



**COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT**

Contract No. UCPJMU5312

This contract entered into this 15th day of October 2018, by **HyperGen, Inc.** hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

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

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

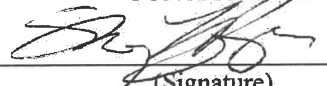
PERIOD OF PERFORMANCE: From November 1, 2018 through October 31, 2019 with four (4) one-year renewal options.

The contract documents shall consist of:

- (1) This signed form;
- (2) The following portions of the Request for Proposal # MLO-981 dated September 15, 2017:
 - (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 October 10, 2017,
 - (e) Addendum No. Two dated October 17, 2017;
- (3) The Contractor's Proposal dated November 1, 2017 and the following negotiated modifications to the Proposal, all of which documents are incorporated herein.
 - (a) Negotiations Summary dated October 3, 2018,
 - (b) Commonwealth of Virginia Agency Contract Form Addendum To Contractor's Form dated July 18, 2018, 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: 
(Signature)
Sherry Z. Dyer
(Printed Name)

Title: Vice President of Sales

PURCHASING AGENCY:

By: 
(Signature)
Leah Frank
(Printed Name)

Title: Procurement Manager



**RFP # MLO-981, Information Technology Consulting Services
Negotiation Summary for HyperGen, Inc.**

October 3, 2018

1. Contractor's pricing schedule for the Purchasing Agency is as follows:

Role	Onsite Hourly Rate
<i>Oracle/PeopleSoft Campus Solutions v9.2; PeopleTools 8.55.x</i>	
Project Manager	\$180.00
Functional SME	\$170.00
Technical Developer	\$170.00
<i>Oracle/PeopleSoft Human Resources v9.2; PeopleTools 8.55.x</i>	
Project Manager	\$170.00
Functional SME	\$165.00
Technical Developer	\$160.00
<i>Oracle/PeopleSoft Financial Management v9.2; PeopleTools 8.55.x</i>	
Project Manager	\$170.00
Functional SME	\$170.00
Technical Developer	\$160.00
<i>Oracle/PeopleSoft Enterprise Application Portal v9.2; PeopleTools 8.55.x</i>	
Project Manager	\$170.00
Functional SME	\$170.00
Technical Developer	\$160.00
<i>Desktop and Mobile Device Management</i>	
Senior System Administrator	\$180.00
System Administrator	\$120.00
<i>Microsoft</i>	
Senior System Administrator	\$180.00



**RFP # MLO-981, Information Technology Consulting Services
Negotiation Summary for HyperGen, Inc.**

October 3, 2018

System Administrator	\$120.00
<i>Audio Visual Technologies</i>	
Senior System Administrator	\$180.00
System Administrator	\$120.00
<i>VoIP and Unified Communications</i>	
Senior System Administrator	\$180.00
System Administrator	\$120.00
<i>Other Technology and Systems</i>	
Senior System Administrator	\$180.00
System Administrator	\$120.00

<i>Onshore Remote On-Demand</i>	
Resource Type	Hourly Rate
Developer	\$115.00
Technical Lead	\$135.00
Remote Services Manager/Senior Consultant	\$155.00

<i>Onshore Remote Bulk Hour Purchase Option</i>	
Bulk Hours	Total Cost
500 Hours	\$55,000.00
1,000 Hours	\$105,000.00
1,500 Hours	\$150,000.00



**RFP # MLO-981, Information Technology Consulting Services
Negotiation Summary for HyperGen, Inc.**

October 3, 2018

2. Onsite pricing shall be inclusive of all travel costs.
3. Billable hours shall be for actual work hours on authorized projects/tasks rounded to the quarter hour. Billable hours shall not include travel time.
4. Contractor shall extend an additional 1.5% discount for Net 15 payment terms.
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 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.
7. Contractor has disclosed all potential fees. Additional charges will not be accepted.

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

AGENCY NAME: James Madison University

CONTRACTOR NAME: HyperGen Inc.

DATE: 7/18/2018

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 Vendor enters into terms of use agreements or other agreements of understanding with University employees and students (whether electronic, click-through, verbal, or in writing), the terms and conditions of this Agreement shall prevail.

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

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

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

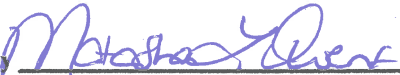
1. Requiring the Commonwealth to maintain any type of insurance either for the Commonwealth's benefit or for the contractor's benefit;
2. Renewing or extending the agreement beyond the initial term or automatically continuing the contract period from term to term;
3. Requiring or stating that the terms of the attached Contractor's form agreement shall prevail over the terms of this addendum in the event of conflict;
4. Requiring the Commonwealth to 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 Agency contract consisting of this Agency addendum and the attached Contractor's form contract constitute the entire agreement between the parties and may not be waived or modified except by written agreement between the parties.

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.

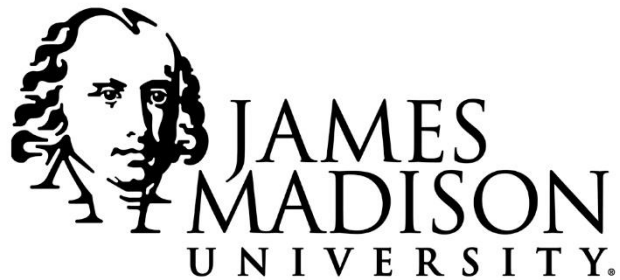
AGENCY by 
Title Buyer Senior
Printed Name NATASHA OWENS

CONTRACTOR by 
Title Vice President of Sales
Printed Name Sherry Z. Dyer

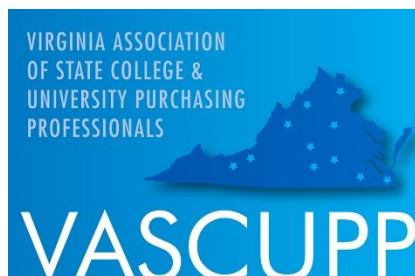
JUL. 2009



**Request for Proposal No. MLO-981
Information Technology Consulting Services**



**Prepared for:
Commonwealth of Virginia
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Bldg.
First Floor, Suite 1023
Harrisonburg, VA 22807**



(For the use of James Madison University only)



November 1, 2017

RFP No. MLO-981

Information Technology Consulting Services

Commonwealth of Virginia
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Bldg.
First Floor, Suite 1023
Harrisonburg, VA 22807

Dear Sir/Madam:

On behalf of HyperGen Inc., I would like to thank you for the opportunity to present our qualifications for your Request for Proposal No. MLO-981 for Information Technology Consulting Services. As a PeopleSoft Consulting Services and Information Technology industry leader, we offer the functional strength and the technical flexibility to support James Madison University's ("JMU") needs.

Our commitment to your success will be dedicated, transparent and will represent a true partnership. Our team brings rich experience and perspective that will contribute to a smooth and efficient implementation and will deliver the quality customer service that our reputation is built upon. HyperGen's team of Technology Professionals are uniquely positioned to reduce costs and meet JMU's needs and requirements based upon the following:

- ***Dedicated Resource*** – We have been providing IT Services and Solutions to clients nationwide for 25 years. We have a proven track record of providing Onshore Remote and Onsite Consulting Services to clients and bring a depth of expertise and strategy to successfully utilize PeopleSoft projects and support.
- ***Swift Response*** – JMU will be provided a single point of contact for account management who is ready to assist and available to rapidly respond to JMU's service needs.
- ***Harmonious Staffing*** – With our team approach to PeopleSoft Consulting Services, our clients receive tailored support regardless of the project workload. We are equipped with the necessary resources to seamlessly add or reduce staff based upon client demands, relieving the stress and worry of onboarding of resources or facilities requirements.
- ***Balanced Mentoring*** – Our PeopleSoft experts become an extension of your staff and can have access to our wealth of Onshore Remote Services Lab resources. These tools allow them to provide knowledgeable mentoring and assist with troubleshooting all aspects of our clients' PeopleSoft and related business systems.
- ***Advanced PeopleSoft Expertise*** – Our team of experts possess a wealth of knowledge in the field of PeopleSoft and each have successfully completed our comprehensive and stringent proprietary PeopleSoft Training Course.
- ***Centralized Resources*** – Unlike many of our competitors, our team of U.S. Based Onshore Remote PeopleSoft Support Experts work in our corporate office, as opposed to being dispersed at home

locations or other facilities. This is crucial to cultivating our team of rapid knowledge growth experts. Through constant communication, our cohesive team works together to leverage each other's skills and ensures clients do not experience unnecessary support lags when one team member is unavailable.

- ***Innovative and Proprietary Tools*** – Our firm has resources dedicated to the development of software tools for the sole use of our Onshore Remote Services Team to streamline projects for our clients. Software solutions such as our HG Upgrade Toolkit and HG DataMapper are outstanding examples of applications that will significantly reduce the costs and time associated with upgrades and implementations. Additionally, our staff maintains a database of proven project solutions and routinely use previously developed solutions whenever possible for rapid deployment of issue resolutions or enhancements.
- ***Managed Services*** – Updates and maintenance to keep software current, ongoing support for interfaces, security, performance management, business improvements and application monitoring.
- ***Hosting & Hardware*** – HyperGen's Enterprise Cloud Hosting Environment is inside of a data-center with multi-redundant power/internet and cooling infrastructure. Our team's dedication to hardware maintenance and upgrades coupled with our PeopleSoft support team working directly with our infrastructure support team makes HyperGen the perfect consulting team for JMU.
- ***Reducing Operating Costs*** – By allowing our team to provide the support for JMU, you can eliminate costs of managing resources and associated facilities costs, supplement your staff during special projects, provide coverage when staff leave and provide JMU resources with knowledge mentoring in the latest and greatest technology in the industry!

We are excited to have the opportunity to partner with you and participate in your future success. If I can provide additional information or be of further assistance, please do not hesitate to contact me.

Sincerely,

A handwritten signature in black ink, appearing to read "Sherry Z. Dyer".

Sherry Z. Dyer

Vice President of Sales

Phone: (800) 497-3744 EXT. 350

Fax: (540) 992-6563

Email: dyers@hypergeninc.com

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IV. 1. Corporate Competencies/Experience

Provide detailed corporate competencies/experience serving 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; e. Security and Federation Services; f. Cisco Technologies, Infrastructure Support, and Virtualization; g. Audio Visual Technologies; h. NEC Voice and Collaboration Technologies; i. VoIP and Unified Communications; j. Cellular and RF Technologies; k. Distributed Antenna Systems; and l. Other Technology & Systems.

b. Oracle/PeopleSoft Enterprise Solutions

HyperGen is an Oracle Gold Partner firm providing technology-driven IT Services and Solutions nationwide for 25 years. We offer consultants skilled in Enterprise Resource Planning (ERP) Software Solutions such as Oracle and PeopleSoft Human Capital Management, Financials, Manufacturing, Supply Chain Distribution, Customer Relationship Management, Campus Solutions and related modules.

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

PeopleSoft Services

PeopleSoft Project Management

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

PeopleSoft Functional Consultancy

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

IV. 1. Corporate Competencies/Experience (Continued)

b. Oracle/PeopleSoft Enterprise Solutions (Continued)

PeopleSoft Services (Continued)

PeopleSoft Technical Consultancy

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

PeopleSoft Upgrade Consultancy

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

Systems Integration

HyperGen offers Systems Integration Services, which assist clients in trying to gather disparate systems and maximizes their corporate investment in the Information Technology applications. We have performed successful integration projects for many of our clients and have a proven track record for unsurpassed integration services.

Data Migration

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

IV. 1. Corporate Competencies/Experience (Continued)

i. VoIP and Unified Communications

VoIP and Unified Communications

- 1) We are a VoIP provider
 - a. We can provide a multitude of VoIP services ranging
 - i. from metered to unmetered phone lines
 - ii. international calling and number
 - iii. DID
 - iv. Faxing Services
 - v. SMS messaging can be enabled on most line types
 - vi. 1-800 numbers
 - b. We provide support and expertise in FreePBX and Asterisk phone systems
 - i. We can provide cloud hosted phone systems
 - ii. On-Premise phone systems
- 2) We have experience in support a multitude of phone systems not limited too
 - a. Allworx
 - b. Alcatel
 - c. TeleVantage
 - d. Avaya
 - e. FreePBX
 - f. Asterisk
- 3) The HyperGen team has a Video Conferencing Systems support and setup Experience
 - a. Life-size video Conferencing solutions
 - b. PoloyCom
 - c. Skype
 - d. WebEx
- 4) Unified Communications Experience.
 - a. The HyperGen team has been tying together video, audio and text based messaging systems into Exchange/Microsoft is for medium-large business for 6 years+

I. Other Technology & Systems

PeopleSoft Hosting Consultancy

HyperGen is uniquely positioned to provide our clients with the necessary hardware and infrastructure needed to assure a robust, scalable and secure PeopleSoft hosting environment for optimal performance of Oracle's PeopleSoft products. HyperGen's Application Platform as a Service makes it easy hosting PeopleSoft in the cloud. Our services provide the complete application platform (server, operating system, user interface, database, backup, network, and disaster recovery) and ongoing patching and maintenance, and software to support your unique configuration of applications. At HyperGen, we realize one size does not fit all, so we offer a variety of services and solutions to provide the level of management you need for your PeopleSoft applications.

IV. 2. Approach and Methodology

Describe approach and methodology to providing IT consulting services to James Madison University. Include how your firm would manage the scope of projects.

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

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

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

IV. 3. Assigned Personnel

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

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

Ms. Sherry Z. Dyer, Account Executive/Primary Contact

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

Please see [Appendix A](#) for Ms. Dyer's complete resume.

Mr. Kyle Gillette, Senior System Administrator

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

Please see [Appendix B](#) for Mr. Gillette's complete resume.

Mr. Ben Ayles, System Administrator

Mr. Ayles has been in the managed services industry for several years. His primary focuses have been on providing helpdesk and hardware troubleshooting for our both our internal needs and customer needs. He has experience servicing customers for clients of various sizes from 3 to 50+ users. Covering a wide range of commercial industries (from law firms to manufacturing). He has built simple desktops to assisting with large complex storage arrays.

Please see [Appendix C](#) for Mr. Ayles' complete resume.

Mr. Erick Kieckhefer, Project Manager

Mr. Kieckhefer is an Information Technology leader with more than eighteen years' experience developing, implementing, and supporting enterprise applications and technology. He offers the unique combination of program & project management experience as well as both technical and functional application expertise. These experiences and skills are coupled with over six years' experience in financial operations with two Fortune 100, industry leading retailers. Mr. Kieckhefer's experiences range from hands-on, detailed work to program & project management.

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

IV. 3. Assigned Personnel (Continued)

Mr. Clifford Smith, HR Functional SME

Highly accomplished PeopleSoft functional implementation and upgrade consultant with strong configuration and technical skills. Proven project participation and leadership through full life cycle implementations and upgrades. Over 20 years of PeopleSoft experience as an analyst, a developer and as a leader. Developed business experience is often relied upon to identify, create and implement ERP strategies necessary to meet overall organizational strategic goals and business needs. Accomplished analytical skills often result in the assignment of 'worse case' projects for troubled business operations and systems requiring automation, reengineering and/or downsizing. Over 20 years of experience working on Oracle platforms resulting in excellent SQL+ data analysis skills to aid teams in troubleshooting test and production errors quickly. Exemplary negotiation and communication skills leading to the development of partnered relationships across the organization.

Ability to analyze and understand situations, opportunities and processes rapidly to manage conflict, create effective solutions and effect change. Adept in translating strategic business needs into practical business functions and processes. Tendency to thrive in dynamic and fluid environments while remaining pragmatic and focused. Effective communicator bridging gaps between managements' expectations/requirements and software delivery across multiple organizations.

Please see [Appendix E](#) for Mr. Smith's complete resume.

Mr. Corey White, Financial Functional SME

Mr. White is versed in ERP, Internet, SCM and e-Procurement solutions. He can provide the following services: project and program management (PMP Certified); financial systems design and management; business development; operations management; e-procurement, SCM & sourcing, functional requirements definition and gap (fit) analysis; proof of concept; conceptual design; application and custom module prototyping and design; methodology development & knowledge capital creation; application development and customization; software/systems integration; documentation; report writing, report distribution strategy, and performance tuning; system strategy and design; training and support; vendor selection; testing strategy; and business process analysis and redesign. He has expertise in multi-national implementations, disparate COA, international statutory requirements, multi-currency, etc.

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

Mr. KJ Rowan, Portal Functional SME

Mr. Rowan is a PeopleSoft Technical Architect/PeopleSoft Administrator/PeopleSoft SQL Server DBA/PeopleSoft Oracle DBA/PeopleSoft Portal Developer, and a PeopleSoft Certified Installer with over 20 years of experience in the Information Technology field. After joining PeopleSoft, he has worked as a Portable Training System Engineer building and providing technical support for various customers on training environments that are shipped to clients. In his role as a PeopleSoft Certified Installer, he has demonstrated a superior knowledge of the PeopleSoft Internet Architecture, which include creating Oracle and SQL Server databases, application servers, batch servers, web servers, and high availability and fail-over solutions for web, application, and batch servers. After leaving PeopleSoft, he has worked in various industries as a PeopleSoft Technical Architect/PeopleSoft Administrator/DBA/Portal

IV. 3. Assigned Personnel (Continued)

Developer/Upgrade Specialist, designing, configuring, upgrading, and providing technical support for various complex environments, to include patching Applications/PeopleTools and troubleshooting errors.

Please see [Appendix G](#) for Mr. Rowan's complete resume.

Mr. AJ Kumar, Campus Solutions Functional SME

Mr. Kumar has over 15+ years of IT as PeopleSoft Functional Lead/Business Analyst, Project Architect for multiple projects and has good higher education experience managing implementations, System Upgrades and Support projects. He has extensive ERP experience in the higher education environment, with over 12+ years' experience implementing PeopleSoft Student Administration/Campus Solutions, HCM and Financial applications. His areas of expertise being in the Campus Solutions (Admissions, Campus Community, Student Financials, Student Records, Academic Advisement and Self Service) and HCM modules (HR, Payroll for NA, Benefits Admin). His successes include a V8.0, v8.9 and v9.0 implementation/upgrades with UT Rio Grande Valley, Houston Community College, Daytona State College, City University of New York, Sheridan College (Canada), Madison Area Technical College (MATC), Capella University, Kaplan University, University of Akron, University of North Dakota and other major colleges and Schools.

Please see [Appendix H](#) for Mr. Kumar's complete resume.

IV. 4. Continuity of Consultants

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

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

IV. 5. Services Available

Describe services available from your firm and/or partners and associated costs. Examples of services that could be included are: 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; and j. Operations metrics.

HyperGen provides Implementation, Development, Project Management, Architecture and Design, Capacity Planning, Installation and Configuration, Performance and Scalability, Conversion, Monitoring, Administration, Upgrades and Operations metrics services to all of our clients. In addition to these services, HyperGen also provides Onshore Remote PeopleSoft Consulting Services and Solutions nationwide, which includes but is not limited to the following services:

- PeopleTools Upgrades*
- PeopleSoft Application Upgrades*
- Implementations/Data Conversion*
- Applying Tax Updates, Patches, Fixes & Bundles*
- PeopleSoft Update Manager (PUM) for 9.2 clients*
- PeopleSoft Administration*

PeopleSoft Development

- | | | |
|-----------------------|-----------------------|----------------------|
| • Fields | • Mass Change | • EDI |
| • Records | • Application Engine | • SQR |
| • Pages | • Application Package | • COBOL |
| • Components | • Web Services | • XML Publisher |
| • Component Interface | • Integration Broker | • Crystal Reports |
| • Menus | • Workflow | • PS Query |
| • PeopleCode | • Approvals Workflow | • Business Interlink |

Other Development

- | | | |
|--|--------------|-----------------|
| • Java | • VB.Net | • JavaScript |
| • C++ | • HTML/HTML5 | • MS SharePoint |
| • C# | • CSS | • ASP.NET |
| • PeopleSoft Interfaces to External Systems | | |
| • Technical Support to Client Staff for Production Support | | |

Technical Analysis

- Technical Business Process Design
- Requirements Gathering
- Specifications Development
- Technical Configuration and Setup
- System/Application Architect
- Test Plan/Script/Case development and execution (PTFs)
- Advanced Troubleshooting¹

IV. 5. Services Available (Continued)

Onshore Remote On-Demand Hourly Rates

The below On-Demand Hourly Rates are for administration/development tasks only, which are listed above. Additional services are available and may be offered at an alternate rate than what is proposed in the On-Demand Hourly Software Support Rate section below. Please contact your Account Executive for alternate rate information. Services shown above with an asterisk (*) may require minimal client-side assistance.

Services will be billed according to the Resource Type and Hourly Rate structure below.

HyperGen assigns Resource Types based on the level of support required to support a service request. In the event of a resource availability issue, or at the request of the client, a higher-level Resource Type may be utilized to support a service request.

Resource Type	Hourly Rate
Developer	\$115 per hour
Technical Lead	\$135 per hour
Remote Services Manager / Sr. Consultant	\$155 per hour

¹Reactive support for upgrades, training, and training materials are not available through our On-Demand plan. Please contact your Account Executive for additional options.

Onshore Remote Bulk Hour Purchase Option

Additional services are available yet may be offered at an alternate rate than what is proposed in the Bulk Purchase Hours Rate section below. Services shown above with an asterisk (*) may require minimal client-side assistance.

Our Bulk Purchase plan allows clients the option of receiving up-front discounts for Onshore Remote Technical Services with the flexibility to utilize the hours purchased at any time within a 12-month period. A minimum purchase of 500 hours is required in order to take advantage of HyperGen's discounted Bulk Purchase Hour Software Support. HyperGen offers several Bulk Purchase Hour Support packages. Each 500-hour increment receives an hourly discount.¹ Please see table below.

Bulk Hours	Total	Standard Pricing	Savings with Bulk Purchase
500 hours	\$55,000.00	\$57,500.00	\$ 2,500.00
1000 hours	\$105,000.00	\$115,000.00	\$ 10,000.00
1500 hours	\$150,000.00	\$172,500.00	\$ 22,500.00

¹Development tasks listed above may be charged at a multiplier rate based upon the resource utilized. Please see Senior Level Onshore Remote Services section.

HyperGen assigns Resource Types based on the level of support required to support a service request. In the event of a resource availability issue, or at the request of the client, a higher-level Resource Type may be utilized to support a service request.

IV. 5. Services Available (Continued)

Onshore Remote Bulk Hour Purchase Option (Continued)

Senior Level Onshore Remote Services Available:

The following tasks are not part of the development tasks that are included in the Bulk Purchase of hours:

***Remote Service Management**

- Design Architecture
- Planning
- Scheduling
- Resource Management
- Monitoring
- Plan Execution
- Managing overall project(s)

Technical Analysis

- Technical Business Process Design
- Requirements Gathering
- Specifications Development
- System/Application Architect
- Test Plan/Script/Case development and execution (PTF's)
- Technical Configuration and Setup
- Advanced Troubleshooting²

If you utilize any of the above services, they will be deducted from your Bulk Hours according to the multiplier chart as follows:

Resource	Multiplier Rate
Technical Lead	X 1.15 per hour
Remote Services Manager / Sr. Consultant	X 1.25 per hour

¹Reactive support for upgrades, training, and training materials are not available through our Bulk Hours plan. Please contact your Account Executive for additional options.

IV. 6. Training and Documentation

Describe the ability to assist in the development and offering of training and documentation.

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

HyperGen also strives to provide a thorough learning experience for our clients and with all our project assistance will perform Knowledge Mentoring to ensure JMU's staff have the skillset needed to support projects into the future.

IV. 7. Training Options and Associated Costs

Describe training options and associated costs. Include a catalog of training offerings and differentiation between technical staff and end-user training.

HyperGen only provides custom PeopleSoft Functional and related training at this time. Our assistance in this area is performed by our PeopleSoft Functional Team experts who will work with your staff to design a course outline specific to your unique team learning needs. For Off-the-Shelf (OTS) training, we can provide recommendations for JMU based upon the course material requested and this is typically provided through Oracle University or an Oracle Partner firm.

HyperGen does not have a catalog of training offerings.

IV. 8. Recent Projects at Higher Education Institutions

Provide examples of recent projects at Higher Education Institutions comparable to James Madison University. Describe the project, timeframe, end result, etc.

Rhode Island College

Project: Onshore Remote Single Sign-On Consulting Services

Project Description: HyperGen is providing Onshore Remote Consulting Services to assist Rhode Island College's team to identify the tasks needed to ensure that they meet TLS v1.2 requirements mandated by CollegeNet so that the Single Sign-On from their MyRIC portal will work flawlessly.

Timeframe: Ongoing/Current

End Result: Since the project is ongoing, we do not have an end result as of yet.

Tufts University

Project: Onshore Remote PeopleSoft Consulting Services

Project Description: HyperGen is providing Onshore Remote PeopleSoft Application Support Services for Tufts University's HR, FSCM, CS and Interaction HUB on an as needed basis.

Timeframe: February 2015 to Present

End Result: HyperGen is continuing to provide Onshore Remote Technical Consultant Services on an as needed basis. Tufts University has continued to renew their bulk hours to receive continued support from our Remote Services Team.

University of Rhode Island

Project: Onshore Remote PeopleSoft Consulting Services

Project Description: Onshore Remote Technical Consulting Services to assist the University of Rhode Island on an as needed basis with their Financial v9.1 to v9.2 Upgrade.

Timeframe: April 2017 to Present

End Result: Since the project is ongoing, we do not have an end result as of yet.

Virginia Community College System

Project: Onsite PeopleSoft Functional SME Consulting Services

Project Description: HyperGen provided an Onsite PeopleSoft Functional SME Consultant to provide the functional systems development methodology in providing functional support for business process analysis, user testing and business process development.

Timeframe: August 2017 to September 2017

End Result: We were able to provide the necessary methodology documentation requested by Virginia Community College System.

