

TEXAS WORKFORCE COMMISSION

CONTRACT COVER SHEET, CONTRACT # 3123ITC017

TYPE OF CONTRACT: Deliverables Based Information Technology Services (DBITS) for Independent Verification and Validation (IV&V) Services

TWC STATEMENT OF WORK NUMBER: 3202200017

INITIAL CONTRACT PERIOD: 10/13/2022 – 10/14/2024

INITIAL CONTRACT AMOUNT: Zero-dollar amount until Task Order is requested by TWC

OPTIONAL RENEWAL PERIOD: Three (3) optional one (1) year extensions

This Contract is entered into by and between the following parties:

THE COMMISSION:

Texas Workforce Commission

IT Acquisitions, Annex Bldg.

101 E. 15th Street

Austin, Texas 78778

Contact Person: Megan McMurtray, Contract Manager

CONTRACTOR:

ISF, Inc.

815A Brazos Street, #368

Austin, Texas 78701

Contact Person: Mark Burk, Senior Director of Clients and Solutions

Any alterations, additions, or deletions to the terms of this award required by changes in federal or state law or by regulations are automatically incorporated into this award without written amendment hereto and shall become effective on the date designated by such law or regulation.

Contractor agrees to provide services in compliance with all applicable State laws, regulations, and rules, and in accordance with the provisions of this Contract consisting of the following parts, listed in order of precedence, which are hereby incorporated as part of this Contract and constitute promised performances by Contractor:

Contract Cover Sheet, Contract #: 3123ITC017

Amended Attachment 4 – Cost Sheet, dated September 08, 2022

Best and Final Offer, dated June 7, 2022

Vendor's responses to Additional Questions for Vendors, dated May 17, 2022

Additional Questions for Vendors, dated May 12, 2022

Vendor Offer, dated March 30, 2022

Amended Statement of Work, dated March 08, 2022

Vendor Questions and Answers Document, dated February 29, 2022

Statement of Work 3202200017, dated January 25, 2022

DIR Contract: DIR-CPO-4953

TWC will complete performance reviews in the Vendor Performance Tracking System (VPTS) annually and at key milestones of the contract, in accordance with Texas Government Code §§ 2155.089 and 2262.055.

NOTICE: Contractor is advised not to begin work under this contract until the eleventh (11th) business day following Notice of Award in the Electronic State Business Daily. TWC shall not be liable for payment for any work performed or goods delivered under this contract prior to the eleventh business day following Notice of Award.

Contractor hereby acknowledges that it has read and understands this entire Contract. All oral or written agreements between the parties hereto relating to the subject matter of this Contract that were made prior to the execution of this Contract have been reduced to writing and are contained herein. Contractor agrees to abide by all terms and conditions specified herein and certifies that the information provided to the Commission is true and correct in all respects to the best of its knowledge and belief.

The obligations of the Commission under this Contract are expressly contingent upon the availability of funds for such purposes. This Contract shall not be binding until expressly approved by the Executive Director of the Commission, or the Executive Director's designee.

APPROVED:

TEXAS WORKFORCE COMMISSION

Ed Serna: 
Executive Director

Date Signed: 10/12/2022

ISF, Inc.


Mark Burk: 
Senior Director of Clients and Solutions

Date Signed: 10/12/2022

Texas Department of Information Resources

SOW ID# TWC-000016

DocuSigned by:


Hershel Becker

7F04C9B913D547B
Hershel Becker

Chief Procurement Officer

11/28/2022 | 5:34 AM CST

Attachment 2: Acknowledgment of TWC Terms and Conditions.

The final Terms and Conditions of any Contract shall be agreed upon during negotiation. However, the minimum required TWC Terms and Conditions (Ts&Cs) that will be included in any awarded Contract are contained in the **SOW Attachment 1: Terms and Conditions**. If the SOW is awarded to a Respondent under a DIR Cooperative Contract, and the TWC Ts&Cs conflict with the DIR contract, the DIR contract prevails.

Respondents must acknowledge and sign this document and include it in their response by selecting either Option A **or** Option B, but not both.

If there are no exceptions, the Respondent shall explicitly state the Respondent takes no exception to any part of this SOW by selecting Option A.

If there are exceptions, the Respondent shall select Option B and explicitly state the exception(s) in the table provided. TWC is allowed to add additional terms and conditions as long as they do not conflict with DIR's. It is incumbent on the vendor to review both the DIR Terms and Conditions as well as the TWC Ts&Cs and tell TWC if there is a conflict. Merely taking a blanket exception to TWC Terms and Conditions is not acceptable.

Any exception may result in the Contract not being awarded to the Respondent.

Respondents are encouraged not to request exceptions to contract Terms and Conditions; TWC, in its sole discretion, may or may not accept the Respondent's requested exceptions. Any exceptions or deviations by Respondent to Attachment 1, TWC's Terms and Conditions (Ts&Cs), may make the offer unacceptable for award without discussion. If a Respondent proposes exceptions to the Ts&Cs, TWC may make an award without discussion to another Respondent that did not take exceptions to the Ts&Cs. At a minimum, proposals that have exceptions to TWC's Ts&Cs will have points deducted from the scoring item related to exceptions to TWC's Ts&Cs, which is worth up to five (5) points.

Option A

Respondent's organization accepts **TWC Terms and Conditions** without exception.



Signature of Respondent Authorized to Contract with TWC

June 7, 2022

Date

Or

Option B

Respondent's organization accepts **TWC Terms and Conditions** with exceptions noted in the table below.

Signature of Respondent Authorized to Contract with TWC

Date



Instructions: In the table below, note any exception to any provision, term or condition specified in the **SOW or Attachment 1**. An explanation as to why the Respondent cannot comply with the provision, term, or condition **and** why the proposed alternative language must be included in the Response. Add additional rows, if needed.

If Respondent fails to note any exception within its Response, Respondent will not be allowed to request an exception after submitting its proposal, during contract negotiations, or upon award.

| Location/Specific Section Reference | Objection/Exception | Proposed Alternative Language (redline) |
|-------------------------------------|---------------------|---|
| | | |
| | | |
| | | |



Addendum #1

Issue date 3/08/2022

Statement of Work

Deliverables Based Information Technology Service (DBITS)

Independent Verification and Validation (IV&V) Services

SOW No. 3202200017

Owner:

Texas Workforce Commission

101 East 15th Street, Austin, Texas 78778

Purpose:

- 1. Posting of Amended SOW dated March 8, 2022.**
- 2. Posting of Questions & Answers for Solicitation.**

THIS ADDENDUM FORMS A PART OF THE CONTRACT DOCUMENTS.

ACKNOWLEDGE RECEIPT OF THIS ADDENDUM IN THE SPACE PROVIDED BELOW AND SUBMIT WITH THE RESPONSE, FAILURE TO DO SO MAY DISQUALIFY RESPONDENT.

A handwritten signature in blue ink that reads "Mark Bunk".

Respondent's Signature of Acknowledgement

Date: June 7, 2022

- 1. Respondent must include page 1, signed, and dated, with their SOW submission response.**
- 2. Pages 2 thru 15 are not required to be submitted with response.**

Amended Attachment 4: Pricing Cost Worksheet

Pricing for Required Deliverables –Deliverable CostsPricing must address all requirements listed in **Attachment 6: Deliverables**

| Number | Task and Deliverable Description | Estimated Duration in Calendar Days | Fixed Price Fee | Total for Task |
|--------|---|-------------------------------------|-----------------|----------------|
| 1 | Status Report on IV&V Work | N/A | \$0 | \$0 |
| 2 | Assessments | 49 | \$69,160.00 | \$69,160.00 |
| 3 | Change Management (for Contract, Project, and Solution) | 32 | \$44,320.00 | \$44,320.00 |
| 4 | Contract Development | 25 | \$46,200.00 | \$46,200.00 |
| 5 | Contract Management | 40 | \$53,920.00 | \$53,920.00 |
| 6 | Communication Management | 16 | \$30,000.00 | \$30,000.00 |
| 7 | Configuration Management | 36 | \$50,000.00 | \$50,000.00 |
| 8 | Data Conversion and Migration | 60 | \$90,500.00 | \$90,500.00 |
| 9 | Governance | 36 | \$50,000.00 | \$50,000.00 |
| 10 | IV&V of Software Solution | 72 | \$98,240.00 | \$98,240.00 |
| 11 | IV&V of Hosting Solution | 72 | \$98,240.00 | \$98,240.00 |
| 12 | Interfaces Management | 36 | \$50,000.00 | \$50,000.00 |
| 13 | Organizational Change Management | 60 | \$89,760.00 | \$89,760.00 |
| 14 | Risk Management | 72 | \$98,240.00 | \$98,240.00 |
| 15 | Implementation Readiness | 36 | \$49,120.00 | \$49,120.00 |
| 16 | Deployment Plan and Dress Rehearsal | 16 | \$28,080.00 | \$28,080.00 |
| | Sub-Total Deliverables Cost | | N/A | \$945,780.00 |

Requirements PricingPricing must address all requirements costs necessary to fully deliver all **Attachment 5: Requirements**.

