positions including all expenses?
Answer - Yes.
17. Question - What are the Oracle core technologies focused on consulting services like OBIA, OBIEE, ODI, OAC, etc.?
Answer - Unavailable at this time.
18. Question - Is there a preferred cloud provider like AWS, GCP, or Azure for a data lake/data warehouse solution?
Answer - No.
19. Question - Is the data warehouse/data lake solution in place that required migrating to a new tool stack or a new solution is expected?
Answer - See RFP Section II. Background.

20. Question - Is there a preferred visualization tool for analytics?
Answer - No.
21. Question - Has Fluid UI been implemented in your PeopleSoft Application?
Answer - No.
22. Question - Is the Boomi atom/molecule installed on-premises or in the cloud?
Answer – On-premises.
23. Question - What Salesforce modules have been implemented/utilized?
Answer - Implementation is just beginning. See RFP Section II. Background.
24. Question - Is it mandatory to showcase the amount of sales our company had during the last twelve months with each VASCUPP Member Institution? Can we skip this portion if we do not have an existing/ previous VASCUPP cooperative contract? Will the proposal be deemed non-responsive if we do not have sales during the last twelve months with each VASCUPP Member Institution?
Answer - A response to the question is required. If the answer is none/zero, indicate that as your answer. Previous sales/experience with a VASCUPP Member Institution is not a requirement for submitting a proposal or being awarded a contract.
25. Question - Please confirm whether the "Secure Research Enclave" category includes CMMC readiness testing? Or, is this category meant for the development/implementation of the architecture for these enclaves?
Answer - Secure Research Enclave could include CMMC readiness or the development/implementation of the architecture for these enclaves.
26. Question - How does JMU define "Consulting Services" and "technology advisor"?
Answer - See RFP Section IV. Statement of Needs.
27. Question - Is this a new requirement or an existing requirement?
Answer - This RFP is to replace an existing contract with multiple vendors.
28. Question - What are your Key Performance Indicators?
Answer - Key performance indicators will vary depending on the project.
29. Question - If we have a teaming agreement with a subcontractor, does the subcontractor's experience count as experience for us?
Answer - The experience of a subcontractor specified in a proposal may be considered in the evaluation of the qualifications and experience of the Offeror.
30. Question - Do we need to submit only one response including the price schedule?
Answer - Vendors should submit one (1) original and four (4) copies, and electronic copy in WORD format or searchable PDF (on a flash drive) of the entire proposal, INCLUDING ALL ATTACHMENTS. The original, copies, and electronic version should all be the same and include the pricing schedule.

31. Question - As a firm registered on eVA, do we have to pay the fees before the submission of the proposal (i.e. this stage) or after award? Please also clarify that the subcontractor also has to pay this fee.

Answer - eVA fees are only paid upon receipt of a purchase order issued through the eVA system. eVA fees are paid by the vendor listed on the issued purchase order. If a subcontractor is issued a purchase order directly, they would have to pay the associated eVA fees; however, if the purchase order is issued to the prime contractor, and the subcontractor is working under the prime contractor, the subcontractor would not pay the associated eVA fees. The University typically issues purchase orders to the prime contractor.

32. Question - Do we need to submit provided RFP Cover Sheet as a Cover Page of the proposal?

Answer - The RFP cover sheet does not need to be submitted as the cover page of a proposal.

33. Question - Is there any local preference for this contract?

Answer - No.

34. Question - Is it mandatory to have experience with higher education institutions?

Answer - Experience with higher education institutions is not required.

35. Question - Please confirm whether security assessment and consulting services are included on this contract. If so, should we price this under the category "Security and Federation Services" on the Pricing Schedule?

Answer - The scope may include security assessment and consulting services, depending on the specific project. In addition to completing *Attachment D*, Offerors should also provide pricing for all other services.

36. Question - Is there any flexibility in the initial contract duration of one year? Is it safe to assume that the same terms and conditions will remain same when the project is renewed? Are there any pre-defined criteria to be met by the vendors to get the renewal of contract?

Answer - JMU typically issues contracts for one year with subsequent one-year renewals. The terms and conditions of existing term contracts are reviewed at the time of renewal. Contract terms may be negotiated and modified as necessary. See RFP *Section VIII.F*.

37. Question - Can you please specify the list of all technologies in each technology area under Section IV? Example: Do we need to consider Oracle Database, Fusions Middleware, SOA, BPM, Identity Management, MDM, Webcenter-Sites, Portal, Content, Social, OBIEE, Golden Gate and ODI when you refer to Oracle Core Technologies? Similarly, can you call out all technologies under each area?

Answer – See RFP *Section II. Background*.

38. Question - Can you provide more information about the technologies listed in Section II of the RFP, such as Oracle Core Technologies, PeopleSoft Enterprise Solutions, Microsoft Azure, Okta, etc.? What level of expertise and experience is JMU looking for in these areas?

Answer – The level of expertise and experience required will vary based on the specific project. Offerors should include the qualifications and experience of the personnel who may be assigned to perform work for the University in their proposals (See RFP *Section IV.3*).

39. Question - What are the expected outcomes of the trainings that a vendor needs to provide to the staff? How much training must be provided in a month? What will be the number of attendees in each session? Will it be a virtual or classroom training?
Answer – Training outcomes, frequency, number of attendees, format, etc. will vary depending on specific training needs and agreed upon SOW.
40. Question - Can you provide more details about the weightage or scoring system that will be used to evaluate proposals based on the criteria stated in the RFP? How will the award decision be made?
Answer - See RFP Section IV. Evaluation and Award Criteria. Allocation of points for evaluation criteria will be published to the eVA solicitation posting prior to the closing date and time.
41. Question - Can you provide more information on the Virtual Payables options mentioned? How can vendors and suppliers enroll in these options?
Answer - Offerors may contact the JMU Accounts Payable office, at acctspayable@jmu.edu 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