IV. 8. Recent Projects at Higher Education Institutions (Continued)

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

- University of VA Medical Center
- Emory University
- Virginia Polytechnic Institute & State University
- Heald College
- Illinois Central University
- Madison Area Technical College
- Soka University
- Akron University
- Michigan State University
- Berkeley College
- Virginia Community College System
- North Carolina State University
- University of North Carolina-Chapel Hill
- New Jersey City University
- Boston College
- Dartmouth Hitchcock Medical College
- Florida State University
- PASSHE Penn State Higher Education System
- Rhode Island College
- University of Rhode Island
- Tufts University
- Virginia Community College System
- Boise University
- UMass HealthAlliance

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

- University of Kansas
- Kansas State University
- University of Missouri
- University of Minnesota
- Indiana University
- University of Connecticut
- University of Iowa
- University of Oklahoma

HyperGen continues to develop services for the Higher-Ed Community and has participated in the PeopleSoft Higher Education User Groups (HEUG) previously as well as the Healthcare Industry Users Group (HIUG).

IV. 9. Knowledge Transfer

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

HyperGen is experienced in retaining and managing key knowledge in our organization resulting in smooth and effective continuation of service over the course of projects with our clients. We have maintained repeat business and relationships with clients for 25 years. Knowledge transfer is critical for the long-term success of any IT project. Through our corporate team approach, our staff meets weekly or more frequently if business needs demand to review and apprise team members of current projects and any related concerns. Through the team approach, our clients will receive their collective knowledge of our team without any impact on their cost estimates. Our IT resource team also maintains a proprietary library of proven project solutions so that our staff can access previous successful project examples to expedite development for current client projects. HyperGen will effectively communicate with your team both through oral and written presentation of the overall project performed and the necessary information needed to ensure your team can maintain any solution going forward.

IV. 10. Project Management Approach

Describe your approach to project management.

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

IV. 11. Functional Staffing Plan

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

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

The functional staffing plan would require sign off prior to kick off of each project.

IV. 12. Functions to be Subcontracted

Describe the functions to be subcontracted and the expertise and credentials required from the subcontractor.

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

V. B. 3. Attachment A: Offeror Data Sheet

ATTACHMENT A

OFFEROR DATA SHEET

TO BE COMPLETED BY OFFEROR

1. QUALIFICATIONS OF OFFEROR: Offerors must have the capability 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 25 Months 3

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 #
Nassau BOCES	9 months	Garden City, NY	Donna Soto / (516) 396-2402
National Geographic Society	9+ years	Washington, DC	James Giordano / (202) 496-3150
Community Transit	9+ years	Everett, WA	Larry Olson / (425) 438-6421
Fresenius Medical Care	10+ years	Nashville, TN	Joe Wallace / (615) 312-1740
Oklahoma Heart Hospital	3+ years	Oklahoma City, OK	Michael Grisser / (405) 971-7269

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

HyperGen Inc., 7810 Carvin Street, Roanoke, VA 24019

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

[] YES [X] NO

IF YES, EXPLAIN:

V. B. 4. Attachment B: Small Business Subcontracting Plan

ATTACHMENT B

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

Offeror Name: HyperGen Inc. **Preparer Name:** Sherry Z. Dyer

Date: November 1, 2017

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

If yes, certification number: 650014 Certification Date: 7/2/2015

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

if yes, certification number: _____ Certification Date: _____

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

If yes, certification number: _____ Certification Date: _____

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

If yes, certification number: _____ Certification Date: _____

Instructions: *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWAMs 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

V. B. 4. Attachment B: Small Business Subcontracting Plan (Continued)

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).

V. B. 4. Attachment B: Small Business Subcontracting Plan (Continued)

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

Procurement Name and Number: Information Technology Consulting Services RFP No. MLO-981

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

November 1, 2017

Date Form Completed

Offeror / Proposer:

HyperGen Inc.

7810 Carvin Street, Roanoke, VA 24019

Sherry Z. Dyer / (800) 497-3744 EXT. 350

Firm

Address

Contact Person/No.

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)
HyperGen Inc. 7810 Carvin Street Roanoke, VA 24019	Sherry Z. Dyer (800) 497-3744 EXT. 350	650014	Onsite PeopleSoft Consulting Services Onshore Remote PeopleSoft Consulting Services Hosting Services Managed Services VoIP and Communications Other Technologies	To be determined	To be determined

V. B. 5. VASCUPP Sales

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

HyperGen has not had any sales during the last twelve months with any VASCUPP Member Institution.

V. B. 6. Proposed Cost/Pricing Schedule

The Offeror shall provide an hourly rate broken down by position type for the proposed services. Provide onsite hourly rate that includes all billables (e.g. travel, lodging, etc.). Include pricing for all other products and services. Specify any associated charge card processing fees, if applicable, to be billed to the University.

b. Oracle/PeopleSoft Enterprise Solutions

1. Oracle/PeopleSoft Campus Solutions v9.2; PeopleTools 8.55.x

Role	Onsite Hourly All-Inclusive Rate
Project Manager	\$180.00
Functional SME	\$170.00
Technical Developer	\$170.00

2. Oracle/PeopleSoft Human Resources v9.2; PeopleTools 8.55.x

Role	Onsite Hourly All-Inclusive Rate
Project Manager	\$170.00
Functional SME	\$165.00
Technical Developer	\$160.00

3. Oracle/PeopleSoft Financial Management v9.2; PeopleTools 8.55.x

Role	Onsite Hourly All-Inclusive Rate
Project Manager	\$170.00
Functional SME	\$170.00
Technical Developer	\$160.00

4. Oracle/PeopleSoft Enterprise Application Portal v9.2; PeopleTools 8.55.x

Role	Onsite Hourly All-Inclusive Rate
Project Manager	\$170.00
Functional SME	\$170.00
Technical Developer	\$160.00

c. Desktop and Mobile Device Management

Role	Onsite Hourly All-Inclusive Rate
Senior System Administrator	\$180.00
System Administrator	\$120.00

d. Microsoft

Role	Onsite Hourly All-Inclusive Rate
Senior System Administrator	\$180.00
System Administrator	\$120.00

g. Audio Visual Technologies

Role	Onsite Hourly All-Inclusive Rate
Senior System Administrator	\$180.00
System Administrator	\$120.00

V. B. 6. Proposed Cost/Pricing Schedule (Continued)

i. VoIP and Unified Communications

Role	Onsite Hourly All-Inclusive Rate
Senior System Administrator	\$180.00
System Administrator	\$120.00

l. Other Technology & Systems

Role	Onsite Hourly All-Inclusive Rate
Senior System Administrator	\$180.00
System Administrator	\$120.00

Appendix A: Ms. Sherry Z. Dyer

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

EXPERIENCE:

HyperGen Inc., Roanoke, Virginia

April 2003 – Present

Chief Executive Officer and Vice President of Sales:

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

June 1993 – Present

Vice President of Sales:

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

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

Marketing Director:

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

- Training of personnel on usage of office equipment including but not limited to:
 - Phone system
 - Fax
 - Copier
 - Corporate Software
- Established legal contractual agreements for non-compete and additional regulations for stipulating the employment and vendor agreements vital to protection of corporate investments.
- Performed all phases of recruiting, interviewing and acquiring talented employees to join HyperGen Inc.
- Researched and negotiated contractual agreements for the establishment of suppliers for business needs such as freight, travel, banking, capital leases, corporate loans, etc.
- Additional areas of expertise include:
 - Customer Service
 - Budgeting
 - Strong Computer Skills
 - Multi-Tasking
 - Customer Relationship Management
 - Personnel Scheduling
 - Facilities Management
 - Project Planning
 - Problem-Solving
 - Managing Aggressive Deadlines
- Assisted in the movement of the home office to a larger business location
- Hire and train new staff members
- Researched and acquired job posting websites to be used by recruiting department

Accounting Manager:

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

Recruiter:

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

Previous Corporate Experience Available upon request.

EDUCATION:

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

PeopleSoft® Technical Professional 1999

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

COMPUTER EXPERIENCE:

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

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

Hardware: IBM PC compatible, Macintosh, DEC/VAX

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

Development Tools: MS ADT, ForeHelp

Databases: MS SQL Server, SQLBase, MS Access Secretary

Submitted on a company fee paid basis

Appendix B: Mr. Kyle Gillette, Senior System Administrator



SUMMARY

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

- Extensive knowledge and experience with windows server and desktop environments: Windows Server 2000-2012r2/ Desktop 95-10
- Ability to integrate existing technologies together to obtain the best return on investment
- Mac/Apple desktop and Server support and management experience
- Knowledge and experience with communication technologies
- Large user management and control experience
- Virtual Environment - maintaining host, virtual servers, virtual appliances
- Working knowledge of Cisco switches
- POE/VOIP/Vlan planning and implementation
- Ability to clearly explain and demonstrate projects, issue resolutions by means of: speech, writing and visual media (graphs, Visio, etc.)
- SharePoint 2003-2013 setup and support
- Linux Desktop and Server support and setup

Overview Skills

LAN, WAN, Cisco GUI, Cisco Switches, All Worx, Datto, Barracuda, SonicWALL, DD-WRT, MS Ex 03-16, SharePoint, SQL, MySQL, Synology, Buffalo Tech, D-Link, 3-Com, EnGenius, LifeSize, Win 95-10, Server 03-12r2, Homeserver, iPhone, Android, Win Phone 8, Blackberry, SAN, WIFI, Optimization, Hyper-V, VMware, MS Office, OpenOffice, Ubuntu, OS X, A/V wiring, A/V Equip, Net/tel wiring, Symantec PGP, LogMeIn, Radmin, Whatsup, Insteon, Hardware Sup, VOIP, Dell Tech, HP Tech, TCP/IP, RealVNC, RDP, Continuum, ConnectWise, Appassure, Symantec A/V, TrendMicro, AVG, DNS, Mesh Networks, Failover, Baremetal, Encoding, Encryption, Wiring, Fiber Optics, Shadow Prot, Synology, AsusTor, WDS, WAP, Bridging, Upgrades, Roll-outs, Imaging, WordPress

Relevant Professional Experience

HyperGen Inc.

VMS Manager/System Administrator

Providing Software as a Service ([SaaS](#)), Platform as a Service ([PaaS](#)) and Infrastructure as a Service ([IaaS](#)) solutions including the equipment used to support operations, including storage, hardware, servers and networking components.

Software as a Service ("SaaS")

- Cloud Based Enterprise Software Applications. The company is currently providing small to mid-sized businesses with Web-based computing solutions utilizing state-of-the-art technology and proprietary applications.

Infrastructure as a Service ("IaaS")

- Hosts hardware, software, servers, storage and other infrastructure components on behalf of its users including system maintenance, backup and resiliency planning.
- Remote Help Desk Ticketing System

Telephony/VoIP

- Voice over IP technologies to provide high quality, flexible and scalable communications services over your broadband Internet connection.

Custom Solutions

- HyperGen experienced IT Technical Development Lab for custom solutions

Clients include:

Senior Net Engineer/IT Consultant Albany, NY/Goode, VA

Premier One IT Solutions

Work with a team to support and manage our client's IT environments and provide project solutions. Some of my roles involve maintaining existing server and backup infrastructures. Mentoring/assisting and training tier one/two technicians. As well as effectively providing remote support for our customers with offices worldwide (US, Mexico, China, Italy and more). Some of my roles and responsibilities are currently:

- Maintain Superior Customer Service and Communications
- Server support from 1 to 15 (physical and virtual)
- Utilize Microsoft services to maximize a client's investment
- Support for Android and Apple Smart phone
- Deployed and Managed new Hyper-V environments (single and multi-host with failover)
- Upgrade existing Hyper-V environments (2008 to 2012r2)
- International Client support
- Continuum NOC utilization
- Manage and Deploy Appassure 4.7.x to Dell Rapid Recovery (6.x.x)
- Support Datto backup appliances
- Support and Implement Sonicwall firewalls
- Support and Implement KeepITSafe DR and None-DR backup solutions
- Manage multiple anti-virus solutions
- In-place upgrades and Migrations
- Cloud Services (secure document sharing/access, Exchange, VOIP)

Technology Consultant Rochester, NY

Info Advantage, Inc.

Worked with top three clients to assess, support and enhance current system practices including video conference, networking and directory integrations. Previous role involved providing all levels of technical support to \$500M client. Not limited to managing support team while maintaining and planning for 40+ office/field locations over two states. Roles and responsibilities included:

- Superior Customer Service
- Multi-site HD Video Conferencing Solutions & SAN Technologies
- Client support from 5 to 500 desktops

- System mapping and configuring
- Support for Blackberry, Android & IP technologies
- Support to mixed platform environments: MAC/Linux/Microsoft
- Maintain virtual server environments containing single or multiple hosts and 30+ virtual servers
- Implementation and management of cutting edge technologies
- Client support
- Client Asset inventory and management (1000+ pieces)
- Cat-5/5E/Telco wiring - running, termination, and management

Education and Training

- SUNY Delhi, Delhi NY – Degree in Information Systems
- A+ Certification
- Network+ Certification
- CSSA: Certified SonicWALL Systems Administrator
- MCSA: Microsoft Certified Systems Administrator
- ACA: Apple Certified Associate
- LCTP: LifeSize Certified Technical Professional
- Have been supporting PC based labs since 1999

Submitted on a company fee paid basis

Appendix C: Mr. Ben Ayles, System Administrator

SUMMARY

Mr. Ayles has been in the managed services industry for several years. His primary focuses have been on providing helpdesk and hardware troubleshooting for our both our internal needs and customer needs. He has experience servicing customers for clients of various sizes from 3 to 50+ users. Covering a wide range of commercial industries (from law firms to manufacturing). He has built simple desktops to assisting with large complex storage arrays. Some of my primary skill sets are as follows:

- High customer communication skills both in-person and remotely
- Wide range of industries and customer types
- Focus on hardware and software integrations
- Vast knowledge in hardware and system building
- Software development and scripting

Overview Skills

Virtualization (VMware and Xen), Linux, Windows, Networking, C#, Java, Server support, WAP, VOIP, VPBX, Desktop/Workstation specking and building, Server Hardware specking and building, customer support, email, monitoring, remote access and support technologies

Relevant Professional Experience

Network Tech

HyperGen, Inc.

Worked with manager to provide and manage network infrastructure. I have been the primary point of contact for several of our largest VMS clients. Providing not only quick response times, but issue resolution as well for the majority of issues. Roles and responsibilities include:

- Implemented SAN and NAS solutions
- Built and virtualized server hosts and installed in colocation datacenter
- Implemented backup solutions for customers
- Act as primary technician for customer break fix needs
- Provide daily monitoring and maintenance tasks

Network Tech

Simplicity Communications

Worked with manager to provide IT solutions to clients. Often having to adapt and learn new technologies that where foreign to me. My primary roles and responsibilities included:

- Installed and supported servers for clients
- Managed client networks
- Built and supported client workstations
- Configured and managed wireless networks for clients

Education and Training

- Virginia Western Community College
 - Engineering Technology (2011-2013)
 - Computer Science & Math (2013-2014)

Submitted on a company fee paid basis

Appendix D: Mr. Erick Kieckhefer, Project Manager



Mr. Kieckhefer is an Information Technology leader with more than eighteen years' experience developing, implementing, and supporting enterprise applications and technology. He offers the unique combination of program & project management experience as well as both technical and functional application expertise. These experiences and skills are coupled with over six years' experience in financial operations with two Fortune 100, industry leading retailers. Mr. Kieckhefer's experiences range from hands-on, detailed work to program & project management.

- Comprehensive experience as Project Manager as well as Functional & Technical Lead on numerous full life-cycle enterprise software implementations and upgrades for both moderate and Fortune 500 sized companies. Familiar with Capability Maturity Model Integration (CMMI) and experienced applying a variety of project management methodologies including Waterfall Methodology, IBM's Rational Unified Process (RUP), PeopleSoft's Compass Methodology, Project Management Institute (PMI)'s methodology, and others. Experience covers every project phase from Initiation through Closing.
- Experience developing project proposals and plans including capital budget requests, Microsoft Project plans, and managing project expenses and budgets. Experienced in assembling enterprise software project teams, assessing resource needs, and hiring & managing project personnel.
- Experience handling communications upstream to Executive and Steering Committees and downstream to Leads, Staff, and Users. This includes reporting status, milestone progress reporting, proposing and evaluating change requests, budget reconciliation and projection reporting, etc.
- Ability to leverage technical skills and management experience to successfully manage large software deployment projects, manage an empowered team, and take on detailed, task level technical work while maintaining engaged control of the overall project.
- Background and skill set includes hands-on and management positions covering corporate accounting, functional consulting for PeopleSoft applications, and PeopleTools technical development.

Core Competencies

PeopleTools v8.54 (*and all prior versions*) including

- | | |
|-----------------------------|--|
| • Change Assistant | • Security Administration |
| • Application Designer | • Portal Registry |
| • PeopleCode & App Packages | • ESS/MSS Development |
| • Application Engine | • Process Scheduler |
| • Component Interface | • Data Mover |
| • Workflow | • Change/Version Control |
| • SQR | • Bus Process Maps, Events, & Activities |

PeopleSoft Human Capital Management v9.2 (*and all prior versions*) including

- Human Resources
- Position Management
- Benefits Administration
- NA Payroll
- Talent Acquisition Manager
- Time & Labor
- Compensation
- Workforce Planning
- eProfile
- eMgr Self Service
- eBenefits
- ePay
- Candidate Gateway
- eDevelopment
- eCompensation
- ESS/MSS

PeopleSoft Financials, Distribution & Manufacturing v9.2 (*and all prior versions*) including

- General Ledger
- Payables
- Purchasing
- Projects
- Receivables
- Billing
- Contracts
- Inventory

PeopleSoft Campus Solutions v9.0

PeopleSoft Enterprise Learning Module (ELM) v9.2

Microsoft Office, Microsoft Access, Microsoft Project

Education

University of Florida, Gainesville, FL Washington & Lee University, Lexington, VA
(MBA) Masters Business Administration (BA) Bachelor of Arts, Economics and Philosophy

Training & Certifications

Project Management Institute

(PMP) Project Management Professional

Oracle, Inc.

Certified Expert – PeopleTools Developer

Certified Expert – PeopleSoft HCM

Certified Expert – PeopleSoft Financial Mgmt.

Professional Experience Detail

Director, Information Technology / Business Systems 2016

National Geographic Society, Washington, DC

The National Geographic Society has been inspiring people to care about the planet since 1888. It is one of the largest nonprofit scientific and educational institutions in the world. Its interests include geography, archaeology and natural science, and the promotion of environmental and historical conservation.

Project Mission: Responsible for supporting all business systems including applications and infrastructure; and managing the staff assigned to deliver this mission's success.

Business Systems in Scope: PeopleSoft HCM v9.2 (HR, T&L, NA Payroll, BenAdmin, AbM, Self Service); PeopleSoft Financials v9.2 (GL, AP, PO, PR, AM, Grants); Hyperion; Workday, variety of smaller business applications; Oracle DB, Linux & Windows OS, and all related and underlying infrastructure.

Erick Kieckhefer Responsibilities & Activities:

- Managed team of twelve managers, analysts, developers, and administrators in supporting all National Geographic business systems. Team members based both onsite and offsite.
- Oversaw all maintenance, development projects, and upgrades involving all business systems and the underlying technical infrastructure including databases, server operating systems, application & web servers, and business applications.
- Managed department budgets, project & delivery plans; handled both upstream communications to executive leadership, and downstream management over the department's team.
- Often participated hands-on in business application development, maintenance, and issues resolution efforts, especially related to PeopleSoft HCM & Financials.
- Lead and hands-on participation in developing the data conversion programs and testing for National Geographic's Workday implementation (moving off PeopleSoft v9.2 to Workday).
- Personally developed programs to create National Geographic's Affordable Care Act: 1094C/1095C XML Filings for the IRS. Programs passed rigorous IRS testing and were approved for production filing use by IRS.
- Worked closely with business user leadership in determining their needs and issue resolutions as related to all business systems.
- Worked with independent auditors and software vendors in completing and answering IT Risk Assessment Audits and Database/Application Licensing Audits.
- Lead and hands-on participation in development, testing, and delivery of a data archiving solution for the retired PeopleSoft HCM and Financials systems.

PeopleSoft HCM Applications Lead 2015
National Geographic Society, Washington, DC

The National Geographic Society has been inspiring people to care about the planet since 1888. It is one of the largest nonprofit scientific and educational institutions in the world. Its interests include geography, archaeology and natural science, and the promotion of environmental and historical conservation.

Project Mission: PeopleSoft Upgrade PeopleSoft HCM v9.1 to HCM v9.2. Post Go-Live
Development Projects & Corporate Transition Implementation.

HCM Applications in Scope: Human Resources, Benefits Administration, NA Payroll, Time & Labor.

Erick Kieckhefer Responsibilities & Activities:

- Serve as PeopleSoft HCM Functional / Technical Lead for the final stages of an HCM v9.1 – 9.2 Upgrade Project.
- Coordinated final SIT and UAT testing stages, resolved testing issues, tracked results.
- Implemented Same Sex Marriage configurations, conducted testing and deployed to Production.
- Implemented configurations for new Company, Business Unit divisions (offshore); handling configuration, testing, data transitions, and deployment to Production.
- Implemented the handling of mass terminations and corporate split; including Terminations w/ Pay, Severance Pay, Employee transitions to new company/business unit within the system. Lead configuration, development, data conversion, and testing and deployment for all that was involved.

- Planned, configured, and executed with the Benefits Dept, Open Enrollment 2016 while factoring in a collection of early separation employees and a large collection of personnel transferring to a new, corporate split, business.

Project Manager 2015**Tampa General Hospital, Tampa FL**

Tampa General Hospital is a level one trauma center, children's medical center and heart transplant center for central Florida as one of the largest hospitals in Florida, Tampa General is licensed for 1,011 beds, and with approximately 7,300 employees, is one of the region's largest employers.

Project Mission: PeopleSoft Upgrade PeopleSoft HCM v9.0 to HCM v9.2. Planning / Assessment – Recast Project Plan – Develop Execution plan for completing Development, Testing & Deployment.

HCM Applications in Scope: Human Resources, Benefits Administration, NA Payroll, Absence Management, MSS, ESS, Time & Labor.

Erick Kieckhefer Responsibilities & Activities:

- Assessed status of inflight Upgrade Project; determined outstanding tasks and required time & resources to complete.
- Updated Project Plan and Resource Plan to reflect findings. Presented recast plans to client leadership for adoption.
- Updated development efforts (RICE Tracker) and re-prioritized outstanding development tasks and resources.
- Worked with Testing and Training/Communications by planning and providing direction towards their respective efforts.

Human Resources & Recruiting Functional/Technical Lead 2015**University of Wisconsin, Madison, WI**

The University of Wisconsin System is primary public university system serving Wisconsin and featuring over 18 campuses and 120,000 plus students. The University of Wisconsin System (UWSA) employs over 75,000 and handles over \$2 billion in annual payroll. UWSA is the largest employer in the state and operates 18 independent and integrated campus institutions across the state.

Project Mission: Planning & Assessment / 12 Week Exercise. Planning & Assessing Project Requirements for a PeopleSoft Upgrade PeopleSoft HRIS v9.0 to HCM v9.2.

HCM Applications in Scope: Human Resources, Benefits Administration, NA Payroll, Absence Management, MSS, ESS, Time & Labor.

Erick Kieckhefer Responsibilities & Activities:

- Establish Current State findings for Human resources and PeopleSoft Recruiting Solutions.
- Conduct Fit/Gap Analysis for current state requirements vs. PeopleSoft HCM v9.2 functionality.
- Develop project plan for PeopleSoft Upgrade HRIS v9.0 to HCM v9.2.

Project Manager & Technical Lead 2013 - 2014**City of Minneapolis, Minneapolis, MN**

The City of Minneapolis is the local municipal government governing Minneapolis, MN. Under its administration are all municipal services including city administration, police, fire, public works, and several independent agencies including the Park Board, Building Commission, and Public Housing.

Project Mission: Upgrade PeopleSoft HCM v8.9 to v9.2 / Upgrade PeopleSoft ELM v9.0 to v9.2 / Upgrade PeopleTools v8.49 to v8.53.10. Retire all legacy customizations, execute full Design Phase with Fit/Gap Analysis, and reconfigure all applications. Work in coordination with parallel project upgrading PeopleSoft Financials v9.0 to v9.2.

HCM Applications in Scope: Human Resources, Benefits Administration, Global Payroll, Absence Management, MSS, ESS, Time & Labor, Enterprise Learning Management

Erick Kieckhefer Responsibilities & Activities:

- Provided full Project Management services including development and composition of the Project Charter, Roles & Responsibilities, Communications Plan, Risk Management Plan & Log, Project Budget, Project Workplan (WBS), Change Control Plan, Development Methodology, and all Status Reporting including Plan vs. Actual Reporting for Project Costs and Project Schedule.
- Developed a Resource Plan, composed an RFP soliciting resources from city vendors, interviewed and hired the external resources required to complete the Project Team.
- Managed project team comprised of eight external resources and ten in-house subject matter experts 100% dedicated to the project. Also oversaw approximately 30 additional in-house resources partially dedicated to the project.
- Report to the City's upgrade Program Steering Committee comprised of director level management from the relevant city departments and also report to the project sponsors comprised of the city's C-Level Executives and the Mayor.
- As of 03/19/2014 this project is wrapping up its Design Phase and preparing to launch the Build Phase in the coming weeks.
- Developed the scope, approach, deliverable artifacts, goals, and process used in executing the project's Design Phase. Based on client desires and requirements, Design Phase was conducted as it would for a new PeopleSoft HCM & ELM implementation; including a full featured requirement gathering and Fit/Gap analysis.
- In addition to project management duties, Erick Kieckhefer handled several hands-on responsibilities including Security Administration; Compare Report & legacy customization analysis and cataloging all RICE items in scope.