Please note some requirements are expected at no cost to TWC (\$0).

| Number | Other Costs (software, licensing, tools, services, etc.) | Estimated Duration in Calendar Days | Fixed Price Fee | Total for Task |
|--------|--|-------------------------------------|-----------------|----------------|
| 1 | Insert all items, one per row | | N/A | \$ |
| | None | N/A | N/A | N/A |
| | | | | |
| | Sub-Total Requirements Cost | | N/A | \$0 |

Grand Total Pricing

| Items | Fixed Price Fee | Total for Task |
|-----------------------------|-----------------|----------------|
| Sub-Total Deliverables Cost | N/A | \$945,780.00 |

| Items | Fixed Price Fee | Total for Task |
|----------------------------------|-----------------|---------------------|
| Sub-Total Requirements Cost | | \$N/A |
| Grand Total Proposed Cost | | \$945,780.00 |

Pricing Assumptions for Deliverable Costs

ISF has made the following assumptions in providing the fees and totals provided above:

1. The cost estimate provided is for the first two years of IV&V services only. ISF reserves the right to provide an update to the Deliverable Costs if services are required two years beyond execution of an initial contract with TWC.
2. In Task Order No. 2: Assessments, to perform "as-is," "to-be," and gap analysis for specified technology needs and provide a written report of findings and recommendations, ISF IV&V will perform a high-level assessment of how TWC's technology needs (business capabilities) are being met by the system being designed, developed, and implemented. High-level assessment by the ISF IV&V means highlighting where required business capabilities are retained in the "to-be" system. Business capabilities are a higher-level categorization of functional and technical requirements.
3. In Task Orders No. 7, 9, 12, 13, 15, and 16, ISF assumed the evaluation/assessment is to be performed for up to 4 MIRPs. Any additional occurrence will be subject to Change Order approval.
4. In Task Orders No. 3, 6, 10, 11, and 14, ISF assumed the evaluation/assessment is to be performed for up to 8 occurrences (quarterly over 2 years), each one encompassing only up to 4 active MIRPs. Any additional occurrence and MIRPs will be subject to Change Order approval.
5. TWC will include ISF IV&V personnel in all meetings with the project team(s) and vendor(s) as optional attendees, and ISF will attend based on schedule availability for projects assigned to ISF.
6. In the event that a task order quote request is provided and one or more of the resources listed on this SOW response is no longer available, ISF reserves the right to quote and propose an alternate resource who meets or exceeds the requirements at an hourly rate which falls within the NTE rate.
7. If for any reason, ISF has concerns about meeting a task order deadline, ISF will communicate with the TWC IT Contract Manager in writing and attempt to resolve concerns to both parties' satisfaction.



Texas Workforce Commission

Amended Statement of Work

Deliverables Based Information Technology Services (DBITS)

Independent Verification and Validation (IV&V) Services

Solicitation Number – 3202200017

Issued: March 8, 2022

Responses Due: March 11, 2022 2:00pm CST

TWC Independent Verification and Validation Services - Procurement Number - 3202200017

1. Introduction

Texas Workforce Commission (TWC) seeks Responses from Respondents who hold an active Texas Department of Information Resources (DIR) Deliverables Based Information Technology Services (DBITS) contract, to provide Independent Verification and Validation (IV&V) Services.

IV&V Services will enable TWC to achieve compliance with IV&V statutory requirements and achieve the following outcomes:

- Enhance management insight into risk and needed mitigation strategies;
- Support project life cycle processes to ensure compliance with regulatory, performance, schedule, budget, and quality requirements;
- Provide oversight of the Systems Development Life Cycle (SDLC);
- Provide supporting evidence on whether the customer's expectations will be met;
- Enhance assessment of outsourced systems vendor performance; and
- Facilitate project success.

2. Background

a. Agency Information

TWC is an administrative agency within the executive branch of the State of Texas, having its principal office at 101 East 15th Street, Austin, Texas 78701.

b. TWC Point of Contact during Solicitation

TWC Point of Contact (POC) for this procurement follows:

Paul Hesser, CTCD
Texas Workforce Commission
Procurement and HUB Services
Email: vendorproposals@twc.texas.gov

Required Subject Line for all Communications related to this Statement of Work (SOW):

IV&V Services 3202200017– XXXX

Examples:

IV&V Services 3202200017– ABC Question(s)

IV&V Services 3202200017– ABC SOW Response

Note: ABC refers to Respondent name

Respondents shall make no contact concerning this SOW with other TWC personnel, except as permitted by the Point of Contact. **Failure to comply with this requirement at any point prior to contract award may result in disqualification.** This restriction does not preclude discussions between affected parties for the purpose of conducting business unrelated to this procurement.

c. TWC Point of Contact **After** Contract Award and 10-day Waiting Period:

TWC Information Technology (IT) Contract Manager and POC after award:
Jamie Bindock, Manager of IT Acquisitions

TWC Independent Verification and Validation Services - Procurement Number - 3202200017

Texas Workforce Commission
 Information Technology Division
 Email: Jamie.Bindock@twc.texas.gov
 Telephone Number: 512/936-3441

3. Schedule of Events

It is TWC's intention to comply with the following schedule for this SOW. These dates represent a tentative schedule of events. **TWC reserves the right to modify these dates at any time.** Prospective Respondents will be notified by email of modifications to the schedule.

Table 1: Schedule of Events

| Activity | Date |
|---|------------------|
| IV&V Services SOW Sent to DIR DBITS (Vendors) | January 25, 2022 |
| Deadline for Submitting SOW Questions | February 9, 2022 |
| Answers provided to DBITS Vendors | February 25 2022 |
| Deadline for submitting Response | March 11, 2022 |
| Evaluation of Responses | March 23, 2022 |
| Award of Contract (AoC) | April 20, 2022 |
| Ten (10) business day hold period | May 5, 2022 |

4. SOW Attachments and Tables

Attachments to this SOW are listed in Table 2: SOW Attachments.

Table 2: SOW Attachments

| Attachment Number | Attachment Name |
|-------------------|---|
| Attachment 1 | TWC Terms and Conditions |
| Attachment 2 | Acknowledgement of TWC Terms and Conditions |
| Attachment 3 | Executed Offer Form |
| Attachment 4 | Pricing Cost Worksheet |
| Attachment 5 | Requirements and Minimum Qualifications |
| Attachment 6 | Deliverables |
| Attachment 7 | Deliverable Expectation Document (DED) |
| Attachment 8 | Task Order Form |
| Attachment 9 | Scoring and Points |
| Attachment 10 | Response File Names |
| Attachment 11 | Vendor's References |
| Attachment 12 | Sample Vendor Performance Report |

Tables within this SOW, including those to be used by the Respondent as templates for the Responses, are listed in **Table 3: Tables within this SOW.**

TWC Independent Verification and Validation Services - Procurement Number - 3202200017

Table 3: Tables Within this SOW

| Table Number | Table Name |
|--------------|------------------------|
| Table 1 | Schedule of Events |
| Table 2 | SOW Attachments |
| Table 3 | Tables Within this SOW |
| Table 4 | Question Template |
| Table 5 | Response Sections |

5. Scope of Work

a. Requirements

Awarded Vendors issued an approved Task Order shall complete assigned Tasks in accordance with **SOW Attachment 8 Task Order Form**.

b. Projects Within Scope

TWC is pursuing a DBITS contract through DIR to obtain IV&V Services on both existing and new projects of varying size and scope, including but not limited to, major information resources projects (MIRPs) as defined by Texas Government Code, Chapter 2054, Information Resources Management Act.

The following projects are in scope:

- Child Care Case Management System Replacement Project
- Unemployment Insurance System Replacement Project
- Workforce Case Management Systems Replacement Project
- Vocation Rehabilitation Case Management System Replacement Project.

TWC reserves the right to add projects, some MIRP and non-MIRP, to scope.

TWC desires to awards contracts to multiple DBITS Respondents under this single SOW solicitation. TWC envisions assigning Awarded Vendor(s) at least one or more projects and/or deliverables to perform IV&V Services.

c. Deliverables Within Scope

SOW Attachment 6 lists up to sixteen (16) Tasks (Deliverables) that TWC may issue for a project.

It is TWC's intent to assign one or more Projects to each Awarded Vendor based upon the vendor's qualifications and experience relevant to the business mission of the project. This is intended to align Awarded Vendor's business expertise with the business mission of each project. TWC reserves the right to assign any of the **SOW Attachment 6** Deliverables to any of the Awarded Vendors.

6. Respondent Questions and Official Answers

Respondents shall submit questions by email to vendorproposals@twc.texas.gov to the POC in

TWC Independent Verification and Validation Services - Procurement Number - 3202200017

Section 2.b. using **Table 4: Questions Template**. All questions must be emailed **by midnight, 12:00 am Central Standard Time (CST), February 9, 2022**. No questions will be accepted or reviewed after this date.

Table 4: Question Template

| # | SOW/Document Location/Cell Reference | Question |
|-------------------|--|--|
| <i>Example: 1</i> | <i>SOW Section 8 Response Deadline</i> | <i>May Respondents submit Responses before the deadline?</i> |
| | | |
| | | |

TWC will de-identify all questions, email all questions and TWC official answers separately to each DIR vendor recipient of this SOW by 5:00 pm CST, **March 8, 2022**.

By submission of a question, Respondent acknowledges that the applicable question and TWC official answer will be provided separately to each DIR vendor recipient of SOW. Therefore, Respondent should not include any confidential or proprietary information in such questions. TWC will not publish the identity of any vendor that submitted any inquiry.

7. Response Deadline

Responses must be received by TWC on or before **the date and time specified in SOW Section 3 Schedule of Events, Table 1. No late Responses will be reviewed.**

The system clock in the TWC electronic mail address is the official timepiece for determining compliance with the deadline.

Responses must be e-mailed to the designated email address in **SOW Section 2.b**. TWC only accepts emailed responses. Responses received after the submission deadline will be disqualified.

Note: TWC does not accept emailed responses that include html link(s) or encrypted emails that require downloading additional software.

TWC is not responsible for responses emailed late, illegible, incomplete, or otherwise considered disqualified due to failure of electronic equipment or operator error.

8. Response Ownership

All Responses, both redacted and complete, become the property of TWC. TWC reserves the right to use any and all information or materials presented in response to this SOW. Disqualification of a Respondent's Response does not eliminate this right. **Respondents must submit two (2) versions of the Response: one (1) redacted and one (1) complete. In the redacted version, please include "redacted" in file name(s). (Example: "Redacted_ABC_TWC_SOW_3202200017_Cost_Sheet.pdf")**

9. Public Information

- a) TWC is a government agency subject to the Texas Public Information Act. Responses submitted to TWC as a result of this SOW are subject to release as public information after Contracts are

TWC Independent Verification and Validation Services - Procurement Number - 3202200017

executed or if the procurement is terminated. Respondent may not mark its complete Response “copyrighted” or mark every page as proprietary or confidential, but if a Respondent believes that its Response, or parts of its Response, may be exempted from disclosure under Texas law, the Respondent must specify page-by-page and line-by-line the parts of the Response that it believes are exempt. In addition, the Respondent must specify which exception(s) are applicable and provide detailed reasons substantiating the exception(s). Pursuant to Texas Government Code Section 2252.907, Respondent is required to make any information created, exchanged with the state pursuant to a Contract with TWC, and not otherwise excepted from disclosure under the Texas Public Information Act, available in a format that is accessible by the public at no additional charge to the state.

- b) The Office of the Texas Attorney General (OAG) has the sole authority to determine whether information is confidential and not subject to disclosure under the Public Information Act. TWC shall comply with all decisions of the OAG.
- c) TWC assumes no responsibility for asserting legal arguments on behalf of any Respondent. Respondents are advised to consult with their legal counsel concerning disclosure issues resulting from this procurement process and to take precautions to safeguard trade secrets and other proprietary information.
- d) The issuance of this SOW does not imply that TWC is making an offer to do business with any SOW recipient or Respondent. No agreement or other binding obligation on TWC is implied or will occur unless and until a definitive agreement is executed. The issuance of this SOW and the submission of the Respondent’s Response do not create any obligation upon TWC to purchase goods or services from the Respondent, or to enter into any binding legal relationship with one (1) or more of the Respondents.
- e) TWC makes no representations or warranties regarding the accuracy or completeness of the information contained in this SOW, its Appendices and Attachments. The Respondent is responsible for making its own evaluation of information and data contained in this SOW and in preparing and submitting its Response.

10. Response Requirements

- a. Response shall be a maximum of nineteen (19) pages in total as listed in **SOW Table 5 Response Sections**. Failure to stay within the nineteen (19) page limit may be grounds for disqualification at TWC’s discretion.
- b. Respondent shall not refer to information located outside the SOW Response, such as a reference to a website, or linked document.
- c. Respondent’s response to each section must be fully contained within the section response, without referral to a response within another section; however, clearly marked attachments are acceptable if clearly referenced within the response to which they pertain.
- d. No documents, reports, or outputs prepared about TWC, its projects, contracts, or vendors may be shared with other entities without the expressed written permission of the TWC General Counsel.

TWC Independent Verification and Validation Services - Procurement Number - 3202200017

11. Response Content Requirements

Respondents shall organize their responses in the sequence listed within SOW Table 5 Response Sections. Each section shall be saved as a separate file and be named as described in SOW Attachment 10 Response File Names.

Table 5. Response Sections

| Section Title | Description | Source & Page Limits |
|--|--|---|
| Transmittal Letter | The transmittal letter shall include a statement that the person signing is authorized to contractually bind the organization in a contract with TWC. | Company letterhead Limit: 1 page |
| Executive Summary | Provide a separate Word document to communicate a summary of the Response. No appendices or specific references to additional information will be accepted. | Limit: 2 pages |
| Acknowledgement of TWC Terms and Conditions | Complete and sign SOW Attachment 2, Acknowledgement of TWC Terms and Conditions . | SOW Attachment 2 |
| Executed Offer Form | Attachment 3, Executed Offer Form must be completed and signed or the Response will be disqualified as noncompliant. | SOW Attachment 3 |
| Pricing Cost Sheet | Attachment 4, Pricing Cost Worksheet form must be completed and signed or the Response will be disqualified as non-compliant. | SOW Attachment 4 |
| Requirements | <p>Respondent must provide a file explaining how they will meet all Requirements provided in Attachment 5.</p> <p>Respondent must imbed their Response to each Requirement within Attachment 5. Respondents may add columns to tables listing Requirements or may insert paragraph(s) below each Requirement to provide explanations. Respondents must label their imbedded responses as follows: (Replace “ABC” with Respondent organization name.)</p> <p>In column headings add “ABC Response”</p> <p>In additional narrative text, add “ABC Response for Requirement number [X] Begins” at the start of the narrative text for a Requirement and add “ABC Response for Requirement number [X] Ends” at the end of the</p> | <p>SOW Attachment 5</p> <p>Limit: 12 pages</p> |

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| | | |
|--|---|--|
| | narrative text for a Requirement. The Respondent must re-name the file as required in SOW Attachment 10 Response File Names. | |
| Deliverables | Itemize each Deliverable listed in SOW Attachment 6 Deliverables. | Attachment 6 Limit: 20 pages |
| Respondent Organization References | In Attachment 11, References, Provide three (3) references for whom the Respondent organization provided the same or similar scope of work and deliverables required in the SOW. | SOW Attachment 11 Limit: 2 pages |
| Curriculum Vitae (CVs) of Key Personnel | Provide a separate Word document consolidating CVs for key personnel. For each key person, include: Full Name Planned Role throughout the life of the contract Relevant Professional Credentials Qualifications Past work experience on similar contracts or projects during the preceding (five) 5 years. | Respondent's consolidated Word document. Minimum CVs per Page: 2 Page Limit: 2 pages |
| | Response Total Page Limit (Attachments 2, 3, and 4 are not counted in this page limit.) | 39 Pages |

Response Organization and File Names

The Respondent must organize its response so that all required sections/files are in the same order as SOW **Table 5 Response Sections** and names files according to SOW **Attachment 10 Response File Names.**

12.TWC Right to Amend or Withdraw SOW

TWC reserves the right to alter, amend, or modify any provision of this SOW including the Terms and Conditions, or to withdraw this SOW, in whole or in part, at any time prior to the award of a Contract if doing so is in the best interest of the State. TWC reserves the right to re-solicit for like or similar products and services whenever it determines re-solicitation to be in the best interest of the State.

13.Pre-agreement Costs

TWC shall not be responsible or liable for any cost incurred by any Respondent in the preparation and submission of its Response to this SOW or for other costs incurred by participating in this procurement process. Further, TWC is not responsible or liable for any costs or expenses incurred by any Respondent prior to the execution of an agreement between TWC and Respondent and TWC's written authorization to commence work under a Contract.