Functional & Technical Lead 2013 - 2013**MedStar Health System, Baltimore, MD**

MedStar Health Systems is the leading health services company in the Baltimore, Washington DC area. MedStar owns and operates numerous hospitals, clinics, doctor's offices, and other health services.

Project Mission: Retire Lawson for New Implementation PeopleSoft HCM v9.1, FMS/SCM v9.1, PeopleTools 8.52; Supervise & oversee implementation partner Deloitte.

HCM Applications in Scope:

Human Resources, Benefits Administration, North American Payroll, MSS, ESS, and Time & Labor

Erick Kieckhefer Responsibilities & Activities:

- Managed project team comprised of in-house and consulting resources; seven dedicated resources and eight shared in-house resources.
- Worked closely with and oversaw the work executed by implementation partner Deloitte.
- Coordinated and participated in the composition of Specifications for all Interfaces, Enhancements and Reports including Technical Team walk-throughs.
- Testing Lead coordinating and participating in System, Integration, User Acceptance and Parallel Testing. Ensured the thoroughness in testing script scope, managed the pace and schedule of testing execution, and managed the defect reporting & resolution processes.

Project Manager & Technical Lead 2012 - 2013

Honda America Manufacturing, Marysville, OH

Honda America Manufacturing is an international organization which manufactures auto components and performs final assembly of all Honda cars and motorcycles in the U.S.

Project Mission: Upgrade PeopleSoft HRMS v8.0 to PeopleSoft HCM v9.1 (PeopleTools 8.22 to 8.51) Double Upgrade and merger of PS instances of different database platforms. (HRMS v8.0 DB2 -> HRMS v8.9 DB2 + HRMS v8.9 SQL Server -> HCM v9.1 DB2)

Applications in Scope: Human Resources, Talent Acquisition Management, Candidate Gateway, ePerformance, Benefits Administration, and North American Payroll.

Erick Kieckhefer Responsibilities & Activities:

- Managed project team comprised of in-house, consulting, and offshore resources; eighteen dedicated resources and ten shared in-house resources.
- Directed all project activities and aspects of the upgrade project. Worked with Honda's in-house Project Management in satisfying all internal PMO requirements.
- Directly managed twelve-member Technical Team including Developers, PS Administrator, and DBA. Oversaw and directed activities of Functional Leads.
- Personally performed a significant amount of hands on development and technical administration work. This included the development of dozens of customizations and data conversion programs, as well the execution of several phases of the double upgrade pass.

Technical Lead 2011 - 2012

Boy Scouts of America, Dallas, TX

Boy Scouts of America is an international organization with a National HQ operation and over 225 franchises like Local Councils.

Project Mission: Upgrade PeopleSoft Financials v8.9 to v9.1 (PeopleTools 8.49 to 8.51)

Applications in Scope: General Ledger, Payables, Receivables, Billing

Erick Kieckhefer Responsibilities & Activities:

- Managed development team of in-house, consulting & offshore resources; five dedicated resources and five shared off-shore resources.
- Directed all activities and handled all technical aspects of the upgrade project.
- Joined the project late in the life-cycle due to a rush of project team resignations including the Project Manager, Technical Lead, and two lead developers.
- Hands-on responsibility to handle all development change control, and implement development methodology which was previously non-existent.
- Assumed responsibility of developing several customizations and resolving many issues stemming from testing.
- Lead and hand-on executed the Go-Live deployment activities.

Project Manager / Technical Lead 2010 - 2011

K&L Gates, Inc. Pittsburgh, PA

K&L Gates is an international law firm boasting over a billion dollars in annual revenue.

Project Mission: Upgrade PeopleSoft HCM v8.9 to v9.1 (PeopleTools 8.49 to 8.51)

Applications in Scope: Human Resources, Benefits Administration, Payroll Interface, Talent Acquisition Manager, Candidate Gateway, eBenefits, eProfile, eManager Desktop, eCompensation

Erick Kieckhefer Responsibilities & Activities:

- Managed project team of external, internal & offshore resources; seven dedicated resources and twelve shared resources.
- Directed all activities and handled all technical aspects of the upgrade project.
- Handled the execution of the Initial Upgrade Pass, all Move to Production Upgrade Passes, and the Go-Live deployment. Developed the detailed Go-Live and Abort plan.
- Led and participated in the development phase where over 175 modifications (thousands of objects and code elements) were evaluated and either carried forward, re-developed, or retired.
- Led and participated in all aspects of Change Control and Configuration Changes.
- Led and participated in testing execution and testing support including issue resolution and coordinating Oracle Support.
- Responsible for delivering all project management deliverables as well as handling status reporting project communications, project plan maintenance, and budget variance reporting.

Program Director 2010 - 2010

WellPoint, Inc. Indianapolis, IN

WellPoint, Inc. is the world's largest Health Insurance provider; a multi-billion-dollar organization employing tens of thousands of associates in 14 states.

Program Mission: Manage a portfolio of projects initiated to Develop, Test, and Deploy a collection of custom development requests and individual development requests involving a variety of technologies other than PeopleSoft.

Applications in Scope: PeopleSoft Financials v9.1, PeopleTools v8.51, other development tools.

Erick Kieckhefer Responsibilities & Activities:

- Severed as Director managing all ERP Small System Change Requests (SSRC); Initiatives rated at 3000 Hours and under. Annual portfolio of \$10 million.
- Provide program management for all change and enhancement requests within the company's ERP space covering back office operations ranging from Financials to Human Resources and Payroll.
- Devised strategy and priority for ERP initiatives weighing resource availability, return on investment, risk vs. reward, and policy mandates in establishing goals and target dates.
- Managed budget, project management, hardware and human capital allocations.
- Provided direct management over team of project managers ensuring that all development methodologies, and project management methodologies were followed.
- Provide quality control oversight as well as adherence to Sarbanes-Oxley requirements and industry mandates.

Project Manager **2009 - 2010**

WellPoint, Inc. Indianapolis, IN

WellPoint, Inc. is the world's largest Health Insurance provider; a multi-billion-dollar organization employing tens of thousands of associates in 14 states.

Project Mission: Upgrade PeopleSoft Financials v8.4 to v9.1 (PeopleTools 8.46 to 8.50)

Applications in Scope: General Ledger, Receivables, Billing, Purchasing, Payables, Asset Management, Project Costing

Erick Kieckhefer Responsibilities & Activities:

- Managed all aspects of Functional and Technical Upgrade project for the largest health insurance provider in the world. Production database handles transaction volumes among the highest of any PeopleSoft installation anywhere.
- Managed a dedicated resource team of 5 Team Leads and 12 Staff Members; working with 8 Executive Sponsors, 12 Business Managers, and 22 Business Leads. Also managed external resources from Oracle's Upgrade Lab, and offshore developers provided by Cognizant, Inc.
- Responsible for managing \$2.5 Million budget in acquiring services, hardware upgrades, and additional software licensing necessary to complete the upgrade project.
- Developed all project management tools including Project Plan, Work Breakdown Structure, Project Charter, Communications Plan, Test Plan, Development Methodology, Scorecard Updates, Sponsor & Stakeholder Status Reports, and Financial Impact Tool updates.
- Applied PeopleSoft expertise directing the execution of every aspect of the upgrade project including, Requirements Gathering, Fit/Gap, Compare Report Analysis, Development, Configuration, Testing,

and Deployment. Over saw execution of the PeopleSoft Upgrade process through six Move To Production (MTP) passes as well as Go-Live.

- Designed and configured all aspects of PeopleSoft Security including User Security, Row Level Security, Process Groups, Access Groups, and Query Security.

Project Manager / Functional Lead 2008 - 2009

Atria Senior Living Group, Louisville, KY

Atria Senior Living is one of the nation's leading providers of independent living, assisted living and memory care services. Atria is home to 13,000 residents in 27 states, and served by 8500 employees.

Project Mission: Upgrade PeopleSoft HCM v8.3 to v9.0 (PeopleTools 8.43 to 8.49)

Applications in Scope: Human Resources, Enterprise Learning Module (ELM), eProfile Mgr Desktop, Benefits Administration, eBenefits, NA Payroll, ePay, Talent Acquisition Manager, Candidate Gateway, ESS/MSS, eCompensation, Absence Mgmt.

Erick Kieckhefer Responsibilities & Activities:

- Handled Project Management and Change Management duties for this smaller project, including communications with Executive Committees, Project Plan, establishing team direction, managing Technical Architecture elements and scope, and composing all project management deliverables. Responsible for all project status reporting including budget variance analysis.
- Lead Fit/Gap sessions for end users and user managers covering Enterprise Learning Module, Human Resources, Benefits Administration, eProfile Manager Desktop, ESS and MSS.
- Configured PeopleSoft applications and composed Configuration Workbooks.
- Configured workflow approvals and notifications for Talent Acquisition Manager and Human Resources (ESS/MSS) utilizing both Approval Workflow Engine and 'old school' workflow tools.
- Designed and composed the Functional Specifications and Technical Specifications for customizations required to fill Gaps discovered during Fit/Gap.
- Designed and implemented all aspects of the PeopleSoft Security design including Data Security, User Security, Query Security, Role Based Workflow Security, Primary Permission Lists, Access Groups, Process Groups, and custom Field Level Security.
- Developed numerous application customizations requiring the delivery of a final Technical Specification, successful Unit Test, and Deployment migration to production.
- Worked with users to develop Testing Scripts and managed the users' efforts through Unit Testing, Integration Testing, System Testing, User Acceptance Testing, and Parallel Testing.

Functional Lead 2008 - 2008

Giant Eagle, Pittsburgh, PA

Giant Eagle is a retail grocer & real estate company and is one of the largest, privately owned and family-operated companies in the nation; boasting 8.2 billion in sales and 40,000 associates.

Project Mission: Upgrade PeopleSoft HCM v8.3 to v9.0 and ESS/MSS implementation.

Applications in Scope: Human Resources, eProfile, eProfile Mgr Desktop, Benefits Administration, eBenefits, NA Payroll, ePay, ESS/MSS.

Erick Kieckhefer Responsibilities & Activities:

- Served as Functional Lead for Benefits Administration and eBenefits.
- Directly Lead Fit/Gap Analysis and configuration of the Benefit applications.
- Setup Unit Test Scripts and executed Unit Test and delivery of Benefit Administration modifications in a heavily customized environment.

Functional Lead / Data Conversion Lead 2007 - 2008

Columbia Sportswear, Beaverton, OR

Columbia Sportswear Company is a leading innovator in the global outdoor apparel, footwear, accessories and equipment markets; boasting over 1.5 billion dollars in annual sales.

Project Mission: Upgrade PeopleSoft HCM v8.3 to v9.0 and ESS/MSS implementation.

Applications in Scope: Human Resources, eProfile, eProfile Mgr Desktop, Benefits Administration, eBenefits, NA Payroll, ePay, ESS/MSS.

Erick Kieckhefer Responsibilities & Activities:

- Functioned as Functional Lead for Benefits Administration/eBenefits and Human Resources/eProfile/eMgr Desktop implementation.
- Directly Lead Fit/Gap Analysis and configuration of the applications.
- Data Mapped conversion of all employee data between ADP HR Perspectives and PeopleSoft HCM.
- Developed various modifications to facilitate required functionality and data conversion.
- Designed and configured all User, Data, Process, Field, and Query Security.

Project Manager / Functional Lead 2007 - 2007

MiraCosta College, Oceanside, CA

MiraCosta College is a public California community college serving coastal North San Diego County. The College is administered by the San Diego Public School Board and serves 18,500 students.

Project Mission: Reimplementation PeopleSoft HCM v9.0 retiring v8.1 with TAM/CG implementation.

Applications in Scope: Campus Solutions, Human Resources, eProfile, eProfile Mgr Desktop, Benefits Administration, eBenefits, ESS/MSS, Talent Acquisition Manager, Candidate Gateway.

Erick Kieckhefer Responsibilities & Activities:

- Developed and managed Project Plans and Resources for a Version 8.0 – 9.0 reimplementation / upgrade and an implementation of Talent Acquisition Manager / Candidate Gateway.
- Directly Managed a team of three functional analysts and indirectly a project team of over fifteen committed consultants and other county employees.

- Directly handled communications with Executive Sponsor and Steering Committee; in so doing, developed presentation and communication devices as well as delivered regular status reports and milestone progress reports.
- Functioned as Functional Lead for an upgrade of Benefits and an implementation of Benefits Administration, eBenefits, Talent Acquisition Manager, and Candidate Gateway.
- Led functional team in performing a Fit Gap Analysis, developing a future state set of business processes, and configured the applications for Mira Costa's needs.

Project Manager / Technical Lead 2006 - 2007

Miami Dade County, Miami, FL

Miami Dade County is comprised of Miami, FL and its surrounding county. Miami Dade is home to 2.5 million residents and the Miami Dade government operates an annual budget of 4.5 billion dollars.

Project Mission: Implementation PeopleSoft HCM v8.9.

Applications in Scope: Human Resources, Talent Acquisition Manager, Candidate Gateway, Time & Labor.

Erick Kieckhefer Responsibilities & Activities:

- Managed Project Plans and Resources for a county-wide implementation of the Human Resources, Talent Acquisition Manager, Candidate Gateway, and Time & Labor applications from the PeopleSoft HCM 8.9 Application Suite. Utilized PeopleSoft's Compass Methodology to guide the management of the project.
- Directly Managed a team of eight developers and indirectly a project team of over thirty committed consultants and county employees.
- Directly handled communications with Executive Sponsors and Steering Committee; in so doing, developed presentation and communication devices as well as delivered regular status reports and milestone progress reports.
- Functioned as Technical Lead for a county-wide implementation of the Human Resources, Talent Acquisition Manager, Candidate Gateway, and Time & Labor applications from the PeopleSoft HCM 8.9 Application Suite.
- Led development team in developing dozens of customizations and modifications to what eventually became a much-customized version of PeopleSoft Human Resources, Talent Acquisition Manager/Candidate Gateway and Time & Labor.
- Personally performed a great deal of hands-on development work as well as mentored a development team of mixed experience in developing extensive PeopleCode, Application Package, Application Engine, Application Designer, Interfaces, and SQR customizations.
- Developed Development Standards and Development Procedures for the project which carried on to be the foundation of Miami Dade Technical Support and Development going forward.
- Personally developed and executed the Go-Live/Cutover plan which upgraded seven different legacy subsystems and deployed PeopleSoft 8.9 into Production.

Executive Consultant / Thought Leader 2006 - 2006**Mira Costa College, Oceanside, CA**

Mira Costa College is a public California community college serving coastal North San Diego County. The College is administered by the San Diego Public School Board and serves 18,500 students.

Project Mission: Reimplementation PeopleSoft HCM v9.0 retiring v8.1 with TAM/CG implementation.

Applications in Scope: Campus Solutions, Human Resources, eProfile, eProfile Mgr Desktop, Benefits Administration, eBenefits, ESS/MSS, Talent Acquisition Manager, Candidate Gateway.

Erick Kieckhefer Responsibilities & Activities:

- Performed analysis of technical status of current PeopleSoft 8.0 installation. Developed needs assessment on required PeopleSoft Bundles, Hardware & Network for near future Upgrade and Implementation to Version 9.0/8.9
- Performed analysis of current business processes and functional operation of PeopleSoft 8.0. Devised recommendation on changes required to position Mira Costa College for maximum utilization of near future Upgrade/Implementation of Version 8.9/9.0. recommendations touched on new interfaces with external systems, business process improvements, training needs, and mid-level Benefits Administration/Benefit Fit/Gap analysis.
- Advised and contributed on Request for Proposal being composed for near future Upgrade/Implementation of PeopleSoft 8.9/9.0

Functional Lead 2006 - 2006**Harris County Hospital District, Houston, TX**

The Harris County Hospital District is a governmental entity with taxing authority that owns and operates three hospitals and numerous clinics throughout Harris County (Houston), Texas.

Project Mission: Upgrade PeopleSoft HRMS v8.1 to v8.9 with ESS & MSS implementation.

Applications in Scope: Human Resources, NA Payroll, eProfile, eProfile Mgr Desktop, Benefits Administration, eBenefits, ESS/MSS, Talent Acquisition Manager, Candidate Gateway, eDevelopment, Workforce Rewards & Planning.

Erick Kieckhefer Responsibilities & Activities:

- Led Business Process Review sessions in which Fit/Gap determinations were made, and Future State Business Processes were devised. Participated and led effort to document Solution Models and Configuration Workbooks.
- Evaluated current modifications and worked with users to determine which modifications could be retired with the upgrade and which had to be carried forward.
- Worked with super-users to configure PeopleSoft Applications and execute Unit Testing. Worked with users and team members to develop Integration Test scripts and to execute the Integration Test and User Acceptance Testing.

- Developed Functional Specifications for required customizations and worked with developers in devising Technical Specification for the customizations. This applied to both new customizations and carry forward customizations.
- Configured all Workflow and related Security/Role Assignments for all eApplications (Self Service). Tested and conceived customizations to delivered workflow.
- Led and participated in all aspects of the implementation.

Executive Consultant / Thought Leader 2005 - 2006**Ajilon Finance, Saddlebrook, NJ**

Ajilon Professional Staffing is a leader in temporary and permanent recruitment services with offices all across North America; specializing in management & office support and accounting & finance.

Project Mission: Assist with Year End Closing and Strategic Planning with Road Mapping for IT Dept.

Applications in Scope: Human Resources, North American Payroll

Erick Kieckhefer Responsibilities & Activities:

- Repaired significant Tax Balance inaccuracies which resulted from an un-reconciled conversion during the PeopleSoft implementation from earlier in 2005.
- Developed a custom Application Engine & Component Interface program to apply mass Tax Balance Adjustments. Also developed an SQR which re-calculated and rolled-up all Tax Balance amounts for Quarter-To-Date and Year-To-Date.
- Developed custom Pages and underlying PeopleCode programs to combine EMPLIDs and Tax Balances when an employee moves from one EMPLID to another.
- Balanced and Executed the Canadian Payroll Year-End Closing.

Project Manager / Technical Lead 2004 - 2005**Shands Hospital, University of Florida**

Shands Healthcare System hosts the teaching hospital for the University of Florida in Gainesville, Florida and Jacksonville, Florida; as well as administrating many hospitals in Florida & Georgia.

Project Mission: Upgrade PeopleSoft HRMS v8.1 to v8.8 with Self Service Implementation

Applications in Scope: Human Resources, eRecruiting, eProfile, eProfile Mgr Desktop, ESS, MSS, Benefits Administration, Payroll Interface, Portal Pack, Time & Labor.

Erick Kieckhefer Responsibilities & Activities:

- Lead team of 20 professionals comprised of consultants and in-house personnel. Applied the Project Management Institute (PMI) methodology and managed the project through the Initiating, Planning, Executing, Controlling, and Closing stages. Also utilized elements of PeopleSoft's Compass Methodology to guide the management of the project and drove the Upgrade process with PeopleSoft's Upgrade Assistant.

- Served as a Technical Lead on an upgrade and implementation which added the Shands Jacksonville business to the existing PeopleSoft installation being run by Shands Gainesville and also upgraded the Gainesville installation while implementing Self Service applications organization wide. Developed custom conversion routines, application customizations, and numerous interfaces.
- Configured and ran the Upgrade Assistant and executed the technical upgrade for initial pass and go-live; in conjunction with the Technical Architecture personnel.
- Designed, developed and delivered Time & Labor solution with customizations to handle the Shift Premiums of a collection of extremely varied nursing shift schedules, each with different rates & shift premiums. Customization and configuration involved PeopleSoft & Kronos.

Project Manager / Technical Lead 2003 - 2004**Eckerd Drug, Largo, FL**

Eckerd Drug was an American drug store chain with 2,800 stores in 23 states and a 1.3 billion mail order pharmacy business; the fourth largest drug chain in the U.S.

Project Mission: Upgrade PeopleSoft HRMS v7.5 to v8.8 with Self Service Implementation

Applications in Scope: Human Resources, eRecruiting, eProfile, eProfile Mgr Desktop, ESS, MSS, Benefits Administration, NA Payroll, Portal Pack, Time & Labor.

Erick Kieckhefer Responsibilities & Activities:

- Lead team of 25 professionals comprised of consultants and in-house personnel. Followed the Rational Unified Processes (RUP) methodology and managed the project through the Initiation, Elaboration, Construction, Verification, and Transition stages.
- Supervised and managed the Requirements gathering and Fit/Gap Processes. Hands-on management of the Joint Application Development (JAD) sessions. Functional Spec composition, Technical Spec development, and the construction/retro-fit of 100 modifications and retirement of 180 modifications. Hand-on management of the Upgrade Process including the execution of the Initial Pass, Data Conversions, and Move to Production Passes (MTPs).
- Served as a Sr. Technical Lead. Designed Functional and Technical Specifications, developed and tested numerous modifications; both re-development of upgrade modifications, and modifications new for Version 8.8.

Submitted on a Company Fee Basis

Appendix E: Mr. Clifford Smith, HR Functional SME

Highly accomplished PeopleSoft functional implementation and upgrade consultant with strong configuration and technical skills. Proven project participation and leadership through full life cycle implementations and upgrades. Over 20 years of PeopleSoft experience as an analyst, a developer and as a leader. Developed business experience is often relied upon to identify, create and implement ERP strategies necessary to meet overall organizational strategic goals and business needs. Accomplished analytical skills often result in the assignment of 'worse case' projects for troubled business operations and systems requiring automation, reengineering and/or downsizing. Over 20 years of experience working on Oracle platforms resulting in excellent SQL+ data analysis skills to aid teams in troubleshooting test and production errors quickly. Exemplary negotiation and communication skills leading to the development of partnered relationships across the organization.

Ability to analyze and understand situations, opportunities and processes rapidly to manage conflict, create effective solutions and effect change. Adept in translating strategic business needs into practical business functions and processes. Tendency to thrive in dynamic and fluid environments while remaining pragmatic and focused. Effective communicator bridging gaps between managements' expectations/requirements and software delivery across multiple organizations.

Education: Bachelor of Science in Accounting (BS) • Berry College – Mt. Berry, GA

Certifications: Certified Public Accountant • Current License in Georgia since 1987 (CPA008942)

SOFTWARE KNOWLEDGE

Oracle (PeopleSoft) HCM v9.2 Core HCM, Manager/Employee Self Service, Manager Dashboard & Talent Summary, Talent/Performance Management: (ePerformance, Profile Mgmt., eDevelopment /Enterprise Learning Mgmt., Career Planning & Succession Planning), eCompensation Manager, eProfile Manager, eProfile, Application Workflow Engine (AWE), Benefits Administration, Base Benefits, Position Management, Payroll for NA, TAM; Oracle User Productivity Kit (UPK), PS Financials & HCM Interfaces (i.e. Payroll to General Ledger, A/P to G/L, Requisitions to PO's, Payroll to A/P, etc.); PeopleTools (Security Administration, PeopleCode, Application Designer, Application Engine, Integration Broker, Component Interface); Oracle SQL+, SQR, TOAD, SQL Navigator/Worksheet; MS Office 2010, MS Visio, MS SQL Analyzer, MS Projects, MS Access

PROFESSIONAL EXPERIENCE

Independence Blue Cross (March 2015 - Present)

Senior Functional Consultant/Team Lead

- HCM Lead for HCM v9.2 ePerformance (Performance Mgmt.) Implementation including annual, mid-year, 360, multi-rater and intern reviews and forms.
- Included implementation of Competencies and Profile Management.
- Develop and deploy Career Planning training to cover configuration/setup and self-service use.
- Configure and deploy Succession Planning using key job codes to build plans and plan participants
- Configure and implement Manager Dashboard, Talent Summary, Org Chart Viewer and Profile Mgmt Search and Compare using the Oracle SES (search engine) installed by the HG technical team.

- Conducted and documented CWR (Contingent Worker) Fit/Gap to include future design and business process recommendations utilizing the delivered Person model. Included Manager Self Service transactions to allow managers to submit job changes for their contract/temporary workforce.
- Required configuration of the Approval Workflow Engine (AWE) and the Self-Service Workflow Configurations and Transactions. Also requires configuration of the Direct Reports manager/supervisor functionality to help drive AWE routings and notifications.

General Dynamics (July 2014 - February 2015)

Senior Functional Consultant/Team Lead

- HCM Lead for HCM v9.1 Manager Self Service Implementation
- Same Team Lead and General responsibilities as described below for Shaw Industries
- In addition, extensive analysis, configuration, design and testing of Manager Self Service and Employee Self Service functionality. General Dynamics implemented a distributed and decentralized self-service process that allows for data entry by managers/employees in the field and approvals to drive JOB data and Personal data posting. These processes include eProfile demographic/job data changes.
- Required configuration of the Approval Workflow Engine (AWE) and the Self-Service Workflow Configurations and Transactions. Also requires configuration of the Direct Reports manager/supervisor functionality to help drive AWE routings and notifications.

Fresenius (August 2013-June 2014)

Senior Functional Consultant/Team Lead

- HCM Lead for HCM 8.9-9.2 Upgrade
- Same Team Lead and General responsibilities as described below for Shaw Industries
- In addition, extensive analysis, configuration, design and testing of Manager Self Service and Employee Self Service functionality. Fresenius has a fully distributed and decentralized self-service process that allows for data entry by managers/employees in the field and approvals to drive JOB data and Personal data posting. These processes include Ad Hoc Salary Changes and Group Salary changes through the Group Build functionality.
- Required configuration of the Approval Workflow Engine (AWE) and the Self-Service Workflow Configurations and Transactions. Also requires configuration of the Direct Reports manager/supervisor functionality to help drive AWE routings and notifications.

Shaw Industries (Mar 2013-Aug 2013)

PeopleSoft Functional Team Lead for PeopleSoft 8.8 to 9.1 MP9 Tools 8.52 Upgrade

Fit/Gap, Delta Training, Functional Set-Up of the currently used modules to support 9.1, Test Scripting, and Testing Support.

Team Lead

- Support Project Manager ("PM") with weekly updates on Status and Task completion
- Monitor Functional Teams tasks and report any issues or road blocks that may impede progress of project
- Support PM to keep project on time and ensure milestones are met.
- Ensure that Functional Team Members assigned to the project adhere to documentation standards, file design, and storage methodology.

- Support and Lead Pre- Fit/Gap Preparations, Questionnaires and Presentations
- Lead Fit Gap Sessions that relate to your assigned modules and assist in other areas as needed.
 - Identify and document any set up requirements and functional specifications.
 - Identify Gaps from delivered, not Gaps for followed and discussion on resolution.
 - Review Customizations for return to delivered.
 - Work with Shaw Team to answer open questions from Fit Gap Sessions.
- Complete Fit-Gap Documentation that identifies Gaps from 8.8 to 9.1 that will require an additional set-up or support.
- Provide Fit-Gap documentation to the PM for integration into Fit Gap Book.
- Review Fit-Gap Book once complete prior to customer delivery.
- Lead Fit Gap Review Session.
 - Review Fit-Gap documentation with Shaw Team
 - Update any changes to documentation from feedback.
- Document all Set-Up changes to the Upgraded environment in the designated Set-Up Book using provided standards.
- Develop test plans, and scripts
- Assist Technical Team with Functional input as needed.
- Assist Application Developers with design solutions for application modifications, interfaces and reports.
- Attend Project Status Meetings to review project progress and present risks including issues and constraints that are impeding or may impede project performance.
- Provide recommendations for risk mitigation.
- Document Issues in the Issues Log
- Develop and deliver Delta Training.
- Update Project Status Reports covering all assigned, pending, and current project activities.

General

- Work with team to ensure effective use of PeopleSoft HCM application before and after the upgrade.
- Provide leadership in the development of functional skills in others through active knowledge sharing.
- Perform other functional analyst support duties as needed
- Assist in managing requests from Stakeholders following the Change Management Process.
- Support the PM in the development of Change Request Business Cases. (i.e. define the problem, pros, cons, suggestions, cost/benefit analysis; recommendations)
- Lead in performing configuration changes, testing, training and business process documentation as needed.

Brinks Inc., Dallas, TX (September 2011 – Feb 2012)

PeopleSoft HCM v9.1 implementation analyst/consultant for a full implementation of ePerformance throughout the US inclusive of incentive and performance plans. Responsible for analysis and design documentation, system configuration to include Approval Workflow engine setup and role based security access. Developed configuration guide to leave with users so they know how and why the system was setup the way it was. Developed HR Administrators Guide for HR department. Conducted all FIT/GAP sessions. Created all test scripts and scenarios; setup the test data and conducted the user acceptance

test sessions. Made adjustments to configuration based upon the UAT sessions and developed 9 UPK training courses for all incentive plans and performance reviews (employee and manager training). Currently helping with roll-out activities and training as we go live.

Began Succession Planning analysis; developed high level project plan and a prototype utilizing the 'Jobcode' succession planning roll-up. Developed US succession plan within PeopleSoft and demonstrated the use of the organizational charts and the 9-Box matrix for promotability. Currently developing design documentation and identifying the reporting GAPs. Building jobcode succession plan in production as prototype was approved.

Accuride, East Alton, IL (July 2011 – August 2011)

PeopleSoft HCM v9.1 Upgrade Analyst (Core HCM, Employee Self-Service, Manager Self-Service, Workforce Administration, Profile Mgmt., Performance Mgmt., Labor Administration); Payroll for North America and Base Benefits; Canadian Payroll. Conducted and documented the FIT/GAP analysis for upgrade to v9.1 from v8.9. Conducted the FIT/GAP sessions with the users and delivered the required documentation.

Olin, East Alton, IL (June 2011 – July 2011)

PeopleSoft HCM v9.1 Upgrade Analyst (Core HCM, Employee Self-Service, Manager Self-Service, Workforce Administration, Profile Mgmt., Performance Mgmt., Labor Administration); Payroll for North America and Base Benefits; Canadian Payroll

V9.1 Developed v9.1 User Acceptance Test scripts and user training documentation. Delivered onsite 3-day user training. Supporting go-live activities.

University of North Carolina, Chapel Hill, NC (September 2010 – June 2011)

PeopleSoft HCM v9.1 Implementation Analyst (Core HCM, Employee Self-Service, Manager Self-Service, Workforce Administration, Position Mgmt., Compensation, Profile Mgmt., Performance Mgmt., Faculty Events & Tracking, Labor Administration, Commitment Accounting, Approvals Workflow Engine (AWE), ELM, Training Administration)

V9.1 Conducted FIT/GAP requirements gathering sessions for Core HCM, Employee Self-Service, Manager Self-Service, Workforce Administration, Position Mgmt., Compensation, Profile Mgmt., Performance Mgmt., Faculty Events & Tracking, Labor Administration, Commitment Accounting, Approvals Workflow Engine (AWE) and Training Administration. Conducted HCM v9.1 full system demonstrations highlighting the major differences between version 9.1 and current University business processes. Developed v9.1 FIT/GAP documentation and requirements traceability matrices. Began prototype configuration.

Orrick, Herrington & Sutcliffe, Wheeling, WV (March 2010 – August 2010)

PeopleSoft HCM v9.1 Upgrade Lead and Analyst (Core HCM, Benefits Administration & Payroll for North America, Position Mgmt., Compensation, Profile Mgmt.)

V9.1 Conducted FIT/GAP requirements gathering sessions for Core HCM, Talent Management (Profile Mgmt., ePerformance, Enterprise Learning Mgmt., Career Planning & Succession Planning), Benefits Administration and Payroll for NA. Conducted HCM v9.1 full system demonstration highlighting the major differences between version 9.1 and previous versions. Documented v9.1 enhancements and upgrade challenges particularly revolving around the Profile Mgmt. /Person Model/and eApplications functionality. Developed v9.1 FIT/GAP documentation, developed v9.1 Test Scripts and setup new v9.1 configuration tables. Responsible for leading and conducting user acceptance testing and managing test cycles through each move to production pass into go-live.

Maricopa County Community College District, Tempe, AZ (Feb. 2010 – October 2010)

PeopleSoft HCM v8.9 Performance Management / ePerformance Implementation Lead
PS HCM Competency Management/ePerformance/Profile Management v8.9 implementation. Implementation Lead performing hands on leadership, project direction, configuration and development. Performed FIT/GAP analysis, system design documentation, system configuration and technical specification development. Developed/configured prototype for presentation and user sign-off of design. Responsible for all test cycles and product readiness. Responsible for User Acceptance Test script development and delivery. Supported client through go-live.

Washington County, Maryland (Feb. 2010 – May 2010)

PeopleSoft HCM v8.9 Compensation Module/Salary Planning Implementation Lead
V8.9 Base Compensation implementation including Salary Plans, Grades & Steps, Group Budgets, Group Increases, Wage Progression Rules and Automated Step Increment. Conducted planning and requirements gathering sessions, created design documentation, developed working prototypes, configured necessary base compensation setup tables, developed user training and test guides, conducted user training and documentation review from those guides, aided with job code and position management data conversion development and assisted with go-live and post go-live activities.

Weld County, Colorado, Greeley, CO (Oct. 2008 – March 2010)

PeopleSoft HCM v8.9, v9.0 Implementation/Upgrade Lead, Analyst and Project Manager; Multiple Projects/Modules

V9.0 BenAdmin / eBenefits Implementation Lead/Analyst performing simultaneous work using an agile project implementation methodology. Responsible for full plan design, table configuration, test script development, testing and roll-out (full life cycle project). MSS (Manager Self- Service) and ESS (Employee Self-Service) security design, configuration and implementation. Payroll for NA Integration and Testing. Open Enrollment configuration, testing, rollout and support. August 2009 – January 2010

Responsible for managing a remote application development, upgrade and implementation model for v9.0 Time and Labor. Responsible for daily activities and project resource management. Implemented Enterprise Learning Management for time and labor training enrollment and tracking with the Peoplesoft ELM module. Responsible for payroll to general ledger development, testing, rollout and support. Responsible for ESS and MSS security review, reconfiguration and rollout. February 2009 – March 2010

Single Sign On/MS Active Directory Interface Implementation. Hands on PS Directory Interface configuration and development leadership role interacting with MS Active Directory technical analyst. August 2009

Project Manager/Implementation and Test Lead for PS HCM v8.9 to v9.0 Upgrade; Person Model, Catalog and Profile Mgmt. implementations required to upgrade ePerformance / Competency Mgmt., Security Rebuild, Base Benefits, NA Payroll. Responsible for full project life cycle direction, leadership, change and resource management. February 2009 – July 2009

PS HCM Competency Management/ePerformance/Profile Management v8.9 implementation. Implementation Lead performing hands on leadership, project direction, configuration and development. Performed FIT/GAP analysis, system design documentation, system configuration and technical specification development. Developed/configured prototype for presentation and user sign-off of design. Responsible for all test cycles and product readiness. Responsible for User Acceptance Test script development and delivery. Responsible for UPK online training development, instructor led training and roll-out. Created training through UPK development and roll out to general employee population through intranet access. Manager Direct Reports drill down configuration and security updates. October 2008 – April 2009

State of Florida - FAMU, Tallahassee, FL (May 2008 – Sept. 2008)

PeopleSoft Financials v9.0 Upgrade Security Analyst

PS Financials v9.0 upgrade security analyst creating new roles and permissions along with ensuring the inclusion of new version 9.0 components and pages within prescribed roles and profiles. Complete assessment of current security setup, reconfiguration of all user roles and permissions to a standard naming convention, reassignment of cloned delivered permissions and roles to user profiles. Performed security configuration and financial transaction process testing prior to user acceptance testing. Created new MS Excel security matrices for the client to ensure easier ongoing management of the security setup. Modules upgraded, tested and matrices developed include: eProcurement/Purchasing, Accounts Payable, Travel & Expense (T&E), General Ledger / Commitment Control, Contracts & Grants Mgmt. and Project Costing.

State of Georgia (Anteo Group Consulting), Atlanta, GA (Nov. 2007 – May 2008)

PeopleSoft HCM v8.9 ePerformance Implementation Lead

PS HCM v8.9 implementation lead for full life cycle ePerformance implementation and Competency Mgmt. integration; 20,000 employees across 7 agencies. Created/developed analysis & design documentation; performed prototype configuration, performed full configuration of job profile, competency management and performance management tables (I.e. Template definitions, section definitions, job profile responsibilities, behaviors and competencies configured integration with performance management document create to group build proxies to template definitions to rating models, etc.). Developed and executed test scripts and aided with facilitation of 4 days of UAT. Project liaison between the functional and technical teams. Supported production cutover and go-live April 28th.

State of Florida - FAMU, Tallahassee, FL (Oct. 2007 – Nov. 2007)

PeopleSoft Financials/Student Admin. Security Analyst

PS Financials v8.9 and Student Admin v8.0 security analyst performing a full security audit and reconfiguration, where necessary, of current security setup. Aided FAMU in passing their next state Audit General's audit through implementing my audit findings and recommendations. Redesigned correction mode and super user access. Updated PS Security roles with the proper permissions, components and pages access to ensure quality internal control over university assets and financial transactions. Developed security audit queries for weekly 'database changes' audit reviews.

BCD Travel, LLC, Atlanta, GA (December, 2006 to August, 2007)

PeopleSoft Project Director

PS Financials v8.9 production support of Purchasing / Accounts Payable / Travel & Expenses / General Ledger. PeopleSoft director over 10-member development team completing full-life cycle global implementations of PS CRM Support/Help Desk v8.9 across Mexico/Latin America and Germany. First release pilot within Germany IT organization. Completed User Acceptance testing UK/Ireland with expected implementation to occur within the next 60 days. Concurrently lead same team through a PS Enterprise Portal v9.0 global implementation in Canada, US and South America. Currently implementing same portal with country unique customizations across Europe. Responsible for creating/registering pagelets, content load and portal object configuration. Developed analysis and design documentation. Directed development and testing activities. Aided with architectural design and WEB security considerations. Utilized PeopleSoft's LDAP dynamic role integration with MS Active Directory as an integral component to the global security issues. Directed resources and participated through all project life cycles using a blend of waterfall and agile project methodologies.

ING Financial Corporation, Atlanta, GA (October, 2006 to December, 2006)

PeopleSoft HCM Analyst

Aided with the design of PeopleSoft HCM v8.8 to MS Tivoli LDAP authentication. Developed integrated reporting and user interface processes utilizing demographic and transactional HR data along with system access data subscribed from Tivoli. The interface allows ING to centrally secure applications through an integrated and automated SOX audit process. Worked closely with IBM consulting (hardware vendor) and ING ensuring all of ING North America was included in the security audit integration. Worked closely with off-shore development resources during construction and test phases necessary to implement various PS solutions. Edited and clarified design documentation along with IBM and ING teams, facilitated user sign-off, wrote test cases/scripts while developing and unit testing the PeopleSoft solutions with offshore resources.

Lexington-Fayette County, Lexington, KY (September, 2006)

PeopleSoft HCM Benefits Administration/eBenefits Implementation Lead

Responsible for PeopleSoft v8.9 FIT/GAP of HCM eBenefits/Benefits Administration for public sector. Facilitated, lead and documented FIT/GAP reviews with City of Lexington and County officials. Completed FIT/GAP analysis with over 200 requirements within 4 weeks for HCM, Benefits Administration, eBenefits and Training.

Markel / Essex Insurance Corporation, Richmond, VA (August, 2006)

PeopleSoft HCM v8.9 ePerformance Product Expert

PeopleSoft HCM v8.9 ePerformance product expert performing analysis, pilot, design and configuration phases of an ePerformance implementation on PeopleSoft v8.8. Phases consisted of documenting Markel's annual performance review business requirements and processes; building and configuring ePerformance foundation tables (i.e. section definitions, template types, template definitions, group build, etc.), document creation of supervisory and non-supervisory ePerformance forms, creation of routing and approval rules/process and conducting pilot presentation showing that v8.9 functionality is a FIT for Markel / Essex. Wrote configuration procedures for HRIS and trained same.

American Heart Association, Dallas, TX (October, 2005 to July, 2006)

Project Lead 01/06 – 07/06

Interim HRIS Manager 10/05 – 12/05

Interim HRIS Manager and Project lead for the American Heart Association Headquarters in Dallas, TX.

Responsible for full HCM database integrity, Benefits Administration and staging the bi-weekly PS Payroll Interface. Responsible for directing, managing and participating in daily production support, benefits administration, clearing of payroll errors and ongoing development enhancements to PeopleSoft HCM while managing two HRIS staff analysts. Managed and supported 2006 Open Enrollment through plan design review and base benefits table configuration.

Responsible for the full life cycle implementation of ePerformance. Responsible for driving project issues through to resolution and implementation of the project by 06/30/06. Brought project approach and documentation techniques to the AHA teaching the client how to document and manage large scale PeopleSoft implementations. Created and implemented service level agreements between IT and HR. Responsible for writing design specifications, test cases & scripts and managing execution of test cycles. Responsible for PeopleSoft workflow creation and administration. Facilitated planning sessions, design sessions, communications and issue resolution meetings. Responsible for facilitating and managing the project schedule while also anticipating and solving management / resource / schedule issues. Utilized SQL Analyzer in an Oracle database environment for problem and support analysis. Responsible for the planning and analysis phases of an eRecruit project. Phases consist of vendor analysis, selection and integration with AHA's system's strategy. Phase deliverables due 6/30/06.

AGL Resources - Atlanta, GA (February, 2001 to October, 2005)

CPA, Management Consultant

Serving in many capacities from project direction and management to roll up the shirt sleeves design, analysis, coding, implementation and training. Providing management, strategic, technology and business process consulting services to a public utility holding company.

PeopleSoft Benefits Administration & Pension Process Re-engineering

Project Manager over the consolidation of two benefit positions into one Jr. Benefits Analyst position. Automated and re-engineered the benefit processes between PS Base Benefits, the Web enrollment provider, the insurance carriers and other external third parties. Developed interface design specifications and test cases/scenarios for the PeopleSoft to Pension database interface. Utilized internal resources and one external resource to accomplish full life cycles for both projects. Completed the

analysis and design phases of the project documenting future state processes in MS Visio and reviewing with upper management for agreement on strategy. Completed development and test phases of the project by 9/30. Created the 2006 open enrollment detailed benefit plan design document for both active and retired employees. Converted the plan design into benefit table setup; configuring Benefits Administration (benefit program, plan, rate, cost, event rules, etc.) tables for 2006 Open Enrollment and Event Maintenance processing. Configured and processed PeopleSoft Payroll test cycles and compared benefit's deduction data in MS Access.

PeopleSoft Succession Planning

Implemented and developed executive succession plan for AGL Resources executive management structure. Utilized executive succession strategy to configure and develop reporting from PeopleSoft's succession planning module.

PeopleSoft Acquisition HCM Integration of Training

HR Project Manager responsible for entire training and development integration plan for AGL Resources acquisition of NUI utility. Managed the development of training schedules and communication to newly acquired employees. Managed the administration of facility, classroom and employee booking utilizing PS Training module. Scheduled internal training resources and coordinated efforts with IT for full system integration to occur simultaneously as training came to a close and new systems were turned on for the acquired company.

PeopleSoft Sarbanes - Oxley Review (SOX)

Involved in the full audit and documentation of HR systems and business processes for compliance with Sarbanes - Oxley. Produced MS Visio process/system flowcharts with key risks and controls identified. Produced Key Risks and Control Matrices from the process flowcharts identifying key control methods and types and evidence to substantiate those controls. Produced summary reports for executive management review and approval.

PeopleSoft Implementation of eCompensation Managers Desktop (eApplications) in v8.3

Involved in the full project life-cycle for the implementation of PeopleSoft's eApplication eCompensation Managers Desktop. Developed user-training programs with compensation department users working as a team with the training department staff. Two training plans were developed; the first was instructor lead training allowing each executive and manager the opportunity to attend 'live' training and use the system. The second plan was Web based delivered self-paced training for newly hired managers.

PeopleSoft Upgrade from HRMS v7.5 to v8.3

Involved in the full project life cycle of AGL's PeopleSoft HRMS upgrade to v8.3 from v7.5 with go-live 9/30/02. Co-chair of the HRMS Steering Committee and user project manager. Aided in the planning stage preparing resource work-effort and budget estimates. Developed Human Resources' project plans to be included in the master upgrade project plan. Managed the HR project plan and ensured resources were meeting deliverables. Aided with task development and strategy regarding implementation methodology. Developed 'As-Is' documentation standards and aided with development of test strategies. Managed the user acceptance test process including the users' creation and execution of test scripts. Managed post-go-live issues and resolutions.

Position Management Best Business Practice Review

AGL utilized full position management. Performed a Best Business Practice review to determine if PeopleSoft's full Position Management module implementation was a solid business decision and should it be used going forward with the upgrade to PeopleSoft HRMS v8.3. PeopleSoft Connection and regional user group networking offered many companies to interview and compare with AGL's operation. Developed survey for companies agreeing to participate and documented the results in an Executive Summary. Each company participating was given a copy of the review. Responsible for the upgrade of Position Management once the business decision was made.

Web Enabled Benefits Administration Implementation

Performed consulting services/project management for the outsourcing of benefits Open Enrollment to a Web based provider iBenefits. Aided in the development of design documentation. Worked with developers to code interfaces between iBenefits and PeopleSoft HR/Base Benefits for events triggered in either system. Acted as a business technology liaison between HR and IT. Performed test manager duties by facilitating and performing test script creations and executions. Developed test strategy and documentation standards/quality control. Tests included running PS Payroll to ensure that benefit deductions per PS matched enrollment confirmations per iBenefits. MS Access was used to run full compares for each test payroll. The Web-based benefits enrollment system went live on 11/01/01 for approximately 2,000 employees with only four employee complaints throughout open enrollment. There were no payroll errors reported due to comprehensive test cycles. The project was recognized by upper management as a major success and complete turnaround from the prior year.

Acquisitions

Aided in converting the acquisition of Virginia Natural Gas to PeopleSoft HR and Benefits Administration v7.5 through strategy consulting, analysis, end-user acceptance testing, implementation and post-production support. Facilitated AGL in developing data maintenance procedures to prevent data errors and omissions between PeopleSoft, iBenefits and the insurance carriers.

Production Support and Business Process Re-engineering

Responsibilities initially included cleanup of the Benefits Administration system configuration as it related to Open Enrollment and Event Maintenance. Open enrollment was in error with several hundred 'hung' events. On-going event maintenance would not properly process benefit events due to incorrect rules, plan and rate table configuration. Analyzed the implementation methodology, full table configuration and conversion data to determine what mistakes were made during implementation and conversion to cause current processing errors. Made and implemented recommendations to upper management for correction and cleanup. Provider interfaces were incorrectly implemented and records with the insurance carriers did not properly reflect employee and dependent coverages as reported within PeopleSoft. Corrected and cleared all 'hung' and erroneous BenAdmin events while properly populating setup tables to prevent reoccurrence of errors and omissions. Cleared the BenAdmin Employee Process Status Report to only current BenAdmin events. Trained current staff on management of the BenAdmin Employee Process Status Report in order to keep BenAdmin triggered events current. The cleanup and training of AGL employees was completed within 60 days. Initiated and facilitated a Business Process Review (BPR) team to document and re-engineer, where needed, HR/Benefit Department processes. The process review team concentrated on utilizing PeopleSoft to its fullest for every human resource and benefit

event. HR/Benefit processes were placed into Visio and roles and responsibilities matrices produced for every role within the HR/Benefit organization. The Personnel Action Notice (HR/Benefit event trigger) was re-engineered to diminish and practically eliminate data integrity errors and issues. Eighty percent of the data issues within PS HRMS were caused due to incorrectly completed PAN's or erroneous input to PS HRMS.

Allied Automotive Group - Decatur, GA (July, 2000 to February, 2001)

Senior Technical Analyst/Production and Database Support - Contract

Responsibilities included daily production support and development for Allied's PeopleSoft Financial products, General Ledger, Inventory, Purchasing, Accounts Payable (Procurement) and Asset Management. Supported a Procurement and Accounting Staff of approximately 50 employees across multiple business units, which requires use of Application Engine debug and Oracle SQL Navigator for analysis, data query and data manipulation to test/production databases. Developed Oracle database triggers and stored procedures. Allied relies heavily upon interfaces with distributed mainframe processes. These interfaces must be monitored daily for accurate and complete FTP upload processing into PeopleSoft through the EDI Manager tool. Performed year-end IRS Form 1099 Reporting for the Accounts Payable Department including the upload of external vendor information to be included in the 1099 processing. Trained newly hired staff members to support the daily production environment. Processed necessary database and Asset Management changes to account for Allied's recent corporate reorganization. The reorganization included mass conversions of assets from closed business units to remaining business units. Current support position also includes security administration. Allied is on PeopleSoft v7.50 running in an Oracle 8.0.5 RDBMS running on a COMPAQ ProLiant 5500 server.

RPC, Inc. - Houma, LA (April, 2000 to July, 2000)

Time & Labor/Payroll Implementation Consultant - Contract

Responsibilities included the daily management of the staff of Analysts, Developers and designated business resources on a PeopleSoft v7.50 implementation of HRMS/ Payroll/ Benefits/T&L. Project Manager responsibilities included performing initial project planning activities and leading the client through the Solution Definition (Analysis and Planning) phase of the project life cycle. Planning and analysis (Solution Definition) deliverables completed within first 60 days encompassing project kickoff, development of project plan and approach, performing company assessment interviews to develop current state process model, documentation of current state model, development of high level application flow future state PeopleSoft model, documentation of system change requests and development of analysis cost model and approach. Completed the Solution Definition phase of the project life cycle, responsible for requirements gathering and documentation, facilitation of client/team JAD sessions ensuring module integration, completion of FIT/GAP analysis, development of final detailed future state model, development of project implementation plan and development of final implementation recommendations through deployment. Began Solution Construction phase configuring the Time & Labor/Payroll tables and obtaining sign-off of table values (I.e. TRC's to Earnings Codes) from the client. Implementation size is converting 200 staff and 1,000 hourly employees into a MS SQL Server RDBMS running on a Compaq server.

Cox Enterprises, Inc. - Atlanta, GA (March, 1999 to April, 2000)

Senior Functional/Technical Analyst - Contract

Involved in Cox Enterprise Inc.'s PeopleSoft Benefits Administration full project life-cycle from analysis through Implementation with a 'go-live' date of May 15, 2000. CEI went live with Phase I PeopleSoft HRMS v7.56 in an Oracle 8.0.5 RDBMS running on a Sun4500 server. The Human Resources and Benefits Administration modules were implemented in Phase I while Payroll Interface will be implemented during Phase II for update to ADP Payroll. Performed Phase I functional 'GAP/FIT' analysis duties and documentation. Performed Phase I functional design and documentation through Hunter Group's Interactive Design Process (IDP), same as JAD design sessions. Aided in Future State Model development. Aided in initial table set-up and design with the users. After user sign-off of design, transferred to technical team to aid with the construction cycle including technical specification documentation, SQR programming, PeopleTools and PeopleCode modifications and new object/report creations. Completed the construction / development cycle and technically supported testing and user training. Cox Enterprises went live May 15, 2000.

Pennsylvania Power & Light (PP&L) - Allentown, PA (February, 1999 to March, 1999)

Technical Consultant to PeopleSoft's PSG - Contract

Provided post production COBRA Administration issue resolution and support. Reviewed Benefits and HR tables and data setup to ensure proper relationships. Troubleshoot COBRA Administration's COBOL program PSPCOBRA reviewing error logs and traces from UNIX. Ran test scenarios within benefits in order to trigger events. Used SQL v3.3 for analysis. Aided client ensuring all COBRA event classes were properly working and guidelines for continued production established. PP&L is in production with PeopleSoft's HRMS v7.01 in an Oracle 7.3.3 RDBMS running on an HP570 UNIX Server.