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14. Evaluation and Scoring Written Responses

TWC will establish a Response Evaluation Committee of Agency subject matter experts (SMEs) and score each response as shown in SOW **Attachment 9 Scoring and Points**.

At any time during the evaluation process, TWC may ask any or all Respondents to elaborate on or clarify specific points or portions of their Response. TWC's request and Respondent's response shall be in writing.

15. Best and Final Offer (BAFO)

- a) TWC in its discretion will make the determination whether to engage in a BAFO process. The BAFO process, if held, may be scored.
- b) TWC reserves the right to continue to evaluate BAFO Responses until such point as it has determined that it has obtained best value for the State, as defined by Texas Government Code § 2157.003.

16. Negotiations

At the conclusion of the evaluation, as described in **Section 14** above, TWC will determine the number of BAFO Respondents with which it will start Contract negotiations. Negotiations will continue until TWC, in its sole discretion, determines that the best value for the State has been obtained.

17. Award of Contract

TWC Executive Management shall make the decision to award a Contract, if it is in the best interest of TWC and the State to do so. The decision of Executive Management on any award is final. All Responses and working papers pursuant to this SOW are not subject to disclosure under the Public Information Act until all Contracts resulting from this SOW have been executed.

18. Contract Terms

a. Period of Performance

TWC estimates that the term of the Contract will be approximately two (2) years with three (3) optional extensions at one (1) year each to be exercised by TWC at its discretion.

b. Form of Contract

This Contract will be a firm, fixed price contract.

c. Terms and Conditions

The final Terms and Conditions of any agreement ("Contract") resulting from this solicitation shall be agreed upon during negotiation. The DIR Cooperative Contract agreement shall be followed. TWC's minimum Terms and Conditions shall be included in any awarded Contract (see **Attachment 1**). Many of the TWC's Terms and Conditions contained in **Attachment 1** are required by Texas law, which shall be the governing law for any Contract.

In the event of conflict between the DIR Cooperative Contract and TWC's Terms and Conditions,

TWC Independent Verification and Validation Services - Procurement Number - 3202200017

the DIR Cooperative Contract shall prevail.

Respondents must use **SOW Attachment 2 to Acknowledge TWC Terms and Conditions** and to note any objection or exceptions to any provision, term, or condition specified in the SOW or SOW Attachment 1.

Exceptions must include:

1. Explanation as to why Respondent cannot comply with the term or condition **and** why the proposed alternative language **must** be included in the Response.; and
2. Proposed alternate language (redline).

It is incumbent on the vendor to review both the TWC Terms and Conditions and the DIR contracted Terms and Conditions and tell TWC if there is a conflict. Merely taking a blanket exception to TWC's Terms and Conditions is not acceptable.

TWC reserves the right to make changes to the TWC Terms and Conditions if it is in the best interest of the State to do so. Should this occur prior to the award of any Contract, Respondent(s) selected for negotiations will be notified.

d. Contract Change Management

After Contract Award, any changes made to the signed Contract must be documented as a Contract Change and must be approved by the original signers from TWC and the Awarded Vendor or their specified designees or replacements.

19. Security Agreements, Background Checks, and Mandatory Training

Successful Respondent staff performing work under the contract must sign and submit TWC security agreements and receive notification that there are no barriers to employment **prior to their start date**. Pursuant to Section 2.28 of TWC Terms & Conditions, Successful Respondent must submit criminal background checks on all personnel assigned to the services related to this Contract and provide TWC with the information required for TWC to conduct a Criminal History Report Investigation. Successful Respondent personnel must have approval from TWC in order to work on TWC Contracts and project(s).

Successful Respondent Project staff must comply with TWC Mandatory Training requirements during the term of the Contract and during any extension period.

The training will consist of no more than seven (7) classes with each class taking no more than forty-five (45) minutes. Class topics are subject to change, but currently include:

- a. IRS Information Security
- b. Information Technology Security Awareness
- c. Introduction to Electronic and Information Resources (EIR) Accessibility
- d. Sensitive Personal Information (SPI) Training
- e. Diversity, EEO, and Discrimination Prevention
- f. TWC Ethics Training
- g. Fraud Awareness Training

TWC Independent Verification and Validation Services - Procurement Number - 3202200017

h. Cybersecurity Awareness Training.

20. Task Orders and Deliverable Expectation

TWC IT Contract Manager will assign **SOW Attachment 6 Deliverables** to Awarded Vendor(s) by using **SOW Attachment 8 Task Order** form. TWC reserves the right to issue each Task (Deliverable) one Task Order at a time or to issue several Tasks (Deliverables) on one Task Order. TWC IT Contract Manager will include **SOW Attachment 7 Deliverable Expectation Document (DED)** with the Task Order form.

Within five (5) or fewer business days after receipt of assigned Task Order, Awarded Vendor will return the Task Order to the TWC IT Contract Manager with proposed start and end dates, proposed cost for each deliverable equal to or less than the Not to Exceed (NTE) amount listed in **SOW Attachment 6 Deliverables**, signature by Awarded Vendor's representative authorized to make agreements with TWC, and date of signature and the signed and dated DED document to show agreement with expectations.

Within three (3) business days after receipt of assigned Task Order, TWC will reply to accept, reject, or request more information on the returned Task Order. For accepted Task Orders, TWC IT Contract Manager will attach the DED with approval signature and date from either the TWC Chief Information Officer (CIO) or a Deputy CIO (DCIO).

Awarded Respondents will not begin work on any Deliverables without an approved Task Order and DED signed and dated by the TWC CIO or DCIO.

21. Invoices and Payment

a. Deliverable Expectation Document (DEDs)

Both Contracting parties must review, sign, and date **SOW Attachment 7 Deliverable Expectation Document (DED)** to document acceptance of each assigned, completed Deliverable listed in **SOW Attachment 6 Deliverables**.

b. Invoices

Awarded Vendors may invoice TWC after the **SOW Attachment 7 Deliverable Expectation Document (DED)** documenting acceptance of the deliverable is signed and dated by all required TWC IT parties. Awarded Vendors may send invoices for payment to appo@twc.texas.gov and submit an electronic copy to the TWC IT Contract Manager listed in SOW Section 2 Background.

c. Payment

Typically, payment will be issued within thirty (30) calendar days after receipt of the Invoice and DED. Awarded Vendors may track payments at the Texas Comptroller Public Account (CPA) website url:

https://fm.xcpa.texas.gov/fm/pubs/payment/gen_prov/index.php?s=pay_search&p=pay_search

22. Texas Government Code

In accordance with Texas Government Code § 2155.089, TWC will complete vendor performance

TWC Independent Verification and Validation Services - Procurement Number - 3202200017

reviews and report results to the Texas Comptroller of Public Accounts (CPA) as follows:

- a. At the end of the first six (6) months of the Contract;
- b. At the end of the first six (6) months of each Contract extension;
- c. At the end of each fiscal year throughout the life of the Contract;
- d. At the end of the Contract; and
- e. At any time deemed necessary by TWC.

Manny Hernandez, PMP, Senior Technical Project Manager

Manny Hernandez has more than 31 years of experience in the Information Technology and Applications Development industry and in IT Management Consulting, providing expert delivery of IV&V, PMO, System/Solution Integration, and advisory services for large State IT organizations. Project domains include State and Local Government, Health Care Administration, Health Information Technology, Health Insurance Exchange, Regulatory, Law Enforcement Systems and Telecommunications, Criminal Justice, Corrections, Transportation, Environmental Protection, quasi-government programs, HHS, Social Welfare, Child Welfare, Disability, Benefit Integrity, and private industries (Banking and Manufacturing).