Pepsi Cola General Bottlers, A Whitman Corp. - Chicago, IL (November, 1998 to January, 1999)

Technical Consultant to PeopleSoft's PSG - Contract

Developed General Ledger interface from payroll involving design specification, SQR program modifications to PAYGL01.sqr, unit testing, General Ledger journal generator, edit and post, system parallel testing, and implementation. Developed PeopleSoft G/L to Payroll conversion scripts and populated user tables with necessary data, making the interface functional through the 'Administer GL Interface' menus. Developed custom translate records and maintenance panels to solve multiple business units to a single company design concept (pre-v.7.5). Modified existing code for three custom SQR payroll reports to utilize the new PAYGL01.sqr routine. Migrated code to UNIX server and utilized UNIX log files to debug code errors and track process performance. Pepsi is upgrading from v6.02 to v7.02 in an Oracle8 RDBMS running on an HP570 UNIX server.

COMSYS, Inc. - Rockville, MD (March, 1998 to October, 1998)

Project Manager - HRMS Implementation - Contract

Responsibilities included the daily management of the staff of Analysts, Developers and designated business resources on a PeopleSoft v7.50 implementation of HRMS/ Payroll/ Benefits/T&L. Interfaced to the PeopleSoft Financial modules v7.50 Projects/AP/Billing/GL requiring functional and technical knowledge of both the Financials and HRMS suites. Project management included entire project life cycle from planning through deployment. Planning deliverable completed within first 45 days encompassing project kickoff, development of project plan and approach, performing company assessment interviews

to develop current state process model, documentation of current state model, development of high level application flow future state PeopleSoft model and development of analysis cost model and approach. Completed the analysis phase of the project life cycle; responsible for requirements gathering and documentation, facilitation of client/team JAD sessions ensuring module integration, completion of FIT/GAP analysis, development of final detailed future state model, development of project implementation plan, development of final implementation recommendations and baseline cost model through deployment. Implementation size is converting 1,000 staff and 6,000 Consultants into an Oracle 8 RDBMS running on an HP9000 UNIX server.

Corning, Inc. - Corning, NY (November, 1997 to March, 1998)

Consultant to PeopleSoft's Professional Services Group (PSG) - Contract

Developed one of the first PeopleSoft Payroll to Accounts Payable interfaces. Contracted by PeopleSoft's PSG to work with Arthur Andersen and Corning, Inc. to develop a software modification interfacing payroll deduction to accounts payable automatically after each payroll run, thereby, eliminating manual AP data entry. Directed resources from payroll, accounts payable and IT involving many in the design, construction, testing, and implementation of the interface. Payroll deductions and withholdings were staged to the Accounts Payable system header, line and distrib tables for EDI Inbound Agent utilization of the PeopleSoft EDI Manager tool. Test Accounts Payable Pay Cycles and Accounts Payable Checks were produced to view and validate results during testing. Developed PeopleSoft G/L to Payroll conversion scripts and populated user tables with necessary data, making the interfaces functional. Developed PeopleSoft Payroll to G/L interface implementation plan and considerations. Working knowledge of Lotus Notes was required on this engagement.

Norrell Corporation (Ranstad) - Atlanta, GA (October, 1996 to October, 1997)

Senior Functional Analyst/Development Lead - Contract

Responsibilities included the daily management of the staff of Developers on the second phase of a two-phase PeopleSoft v5.12 HRMS/ Benefits/Payroll/AR/Billing implementation converting 10,000 biweekly and 250,000 weekly employees, into an Oracle7 RDBMS running on an IBM RS/6000 UNIX server. Developed interfaces into the PeopleSoft Financial modules v5.01 AR/Billing/GL. Directed development resources and distributed assignments in conjunction with the project timeline. Performed technical analysis and developed specifications for PeopleSoft Payroll SQR reports, and SQR interfaces into the PeopleSoft Financial GL/AR/Billing systems/modules. Developed unit test specifications for the software development staff. Troubleshoot and provided resolution to database, application, PeopleTools or SQR issues for the PeopleSoft HRMS and Financial development environments. Functioned as an implementation team liaison to the financial user community, ensuring requirements were met throughout the construction and test phases. Was the directing member of the Architectural Development Team making major system design decisions.

Medaphis Corporation - Atlanta, GA (January, 1996 to October, 1996)

Senior Business/Systems Analyst, Human Resources/Payroll Interface, G/L - Contract

Provided PeopleSoft production support services for companywide G/L: P/R. Supported an Accounting Staff of approximately 20 Accountants across six different business units through nine month-end closings. Required use of MS Access, SQL+ and SQR for data query and manipulation to production databases. Developed general ledger interface from payroll reducing a six-man labor intensive interface

to one-man automated interface until re-engineering project could be completed. Functional Liaison for PeopleSoft interface re-engineering effort including data modeling/mapping, table structure creation, process flow analysis, development, testing, and implementation. Assisted with the PeopleSoft 5.1 upgrade ensuring program, table, and functionality migration. Functional Liaison for set-up and migration to PeopleSoft for newly acquired companies.

Self-Employed (March, 1993 to January, 1996)**CPA- Permanent**

Small Business consulting, accounting and tax services, payroll services, invoice processing, systems automation. Service current client base while performing on-site consulting engagements (NationsBank, SunTrust, Fortune Benefits, Keystone Consulting Group). Project Leader for implementation of G/L, A/P, & P/R for Mt. View United Methodist Church (1.5 million in assets). Vendor analysis and implementation consultant to Garner Brothers Construction for full financial cost system automation.

BellSouth Corporation - Atlanta, GA July, 1990 to February, 1993**Staff Manager, Executive Compensation & Benefits - Permanent**

Responsible for control and administration of the equity section (\$8+ billion) of the balance sheet, includes fulfilling SEC reporting requirements and financial statement disclosure. Re-engineered equity section reporting to the SEC Reporting Group. Received special recognition and a bonus for saving man-hours in both departments. Responsible for ongoing administration and accounting of the company wide stock option plan, fulfilling SEC reporting requirements and writing financial statement footnotes. Managed Payroll and Benefits Administration for the officers of BellSouth Corporation and BellSouth Enterprises. Project Manager for software vendor analysis and implementation of SEC Insider Reporting Corporate Management Solutions software. Project Manager for re-engineering company stock option and deferred compensation processing and reporting. Wrote the executive payroll system user procedure manual.

GTE (formerly Contel Corporation) - Atlanta, GA (July, 1987 to May, 1990)**Accounting Manager - Permanent**

Managed a staff responsible for D&B M: Series G/L, A/P, A/R, F/A & P/R. Responsible for upgrade installation, new corporation set-up, report writing, account creation and roll-up, millennium query and report writing. Also, responsible for monthly and quarterly financial statement preparation of consolidated subsidiaries through the use of mainframe and PC based software. Fulfilled SEC and internal analyses reporting requirements. Accounting Project Representative for the design and implementation of the corporate centralized pension payroll system. Project Manager for the stock option and appreciation rights software vendor analysis, software purchase, implementation and training. Hired and managed outside programming consultants along with internal programming staff. Project Manager for the design and implementation of the company-wide Political Action Committee accounting system on D&B M: Series.

NationsBank (formerly C&S Georgia Corporation) - Atlanta, GA (July, 1981 to July, 1987)**Audit Junior/Audit Senior/Audit Manager - Permanent**

Managed professional audit teams on major corporate audits. Responsible for budgeting, managing and reporting to the audit committee of the board of directors. Mentored and trained new auditors.



7810 Carvin Street
Roanoke, VA 24019



Performed major automated systems reviews through transaction flow analysis to isolate weaknesses and improve efficiencies.

Submitted on a Company Fee Basis

Appendix F: Mr. Corey White, Financial Functional SME

Overview

Mr. White is versed in ERP, Internet, SCM and e-Procurement solutions. He can provide the following services: project and program management (PMP Certified); financial systems design and management; business development; operations management; e-procurement, SCM & sourcing, functional requirements definition and gap (fit) analysis; proof of concept; conceptual design; application and custom module prototyping and design; methodology development & knowledge capital creation; application development and customization; software/systems integration; documentation; report writing, report distribution strategy, and performance tuning; system strategy and design; training and support; vendor selection; testing strategy; and business process analysis and redesign. He has expertise in multi-national implementations, disparate COA, international statutory requirements, multi-currency, etc.

Education

Bachelor of Business Administration (Economics) – Georgia State University, 1994

Masters of Business Administration (Finance, e-Commerce) – Georgia State University, 1998

PMI (Project Management Institute)

PMP - Project Management Professional (Certified); # 1244244

Application Skills

PeopleSoft – 3.0, 5.0, 6.0, 7.0, 7.5, 8.0, 8.4, 8.8, 8.9, 9.0, 9.1, & 9.2

PeopleSoft Financial Management Certified:

General Ledger	Asset Management	Accounts Payable	Expenses
Budgets/KK	Purchasing	AR/Billing	Order Management
Reporting (nVision)	Project Costing	EPM (ABM)	PeopleTools

Ariba (e-procurement) – Ariba Certified Engineer; XML/cXML, Tibco/Scheme, Supplier integration

Relevant Experience

(2002 – Present)

02/16 – Present – Crawford & Company

- 9.2 PeopleSoft General Ledger & AM Lead. GL redesign, configuration, and testing for a complex global insurance company. Promoted/role change to manage AM, EX, CM, AP, and Reporting, coupled with GL implementation duties. Reconfiguration, integration, conversion, and testing for AM; successful go-live with AM, AP, EX and CM (phased go-live).

06/15 – 04/16 – Quintiles

- 9.2 PeopleSoft Global Chart of Values (COV) restructuring lead, changing existing COV from a regional model to a global model to increase transparency and eliminate redundancy across the organization, as well as facilitating detailed reporting to tie to the global HFM model.

03/15 – 06/15 – East Kentucky Power Cooperative

- 9.2 PeopleSoft upgrade 9.0 to 9.2; ALM, AM, PC, and GL lead; helped with EX, AP, and PO.

01/15 – 05/15 – University of Louisville

- 9.2 PeopleSoft EX implementation lead. Rapid implementation of base travel and expense to AP with IBs from HR and base workflow (Reviewer for certain EX TYPES, EX Mgr., Hr Super., Prepay Audit, and Reviewer) with email notifications.

08/14 – 01/15 – University of Texas San Antonio

- FMS PeopleSoft Lead for UTSA PS 9.1 (GL, AP, PO, AR/BI, PC, GM, PC, AM, Contracts, EX, ePro, KK). Issue resolution and reduction by 98%. BPR across several areas of FMS. Combo edits re-design/re-build, GL integration.

04/14 – 9/14 – Hartford Healthcare

- Lead GL Functional for PS 9.2 Implementation for a HealthCare client; large hospital group. COA redesign; allocations; consolidations; JGEN creation; nVision; combo edit strategy; multi-ledger.

02/14 – 06/14 – Lahey Hospital System

- Lead GL Functional Resource for COV reporting redesign effort, Healthcare client on PS 9.1. Combo edits redesign, sub-ledger integration changes due to SetId changes.

04/13 – 02/14 – Hilton Hotel Group

- Lead functional resource in global GL rollout of PeopleSoft upgrade from 8.9 to 9.1 PeopleSoft. Responsible for changes in 2k+ allocation steps (consolidation of 5 SetIds to 1); multi-currency, combo edits redesign, et al.

04/12 – 04/13 – University of Texas System

- Program Manager – promoted to run the PMO for the implementation of PeopleSoft Financials and Human Capital Management across 7 campuses in the University of Texas System for 11 FMS modules and 7 HCM modules, as well as Hyperion and EPM/DW.
- Financials PMO Manager for implementation at a major university system, across seven campuses and shared services in PeopleSoft 9.1. Modules include GL, AP, TE, GM, CM, ePro, PO, AM, AR, BI, and KK. Responsible for scope development & management, deliverables management, process & controls.

04/11 – 03/12 – Advent International

- Financials Lead and Solutions Architect for 9.1 PeopleSoft global rollout (COA redesign & statutory report integration), including statutory ledger and reporting configuration; leading design and configuration for complex GL/AM global reporting capability. Lead AM/CM/AP/GL/Reporting resources in global rollout & post go-live redesign from a previous install.

11/10 – 04/11 – Collective Brands

- Financials Lead for GL and Reporting for an 8.8 to 9.1 PeopleSoft upgrade. Responsible for fit/gap & major business process redesign in standardization effort to move platform global in coming years. Reconfigured Consolidations & Equitization processes from Oracle led build due to inefficiencies.

07/10 – 03/11 – Keane Consulting

- Financials Lead for GL, AP, and EX for an 8.4 to 9.1 PeopleSoft engagement. Responsible for de-customization, fit/gap, redesign, and functionality enhancements, as well as testing and change management for go-live effort.

04/10 – 07/10 – Emory University

- Post-production assessment in PeopleSoft AP/EX 9.0. Gauge opportunities for functionality extension and issue resolution in both Accounts Payable and Expenses; business process redesign.

03/10 – 4/10 – Navigant Consulting

- Back fill for go-live process in GL. Took over 9.1 GL go-live preparation and configuration fit/gap for UAT. Configured Revaluation and Translation processes. Led test cycle & issue resolution.

02/10 – 3/10 – Advance America

- Led the testing effort for an AM, GL, & AP 8.45 to 8.49 PeopleTools upgrade. Leading post-production configuration cleanup effort: consolidating combo editing; Interunit capability; tree development; and reporting; disparate TableSet Controls - consolidating.

11/08 – 02/10 – Lorain County Community College

- Led the implementation of PeopleSoft 9.0 GL, AP, PO, AM, AR, EXP, and KK for in higher-ed to create a standard two-year model for all two-year higher-ed public educational institutions in the state of Ohio. Advising in an 8.8 to 9.0 upgrade for university partnered in effort.

07/08 – 10/08 – Berkshire Hathaway

- Led functional portion of upgrade for GL, AP, and AM from 8.4 to 9.0 PeopleSoft. Responsible for all analysis, configuration changes, customization analysis and elimination, and testing related to the upgrade of these modules at a holding company/international conglomerate.

06/08 – Acxiom

- Led business process assessment in PS 8.8 for 9.0 upgrade in PO, AP, AM, & GL. Evaluating COA and ChartField structure, global reporting, integration, and system standardization and consolidation opportunities. Formalized road map for client to implement significant change in process and configuration for greater efficiency and transparency.

01/08 – 05/08 - Calpine Energy

- Led Purchase Accounting/Fresh Start Accounting configuration for a multi-billion-dollar energy company in PeopleSoft 8.9. Realigned COA and ChartField structure to better compartmentalize reporting across the organization. Modified consolidations processes to reduce close schedule.

07/07 – 12/07 – HealthSouth

- Led Quality Assurance over the implementation of PeopleSoft General Ledger 9.0 for a multi-billion-dollar healthcare organization, including all testing in Mercury Quality Center. Testing all functionality related to GL, including reporting, as well as all integrations in to the ledger. Led configuration changes to better serve client business process.

04/07 – 07/07 – United Health Systems

- Led SCM team in implementation of AR, Billing, PO, INV, and OM for PeopleSoft 9.0. Responsible for the fit/gap in Purchasing and detailed design for a \$600M healthcare organization.

02/07 – 04/07 – VNSNY

- Led ChartField redesign strategy for a \$1 billion healthcare organization. Responsible for ChartField analysis and redesign, reporting evaluation and process redesign, and standardization of policies and procedures within the organization on a go forward basis.

12/06 – 02/07 – BCBS

- Restructured GL consolidations and equitization for an Insurance Company in PeopleSoft 8.8 due to a reorganization and several acquisitions. Responsible for design, build, process changes and training. Responsible for Interunit setup and AP Interunit training. nVision training & report design & build.

09/06 – 11/06 – ACE Insurance

- Project Manager over initiation and planning for a Latin America PeopleSoft Financials rollout. Completed the detailed project charter, scoping, WBS, and project plan. Created high level interface design for varying ledger closings monthly with business units. COA strategy for statutory reporting.

04/06 – 09/06 – Corning

- Led the development of global consolidations for a high-tech organization realigning in order to realize \$36M in tax savings through better cash flow opportunities in PeopleSoft 8.9. Leveraging all components of GL, including complex ledger design, multicurrency, equitization, and consolidations. nVision report design and build. Also led an expense management assessment for shared services spend involving all expatriates globally.

01/06 – 03/06 – BevCore

- Led the integration and implementation effort for a new acquisition of a current PeopleSoft customer. Lead the GL & AP scoping, design, configuration, and integration efforts.

07/05 – 12/05 – H&R Block

- Performed post-production reporting analysis and support for a major accounting firm. Served as a lead on reporting restructuring and code block changes for financial reporting and analysis, with over 45k reports monthly. Streamlined the reporting process, creating greater efficiency and accuracy in reporting. All nVision based report development and distribution.

02/05 – 07/05 – Principal Group

- Project/program manager over a General Ledger RFI/RFP process and package selection for a Fortune 250 financial services company. Program planning and detailed project planning for GL, Global Consolidations, and Forecasting. COA redesign. Initial GL design planning.

10/04 – 02/05 – Sterling Commerce

- Analysis of HR to GL integration project for 8.4; assessment for 8.8 upgrade. Performed a postproduction assessment of the General Ledger for a High-Tech firm. Assessed the multi-currency

processing, reporting, intercompany design, data integrity issues, and process design. Saved the company over \$275k/year in outsourced costs through design solution for multiple countries' Statutory reporting requirements.

03/04 – 09/04 – WilTel

- Managed the upgrade of PeopleSoft 8.8 Financials in AP, PO, INV, AR, Billing, GL, AM, Budgets, Projects, & Employee Expenses from 7.53 to 8.8. Responsible for all development, de-customization, and test development for GL, AM, Budgets, & Employee Expenses. AM to PC integration functional responsibilities and testing with PC lead.

04/03 – 03/04 – Drummond Company

- Designed the PeopleSoft General Ledger and Asset Management modules for a multi-national organization. Designed and developed consolidations, multi-currency/multi-book w/AM writing to multiple ledgers for single assets, inflation processing, COA redesign, and 5 SetId configuration.
- Design and configuration of multi-currency processing, including multi-book capability in AM/INV; consolidations/equitization of 76 business units; 5 SetIds across LOB; allocations; application interfaces; and reporting.
- Development of change control procedures, conversion & testing strategies.
- AM to PC integration functional responsibilities and testing with PC lead.

01/03 – 03/03 – Perot Systems

- Developed PeopleSoft 8.18 report distribution strategy for a large high-tech services company.
- Developed SEC reports and internal key financials in new COA structure in nVision, Crystal/Query.
- Performance tuned reports. Developed reporting security plan.

12/02 – Safeco Insurance

- Developed PeopleSoft upgrade and change management strategies for a large insurance company.
- Trained IT in all aspects of nVision reporting: report development, distribution, and performance.

08/02 – 11/02 – Amicore

- Responsible for the design and delivery of the Financials applications in PeopleSoft for Joint Venture between Microsoft, IBM, & Pfizer.
- Designed and Configured Order Management, Billing, Accounts Receivable, General Ledger, and Accounts Payable for PeopleSoft 8.4., including COA redesign and instituting OM processes.
- Responsible for configuration, integration, and reporting to Accounting & Finance.

3/02 – 08/02 – Aliant Energy

- Managed conversions and reconciliation for a PeopleSoft 8.16 Financials implementation for a utility company. The project had 39 modules from SCM, Financials, HR, and EPM running concurrent work streams for go live.
- Managed the conversions for AM, GL, AP, and PC in a project based accounting structure, including strategy and delivery for both conversions and reconciliation for 21 months of financial data and 1.5 million assets for 118 Business Units worldwide.
- Responsible for training of client staff in reconciliation process between legacy and PeopleSoft.

- Responsible for development of key financial reports (internal & external), including over 50 custom drilldowns, and rebuild of the drilldown menu, and custom table design and development.

Idea Integration – PeopleSoft and B2B Practice Leader

2000 – 2002

- Managed global delivery units for PeopleSoft and B2B consulting services.
- Responsible for client satisfaction, managing revenue, business development, staff utilization & planning, strategic and tactical business planning, budgeting, vendor relations, proposal development, knowledge capital creation and management, and financial performance.
- Managed fit/gap technical/functional assessment between custom applications and PeopleSoft 8.15 AR/Billing and AP for a large insurance company. Assessed and documented all functionality inherent in PeopleSoft AR/Billing, and the gaps existing in the current COMPAS system to reconcile if the custom system should be modified to extend to PeopleSoft capabilities or if PeopleSoft should replace the existing system. Assessed technical architecture and implications of implementing PeopleSoft 8.x and the interface capability with the COMPAS system. Created an alternative solutions assessment for interfacing the COMPAS system with PeopleSoft AP.
- Engagement manager, responsible for quality assurance & risk management of a 7.53 to 8.15 SP2 upgrade for PeopleSoft GL and implementation of PS Budgets at a large home improvement retailer. OS390/DB2.
- Engagement Manager creating a Human Capital portal, which integrates e-Procurement systems, including Ariba, Commerce One, Clarus, and Oracle via custom API development, with front office systems of resource augmenters and staffing firms. The portal provides value added business services, including billing and consolidated billing, cash settlement, time and expense, and bi-directional messaging across applications. The portal facilitates the procurement of resources via the web leveraging business' e-procurement applications.
- Provide risk assessment and quality assurance reviews for projects.
- Creation of reusable delivery components for methodology framework in PeopleSoft, CommerceOne, & Ariba for consistent quality in delivery.

KPMG –Senior Manager – Financial Services

1999 – 2000

- Led the integration of the back-office legacy systems to Ariba for a major global financial institution both in 6.1 Scheme and 7.0 Tibco Message Broker. Created new objects in object model through XML to facilitate seamless integration to the back office and Ariba UI. Also extended multiple objects for data capture in the requisition and PO process. Facilitated requirements analysis sessions and design sessions. Developed and tested adapters in both Scheme and Tibco MB. 7.0 experience from July 1 Early Access Release to present. Assessed integration of Taxware with Ariba for Commodity Taxability self-assessment in the US and Canada. Developed architectural design for the proposed Taxware solution. Environment – Unix/Sun Solaris, UDB.
- Project Manager of postproduction support of the engagement accounting for KPMG, LLP globally. Customized modules managed include GL, AP, AR, Billing, PC, and Business Objects.
- Project Manager for the creation of R2i methodology development for solution pathways for Oracle and PeopleSoft in Traction. R2i is the Rapid Return on Investment methodology at KPMG. Created a leveraged approach to seize commonalties across all packages and R2i specific engagements to ensure

reusability across all solutions. The result was a modular approach to implementing that transcended ERP, empowering other solutions (e.g. SCM, CRM, and e-business) to leverage the development efforts seamlessly.

- Collaborated on several major KPMG proposals that were ERP and Financial Systems Architecture specific. Key role in development of the overall content and packaging of the proposals.
- Developed a system test strategy and managed the testing effort for a major global insurance company in their PeopleSoft GL 6.0 to 7.5 upgrade for GL, AP, AR, Billing, and Projects, which included major system modifications. Also developed, managed, and executed the detailed test plan (unit testing through user acceptance testing). DB2.
- Proof of concept analysis for complex banking business model developed by PeopleSoft on the behalf of a major national bank. Integral in the assessment and identification of key areas for improvement, both from a technical and functional perspective in the PeopleSoft model. Identified key business process redesign opportunities outside of the package selection area that impacted the firm. Assessed the back end, downstream reporting databases and potential performance issues related to GAAP report requirements.

Independent Contractor

1998 – 1999

- Managed Reporting Reorganization for one of the largest global telecommunications companies. Managed the reporting process (Design through User Acceptance). Created system test strategy for nVision reporting for all divisions. Developed a report distribution strategy and contingency plan for all divisions.
- Managed the implementation of the PeopleSoft General Ledger 7.5 a large Northeast hospital system. Integration assessment and documentation of current processes.

Deloitte & Touché, LLP

1997 – 1998

- Team lead for financial implementation of the PeopleSoft General Ledger 7.0, for the allocation piece of the project at a major global insurance company. Assisted in the implementation of the PeopleSoft General Ledger module 6.0 and report development and performance tuning for nVision at a major insurance company.
- Responsible for functional and technical support for run-time issues with nVision reporting, report book generation for nVision, and report design, development, and testing for both nVision and budgets.
- Responsible for functional support and design in Asset Management, Accounts Payable, and report design in nVision and Crystal/Query for a large banking institution. Led for report development. Served as team lead for nVision report development and design at a major insurance company. Initiated leadership role to develop reports, test strategy, and test plan for reporting. DB2.

Medaphis Corporation - Regional Financial Analyst

1995 – 1997

- Developed forecasts & budgets - \$34.5 MM. Performed monthly trend analyses for twenty-one separate cost centers. Calculated commissions, margin, comparatives, and conducted statistical analysis. Performed local, division and top-level P&L reporting and analysis. PeopleSoft 3.0.