TECHNICAL SKILLS

Program/Project Management, Systems Integration Delivery, Procurement for large-scale state government systems, PMO, IV&V, Requirements Management, Schedule Management, Test Management and Reporting, Implementation Management, Data Conversion Management, IV&V, Business and Process Analysis, Call Center Assessments and Strategy Formulation,

HIGHLIGHTED EXPERIENCE

Florida Department of Health, STD Program Business Process Analysis; Florida Department of Environmental Protection, SJRWMD e-Permitting Feasibility Study; Florida Department of Transportation, PMO for the Work Program Integration Initiative (WP11); Florida Department of Transportation, Florida Commission for the Transportation Disadvantaged (CTD), Annual Operating Report (AOR) Project; Hillsborough County Bureau of County Commissioners (HC BOCC), Call Center Review; Florida Department of Children and Families, Substance Abuse and Mental Health, Sexually Violent Predator Program (SVPP) Project; University of Texas SW – Texas Department of State Health Services – Immunization Unit, Business Process Improvement and Advisory; Railroad Commission of Texas, Business Process Improvement and Advisory; Florida Department of Management Services, Fleet Independent Verification and Validation (IV&V) Consulting Services; Florida Department of Revenue, SunVISN; Florida Department of Management Services, Statewide Law Enforcement Radio System (SLERS) Project Independent Verification and Validation (IV&V); Florida Department of Revenue and Florida Department of Transportation, Electronic Bill of Lading Portal (eBOLP); NCCER, Paper-Based Testing Solution Project; Florida Department of State, IT Security Risk Assessment; Florida Department of Revenue and Florida Department of Transportation, Electronic Bill of Lading Portal (eBOLP); AHCA MMIS and Decision Support System (DSS) Procurement Project System Replacement Procurement Support and PMO; FDLE Computerized Criminal History System Implementation, Independent Verification and Validation (IV&V); ACCESS Florida and Medicaid Eligibility System Implementation, System Replacement Procurement Support and PMO; Florida Health Choices, Inc., Project Management Office; Florida Agency for Healthcare Administration, State Medicaid Health Information Technology Plan; Criminal Justice Information System (ICJIS); California Department of Justice, Law Enforcement Telecommunications System; Florida Department of Children and Families, Applications Development and Project Management.

Roger Balettie, PMP, Project Manager

Roger Balettie is a results-proven certified project manager with extensive progressive experience in project leadership and the successful delivery of complex software solutions with cutting-edge development languages, technology, and Agile techniques. Roger is a proven leader and problem solver with a strong history in Texas IT projects.

EXPERTISE AND KEY QUALIFICATIONS

- | | |
|---------------------------------------|--|
| ✓ Project management | ✓ PMO |
| ✓ High-visibility IT projects | ✓ IT infrastructure |
| ✓ Agile and standard PM methodologies | ✓ Texas and Florida state government projects |
| ✓ Significant CMMI experience | ✓ Experience with full Software Development Life Cycle |

HIGHLIGHTED EXPERIENCE

As a project manager, Roger created and oversaw implementation of Project Management Office (PMO) processes for major US Army Product Director for Intel Software modernization. Provided Systems Engineering and Technical Advisor (SETA) program leadership to 9 Programs of Record (PORs) across various Army organizations and contractors with programmatic and technical reviews of cost, schedule, and performance metrics. He standardized PMO reporting processes, providing streamlined oversight of POR cost, schedule, and performance metrics and reducing PMO time and manpower. In this role he mentored several Army Project Managers in industry-standard PM techniques, resulting in POR adherence to US Army Acquisition standards.

His prior experience includes the University of Texas Health Science Center – San Antonio, MentalHealthTX Website Redesign; University of Texas Health Science Center – San Antonio, Behavioral Health Awareness Module Development; Texas Department of State Health Services, HIV Surveillance Module Development; University of Texas Health Science Center – Houston, Children's Learning Institute Engage Scaling; Florida Department of Children and Families, Methadone Treatment Licensure Application Review; Texas NIC, Senior Project Manager.

Mike Horowitz, Program Manager

Mike Horowitz has more than two decades of experience in a variety of roles leading large systems implementation and operations, including IV&V and quality assurance responsibilities. Since May 2016, he has served as the SPMO Program Manager for the State of Tennessee's Medicaid Modernization Project (MMP), I lead the PCG team of project managers, technical experts and business analysts providing program and project management services to Tennessee's Medicaid and HIE related projects. As a Principal with CSG's Healthcare and Human Services practice, he was assigned to projects with state government agencies, including Independent Verification and Validation (IV&V) and Quality Assurance engagements.

From 2013 to 2014, he provided Program Management Consulting to the Texas Medicaid Healthcare Partnership (TMHP). Activities included planning, requirements analysis and validation, technical design review, implementation support, and ongoing risk/issue management. Projects included analysis of the provider-related provisions of the Affordable Care Act, Long Term Care (LTC) Managed Care expansion, and Health & Human Services (HHS) Enterprise Data Warehouse/Data Governance.

From 2010 to 2013, he led a team that provided Independent Validation and Verification (IV&V) services for the Texas Health and Human Services Commission's Medicaid Eligibility and Health Information Service (MEHIS) system. He has previously served as CHIP Application Director for the Texas Access Alliance (TAA), where he provided management oversight to the sub-contracted vendor responsible for maintaining the Children's Health Insurance Program (CHIP) for the state of Texas. Responsibilities included validation of adherence to requirements, design standards, documentation completeness and accuracy, and project management processes and procedures.

Rob Cardelli, PMP, MBA, Program Manager

Rob Cardelli has more than two decades of risk management and IV&V expertise, including performing IV&V over some of the largest ERP engagements in the U.S., including:

- Maricopa County Community Colleges (PeopleSoft HCM, Finance and Student)
- University of South Carolina (PeopleSoft HR and Finance)
- Homeland Security (PeopleSoft HCM)
- IRS/Department of Treasury (PeopleSoft HCM)
- Kaiser Permanente (PeopleSoft HCM/Finance)
- University System of Georgia (32 colleges with PeopleSoft HCM and Finance)
- Colorado University System (PeopleSoft HCM, Finance and Student)
- University System of Texas (UT Shared Services- PeopleSoft HCM and Finance)
- New York University (Global Deployment- PeopleSoft HCM, Finance and Student)
- St. Lawrence Colleges (4 colleges- PeopleSoft HCM, Finance and Student)
- University of Connecticut Merger With UCONN Health (PeopleSoft HCM/Finance/Student)
- Crawford and Company Global Insurance (PeopleSoft Finance Global Deployment)

He is a project management expert in Agile, SCRUM, Waterfall and custom ERP specific deployment methodologies. He has managed engagements with multiple industry leading modern software platforms, and has state, local, and federal government experiences. He has deep experience leading strategic planning and cloud strategy initiatives, and is an expert at helping clients perform health checks and risk mitigation strategies.

Sinclair Garvin, PMP, MBA, Project Manager

Sinclair Garvin has more than 15 years of experience leading all phases of complex technology projects. He is an expert in the technical sections of the IV&V assessments, including implementation, technical operations, usability, performance, and others. He has previously managed the Department of Veterans Affairs (VA) MAS/Regional/OI&T large-scale organizational change management, developed the VA Organizational Change Plan, development, and execution of strategy rollout across the policy, data quality, and inventory tracks of work.

He has supported research and analysis, assessment, and Independent Verification and Validation (IV&V) efforts to establish or confirm accuracy, completeness, sufficiency, appropriateness, and/or effectiveness of VA Maryland Health Care System.

His subject matter expertise includes Clinical Quality Management (CQM), Program/Project Management Best Practices, Systems Engineering, Software Engineering, Oracle Financials Implementation, IEEE Standard 1012-2012 Standard for Software Verification and Validation industry Best Practices.



Attachment 6 – Deliverables

Awarded Respondents will prepare Attachment 6 Deliverables only after receiving an approved, signed, and dated Task Order from TWC. Awarded Respondents shall not begin work on any Deliverables without an approved Task Order and DED signed and dated by either the TWC Chief Information Officer (CIO) or Deputy CIO. Any work done prior to receiving and approved and TWC signed Task Order and DED is at risk of not receiving payment for the Deliverable. Find the Task Order Form in Attachment 8. The Not To Exceed amount for any one project is \$1,000,000.

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|---|--------------------------------|---|---|
| 01 | Status Report on IV&V Work (Required) | \$0 | Requirements: Prepare and provide a formal status report for all active IV&V work including current status, milestones, accomplishments for the previous month, and planned activities for the next month, risks, and issues. Written Report Required? Yes Task Duration: As specified on Task Order. Frequency: Monthly Due: First business day of each calendar month. | Methodology: The IV&V reporting cadence determined from the planning phase establishes the iterations or occurrences needed to conduct IV&V reporting for the project. These phases are normally executed by the IV&V for the customer's implementation project immediately following the IV&V Plan phase. The first iteration of the Execute Phase produces the IV&V initial report. Subsequent reports produced from review iterations will comprise the updates to the weekly status reports. In addition to these IV&V tasks, ISF will provide regular project status reports and facilitate status meetings, as required, and perform ongoing monitoring activities, including reviewing and validating issues, deficiencies, and risks identified with the consumer-first workforce system program. Inputs: Interview Summaries |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|--|--|--|---|
| | | | | <p>ISF IV&V Budget/Spend Plan ISF IV&V Project Schedule MIRP management data MIRP schedules MIRP Status Reports Tracking Logs for Risks, Issues, Action Items, Decisions, Change Requests, and Lessons Learned</p> <p>Output: ISF IV&V Status Report Updated ISF IV&V Schedule ISF IV&V Tracking Log updates</p> |
| 02 | Assessments (TWC's Option) | \$70,000 for 2.A through 2.G or \$10,000 each for selected items | <p>Requirements: Perform "as is", "to be", and gap analysis for specified technology needs and provide a written report of findings and recommendations. Each technology need is priced individually with a Not to Exceed (NTE) amount of \$10,000 each or \$70,000 for 2.A through 2.G combined.</p> <p>Assessment may be ordered for the following topics. Tasks may be ordered individually at separate times and annotated as Task Order 2.A, 2.B, 2.C, etc.</p> <ul style="list-style-type: none"> A. Application Portfolio B. Bandwidth C. Cloud strategy D. Cybersecurity E. EIR Accessibility F. Network Performance G. Quality Assurance. | <p>Methodology: The project team performs analysis to identify where there is a gap or inadequacy in the documentation, processes, procedures, and tools. Our methodology, along with input from TWC, will define the as-is and to-be states, as well as the criteria for determining where gaps exist. For each item that is not satisfied in the analysis of the current state of the project, ISF will identify a finding and define the associated risk. The objectives of the analysis are to document gaps (inadequate plans, processes, procedures, tools) identified during the assessment, express gaps as clear findings that describe what aspect of the project</p> |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|---|--------------------------------|--|--|
| | | | Written Report with Findings and Recommendations Required? Yes Task Duration: As specified on Task Order. Frequency: One Time for each topic or a group of topics. Due: As specified on Task Order. | needs remediation or improvement and define and analyze project risks associated with the each of the findings, identifying potential consequences and impacts on project success. Inputs: Functional analysis documentation Functional, technical, and security specifications Manuals Project Management Plans Quality checklists Quality policies and procedures Training media Vendor application documentation Output: ISF IV&V Assessment Reports |
| 03 | Change Management (for Contract, Project, and Solution) (TWC's Option) | \$ 50,000 | Requirements: Prepare and provide a formal report to verify and validate that vendor and TWC are in compliance with policies and procedures related to change management from the following state agencies: 3.A TWC including Information Technology (IT) Handbook 3.B Texas Comptroller for Public Accounts (CPA) 3.C Texas Department of Information Resources (DIR) 3.D Texas Legislative Budget Board (LBB) 3.E Texas Quality Assurance Team (QAT) Written Report with Findings and Recommendations Required? Yes | Methodology: ISF reviews all change requests including information on the date the change is proposed, who proposed it, the priority, potential impacts, and current status of the request. Change requests are documented in a Change Log from the initial request to the final implementation decision, ensuring follow-through and traceability. All changes are evaluated against the governing policies and procedures, and compliance or non- |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|---|--------------------------------|--|--|
| | | | Task Duration: As specified on Task Order. Frequency: Quarterly Due: 5th business day after the end of the calendar quarter | <p>compliance is documented in the findings with recommendations for timely remediation.</p> <p>Inputs: Agreement amendments Budget appropriation documents Budget tracking reports Change or task orders Change requests Configuration management system or tool Contractual documents Statements of Work TWC and vendor policies and procedures related to change management Written authorization documents and messages</p> <p>Output: ISF IV&V Change Management Assessment Report</p> |
| 04 | Contract Development (TWC's Option) | \$60,000 | <p>Requirements: Advise TWC employees preparing specified contract procurement documents including the following:</p> <ul style="list-style-type: none"> Request for Information (RFI) Request for Offers (RFO) Statements of Work (SOW). <p>Review and provide feedback for specified contract procurement documents.</p> <p>Review relevant Texas Administrative Code (TAC) and TWC contract development schedule for compliance with document</p> | <p>Methodology: ISF has provided oversight and IV&V for several state procurements of complex IT systems, and is highly qualified to advise TWC employees in this deliverable. Oversight ensures that the procurement adheres to realistic timelines and expectations, and that that the vendor contract reflects the commitments made by the vendors during the procurement</p> |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|--|--------------------------------|---|--|
| | | | <p>requirements set by statute or external state agencies and make recommendations for early compliance and schedule management.</p> <p>Written Report with Findings and Recommendations Required? Yes</p> <p>Task Duration: As specified on Task Order.</p> <p>Frequency: One time</p> <p>Due: Date specified in Task Order</p> <p>Restrictions: Per Texas Government Code § 2155.004, Awarded Vendor will be ineligible to respond to resulting solicitations.</p> | <p>process. In various projects, ISF has also provided oversight during negotiation, award, and the transition into implementation.</p> <p>Inputs: Contracts catalog Draft procurement documents for ISF IV&V review and recommendation Procurement catalog Solicitation resource information on availability, skills, certifications Texas Administrative Code TWC contract development schedule TWC purchasing policies and procedures</p> <p>Output: ISF IV&V Recommendations List for Contract Procurement Documents</p> |
| 05 | Contract Management (TWC's Option) | \$60,000 | <p>Requirements: Monitor work of a vendor and TWC for compliance with a specified written contract executed with the Agency.</p> <ol style="list-style-type: none"> 1. Compliance with Terms and Conditions and contract requirements 2. On-time delivery of deliverables 3. Quality of deliverables and adherence to written specifications 4. Acceptance of deliverables / helping Agency determine whether deliverables meet contract requirements and should be accepted. 5. Invoicing compliance with contract 6. Agency compliance with 30-day prompt payment act. | <p>Methodology: In state government IV&V, contract management is key to monitor a project to ensure it stays in scope, on time, and on budget. Oversight ensures that project execution and timelines meet TWC expectations, and that that the vendor's activities adhere to contractual commitments. ISF is experienced in providing independent third-party oversight of major technology implementations, and</p> |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|--|--------------------------------|---|--|
| | | | <p>Review TAC and TWC contract amendment(s) for TWC compliance with TAC cost increase threshold requirements for reviews by external entities and state agencies and make recommendations for early compliance and schedule management.</p> <p>Task Duration: As specified on Task Order.</p> <p>Frequency: One time.</p> <p>Due: Date specified in Task Order.</p> <p>Restrictions: Texas Government Code § 2155.004, Awarded Vendor will be ineligible to respond to resulting solicitations.</p> | <p>focuses on delivering positive outcomes and overall project success.</p> <p>Inputs: Change orders Contractual agreement documents for ISF IV&V review and recommendation Deliverable review reports or summaries Deliverable schedules Deliverable submittal documents Implementation schedules Invoices Service level agreement metrics and reporting Task orders Texas Administrative Code TWC contract management policies and procedures</p> <p>Output: ISF IV&V Recommendations List for Contract Management</p> |
| 06 | <p>Communication Management</p> <p>(TWC's Option)</p> | \$ 30,000 | <p>Requirements: Assess, verify, validate, and report in writing whether the following communication requirements are met:</p> <ol style="list-style-type: none"> 1. Software Solution Vendor Kickoff meeting is held on time and covers required information. 2. Software Solution Vendor creates and follows a Communication Plan. 3. TWC Project Management Office (PMO) Project Manager creates and follows an internal Communication Plan for keeping | <p>Methodology: Project success is the result of active communication between all individuals, understanding everyone's role in the project, and clear delineation of responsibilities. Communication management involves: Clearly established project goals and requirements</p> |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|--|--------------------------------|--|---|