The industries in which Mr. White has specific experience include financial services, information and communications, public sector, higher-ed, utilities, and health care. His clients include the following:

- Sprint Telecommunications
- State Farm
- Cincinnati Financial
- John Harland Co.
- Mutual of Omaha
- First American Bank
- Drummond Company, Inc.
- Safeco Insurance
- Perot Systems
- Sterling Commerce
- WilTel Communications
- Liquid Medium
- Calpine
- Blue Cross Blue Shield
- United Health Systems
- Calpine
- LCCC/Univ. of Akron
- Navigant Consulting
- Collective Brands, Inc.
- Advent International
- Lahey Health System, Inc.
- Hartford HealthCare Group
- Berkeley College
- EKPC
- Crawford & Company
- Wells Fargo & Company
- Reliance Insurance
- KPMG LLP
- American Express
- Lowe's Companies
- Amicore
- UnitedHealth Group
- Alliant Energy
- Coring, Inc.
- H&R Block
- Principal Financial Group
- ACE Insurance
- HealthSouth
- VNSNY
- Acxiom
- XTRA/Berkshire Hathaway
- Advance America
- Emory University
- Keane, Inc.
- University of Texas System
- Hilton Hotels
- University of Texas, San Antonio
- University of Louisville
- Quintiles

Submitted on a Company Fee Basis

Appendix G: Mr. KJ Rowan, Portal Functional SME

PeopleSoft Certified Technology Consultant, PeopleSoft Admin, Oracle DBA, SQL Server DBA, Upgrade Specialist, Portal Developer

SUMMARY

Mr. Rowan is a PeopleSoft Technical Architect/PeopleSoft Administrator/PeopleSoft SQL Server DBA/PeopleSoft Oracle DBA/PeopleSoft Portal Developer, and a PeopleSoft Certified Installer with over 20 years of experience in the Information Technology field. After joining PeopleSoft, he has worked as a Portable Training System Engineer building and providing technical support for various customers on training environments that are shipped to clients. In his role as a PeopleSoft Certified Installer, he has demonstrated a superior knowledge of the PeopleSoft Internet Architecture, which include creating Oracle and SQL Server databases, application servers, batch servers, web servers, and high availability and fail-over solutions for web, application, and batch servers. After leaving PeopleSoft, he has worked in various industries as a PeopleSoft Technical Architect/PeopleSoft Administrator/DBA/Portal Developer/Upgrade Specialist, designing, configuring, upgrading, and providing technical support for various complex environments, to include patching Applications/PeopleTools and troubleshooting errors.

FUNCTIONAL AND TECHNICAL SUMMARY

PeopleSoft Versions 8.x, 9.x

PeopleTools Versions 8.x, 8.4x, 8.5x

Programming: PeopleTools, Crystal Reports, SQR, Application Designer, Change Assistant, Data Mover, Configuration Manager, Process Scheduler, SQL Query Analyzer, Integration Broker, App Messaging, LDAP, Single Sign-on, Portal

Databases: Oracle 8, 9i, 10G, and 11G, Microsoft SQL Server 2000, 2005, 2008 and 2012

Operating Systems: UNIX (AIX, True 64, HP-UX, Linux, and Sun Solaris), Windows Server 2005/2008

EDUCATION AND TRAINING

B.S., Computer Information Systems candidate, University of Maryland University System, College Park, MD

Professional Training and Certifications

PeopleSoft Certified Technical Consultant

Microsoft Certified Professional

Portal 8.8 Administrator Course

PeopleSoft Administrator Course

PeopleTools 8.40 I/II Courses

Other Relevant Experience

Oracle/Microsoft SQL Server Tools, UNIX Tools

PROFESSIONAL EXPERIENCE**Tech Lead PeopleSoft Admin/DBA - Contra Costa County Health Services, Martinez, CA (4/15 – Present)**

Kerensky served as a Senior PeopleSoft Systems Administrator/DBA creating and configuring **FSCM 9.2/PeopleTools 8.54 SQL Server 2012** environments such as Development, Test, Train, and Production. The various components included were the databases/application servers/batch servers/web servers. He provided extensive knowledge transfer to the client's technical resources to ensure their ability to support all the existing environment configurations. He also wrote technical documentation on how to maintain each component of an environment.

- Installed and configured SQL Server 2012
- Installed and configured Change Assistant in order to apply updates
- Successfully installed and configured Oracle Virtual Box
- Applied PUM image 12 to all the development and production databases
- Created a backup/restore schema for both development and production databases
- Created and configured the production and development Environments
- Performed database and environment refreshes
- Performed post refresh tasks to include post refresh testing and verification.
- Installed and configured all 3rd party applications such as **Tuxedo, WebLogic, JDK, Microsoft Office**
- Setup and configured development and production servers to run nVision.
- Provided production support after go-live
- Continued instructing and training the clients technical team on the PeopleSoft Infrastructure

PeopleSoft Admin/DBA/Portal Developer - Alabama State University, Montgomery, AL (12/12 – 04/15)

Kerensky served as a Senior PeopleSoft Systems Engineer creating and configuring all the **Campus Solutions 9.0/HRMS, FSCM 9.1 and Portal 9.1/11g** environments on **PeopleTools 8.53** such as Demo, Development, Configuration, Test, and Production. The various components included were the databases/application servers/batch servers/web servers. He was instrumental in applying maintenance packs, bundles and patches to each application. He provided extensive knowledge transfer to the client's technical resources to ensure their ability to support all the existing environment configurations. Kerensky also served as the Senior PeopleSoft Portal Architect, designing and integrating the portal 9.1 with the clients PeopleSoft CS 9.0/FSCM 9.1, and the 3rd party applications. He was also instrumental in upgrading the FSCM 9.0 to FSCM 9.1. In addition to upgrading FSCM, he also upgraded the Campus Solution 9.0 environment from PeopleTools 8.50 to 8.53.

- Applied the required for Install/Upgrade patches and fixes to the environments to the CS 9.0
- Successfully completed three test passes for the CS 9.0/PeopleTools 8.53 upgrade in order to isolate any functional and technical issues during the upgrade process.
- Successfully completed the final move to Production CS 9.0/People Tools 8.53 upgrade in a timely manner.
- Instrumental in the installation and configuration of all the Campus Solutions 9.0, FSCM 9.1 and Portal 9.1/11g database instances
- Created a backup/restore schema for all the Campus Solutions 9.0, FSCM 9.1 and Portal 9.1/11g databases
- Refreshed database instances and environments for Campus Solutions 9.0, FSCM 9.1 and Portal 9.1 as needed by the developers

- Proficiently configured Integration Broker and App Messaging between the Campus Solutions 9.0, FSCM 9.1 and Portal 9.1/11g environments in order to synchronize user profiles and roles.
- Provided technical end user support for both the Production and Development environments.
- Applied the necessary Patches, Bundles, and Maintenance Packs to all the Campus Solutions 9.0, FSCM 9.1 and Portal 9.1/11g environments.
- Configured Single Sign-on between all the Campus Solutions 9.0, FSCM 9.1 and Portal 9.1/11g environments.
- Performed initial migration of user profiles and roles from the Campus Solutions 9.0, FSCM 9.1 content provider databases into the Enterprise Portal 9.1 databases.
- Installed and configured all 3rd party applications such as **Tuxedo 10.3, Crystal Reports 2008, WebLogic 10.3, and COBOL compiler.**
- Developed customized Portal Branding Themes for various user groups within the Portal 9.1 environments.
- Developed and created Shortcut Collections and Pagelets for various user groups within the Portal 9.1 environments.
- Developed the security schema within the Portal 9.1 environments for the various user groups.
- Troubleshoot and resolved issues within PIA architecture including Web Server, Tuxedo Application and Server Process Scheduler components.
- Performed and completed the Initial First pass on the FSCM 9.0 upgrade to FSCM 9.1.
- Initiated and completed the First Move to Production for the FSCM 9.0 upgrade to FSCM 9.1.
- Completed the final move to production for the FSCM 9.1 upgrade to FSCM 9.1.

Tech Lead PeopleSoft Admin/DBA/Upgrader - Keeneland, Lexington, KY (05/12 – 12/12)

Kerensky served as a Senior PeopleSoft Upgrade Specialist installing and configuring the various components for upgrading the **HRMS 8.9/Tools 8.49 to HRMS9.1/Tools 8.52 SQL Server 2008** within all the client environment upgrade passes. He provided sound technical knowhow throughout the upgrade process. He successfully completed three test passes in order to isolate any functional and technical issues during the upgrade process, and noted the issues within the upgrade documentation prior to go-live.

- Installed and created the new source HRMS 9.1demo database for the upgrade process.
- Applied the required for Install/Upgrade patches and fixes to the environments.
- Installed and configured Change Assistant for the upgrade process.
- Successfully completed three test passes in order to isolate any functional and technical issues during the upgrade process, and noted the issues within the upgrade documentation.
- Identified customized code, objects and procedures to be performed during the final move to production.
- Successfully completed the final move to Production Application/People Tools upgrade in a timely manner.
- Assisted functional team with development of test plans and scripts, and responded to all technical issues and queries that arose during the integration testing, UAT and deployment.
- Configured and created additional environments to include application servers, Web servers, and Process Scheduler servers.
- Provided sound documentation for all installation, configuration, and procedures performed during the upgrade.

Tech Lead PeopleSoft Admin/DBA/Upgrader - Keeneland, Lexington, KY (10/11 – 05/12)

Kerensky served as a Senior PeopleSoft Upgrade Specialist installing and configuring the various components for upgrading the **FSCM 8.9/Tools 8.49 to FSCM 9.1/Tools 8.52 SQL Server 2008** within all the client environment upgrade passes. He provided sound technical knowhow throughout the upgrade process. He successfully completed three test passes in order to isolate any functional and technical issues during the upgrade process, and noted the issues within the upgrade documentation prior to go-live.

- Installed and created the new source FSCM 9.1demo database for the upgrade process.
- Applied the required for Install/Upgrade patches and fixes to the environments.
- Installed and configured Change Assistant for the upgrade process.
- Successfully completed three test passes in order to isolate any functional and technical issues during the upgrade process, and noted the issues within the upgrade documentation.
- Identified customized code, objects and procedures to be performed during the final move to production.
- Successfully completed the final move to Production Application/People Tools upgrade in a timely manner.
- Assisted functional team with development of test plans and scripts, and responded to all technical issues and queries that arose during the integration testing, UAT and deployment.
- Configured and created additional environments to include application servers, Web servers, and Process Scheduler servers.
- Provided sound documentation for all installation, configuration, and procedures performed during the upgrade.

PeopleSoft Admin/DBA/Portal Developer - Alabama State University, Montgomery, AL (08/09 – 10/11)

Kerensky served as a Senior PeopleSoft Systems Engineer creating and configuring all the **Campus Solutions 9.0, FSCM 9.1 and Portal 9.1/11g** environments on **PeopleTools 8.50** such as Demo, Development, Configuration, Test, and Production. The various components included were the databases/application servers/batch servers/web servers. He was instrumental in applying maintenance packs, bundles and patches to each application. He provided extensive knowledge transfer to the client's technical resources to ensure their ability to support all the existing environment configurations. Kerensky also served as the Senior PeopleSoft Portal Architect, designing and integrating the portal 9.1 with the clients PeopleSoft CS 9.0/FSCM 9.1, and the 3rd party applications. He was also instrumental in upgrading the FSCM 9.1 to FSCM 9.1.

- Instrumental in the installation and configuration of all the Campus Solutions 9.0, FSCM 9.1 and Portal 9.1/11g database instances
- Created a backup/restore schema for all the Campus Solutions 9.0, FSCM 9.1 and Portal 9.1/11g databases
- Refreshed database instances and environments for Campus Solutions 9.0, FSCM 9.1 and Portal 9.1 as needed by the developers
- Proficiently configured Integration Broker and App Messaging between the Campus Solutions 9.0, FSCM 9.1 and Portal 9.1/11g environments in order to synchronize user profiles and roles.
- Provided technical end user support for both the Production and Development environments.
- Applied the necessary Patches, Bundles, and Maintenance Packs to all the Campus Solutions 9.0, FSCM 9.1 and Portal 9.1/11g environments.

- Configured Single Sign-on between all the Campus Solutions 9.0, FSCM 9.1 and Portal 9.1/11g environments.
- Performed initial migration of user profiles and roles from the Campus Solutions 9.0, FSCM 9.1 content provider databases into the Enterprise Portal 9.1 databases.
- Installed and configured all 3rd party applications such as **Tuxedo 10.3, Crystal Reports 2008, WebLogic 10.3, and COBOL compiler.**
- Developed customized Portal Branding Themes for various user groups within the Portal 9.1 environments.
- Developed and created Shortcut Collections and Pagelets for various user groups within the Portal 9.1 environments.
- Developed the security schema within the Portal 9.1 environments for the various user groups.
- Troubleshoot and resolved issues within PIA architecture including Web Server, Tuxedo Application and Server Process Scheduler components.

PeopleSoft Enterprise Portal Assessment - OHIO University, Athens, OH (07/09 – 08/09)

Kerensky served as a PeopleSoft Enterprise Portal Technical subject matter expert. He helped conduct requirement gathering sessions with the designated focus groups to establish the needs of the client. He provided sound documentation outlining the requirements provided, and additional recommendations for a successful portal implementation.

- Assisted in conducting breakout sessions with the various focus groups to gather Portal requirements
- Provided Technical Portal insight in regards to security and portal infrastructure configurations
- Demonstrated the ability to successfully integrate Portal with PeopleSoft Campus Solutions and other third-party applications

PeopleSoft Portal Developer - University of Texas Arlington, Arlington, TX (04/09 – 07/09)

Kerensky served as a PeopleSoft Enterprise Portal Administrator. He configured Integration Broker and App Messaging between the Portal 9.0 and the Development Campus Solutions 9.0 and the CRM 9.0 environments in order to synchronize user profiles and roles. He developed customized Portal Branding Themes for various user groups within the Portal environment. He created a custom Portal and migrated all the portal registries from the EMPLOYEE portal to the custom portal. He imported both the CRM 9.0 and the Campus Solutions portal registries into the Portal 9.0 database to maintain navigation within the portal.

- Instrumental in the installation and configuration of several Enterprise Portal 9.0 instances
- Proficiently configured Integration Broker and App Messaging between the Portal 9.0 and the Development Campus Solutions 9.0 and the CRM 9.0 in order to synchronize user profiles and roles.
- Configured Single Sign-on between the Portal 9.0, the Development Campus Solutions 9.0, and the CRM 9.0 environments.
- Migrated user profiles and roles from the various content provider databases into the Enterprise Portal Prototype database.
- Installed and configured all 3rd party applications such as **Tuxedo 8.1, Crystal Reports 9.0, and WebLogic 8.1.**
- Applied most current patches and bundles for both **PeopleTools 8.49** and Enterprise Portal utilizing **PeopleSoft Change Assistant.**

- Migrated the customized Portal Branding Themes for various user groups within the Portal 8.9 environments into the new Portal 9.0 environments.
- Troubleshoot and resolved issues within PIA architecture including Web Server, Tuxedo Application and Server Process Scheduler components.

Senior PeopleSoft Upgrade Specialist - University of New Orleans, New Orleans, LA (03/09 – 04/09)

Kerensky served as a Senior PeopleSoft Upgrade Specialist assisting the DBA with the FSCM upgrade from FSCM 7.5 to 8.8 to 9.0. He also assisted the DBA and the developers in troubleshooting and isolating performance and discrepancies with their conversion scripts. He provided technical expertise and guidance to the client regarding tuning all of their environments to improve performance.

- Isolated performance bottle-necks within all the Development and Productions environments.
- Worked with the Developers and Tech Lead to troubleshoot performance issues with the conversion scripts.
- Modified and maintained Tuxedo tunable parameters, including server spawning and failover to improve system's performance, fault tolerance and proper statistical analysis.
- Implemented Java tuning parameters within WebLogic web servers to improve system performance.
- Successfully completed the initial upgrade pass for the **FSCM upgrade from FSCM 7.5 to 8.8 to 9.0.**

PeopleSoft Technical Architect - Azusa Pacific University, Azusa, CA (11/08 – 03/09)

Kerensky served as a PeopleSoft Technical Architect utilizing his expertise in resolving both Development and Production environmental issues. He provided technical expertise and guidance to the client regarding tuning all of their environments. Also, with his extensive experience in Integration Broker, he configured and tested both Development and Production Application Messaging to allow seamless integration between applications. He migrated patches and fixes included in Scheduled Bundles in support of all the PeopleSoft Application (CRM 9.0, CS 9.0, FSCM 9.0, Portal 9.0).

- Troubleshoot and resolved issues within PIA architecture including Web Server, Tuxedo Application Server and Process Scheduler components.
- Provided support to integrity and general accessibility of the web server, application servers and process scheduler for all the Development and Production environments.
- Modified and maintained Tuxedo tunable parameters, including server spawning and failover to improve system's performance, fault tolerance and proper statistical analysis.
- Implemented Java tuning parameters within WebLogic web servers to improve system performance.
- Provided technical end user support for both the Production and Development environments.
- Configured Integration Broker and App Messaging between the Campus Solutions 9.0, FSCM 9.0, Portal 9.0, and CRM 9.0/10g environments.
- Applied WebLogic 8.1 sp5 patch level 6 to all the environments in order to comply with PeopleSoft PeopleTools platform standards.
- Applied Tuxedo 8.1 RP 309 to all environments in order to comply with PeopleSoft PeopleTools platform standards.

Senior PeopleSoft System Admin - Norwood Promotional, Indianapolis, IN (02/08 – 07/08)

Kerensky served as a Senior PeopleSoft Systems Administrator mentoring the Junior System Admin. He trained the Junior System Admin in configuring both Development and Production environments. He used

his expertise to troubleshoot and isolate deficiencies within Development and Production. He also assisted in integrating a high availability and fail-over solution for the client's Production environments.

- Assessed the client's overall system requirements and recommended hardware purchases and configurations.
- Troubleshoot and resolved issues within PIA architecture including Web Server, Tuxedo Application and Server Process Scheduler components.
- Isolated performance bottle-necks within all the Development and Productions environments.
- Modified and maintained Tuxedo tunable parameters, including server spawning and failover to improve system's performance, fault tolerance and proper statistical analysis.
- **Applied CRM 8.9** cumulative Maintenance Pack 5 to both Production and all Developmental environments.
- **Applied FSCM 8.8** cumulative Maintenance Pack 5 to both Production and all Developmental environments in preparation for upgrading to FSCM 9.0
- Assisted the DBA in updating existing databases from Oracle 9i to 10g.
- Created new **FSCM 9.0 and CRM 8.9** database instances on Oracle 10g in preparation for the upgrade.
- Applied WebLogic 8.1 SP5 patch level 6 to all the environments in order to comply with PeopleSoft PeopleTools platform standards.
- Applied Tuxedo 8.1 RP 309 environments in order to comply with PeopleSoft PeopleTools platform standards.
- Performed object and code migrations of customizations and fixes for all environments.
- Provided technical end user support for both the Production and Development environments.
- Configured Single Sign-on between the Portal 8.8 environments to both FSCM and CRM.

PeopleSoft System Admin - Wells Fargo Bank, San Francisco, CA (11/06 – 02/08)

Kerensky served as a PeopleSoft Systems Administrator assisting with both Development and Production environment issues. He used his expertise to troubleshoot and isolate deficiencies within Development and Production. He helped design their current complex Load Balanced environment, to include the F5 load-balancer, 3 Web Servers, 3 App Servers, and 3 Process schedulers. He performed object and code migrations of customizations and maintenance patches and fixes for all environments.

- Provided support to integrity, and general accessibility of the web server, application servers and process scheduler for all the Development and Production environments on a 24/7 basis.
- Helped design the current complex Load Balanced environment, to include the F5 load-balancer, 3 Web Servers, 3 App Servers, and 3 Process schedulers.
- Configured Integration Broker and App Messaging between **PeopleSoft CRM 8.8** to the CRM 8.8 Ad hoc environment and PeopleSoft CRM 8.8 to all the 3rd party applications.
- Troubleshoot and resolved issues within PIA architecture including Web Server, Tuxedo Application and Server Process Scheduler components.
- Modified and maintained Tuxedo tunable parameters, including server spawning and failover to improve system's performance, fault tolerance and proper statistical analysis.
- Implemented Java tuning parameters within WebLogic web servers to improve system performance.
- Implemented SSL message integration between PeopleSoft and the 3rd party applications
- Executed phase I of **upgrading** the Development System Integration environments from **PeopleTools 8.45 to PeopleTools 8.48**.

- Performed object and code migrations of customizations and maintenance patches and fixes for all environments.
- During Load-Testing monitored systems performance and benchmark thresholds in an n-tier environment.

Senior PeopleSoft Upgrade Specialist - Medical College of Georgia, Augusta, GA (10/06 – 12/06)

Kerensky served as a Senior PeopleSoft Upgrade Specialist installing and configuring the various components for upgrading the **Tools version from 8.45 to 8.48** within all the client **HRMS 8.9** environments. He provided sound technical knowhow throughout the upgrade process. He successfully completed three test passes in order to isolate any functional and technical issues during the upgrade process, and noted the issues within the upgrade documentation prior to go-live.

- Installed and configured Change Assistant for the upgrade process.
- Successfully completed three test passes in order to isolate any functional and technical issues during the upgrade process, and noted the issues within the upgrade documentation.
- Identified customized code, objects and procedures to be performed during the final move to production.
- Successfully upgraded the Development, Test, and Pre-Production databases and environments.
- Successfully completed the final move to Production People Tools upgrade in a timely manner.
- Assisted functional team with development of test plans and scripts, and responded to all technical issues and queries that arose during the integration testing, UAT and deployment.
- Configured and created additional environments to include application servers, Webserver, and Process Scheduler servers.
- Applied WebLogic 8.1 SP5 patch level 6 to all the environments in order to comply with PeopleSoft PeopleTools platform standards.
- Applied Tuxedo 8.1 RP 309 environments in order to comply with PeopleSoft PeopleTools platform standards.
- Configured and tuned all the upgraded environments to achieve peak performance.
- Downloaded and applied PeopleTools 8.48 patches and fixes to all the environments.
- Provided sound documentation for all installation, configuration, and procedures performed during the PeopleTools upgrade.

PeopleSoft Systems Architect - Kansas State University, Manhattan KS (09/06 – 10/06)

Kerensky provided technical expertise and guidance during the **PeopleTools 8.47** implementation of Integration Broker and Application Messaging integration with the 3rd party application **WebMethods**. He was instrumental in implementing SSL configuration within PeopleSoft for integration with **LDAP**, REX Sever and various 3rd party applications. He integrated PeopleSoft Self-Service with the client's home-grown Learning Management System. He also configured the **LDAP** integration between PeopleSoft and the client's directory server.

- Configured and tuned the **WebLogic 8.1** development Webserver.
- Proficiently configured Integration Broker and App Messaging between PeopleSoft Campus Solutions 8.9 and the client's 3rd party application WebMethods.
- Implemented SSL message integration between PeopleSoft and the 3rd party application WebMethods.
- Integrated PeopleSoft Self-Service with the client's home-grown Learning Management System.

- Configured the security for the PeopleSoft and LMS integration to include creating various permission lists, roles, and user profiles.
- Configured the LDAP integration between PeopleSoft and client's directory server.
- Implemented SSL configuration within PeopleSoft for LDAP integration.
- Instrumental in configuring the REN Server environment with SSL.

PeopleSoft Portal Admin/Developer - Towson University/Salisbury University, Towson/Salisbury, MD (03/06 – 08/06)

Kerensky served as a PeopleSoft Enterprise Portal Administrator. He was instrumental in developing an Enterprise development Portal Prototype that the client could use as a building block for future implementations. He configured Integration Broker and App Messaging between the **Portal 8.9** Prototype and the development **Financials 8.4** and the **Student Admin 8.0** environments in order to synchronize user profiles and roles. He configured Single Sign-on between the Portal Prototype and the development **Financials 8.4** and the **Student Admin 8.0** environments. He developed customized Portal Branding Themes for various user groups within the Portal Prototype environment.

- Instrumental in the installation and configuration of several Enterprise Portal instances
- Proficiently configured Integration Broker and App Messaging between the Portal Prototype, the development Financials 8.4, and the Student Admin 8.0 environments in order to synchronize user profiles and roles.
- Configured Single Sign-on between the Portal Prototype, the development Financials 8.4, and the Student Admin 8.0 environments.
- Migrated user profiles and roles from the various content provider databases into the Enterprise Portal Prototype database.
- Installed and configured all 3rd party applications such as **Tuxedo 8.1**, **Crystal Reports 9.0**, and **WebLogic 8.1**.
- Applied most current patches and bundles for both **PeopleTools 8.47** and Enterprise Portal 8.9 both manually and utilizing PeopleSoft Change Assistant.
- Developed customized Portal Branding Themes for various user groups within the Portal Prototype environment.
- Developed Shortcut Collections for various user groups.
- Troubleshoot and resolved issues within PIA architecture including Web Server, Tuxedo Application and Server Process Scheduler components.

PeopleSoft Systems Admin - Alta College, Denver, CO (10/05 – 02/06)

Kerensky served as a PeopleSoft Systems Administrator assisting with both Development and Production environment issues. He used his expertise to troubleshoot and isolate deficiencies within Development and Production. He also assisted in integrated a high availability and fail-over solution for the client's Production environments. He migrated patches and fixes included in scheduled bundles in support of all the PeopleSoft Application (**CRM, SA, Portal**), and updated security access within those environments.

- Provided support to integrity, and general accessibility of the web server, application servers and process schedulers.
- Troubleshoot and resolved issues within PIA architecture including Web Server, Tuxedo Application and Server Process Scheduler components.

- Modified and maintained Tuxedo tunable parameters, including server spawning and load balancing to improve system's performance, fault tolerance and proper statistical analysis.
- Implemented Java tuning parameters within WebLogic web server to improve system performance.
- Troubleshoot and reconfigured Integration Broker interface between all the PeopleSoft applications.
- Migrated patches and fixes included in scheduled bundles in support of all the PeopleSoft Application (CRM, SA, Portal).
- Performed object and code migrations of customizations and maintenance patches and fixes.
- Updated security access within Development and Production after migration of scheduled bundles.
- Develop and maintained documentation for procedures performed throughout the implementation.
- Instrumental in building new Test environments, to include installing **Tuxedo 8.1, WebLogic 8.1 sp3**, and PeopleTools and Application code.
- Updated the existing Development and Production environments, with Tuxedo and WebLogic patches.

PeopleSoft Technical Architect/Upgrade Specialist - Accenture, Atlanta, GA (02/05 – 10/05)

Kerensky served as a PeopleSoft Technical Architect utilizing his expertise in resolving both Development and Production environmental issues. He was instrumental in assisting developers with the preparation of upgrading their existing **HRMS 8.8 Oracle 9i environment to HRMS 8.9 Oracle 10g**. Helped create and maintain all the **HRMS 8.9/Oracle 10g** environments such as the Demo, Development, Conversion, Test, and Stage in preparation for go-live. He integrated high availability and fail-over solutions for the client Stage environments. He was instrumental in the migration of objects from the various environments for testing and configuration, and ran compare reports to verify the integrity of the migrated objects.