| | | | <p>Executive Sponsors, Steering Committee, and Executive Staff informed.</p> <p>4. TWC Project Manager coordinates with TWC External Relations Communications Office on communications needed outside of TWC, if any.</p> <p>5. Adherence to communications plan.</p> <p>Written Report with Findings and Recommendations Required? Yes</p> <p>Task Duration: As specified on Task Order.</p> <p>Frequency: Quarterly</p> <p>Due: 5th business day after the end of the calendar quarter</p> | <p>Constant measurement of success against established deliverables and milestones</p> <p>Proactive identification and communication of risks and issues</p> <p>Ongoing assessment of quality against established standards</p> <p>Personal presence and commitment of key project leadership</p> <p>Inputs:</p> <p>Analysis reports</p> <p>Decision briefs, risks log, issues log, tracking logs</p> <p>Implementation plans</p> <p>Meeting minutes, meeting invitations, and internal and external notifications</p> <p>Organizational change management plans</p> <p>Project charters, project management plans</p> <p>Project communications, messages, and documentation</p> <p>Status reports</p> <p>Test plans and test defect reports</p> <p>Output:</p> <p>ISF IV&V Communication Management Assessment Report</p> |
| 07 | <p>Configuration Management</p> <p>(TWC's Option)</p> | \$ 50,000 | <p>Requirements: Review and evaluate the TWC IT Handbook, Policy 1103 and Standard Operating Procedure (SOP) 1114 on Configuration Management and recommend improvements.</p> <p>Review and evaluate actual configuration management plans,</p> | <p>Methodology:</p> <p>Drawing on our extensive internal expertise in software development and configuration of both custom and COTS</p> |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|--------------------------------------|--------------------------------|--|--|
| | | | <p>documents, and procedures applied to a specified MIRP by TWC and its software solution vendor to include development, deployment, and post-deployment operations.</p> <p>Verify that all critical development documents, including but not limited to requirements, design, code, are maintained under an appropriate level of control.</p> <p>Verify processes and tools are in place to identify code versions and to rebuild system configurations from source code.</p> <p>Verify processes and tools are in place to manage system changes, including formal logging of change requests and the review, prioritization and timely scheduling of maintenance actions.</p> <p>Verify that mechanisms are in place to prevent unauthorized changes being made to the system and to prevent authorized changes from being made to the wrong version.</p> <p>Written Report with Findings and Recommendations Required? Yes</p> <p>Task Duration: As specified on Task Order.</p> <p>Frequency: One time.</p> <p>Due: As specified on Task Order.</p> | <p>systems, ISF reviews system development procedures, including configuration control procedures. All project management and deliverable documentation must adhere to specified configuration processes.</p> <p>Inputs: Configuration management plans, documents, and procedures applied to a specified MIRP by TWC and its software solution vendor Current change request management procedures and tools Documents specifying requirements, design, development, deployment, and post-deployment operations Policies and procedures for code management and promotion controls Policy 1103 and Standard Operating Procedure (SOP) 1114 on Configuration Management TWC IT Handbook</p> <p>Output: ISF IV&V Configuration Management Assessment Report</p> |
| 08 | Data Conversion and Migration | \$100,000 | <p>Requirements: Review and evaluate the TWC IT Handbook, SOP 702 Design a Solution and SOP 702.06 Data Conversion Plan and recommend improvements in the SOPs.</p> <p>Review and evaluate actual configuration management plans,</p> | <p>Methodology: For this task, ISF draws on our extensive internal expertise in data conversion and migration for state agency clients. Data</p> |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|------------------------------|--------------------------------|---|---|
| | (TWC's Option) | | <p>documents, and procedures applied to a specified MIRP by TWC and its software solution vendor.</p> <p>Review and evaluate data conversion and migration schedule applied to a specified MIRP by TWC and its software solution vendor to determine whether adequate time and resources have been planned to accurately complete data conversion and/or migration.</p> <p>Written Report with Findings and Recommendations Required? Yes</p> <p>Task Duration: As specified on Task Order.</p> <p>Frequency: One time.</p> <p>Due: As specified on Task Order.</p> | <p>migration is the transfer of data from one application or database to another so that it can be used in another application or system. Data migration is a very complex task that requires a systematic approach, data cleaning activities, and multiple tests. The data migration plan lays out the principles and guidelines for the data migration process and each subsequent task, and is the foundation for documenting the scope, steps, and activities required to perform the migration successfully.</p> <p>Inputs: Data conversion and migration schedules applied to each MIRP by TWC and its software solution vendor Data Conversion Test Plans Data Conversion/Migration diagrams MIRP Project Data Conversion/Migration Plans SOP 702 Design a Solution and SOP 702.06 Data Conversion Plan TWC and MIRP/Vendor roles and responsibilities in a RACI (Responsible, Accountable, Consulted, Informed) chart or other narrative specification TWC IT Handbook</p> <p>Output:</p> |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|---|--------------------------------|---|---|
| | | | | ISF IV&V Data Management Assessment Report |
| 09 | Governance (TWC's Option) | \$ 50,000 | <p>Requirements: Assess TWC governance of specified IT domains, including but not limited to accessibility standards, architecture standards, cybersecurity, data, deployments, projects, and software acquisition for compliance with International Organization for Standardization (ISO) 9000 and TWC IT Handbook.</p> <p>Written Report with Findings and Recommendations Required? Yes</p> <p>Task Duration: As specified on Task Order.</p> <p>Frequency: One time</p> <p>Due: As specified on Task Order.</p> | <p>Methodology: Review all specified project organization and governance processes and adherence within scope specified on Task Order.</p> <p>Inputs: Dashboards, systems operations and maintenance records for deployments, upgrades, and installations, security logs, user access reports, cybersecurity and vulnerability assessment reports Dashboards, systems operations and maintenance schedules, summary reports of system incidents, failures, breaches on daily, weekly, monthly, annual, or other frequencies Documentation on accessibility standards, architecture standards, cybersecurity, data, deployments, projects, and software acquisition ISO 9000 IT Governance decision documents Management and control logs, messages, forms, manual and/or electronic requests MIRP organizational charts, roles and responsibilities, position descriptions TWC IT Governance process definitions, SOPs, meeting notes and minutes TWC IT Handbook</p> |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|--|--------------------------------|---|---|
| | | | | Output: ISF IV&V IT Governance Assessment Report |
| 10 | Independent Verification & Validation (IV&V) of Software Solution (Required) | \$100,000 | <p>1st Requirement(s): assess, verify, and validate vendor performance in contrast with the following expectations:</p> <ol style="list-style-type: none"> 1. Verify selected solution with configuration, and minor modifications meets business requirements as stated in Business Case, Business Workbook, the Requirements Traceability Matrix, or as specified in the Task Order. 2. Verify whether vendor is following software engineering practices as stated in ISO 9000 and TWC IT Handbook SOPs 700 through 705 System Development Life Cycle (SDLC) Methodology for implementing a purchased software solution. SOPs include requirements, design, traceability, configuration, minor code modification, testing, and deployment. <p>Written Report with Findings and Recommendations Required? Yes</p> <p>Task Duration: As specified on Task Order.</p> <p>Frequency: Quarterly</p> <p>Due: 3rd business day after the end of the calendar quarter</p> <p>2nd Requirement: Assess, verify, and validate Vendor Performance Tracking System (VPTS) forms on Software Solution Vendor's performance for approval by CIO before submission to TWC Purchasing and Contract Services (PCS). See Attachment 12 for a Sample VPT Report</p> <p>Written Report with Findings and Recommendations Required?</p> | <p>Methodology: For this task, ISF draws on our extensive internal expertise in software development and implementation of both custom and COTS systems. Depending on specifications of the solution, this may include, but is not limited to, items such as the logical data model, data dictionary, detailed design package, solution recommendation, impact assessment, testing strategy, and deployment plan, incorporating collaborative and quality reviews. Scope may include, but is not limited to, the technical environment, architecture, and hardware and software specifications.</p> <p>Inputs: Data conversion plans Implementation and transition plans ISO 9000 and TWC IT Handbook SOPs 700 through 705 System Development Life Cycle (SDLC) Methodology Manuals, training media, quality policies and procedures, quality checklists MIRP and Vendor task orders, SOWs, contracts</p> |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|--|--------------------------------|---|--|
| | | | <p>Yes, using TWC's mandatory form.</p> <p>Task Duration: As specified on Task Order.</p> <p>Frequency: Annually and after delivery of each project milestone.</p> <p>Due: Annually on August 15 and as specified in the Task Orders.</p> | <p>Project Management Plans</p> <p>Test plans</p> <p>Vendor application software documentation, functional, technical, and security specifications</p> <p>Output:</p> <p>ISF IV&V Software Solution Assessment Report</p> |
| 11 | <p>IV&V of Hosting Solution</p> <p>(Required)</p> | \$100,000 | <p>Requirements: Assess, verify, and validate hosting vendor performance in contrast with the following expectations:</p> <p>11.A Adherence to Service Level Agreements (SLA).</p> <p>11.B Deliverables quality, timeliness, and technical competence.</p> <p>11.C Accuracy/quality of deliverables</p> <p>11.D Competency, soundness, and viability of technical solutions</p> <p>11.E Success at collaboration with TWC and its employees and vendors</p> <p>11.F Meeting preparation, attendance, participation.</p> <p>11.G Responsiveness to TWC leadership requests.</p> <p>11.H Success at collaboration with TWC employees and other vendors on the project including the Software Solution Vendor.</p> <p>11.I Amount of unnecessary duplication of effort by TWC.</p> <p>Written Report with Findings and Recommendations Required?</p> <p>Yes</p> <p>Task Duration: As specified on Task Order.</p> <p>Frequency: Quarterly</p> <p>Due: 5th business day after the end of the calendar quarter.</p> | <p>Methodology:</p> <p>As both a hosting provider and broker of hosting services, ISF draws on our internal expertise to evaluate hosting vendor performance against SLAs and TWC expectations, ensuring that TWC is getting the best value.</p> <p>Inputs:</p> <p>Contracts, agreements, licenses, expectation documents with hosting vendor, to include SLAs, project and deliverables schedules, requirements and configuration design specifications, technical plans, communications, messages, interactions between TWC and hosting vendors, meeting agendas, notes, participation, documents indicating responses to TWC requests</p> <p>Output:</p> <p>ISF IV&V Hosting Solution Assessment</p> |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|--|--------------------------------|--|--|