- Helped create and maintain all the **HRMS 8.9/Oracle 10g** environments such as the Demo, Development, Conversion, Test, and Stage in preparation for go-live.
- Isolated performance bottle-necks within all the Development and Production environments.
- Assisted the DBA in the installation and configuration of Oracle 10g on both Production and Development database servers.
- Implemented Application Server and **WebLogic 8.1** Web Server tuning parameters in order to improve performance.
- Configured Integration Gateway within all the Stage environments to allow integration broker messaging.
- Provided technical end user support for both the Production and Development environments.
- Instrumental in the migration of objects from the various environments for testing and configuration, and ran compare reports to verify the integrity of the migrated objects.
- Helped develop Safe Test documentation to test the integrity of environments after refreshes.
- Installed and configured the Digital Certificates for WebLogic 8.1 within the Stage environment.
- Assisted in developing Unix Shell scripts to automate the startup and shutdown of both the Production and Development environments.
- Instrumental in configuring and implementing Integration Broker within Stage and Production environments.
- Troubleshoot query performance issues within the FSCM 8.4 sp1 Development and Production environments.
- Utilized Change Assistant to apply updates, patches and fixes.

- Applied Tax updates to the **HRMS 8.9** Development and Production environments.

PeopleSoft Systems Architect - FDIC, Arlington, VA (10/04 – 01/05)

Kerensky served as the PeopleSoft subject matter expert during the security evaluation of the Test and Production environments. He provided technical expertise and guidance identifying security vulnerabilities within the system configuration. He worked closely with the existing Security Testing and Evaluation team to assure that the clients PeopleSoft architectural configuration complied with government security regulations and publications. He evaluated the infrastructure, all the technical documentation, procedures and policies to meet federal mandated security controls.

- Helped develop technical security controls to identify security vulnerabilities.
- Evaluated the infrastructure, all the technical documentation, procedures and policies to meet federal mandated security controls.
- Assessed the technical control mechanisms for maintaining and auditing the Production environment to ensure System and Information Integrity.
- Verified System Communication and Protection mechanisms were in place to safeguard the internal Information System infrastructure.
- Made recommendations to utilize their current **LDAP** configuration as the centralized authentication mechanism.
- Verified **Logical Access Controls** mechanisms were in place to authenticate user access to the information system.

PeopleSoft Systems Administrator - Penn National Insurance, Harrisburg, PA (05/04 – 09/04)

Kerensky served as the Technical Architect and was instrumental in troubleshooting and resolving connectivity and end user issues. He provided technical expertise and guidance to the clients regarding all of their Production and Training Environments. He was instrumental in the re-installation and re-configuration of the various components in the **EPM, Portal, and FSCM** Training environments after server crash, to include **BAM, Informatica, and nVision**.

- Instrumental in the re-installation and re-configuration of the various components in the EPM, Portal, and FSCM Training environments after server crash, to include BAM, Informatica, and nVision.
- Isolated various Budgeting and configuration errors in both the EPM Production and Training environments.
- Responsible for technical performance and stability of the EPM Budgeting Environments.
- Supported the end-users with various errors within **FSCM 8.4 SP1** such as the posting of journals.
- Implemented the installation of the PeopleSoft Portal 8.8 environments, configuring Single Sign-on between the Test EPM 8.8 and **Financial 8.4 SP1** environments.
- Isolated performance bottle-necks within all the Productions and Test environments.
- Implemented Application Server and WebLogic 6.1 Web Server tuning parameters for performance.
- Instrumental in helping develop detailed documentation for disaster recovery for all the PeopleSoft Production and Training environments.

PeopleSoft Technical Architect - Georgia Technology Authority, Atlanta, GA (04/04 – 05/04)

Kerensky served as the Technical Architect and was instrumental in assessing the clients **PeopleSoft HRMS 8.8** and Network configuration. He provided technical expertise and guidance to the clients regarding the

implementation of Network Security within their current PeopleSoft Architecture. He was instrumental in providing Best Practice Network Security Scheme for their current PeopleSoft environment.

- Provided detailed technical specifications for changes proposed to the existing PeopleSoft environment.
- Participated in requirements gathering and configuration sessions to ensure overall business functionality.
- Reviewed and assessed the current architectural configuration.
- Assessed the impact of updates and provided proposals for applying them effectively and with minimal risk.
- Instrumental in providing Best Practice Network Security Scheme for their current PeopleSoft environment.
- Effectively troubleshooted and solved the client outstanding issue with 3 tier debugging of PeopleCode.

PeopleSoft Technical Architect - Seagull Inc, Atlanta, GA (04/04 – 04/04)

Kerensky was a Technical Architect and a positive impact for the client isolating various connectivity issues with their PeopleSoft Internet Architect configuration. He also assisted the developers with configuration and implementation of PeopleSoft Integration Broker and a 3rd Party application. He provided solid PeopleSoft Best Practices Solutions to the client regarding their architecture. He successfully tested a transaction from PeopleSoft Integration Broker to the clients 3rd Party applications.

- Troubleshooted the database connectivity issues from the client workstations.
- Isolated the Application and Process Scheduler server configuration errors and corrected them in a timely manner.
- Provided technical expertise and guidance to clients on integration approaches, process re-engineering and design
- Applied the applicable patches keeping with PeopleSoft standards.
- Successfully tested a transaction from PeopleSoft Integration Broker to the clients 3rd Party applications.
- Assisted the client in configuring a Test environment for continued development.
- Provided detailed documentation of the suggested configuration of the existing architecture.

PeopleSoft WebLogic Administrator - AON Consulting, Winston Salem, NC (03/04 – 04/04)

Kerensky was the PeopleSoft WebLogic Administrator in which he integrated a high availability and fail-over solution for the client production Web Servers. Kerensky was diligent at keeping with PeopleSoft standards and recommendations for WebLogic configurations and settings. He assisted the Senior Web Administrator with configuring the Foundry Load-Balancer. Installed and configured the **Digital Certificates for WebLogic**, implemented the SSL protocol, and forced secure logins for all users.

- Integrated high availability and fail-over solutions for the client Production Web Servers.
- Assisted the Senior Web Administrator with configuring the Foundry Load-Balancer.
- Configured a separate WebLogic Web Server for redirection.
- Installed and configured the Digital Certificates for WebLogic.
- Implemented the SSL protocol and forced secure logins for all users.
- Configured the Report Repository to utilize the load-balancer and the SSL protocol.
- Troubleshooted the end users' https browser connection errors.

- Applied patches to internet explorer certified by PeopleSoft.
- Implemented Application Server tuning parameters for performance.
- Trained the web administrators on supporting and maintaining WebLogic.
- Configured both Unix and NT Process Scheduler with a Master Scheduler.
- Worked with the Senior Unix Admin in creating scripts to administer the appserver, webserver, and process scheduler servers.

PeopleSoft Technical Architect - Recall Corp, Norcross, GA (11/03 – 03/04)

Kerensky was the PeopleSoft Technical Architect and Technical lead. He was instrumental in the configuration of the various environments included in the go-live migration path. He integrated high availability and fail-over solutions for the client production environment. Kerensky was diligent at keeping all of the environments patched and upgraded to the latest level. He configured the **PeopleSoft Directory Interface (PDI) integration with LDAP**. He also installed the Windows 2000 Server Operating System on the all the production servers.

- Technical lead for the installation and configuration of all go-live environments.
- Instrumental in keeping all environments current with upgrades and patches.
- Applied application fix packs and maintenance packs.
- Upgraded all environments from **PeopleTools 8.42 to PeopleTools 8.43, and then to PeopleTools 8.44.**
- Integrated high availability and fail-over solutions for the client production environment.
- Instrumental in the migration of objects from the various environments for testing and configuration.
- Proficiently ran compare reports to databases when applicable, and also to projects before and after migrating them over.
- Created and refreshed the Unicode Databases for the developers for each phase of the implementation.
- Supported developers with app engine, SQR, and crystal reports.
- Created Process Scheduler for all of the environments to include Production.
- Configured and Load-Balanced the application servers for QA, Test, and Production.
- Implemented the database backup schema for each environment.
- Created and implemented the security strategy for the Test and QA environments.
- Troubleshoot any technical problems and resolved them in a timely manner.
- Assisted in the implementation of **LDAP** for the Production environment.
- Configured the PeopleSoft Directory Interface (PDI) integration with LDAP.
- Installed the Windows 2000 Server Operating System on the all the Production servers.
- Instrumental in the configuration and implementation of the Dell CX600 storage arrays.

Senior PeopleSoft Installation Consultant - PeopleSoft Inc., Atlanta, GA (03/00 – 11/03)

Kerensky, as a Senior Installation Consultant, successfully implemented over 80 + **PeopleSoft/Oracle and PeopleSoft/SQL** server installation across U.S./Canada. He gained extensive knowledge in the implementation of PeopleSoft databases on various platforms such as Oracle and SQL Server. During the implementation of databases, he created and maintained both Non-Unicode and Unicode databases. He successfully installed and configured the PeopleSoft Architecture on various OS platforms such as Windows 2000, AIX, Solaris, and True 64. Also, he configured and installed **WebLogic** and **WebSphere**

web servers for fail-over and load balancing. Kerensky configured Application Servers and Process Scheduler Servers for connection fail-over and installed all the 3rd party applications necessary for a full architectural implementation. He created basic shell scripts to administer the various PeopleSoft servers. He also educated his clients and users by encouraging participation and initiating discussions and debates for thorough knowledge transfer.

Network Admin/Desktop Support Tech - Intercontinental Hotel Group, Dunwoody, GA (12/98 – 03/00)

Kerensky served as the Network Admin/Desktop Support Technician. He was key in converting over 500 user's desktop and laptop computers over to the Y2K standards. He designed and created the system images for all the desktop and laptop machines. He troubleshooted installation, configuration, and network errors, isolating and fixing all.

Network Admin/Desktop Support Tech - US Army Computer Science School, Augusta, GA (01/94 – 12/98)

Kerensky supervised and performed multiple installations of various network topologies. He effectively planned, implemented, and managed the Network Reorganization Project. He also provided technical network and computer support to over 2000 customers, and isolated system deficiencies using hardware and software diagnostics. Kerensky provided advance PC and laser printer maintenance and software technical support. He performed basic configuration and installation of Bay Networks and CISCO Routers. He proficiently installed and configured the SEHI-24 Stackable Intelligent Ethernet Hubs. Also, he was responsible for the management and maintenance support for over 2000 personal computers and peripherals. He was proficient in the installation of Windows NT 4.0, Windows 3.51, Windows 95/98, and Windows for Workgroups 3.11 for network interface.

Unix Administrator - US Army DOIM, Augusta, GA (01/93 – 01/94)

Kerensky installed and configured SMC/EDS Everex 486/66 Towers as servers, and effectively managed user accounts, print queues, and system resources. He provided technical network and administrative support to over 1000 users. He supervised and performed multiple installations of various network topologies. Kerensky also performed equipment upgrades, installations, and network connectivity. He isolated system deficiencies using hardware and software diagnostics, and he was responsible for the management and maintenance support for over 1000 personal computers and peripherals.

Network Administrator - US Army USISEC, Worms, Germany (02/89 - 01/93)

Kerensky supervised the Computer Network and Maintenance Office. He effectively planned, implemented, and administered the Information System Engineering Commands (ISEC) network. He installed PC subsystems and network infrastructure for Unisys 5000 Mainframe WAN System. Also, he was responsible for the management and maintenance support for over 700 personal computers and peripherals. He performed equipment upgrades, installations, and network connectivity.

Submitted on a company fee paid basis

Appendix H: Mr. AJ Kumar, Campus Solutions Functional SME

Summary

Mr. Kumar has over 15+ years of IT as PeopleSoft Functional Lead/Business Analyst, Project Architect for multiple projects and has good higher education experience managing implementations, System Upgrades and Support projects. He has extensive ERP experience in the higher education environment, with over 12+ years' experience implementing PeopleSoft Student Administration/Campus Solutions, HCM and Financial applications. His areas of expertise being in the Campus Solutions (Admissions, Campus Community, Student Financials, Student Records, Academic Advisement and Self Service) and HCM modules (HR, Payroll for NA, Benefits Admin). His successes include a V8.0, v8.9 and v9.0 implementation/upgrades with UT Rio Grande Valley, Houston Community College, Daytona State College, City University of New York, Sheridan College (Canada), Madison Area Technical College (MATC), Capella University, Kaplan University, University of Akron, University of North Dakota and other major colleges and Schools.

His background as a Functional Analyst as well as an integrator with other modules have provided him with an in-depth understanding of and experience with PeopleSoft Campus Solutions, HCM and systems processes. His expert understanding of the product modules has helped him function very effectively in training the Operations, End Users, and Module/Process Leads.

- Establish the business functional and technical IT testing criteria encompassing Application Functional Testing, GUI Testing, Load Testing, Stress Testing, Unit Testing, Regression Testing, Integration Testing, System Testing, Performance Testing, Security Testing and UAT and signoff for Production Release.

Functional Expertise:

Application upgrade, Functional Analysis (Fit/Gaps), Functional Design (BPD), Functional Test Cases, Business Process Architecture, Acceptance Test Cases, Business Analyst, Business Process Design, Business Process Development, Business Process Planning, Business Processes Reengineering, Configuration Management, Consulting, Data Conversion, Editing, Information Systems Development, Integrated Test Cases, Prototyping

Skills

Tools	SQL Plus, SQL Loader, and SQR reports, Server manager Tool, OEM 2.2
ERP	PeopleSoft SA/Campus Solution v8.0/8.8/8.9/9.0 (Campus Community, Admissions, Academic Advisement, Self Service) PeopleSoft HRMS v8.3/v8.8/8.9/9.0/9.1/9.2 (HR, BA, Payroll, PA, TA, T&L and Position Management, ePay, eRecruit, eBen, eprofile), PeopleTools v8.4x/v8.46, v8.48x/8.49/8.51/8.52/8.53 PS Query, Data Mover, Workflow, Process Scheduler, Tools Security, Application Security, Application Engine and PeopleTools, Upgrade Assistant, Tree Manager, IB Web Services
3 Tier	Application Server, Web (PIA) Server (Apache, WebLogic), Budget Web Server, Essbase Server, Integration Broker, Application Messaging, File Layout, EIP
RDBMS	Oracle 10g, 9i, 8i (8.1.6/8.1.7), MS SQL Server 2003, 7.0/ 6.5, DB2/UDB

3rd Party

MSWord, MS Excel, MS Projects, Visio, Ultra Edit, STAT,

Professional Experience

Higher Education University Client, TX

June 2016 - Present

PeopleSoft CS v9.2 AD/SR Functional Project Lead

- Functional Project lead on the stabilization project for PeopleSoft implementation of Campus Solutions v9.2.
- Lead the workshop assessment and features for CS 9.2 and Tools v8.55 Fluid.
- Conduct initial functional requirement gathering, Fit/Gap workshops, conversions and interfaces in lieu of CS 9.2 implementation.
- Lead high level assessment and design session for new tools like Activity Guides, Forms and Approvals, Work Center, Approval Workflows, self-service enhancements for fluid, tiles and worklets for admissions office, recruiting, enrollments, Bursar, Transfer Credits and Financial Aid.
- Worked very closely with the project manager in maintaining CS project plan, work resource plan, testing strategy, testing plans, instance planning, change management planning and migration or cut over planning.
- Work closely with the business SME's on requirement gathering for process improvements and implementation standards for Admissions, Campus Community, Student Records, Student Financials and Financial Aid.
- Provide functional expertise setup for Texas OAA (online admission application) requirements, test loads, GPA calculation rules, academic standing rules and integration with Image Now (Third Party)
- Workshop on 3C's, Priority Registration, Program and Career Change, Academic Standing, Packaging and Repacking, Communications for suspense workflow.

Higher Education College Client, TX

Dec 2015 – June 2016

PeopleSoft CS v9.0/9.2 AD/SR Functional Consultant

- Functional lead on the stabilization project for PeopleSoft CS SR and AD in preparation for the upgrade to v92, and also implement some key functional business process areas
- Performed Fit/Gap analysis for implementation of Priority Registration, re-purpose Academic Standing, PERC and Custom Certificate Print Process.
- Work closely with the Technical and Functional on evaluating the PUM image 1 for the enhancements and functions.
- Prepared, planned and implement the rollout of communication pipeline using 3C Comm Gen from Admissions to Graduation.
- Work closely with the Recruiting team in automating the intake process of prospects, load via PDL.
- Work closely with the business users and SME's in automating the Test Scores (ACT, SAT, CLEP, TSI) load. Coordinate with the testing vendor for the file layouts and validations criteria for the new file formats.
- Lead the initial analysis for a custom Certificate Print Process, enabling the student to print their own certificates from Student Self-Service.
- Work closely with the external vendor DocuSign for mapping the template, web service field layout design, certificate content management and enabling the link and process for student to print the certificate.

- Update and produce automated communication using 3C Comm Gen and Checklist.
- Identified and documented current business processes. Documented, proposed, and recommended possible solutions to identify gaps in functionality. Business process analysis and redesign.
- Review and approve the milestones, effort and time estimates and determine resource need, identification and allocation.
- Lead and created the CS Testing Strategy and Plan, testing data plan and participated in UNIT testing, System Testing and UAT.

Higher Education College Client, FL

Jan 2015 – Nov 2015

PeopleSoft CS Admissions Functional Consultant

- Lead consultant for the implementation v9.0 of Admissions and Campus Community.
- Liaison with the Business SME's and also technical SME's on conversion from Legacy to PeopleSoft. Spearhead multiple functional design sessions and FIT/GAP's on Admissions and Campus Community
- Performed functional design sessions on Residency Conversion, Test Load and Conversion, Transcripts load (inbound and outbound), Search/Match, Prospect and Applicant data conversion and others.
- Lead the SPEEDE/EDI (TS130/TS131 and TS138) conversion.
- Design and configuration of OAA (Online Admission Application) for domestic and international applicants.
- Lead the functional implementation of AAWS, CTM, PDL, File Parser and OAA (Online Admission Application)
- Lead the BPA (Business Process Alignment) sessions with the module leads, conduct cross functional analysis and design for setting up Residency, External Education, Test Scores (ACT, SAT, TOEFL, SPEEDE) and other legacy test scores.
- Involved with the technical leads on the conversion of Prospects, Applicants, Test data, external education data, and residency data, school and subject tables.
- Prototype and modified the General Material data using CAF (Common Attribute Framework) to meet the client needs.
- Lead and created the CS Testing Strategy and Plan, creating test cases, test data plan and participated in UNIT testing, Integration Testing, System Testing and UAT.
- Worked closely with Student Financials in the implementation of NELNET payment gateway to process application fees.

Higher Education University Client NY

May 2014 – Jan 2015

PeopleSoft CS Admissions Functional Consultant

- Implementation v9.0 – Admissions (Undergraduate/Graduate), Campus Community and Academic Advisement
- Full implementation support for the first wave of Graduate Schools under the CUNY umbrella with an emphasis on new functionality as follows: Online Admissions Application (**OAA**)- Admissions Application Web Service (**AAWS**)- Evaluation Management System (**EMS**)- Self Service (**Faculty Center, and Student Center**)
- Validate requirements by actively contributing to the fit/gap analysis meetings with SME's and technical teams.

- Led functional fit/gap sessions with the PeopleSoft 9.0 Admissions (Grad and Undergrad) implementation team in preparation for a PeopleSoft 9.0 implementation.
- Work closely with the business owners for functional requirement gathering, initial **Fit/Gaps, Business Process Design (BPD) documents, Functional Design Documents (FDD) and Custom Reporting**
- Identified and documented current business processes. Documented, proposed, and recommended possible solutions to identify gaps in functionality. Business process analysis and redesign.
- Review and approve the milestones, effort and time estimates and determine resource need, identification and allocation.
- Worked as a lead consultant for some major Online Admission Application (OAA) CEMLI's.
- Led the bolt on Faculty Evaluation Management Summary (EMS) into Self Service (Faculty Center) for the design, create and maintain business process standards, data structures and summary custom reporting need.
- Work heavily with **the admissions business, to provide integration points between admissions and a custom build PDL, to exchange data for Prospects, admit types, school types, honor and awards.**
- Worked with setting up and configuration of EMS, OAA, setting up of application templates, search/match criteria set and Academic and Test load.
- Setup and configure **custom admission self-service for new prospects**

Higher Education College Client Toronto, CA

September 2013 – May 2014

PeopleSoft CS (AD, SR, SF) Functional Project Lead

- Function as Functional Lead in the patch current process for **PeopleSoft Campus Solutions v9.0 (Bundle# 31)**
- Evaluate, Manage and deliver Bundle# 31 for Campus Solutions and prepare for the split for the HCM upgrade to v9.2.
- Work as a part of PMO to design, map, coordinate and finalize the project plan, testing strategy and plan, evaluate test plans and scripts.
- Lead the **Admissions, Campus Community and Student Financials** team for requirement gathering, Fit/Gap Analysis, conduct process workshops, functional workshop workbooks, preparing testing strategy plan, UAT and Integration maps.
- Setup and design the ConEd business process, and work with the team in designing the setup of careers, program and plan, intake process, eligibility criteria
- Redesign the load of student data from external system (OCAS), Test Results, CRM (RightNow) into Admissions.
- Lead the new/enhanced functionality implementation of **PERC, Grading Scheme, Tuition Calc, Graduation processing, what-If** and other integration processes.
- Worked heavily with implementing new and enhanced functionality for **Self Service - Admissions, Self-Service-Student Financials, and Self-Service-Student Records.**
- Redesign and lead the whole custom process **Accept/Decline functionality** for International office to enable international admissions.
- Work heavily on the **3C (Communication, Comments and Checklist)** for both domestic and international admissions office. Setup and processing of 3C's, processing and use of Triggers for Checklist

- Lead the testing effort for Unit, Integration and Regression test. Prepare detailed Integration Test Plan, Integration Test Data Plan, Integration Data Process map.
- Lead the Production Cut Over planning, cut over process map chart, cut over integration map chart and final move to production
- Evaluate Bundle# 31 for implementing Mobile Application, self-service and other third-party applications.

**Higher Education College Client (MATC), Madison, WI
2013**

June 2013 - September

PeopleSoft CS Admissions Functional Lead

- Lead the **Admissions** and **Campus Community** team for requirement gathering, Fit/Gap Analysis, preparing process document flow, preparing testing strategy plan, UAT and Integration maps
- Functioned as lead business Analyst and liaison between the business and development department to distill business requirements for ITE (**Intake Transformation and Expansion**) project.
- Worked closely with cross business team to analyze and design data sources, data audit for all data crossing **RightNow CRM** to PeopleSoft **Admissions, Academic Advisement, Student Records and Financials Aid**.
- Conduct strategic analysis to define internal and external factors affecting the conversion from a semester based to trimester based system.
- Work with the project stakeholders on Expansion of Admissions, to enable and implement increase student intake.
- Extensively worked on setup and processing of 3C's, processing and use of Triggers for Checklist
- Worked on setting up of Comm Gen, pop select, equation engine

Higher Education University Client FL

July 2012 - March 2013

Project CS Functional Upgrade Lead Consultant

- Worked closely with the Assistant Controller and Bursar's office that supervised and was responsible for the setup and maintenance of student accounts within PeopleSoft.
- Setup and configuration of **Admissions module**, load of ACT scores, Service Indicators, Prospective Students, Search/Match/Load rules.
- Setup included Student Financials Installation table, Business Units, Item Types, account Types, Tuition Groups, Adjustment and Billing Calendars, Term/Course/Class/
- Optional Fees, Waivers, and Individual/Mass Tuition Calculations.
- In addition, he was responsible for implementing direct deposit for student refunds.
- Provided support on processed jobs and in daily activities such as Student Refunds, posting charges through Student Posting and Group Posting, posting charges and payments to Corporate Accounts, Group Posting from external sources, monitoring ePayment Transactions, and Cashiering functions.
- He put together detailed documentation on daily processes and that documentation was used by the Controller's Office staff.
- Setup and configured Admissions for various Search/Match, 3C's, ACT Test Load and interfacing parameters with Student Financials, Student Records.
- Have Setup and configured **Student Financials** for Payment Payments and Refunds, Third party Contracts (TPC), setup of Accounts Trees, GL Interface.

Higher Education University Client, MN

Jan 2012 - July 2012

PeopleSoft CS Admissions Lead

In this capacity, led and implemented a major bolt on **SBLMP** (Site Based Learner Management) and **DOCFIND** (Image Now) with PeopleSoft Human Capital Management (**HCM v9.1**), Campus Solutions (**CS v9.0**) split.

- Perform work sessions to map processes and gather business requirements to **create documentation (BRD) and GAP analysis** in order to translate them into business functional and configurable solutions. Edit and confirm documents to obtain the approvals per the business stakeholders.
- Served as the Functional Business Analyst Lead for implementing the **bolt on application SBLM and integrate with Admission, Student Records and Student Financials**.
- Worked on remapping the item type trees and GL accounting for student refunding.
- Participated and worked on customizing a third-party payment processing system TouchNet, and create a product analysis functionality between cashiering and TouchNet.
- Worked heavily on customizing the **external test load data, mapping ethnicity codes, external test ids for all new and freshman**.
- setup new **program actions, program action codes** to enable off site clinical students to choose the right program and course.
- Design and implement **3C's, search/match rules, criteria based selection and pop select**.
- Worked heavily in customizing the Payment Processing process to include multiple part payments from the Student Portal and reconciling at the Tree Level.
- Create the Strategy for the **solution Build (SBLMP and DOCFINE)** admission application Testing (application & process flow) and UAT (business approval and implementation).
- Meet with the business systems SMEs to develop process templates that may be utilized within processing scenarios.
- Design and provide training material as needed for the User Training and also created UPK style training to the Functional SME's and train the trainers.

Kaplan University, IL

June 2009 - Jan 2012

PeopleSoft CS v90 (AD, SF, AA, SR, Self Service) Functional Lead

- Work with the project stakeholders to initiate new projects. Prepared project plans for the implementation/rollout new campuses for modules **Admissions, Student Financials, Student Records and Academic Advisement**
- Validate requirements by actively contributing to the fit/gap analysis meetings with SME's and technical teams.
- Review and approve the milestones, effort and time estimates and determine resource need, identification and allocation.
- Led the bolt on application **Kaplan Commitment (KAPCOM)** application for the design, create and maintain business process standards, data structures, data load sequence tables, reporting needs.
- Work heavily with **the admissions business, to provide integration points between admissions and KAPCOM, to exchange data for Prospects, admit types, school types, honor and awards**.
- Design and implement **service indicator rules, search/match rules, map external test data scores, ethnicity codes, design new logic to map external Test ID's**
- Setup and configure **custom admission self-service for new prospects**

- Planned, coordinate and executed testing strategies for almost all the modules and specific to **Student Financials, Admissions and Student Records**.
- Championed the testing strategies (Unit, Regression, Smoke, UAT).
- Responsible to **design, prototype and conduct functional workshop for business leads, Registrars, Advisors on new functionality in Academic Advisement**.
- Work closely with the business owners for functional requirement gathering, initial **Fit/Gaps, Business Process Design (BPD) templates, DAR Template, New Advisement Reporting Template**
- Work closely with the project manager for the upgrade project plan, retro-fit analysis, time and resource analysis.
- Planned the implementation workshops, prepared the workshop material,
- Design, Setup and configure the new Course Lists, Requirements, Requirement Groups, Condition and rules build, Course Sharing, and Course Reverse Engineering.
- Setup and Configuration of new Transcript Type Table, Instructor/Advisor Table, Grades Table, Course Table, plan table, GPA.

City Colleges of Chicago, IL

Jan 2009 – June 2009

PeopleSoft CS v90 (AA) Functional Lead

- Responsible to design, prototype and conduct functional workshop for business leads, Registrars, Advisors on new functionality in Academic Advisement.
- Work closely with the business owners for functional requirement gathering, initial Fit/Gaps, Business Process Design (BPD) templates, DAR Template, New Advisement Reporting Template
- Work closely with the project manager for the upgrade project plan, retro-fit analysis, and time and resource analysis.
- Designed the UPK material, and involved in the training for Train the Trainer project, end user functional training, and PeopleSoft intro navigational training.
- Design, Setup and configure the new Course Lists, Requirements, Requirement Groups, Condition and rules build, Course Sharing, and Course Reverse Engineering.
- Setup and Configuration of new Transcript Type Table, Instructor/Advisor Table, Grades Table, Course Table, plan table, GPA.
- Worked heavily on building new service indicators, 3C's, What-If Reporting, Self Service (Advisor and Student), and other related functionalities.

University of Akron, OH

Apr 2008 to Jan 2009

PeopleSoft CS Admissions/SF Functional Consultant

- Involved with working in the **Student Accounts/Bursar's office**, and work with the functional users for all cash receipt functions, **payment and loans, refunds, eBill** and other functions.
- Design, Setup and configure Self Service (Staff Perspective), Student Center, 1098-T for **Student Financial, and also Self Service for Admissions, Campus Community**.
- Re-implementation/instruction on **best practices** for Pell, Overawarding, SAP, Verification, Return of Title IV.
- Retro Fit ACG/SMART, Equations, SAP and Self Service (Student and Faculty) Centers
- Responsible for **training and implementation** of PeopleSoft **Student Financials, Financial Aid and Campus Community** modules, worked closely with client on all aspects of implementation

- Setup of the **Student Self Service functionality** in Academic Reporting, **creating Career What-If reporting, enrollment backpack setup.**
- Created business process maps, business process documents (BPD), data mapping, and created upgrade setup task list for Student Records, and Academic Advisement.
- Prepare detailed functional documents and functional Training material for the users with new enhanced functionalities in **Student Financials**
- Prepare and work on Setup and configuration of Items, accounts, account types, and map the chart of accounts.
- Participated in **Setup and configuration of core data tables** as required like **calendar table, course tables, search/Match rule table** and others.
- Functioned as a resource to other modules interacting in a cross-functional environment

University of North Dakota, ND

Nov 2007 - Apr 2008

PeopleSoft CS v90 (SF, AD, AA, Self Service) Functional

- Gathering requirements, which included an analysis of the existing system **SA v8.0 SP1**, and the interface necessary with the various product processors, which are in use at the organization.
- Organized User workshops and developed fit-gap documentation.
- Responsible for conducting prototype testing, training and acceptance testing of the **PeopleSoft Student Financials, Campus Community and Financial Aid**, worked closely with client on all aspects of re-implementation
- Designed and planned **communications/letter generation** for both the **Admissions module and the Student Financials Collections modules.**
- Responsible for training and implementation of PeopleSoft Academic Advisement, **Student Financials, Financial Aid and Campus Community** modules, worked closely with client on all aspects of implementation
- Involved in all levels of testing and coordinating with **testing team in Unit, Functional, System Integration and User Acceptance Testing** using manual and testing tools HPQC, Win runner and Load runner

Florida State University, FL

May 2007 - Sep 2007

PeopleSoft v89 (SF, AD) Business Analyst

- Prepare detailed functional documents and functional Training material for the users with new enhanced functionalities in **Admissions, Student Financials, and Academic Advisement.**
- Prepare and work on Setup and configuration of Items, accounts, account types, and map the chart of accounts.
- Prepare and perform initial functional walk thru of campus solutions, features and functions, data load sequence processing, use of control data setup.
- Plan and update the implementation project plan and co-ordinate with the project manager.
- Perform initial Fit/Gaps, business process maps, data mapping, table load sequence.

July 2004 - Feb 2007

State of Florida, Dept. of Financial Services**PeopleSoft Financials and EPM BA**

- Understanding user requirement, devising appropriate strategy, creating a **Project Plan**, identifying required resources while being responsible for managing the Project, working as a **Functional and Technical Expert** in implementing the assigned task.
- Ensure compliance with Information Technology standards, procedures and methodologies in coding and documentation.
- Extensively used **Data Stage designer** to develop Jobs for **extracting, transforming, integrating and loading data into data warehouse tables**.
- Close co-ordination with users and overseas team understands the value of a standardized, centrally managed environment.

Peralta College, CA

Oct 2003 to Jun 2004

PeopleSoft v89 (SF, ADM) Business Analyst

- Performed the role of Functional Business Analyst
- Assisted a core team of university's staff in setting up all the tables in **Academic Structure, Admission, Student Records, and Financial Aid** while at the same time transferring functional knowledge to the team members on the PeopleSoft delivered Student System.
- Analyzed and designed the functionality requirements for the university's web application in the Student Records module.
- Developed process improvement recommendations
- Assisted with presentations and the preparation of business communications
- Assisted in individual/group training

Florida State and Florida A&M University, Tallahassee, FL

Nov 2002 to Sep 2003

PeopleSoft CS v80 SP1 (SF, ADM, SR) Analyst

- Directly accountable for supporting the business related to the administration of policies and procedures managed by the PeopleSoft Student Administration.
- Work on the Fit/Gap Analysis, Business Process Design, Conduct Functional War Room Sessions, prepare Test Cases and Test Plans
- Responsible for the compilation of reports and statistical data required to support the administration of Student Records.
- Collected, interpreted and documented user requirements
- Assisted in the review of system design proposals
- Participated in the development of testing plans
- Quality assurance testing for all the above modules using Test Director.

Toyota Motor Manufacturing, North America, KY

Feb 2002 to Oct 2002

PeopleSoft Technical Lead/Architect

- Impact analysis, including documentation of changes to custom Payroll Programs, General Ledger and Time and Labor because of upgrade to People Soft 8.3 from 7.5.
- Transferred programs as appropriate to facilitate development testing for Upgrade in multiple environments.

- Created New **Jobs** and SQRS as needed for Upgrade to PS8.3 to comply with naming standard at vendor site

Southwest Bank of Texas, Houston, TX

Nov 2001 to Jan 2002

PeopleSoft HRMS Business Analyst

- Define, plan and installation of new hardware for the upgrade. Designing the upgrade templates in Upgrade Assistant, installation of the Application server and the Web Servers. Designing configuration files for the users of different roles, designing and maintaining the application security. Modules Gap/Fit analysis, Modules Integration Mapping, Designing the inbound and Outbound interfaces, Tax Updates, SQL Tuning, Giving training to the client users for the PeopleSoft Best Practices.

Sunglass Hut International, Miami, FL

Aug 2000 to Oct 2001

PeopleSoft Business Analyst

Project Management

- Used **D&T Project Management Tool** and **Express** for designing PeopleSoft Application upgrade, implementations, Oracle Database Upgrade, and OS Upgrade.
- Develop and design the PeopleSoft Ver 8.14 Upgrade project map definition.
- Design and develop the Upgrade templates for PeopleSoft Financial and HRMS, for use with the Upgrade Assistant.
- Upgraded the PeopleSoft Budgets ver7.5 to 8SP1.

State of Georgia, Atlanta, GA

Oct 1998 – July 2000

PeopleSoft/Oracle Technical Consultant

- Designed and implemented the PeopleSoft infrastructure for the Department of Admin services. Closely monitored the Solaris install for the mount points and the directory structures. Designed the procedure to implement PeopleSoft database on E5500 Sun Server (Production Server), E3500 Sun server for the development Server and E450 as the Application Server.
- Supported the PeopleSoft AR application on Oracle database. Applied any patches and fixes from time to time in accordance with the guidelines given by the PeopleSoft

Submitted on a Company Fee Basis



October 17, 2017

ADDENDUM NO. TWO

TO ALL OFFERORS:

REFERENCE: Request for Proposal No: **RFP# MLO-981**
Dated: **September 15, 2017**
Commodity: **Information Technology Consulting Services**
RFP Closing On: **November 2, 2017 at 2:00 p.m. (Eastern)**

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

1. QUESTION: Can you provide the type(s) of video teleconferencing equipment being used by JMU? More than one brand was mentioned in the solicitation.

ANSWER: **WebEx, Skype, and Cisco**

2. QUESTION: Can you provide the brand of phone system being used by JMU? More than one brand was mentioned in the solicitation.

ANSWER: **NEC**

3. QUESTION: Does JMU currently use any of the three Federation Services listed: Shibboleth, CAS, OpenID?

ANSWER: **Shibboleth**

4. QUESTION: Which specific Cherwell products are installed and in use by JMU?

ANSWER: **IT Service Management**

Signify receipt of this addendum by initialing “*Addendum #2*” on the signature page of your proposal.

Sincerely,

Matasha Owens, MPA, VCO, CUPO
Buyer Senior



October 10, 2017

ADDENDUM NO. ONE

TO ALL OFFERORS:

REFERENCE: Request for Proposal No: **RFP# MLO-981**
Dated: **September 15, 2017**
Commodity: **Information Technology Consulting Services**
RFP Closing On: **November 2, 2017 at 2:00 p.m. (Eastern)**
~~October 19, 2017 at 2:00 p.m. (Eastern)~~

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

1. **The closing date and time has been extended to November 2, 2017 at 2:00 p.m.**
2. **QUESTION:** Will there be a pre-proposal conference for this RFP?
ANSWER: **No.**
3. **QUESTION:** Can you please provide a specific scope of work for this RFP?
ANSWER: **The University does not have a specific project at this time. The intent of this RFP is to establish a contract(s) that may be utilized by the University as information technology consulting needs arise.**
4. **QUESTION:** Since the RFP is not for specific services or a specific project, what will be JMU's process for moving from a list of "pre-qualified consultants" to the development of project scopes and task orders? How will JMU engage the firm(s) who are awarded a contract as a result of this RFP.
ANSWER: **JMU IT will contact the firm and describe the project for which the University requires assistance. A statement of work will be requested and additional discussions will occur.**
5. **QUESTION:** Reference IV.1.1. *Other Technology & Systems*- Is there a specific technology and systems in which JMU would be seeking additional services for? Can JMU define what it means by "other technology and system?"
ANSWER: **The University does not want to limit itself to the technologies that are currently being used, so JMU is simply stating that something in addition to what is described in the RFP may be required.**
6. **QUESTION:** Does this RFP include staff augmentation? If so, how many independent IT temporary staff does the University currently have?
ANSWER: **The University is open to reviewing proposals for staff augmentation services; however, JMU is not currently seeking this service. The University does not have any IT temporary staff at this time.**



7. QUESTION: Are there any budget limitations for this project?
- ANSWER: **Budget limitations will depend on the specific project.**
8. QUESTION: Reference IV.1.1. *Other Technology & Systems*- Is JMU interested in receiving proposals for analytics, data integration, and mobile development?
- ANSWER: **The University is open to receiving proposals for these services.**
9. QUESTION: Reference IV.1.f. *Cisco Technologies, Infrastructure Support, and Virtualization* – Please clarify if only firms that are exclusive to Cisco Systems can respond to the RFP.
- ANSWER: **JMU utilizes Cisco technologies currently. The University is open to receiving proposals for other services.**
10. QUESTION: Are security, risk and compliance consulting/assessment services covered under this contract, relative to the technologies listed in the RFP?
- ANSWER: **The University is open to receiving proposals for these services.**
11. QUESTION: How many permanent IT employees does the University have and will this RFP cover providing those services?
- ANSWER: **JMU currently has over 130 permanent IT employees and does not intend to replace permanent university staff with external resources.**
12. QUESTION: Is there an incumbent for IT temporary and permanent staffing services for the University?
- ANSWER: **No.**
13. QUESTION: Would JMU entertain proposals that offered expertise in technologies indirectly supportive of the technologies listed on page 1 of the RFP? For example, software that addresses areas such as mobile and video for future JMU projects (i.e. iOS, Android, Rails, NodeJS)?
- ANSWER: **The University is open to receiving proposals for these services.**
14. QUESTION: Please provide clarification for desktop management. For example, OS administration/management, application administration/management, user support, etc.
- ANSWER: **JMU has a managed desktop environment that includes management and configuration of the OS image, which includes pre-configured standard applications. In this context, desktop management means all of the above.**
15. QUESTION: Is there an incumbent for IT consulting services? If so, please list the firm(s) previously on contract with the University.
- ANSWER: **Contracts were previously awarded to the following firms for RFP # MLO-665 dated October 15, 2012 for Information Technology Consulting Services: The Computer Solution Company of Virginia, Inc. (TCSC), LumenData, Inc., Advance Digital Systems, Planet Technologies, Dell Marketing LP, and Sycom Technology.**



16. QUESTION: Are we able to submit a partial technology response?

ANSWER: **Offerors may submit proposals for one or all of the technology listed in the RFP. Offerors should identify their firm's technology specializations in their proposal.**

17. QUESTION: Reference IV.5.h. *NEC Voice an Collaboration Technologies* – Please clarify, in detail, what is meant by “conversion.”

ANSWER: **Conversion means everything from analysis, planning and execution of data conversion, to the same for general conversion from one technology to another.**

18. QUESTION: Some aspects of the RFP seem to be more service-provider/integrator oriented (i.e. implementation, installation and configuration, conversion, and monitoring, administration, and updates.). As an independent consulting firm, we do not sell or physically implement any products; however, we do provide oversight of such vendor-provided services. Can JMU please explain what it means by these terms and confirm this RFP is for consulting services?

ANSWER: **The service-oriented services are just a portion of what the University is interested in procuring. JMU is also interested in consulting services.**

19. QUESTION: Are we correct in our interpretation that there is no guarantee of work resulting from this RFP?

ANSWER: **Yes, there is no guarantee of work from JMU; however, the resulting contract(s) will be cooperative and may be utilized by any public body, cooperative purchasing organizations, public or private health or educational institutions, or any University related foundation and affiliated corporation. See VIII.I. *Cooperative Purchasing/ Use of Agreement by Third Parties* for more information.**

20. QUESTION: If a proposal is submitted by a non-SWaM business that is teamed up with a subcontractor that is SWaM certified, will it have the same status as an offer from a SWaM certified business? If not, how will that difference be reflected in the evaluation?

ANSWER: **See VI.A. *Evaluation Criteria* on page 6 of the RFP. Proposals submitted by SWaM certified firms will receive all points allocated to the evaluation criteria designated for SWaM participation. Proposals submitted by non-SWaM firms that include a SWaM certified firm as a subcontractor on their SWaM Utilization Plan (Attachment B) may receive a portion of the points allocated to SWaM participation. Note: Offerors will only receive points for SWaM certification received from the Virginia Department of Small Business and Supplier Diversity (SBSD).**

21. QUESTION: Are firms awarded services under this RFP precluded from selling products or services on which they are consulting? Example – If a firm is consulting on the VoIP telephone system, are they precluded from being the provider of that system?

ANSWER: **No; however, the University intends to utilize the resulting contract(s) solely for the purpose of obtaining information technology consulting services.**



22. QUESTION: Reference IV.1. – Should we provide competencies/experience only on those items which we intend to provide to JMU?
- ANSWER: **Yes.**
23. QUESTION: Reference IV.8. – Does JMU want reference contact information as well as the project description.
- ANSWER: **Yes.**
24. QUESTION: Are there any specific labor categories that JMU would like offerors to price? Is there a pricing template that JMU would like offerors to use? Will the University accept pricing in terms of hourly rates?
- ANSWER: **See Section X. Pricing Schedule on page 17 of the RFP.**
25. QUESTION: Is there a specific format that JMU would like proposals to follow? Is there a page limit?
- ANSWER: **See Section V. Proposal Preparation and Submission on page 3 of the RFP. There is no page limit; however, proposals should be complete and concise.**
26. QUESTION: Will JMU accept proposals from offerors who respond to provide services in some, but not all technology categories?
- ANSWER: **Yes.**
27. QUESTION: Can an offeror propose and describe relevant IT services that are not specifically listed in the *Statement of Needs* section of the RFP?
- ANSWER: **Yes. Offerors should describe any proposed services not specifically listed in the RFP in their response to *Statement of Needs* question 1.i. Other Technology and Systems.**
28. QUESTION: Does JMU have any specific projects envisioned that fall into one or more categories over the next 6 months to a year? Can the University provide examples of these projects?
- ANSWER: **The University has numerous projects in the pipeline. We have not determined at this point whether outside resources will be required.**
29. QUESTION: Will the awarded firm(s) be asked to provide services on JMU's campus? If so, will IT provide workstations or an assigned work area?
- ANSWER: **The University is open to both on-site and off-site services. JMU is able to provide workstations and space in which to work.**
30. QUESTION: Please identify the number of users the awarded firm(s) will be providing support services for.
- ANSWER: **It depends on the service. JMU has nearly 30 thousand campus customers (including students, faculty and staff.)**



31. QUESTION: Will there be a requirement for the awarded firm(s) to travel or attend training away from the JMU worksite? If so, can you please provide the estimated frequency?

ANSWER: No

32. QUESTION: Will there be a requirement for the awarded firm(s) to provide IT training to JMU staff members?

ANSWER: **The University has utilized outside resources to provide training to IT staff members in the past, but not to the university community.**

33. QUESTION: Are the awarded firm(s) required to be on-call 24/7 or is there a prescribed 40 hour work week?

ANSWER: **It would depend on the service. Some IT staff support 24/7 services, but typically JMU does not require consultants to work beyond normal hours.**

34. QUESTION: Can you identify the type of hardware and software licensed application to be supported?

ANSWER: **The University uses too many different things to list them all. Offerors should respond with what their firm is capable of supporting.**

35. QUESTION: Will JMU IT provide tech refresh services (i.e. life cycle management) to the existing and new systems?

ANSWER: **That is typically the case.**

36. QUESTION: Is this RFP limited to firms who are registered with the State Corporation Commission in Virginia?

ANSWER: **See VIII. L. *Authorization to Conduct Business in the Commonwealth* listed on page 15 of the RFP.**

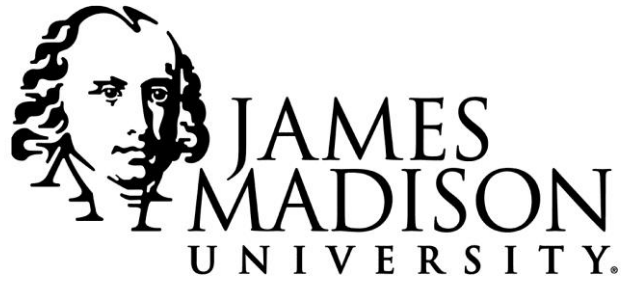
37. QUESTION: What is the period of time for questions to be submitted?

ANSWER: **Questions must be submitted no later than five (5) business days prior to the closing date and time. All questions should be submitted in writing and directed to Matasha Owens at owensml@jmu.edu.**

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

Sincerely,

Matasha Owens, MPA, VCO, CUPO
Buyer Senior



Request for Proposal

RFP # MLO-981

Information Technology Consulting Services

September 15, 2017



REQUEST FOR PROPOSAL
RFP # MLO-981

Issue Date: September 15, 2017
Title: Information Technology Consulting Services
Issuing Agency: Commonwealth of Virginia
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Bldg.
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 p.m. on October 19, 2017 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: Matasha Owens, Buyer Senior, Procurement Services, owensml@jmu.edu, 540/568-3137, (Fax) 540/568-7936 not later than five (5) business days before the proposal closing date.

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)

Title: _____

Date: _____

Phone: _____

Web Address: _____

Fax #: _____

Email: _____

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 # MLO-981

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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 (JMU) is a comprehensive public institution in Harrisonburg, Virginia with an enrollment of approximately 22,000 students and more than 3,000 faculty and staff. There are over 600 individual departments on campus that support seven academic divisions. The University offers over 120 majors, minors, and concentrations. Further information about the University may be found at the following website: <http://www.jmu.edu>.

James Madison University's Office of Information Technology is responsible for technology initiatives for campus. JMU was an early adopter of PeopleSoft/Oracle's Campus Solutions product, serving as a beta for its development and implementing it early. Additionally, we use Oracle's PeopleSoft Financials, Human Resources and the Interaction Hub for JMU's self-service portal. JMU 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)
- Encryption services (Dell Data Protection Enterprise, Apple FileVault)
- Microsoft Office 365
- Microsoft Active Directory
- Microsoft Exchange 2016
- Microsoft Skype for Business 2016
- Federation Services (Shibboleth, CAS, OpenID)
- Cisco technologies (including but not limited to network and video conferencing)
- Virtualization technologies (VMWare and Unidesk)
- Cherwell ITSM
- NEC Voice and Collaboration Technologies

III. SMALL, WOMAN-OWNED AND MINORITY (SWAM) 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. Provide detailed corporate competencies/experience serving 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
 - e. Security and Federation Services
 - f. Cisco Technologies, Infrastructure Support, and Virtualization
 - g. Audio Visual Technologies
 - h. NEC Voice and Collaboration Technologies
 - i. VoIP and Unified Communications
 - j. Cellular and RF Technologies
 - k. Distributed Antenna Systems
 - l. Other Technology & Systems
2. Describe approach and methodology to providing IT consulting services to James Madison University. Include how your firm would manage the scope of projects.
3. Provide the names, qualifications, and experience in personnel to be assigned to James Madison University. Designate who would be assigned as the primary contact for this account.
4. Describe the ability to provide continuity of consultants throughout the duration of a project.
5. Describe services available from your firm and/or partners and associated costs. Examples of services that could be included are:
 - 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. Operations metrics
6. Describe the ability to assist in the development and offering of training and documentation.
 7. Describe training options and associated costs. Include a catalog of training offerings and differentiation between technical staff and end-user training.
 8. Provide examples of recent projects at higher education institutions comparable to James Madison University. Describe the project, time frame, end result, etc.
 9. Describe the ability to provide for a thorough transfer of knowledge to JMU IT on any given project.
 10. Describe your approach to project management.
 11. Describe how your firm would propose a functional staffing plan indicating the number, characteristics, and schedule for the consultants.
 12. Describe the functions to be subcontracted and 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 seven (7) 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** (*CD or 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 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 modifications 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 should 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 acknowledgments, 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. Offeror Data Sheet, included as Attachment A to this RFP.
4. 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.
5. 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.

6. 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 the 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 and 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.

- B. **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 (Revised 8/18/15 ABS)

- 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 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, 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 subcontractor(s), 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 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 \$50,000, 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, 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:

- a. For orders issued July 1, 2014 and after, the Vendor Transaction Fee is:
 - (i) Department of Small Business and Supplier Diversity (SBSD)-certified Small Businesses: 1%, capped at \$500 per order.
 - (ii) Businesses that are not Department of Small Business and Supplier Diversity (SBSD)-certified Small Businesses: 1%, capped at \$1,500 per order.

For orders issued prior to July 1, 2014 the vendor transaction fees can be found at www.eVA.virginia.gov.

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 US 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.

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 Number
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/ 568-7936 or 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. **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.
- L. **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.

- M. 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,
- N. 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.
- O. 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.
- P. 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.
- Q. 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.
- 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 on the basis of 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 are asking our vendors and suppliers to enroll in the Wells Fargo Bank single use Commercial Card Number process or electronic deposit (ACH) to your bank account so that future payments are made electronically. Contractors signed up for the Wells Fargo Bank single use Commercial Card Number process will receive the benefit of being paid in Net 15 days. 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 an hourly rate broken down by position type for the proposed services. Provide onsite hourly rate that includes all billables (e.g. travel, lodging, etc.). Include pricing for all other products and services.

Specify any associated charge card processing fees, if applicable, to be billed to the University.

XI. ATTACHMENTS

Attachment A: Offeror Data Sheet

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

Attachment C: Standard Contract Sample

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: _____

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

Date Form Completed

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: _____