| | | | | Report |
| 12 | Interfaces Management (TWC's Option) | \$50,000 | <p>Requirements: Assess TWC's management of interface requirements and recommend improvements in planning and implementation for a specified MIRP to include the following:</p> <ul style="list-style-type: none"> • Identification of all relevant interfaces • Identification of parties exchanging information using the interfaces • Identification of required interface changes • Development of plan and schedule to modify interfaces, ensuring TWC and vendor have allowed adequate time • Notification / communication with all affected parties • Identification and execution of changes to code or configurations required • Methods for testing changes in interfaces • Evaluation of test results and planned corrective actions • Implementation of changed interfaces in production. <p>Written Report with Findings and Recommendations Required? Yes</p> <p>Task Duration: As specified on Task Order.</p> <p>Frequency: One Time</p> <p>Due: As specified on Task Order.</p> | <p>Methodology:</p> <p>ISF has extensive experience designing and implementing interfaces among state government systems, and draws on our internal expertise to review interfaces between systems for performance, ease of use, and ease of maintenance.</p> <p>Inputs:</p> <p>Governing policies regarding the interfaces to be developed and supported Interface metadata and catalog Interface reporting procedures, interface incident reports, interface enhancement requests, interface change requests, interface ownership details, interface problem resolution processes Interface status reports and dashboards, interface volumetric statistics MIRP's technical and functional design specifications Quality assurance measures for interfaces and data integrity Requirements Traceability Matrix or requirements lists Risks and responses methods, interface issue resolution procedures Roles and responsibilities of interface development support functions Schedule and list of interface management</p> |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|---|--------------------------------|---|---|
| | | | | activities, meetings, sessions, analysis documents, interface stakeholders involved in the exchange of information Output: ISF IV&V Interface Management Assessment Report |
| 13 | Organizational Change Management (TWC's Option) | \$100,000 | <p>Requirements: Evaluate the Agency's strategy, plan, and schedule for Organizational Change Management (OCM) as applied to TWC business area(s), TWC customers, and/or IT for a specified MIRP and recommend improvements in OCM approach.</p> <p>Verify that TWC considered the following factors:</p> <p>13.A OCM Process and Schedule 13.B Organizational Current State 13.C Organizational Planned Future State 13.D Gaps to Achieving Planned Future State:</p> <ul style="list-style-type: none"> • Resistance to change • Change in Workflow • Change in Business Process • Change in Policies • Change in Procedures • Change in employee roles, responsibilities, and duties • Training Needs • Communication Needs • Change in IT Support • Change in volume of work • Change in human resource capacity. <p>Task Duration: As specified on Task Order. Frequency: One time</p> | <p>Methodology: Adoption of the new system by its users is critical to overall project success and OCM should be addressed early and often. ISF will evaluate OCM planning and execution and assess adherence to any specified OCM methodology, the expected effectiveness, and recommend any corrective actions if needed.</p> <p>Inputs: Any enterprise OCM approach and methodology information Communications plans Current and future state organizational structures, organizational analyses, existing organizational change networks Data conversion and migration plans Data management strategy and plans End-user engagement plans, test plans, testing roles and responsibilities Internal and external communications to stakeholders, technical implementation approach and schedules</p> |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|---|--------------------------------|--|--|
| | | | Due: As specified on Task Order. | <p>MIRP status reports and dashboards</p> <p>OCM and stakeholder roles and responsibilities</p> <p>OCM approach and implementation plans, schedules</p> <p>OCM policies and procedures</p> <p>OCM service-level requirements, training plans, training materials, sponsorship engagement plans</p> <p>Resource management plans, budgets and spend plans</p> <p>Risks and response plans</p> <p>Stakeholder management plans</p> <p>Output:</p> <p>ISF IV&V OCM Assessment Report</p> |
| 14 | <p>Risk Management</p> <p>(TWC's Option)</p> | \$100,000 | <p>Requirements: Verify that Risk Management Plans for the contract with the Software Solution Vendor, Hosting Solution Vendor, and the project for a specified MIRP are created and followed.</p> <p>Validate that risks to the contracts and project are being detected and identified early, documented, quantified, qualified, and reported to IT Leadership and Executive Sponsors.</p> <p>Validate that a risk response (acceptance, elimination, or mitigation) is identified for every critical or high risk and reported to IT Leadership and Executive Sponsors for early and timely response.</p> <p>Recommend corrective actions to improve Risk Management.</p> <p>Written Report with Findings and Recommendations Required? Yes</p> | <p>Methodology:</p> <p>Risk management is a core activity in any project from kickoff through close. ISF thoroughly review risk management planning and risk response against industry best practices, identifies areas for improvement if needed, and advances recommendations to project leadership.</p> <p>Inputs:</p> <p>Contracts, SLA's, change requests</p> <p>Historical risk realization and management reports</p> <p>MIRP risk logs</p> <p>Project management plan, schedules</p> |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|---|--------------------------------|---|--|
| | | | Task Duration: As specified on Task Order. Frequency: Quarterly Due: 5th business day after the end of the calendar quarter. | Risk analysis reports Risk management meeting agendas and notes Risk management roles and responsibilities, other risk management tools Output: ISF IV&V Risk Management Assessment Report |
| 15 | Implementation Readiness (TWC's Option) | \$50,000 | Requirements: Prepare and provide a formal report to verify and validate that vendor and TWC are ready to implement the MIRP into production. Considerations include but are not limited to the following: A. Test results B. State and quality of software and hardware solutions C. Status of training D. State of OCM Plan E. State of employee morale/resistance to change F. Adequate communications to all parties with a need to know G. Planning, implementation, and staffing of Go Live Command Center H. Post-implementation maintenance and operations plan. Written Report with Findings and Recommendations Required? Yes Task Duration: As specified on Task Order. Frequency: One Time | Methodology: Review all testing activity, results, and defect management, training activities and knowledge retention, conduct qualitative assessments of staff readiness and organizational readiness via interviews and review of project communications and stakeholder feedback. Review implementation scenarios, rollback planning, and contingency plans. Inputs: Assessments of contact management planned activities resources, schedules Contact support scripts and procedures Contingency plans Deployment checklists Incident management system readiness assessments MIRP implementation plans, schedules Open defect and issue logs, reports, and |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|--|--------------------------------|---|--|
| | | | Due: As specified on Task Order. | statistics Operational procedures and job aids Operational roles and responsibilities Peak-time staffing plans Requirements traceability matrices Resource readiness checklists Risk logs Software readiness checklists Staffing reports Systems operations and maintenance plans and schedules Training plans, training results assessments Transition plans and support mechanisms User acceptance test results Output: ISF IV&V Implementation Readiness Assessment Report |
| 16 | Deployment Plan and Dress Rehearsal (TWC's Option) | \$30,000 | Requirements: Prepare and provide a formal report on review of TWC's and vendor's deployment plan / checklist and dress rehearsal and recommend improvements before go live. Written Report with Findings and Recommendations Required? Yes Task Duration: As specified on Task Order. Frequency: One Time Due: As specified on Task Order. | Methodology: Review deployment plan against best practices and ISF subject matter expertise, including past deployment experience, to identify any gaps and recommended improvements prior to go-live. Inputs: Assessments of contact management planned activities resources, schedules Contact support scripts and procedures Contingency plans |

| Task Order No. | Task Order Short Description | TWC's Not to Exceed (NTE) Cost | Task Long Description | Respondent's Proposed Approach |
|----------------|------------------------------|--------------------------------|-----------------------|--|
| | | | | <p>Deployment checklists</p> <p>Incident management system readiness assessments</p> <p>MIRP implementation plans, schedules</p> <p>Open defect and issue logs, reports, and statistics</p> <p>Operational procedures and job aids</p> <p>Operational roles and responsibilities</p> <p>Peak-time staffing plans</p> <p>Requirements traceability matrices</p> <p>Resource readiness checklists</p> <p>Risk logs</p> <p>Software readiness checklists</p> <p>Staffing reports</p> <p>Systems operations and maintenance plans and schedules</p> <p>Training plans, training results assessments</p> <p>Transition plans and support mechanisms</p> <p>User acceptance test results</p> <p>Output:</p> <p>ISF IV&V Deployment Plan and Dress Rehearsal Assessment Report</p> |

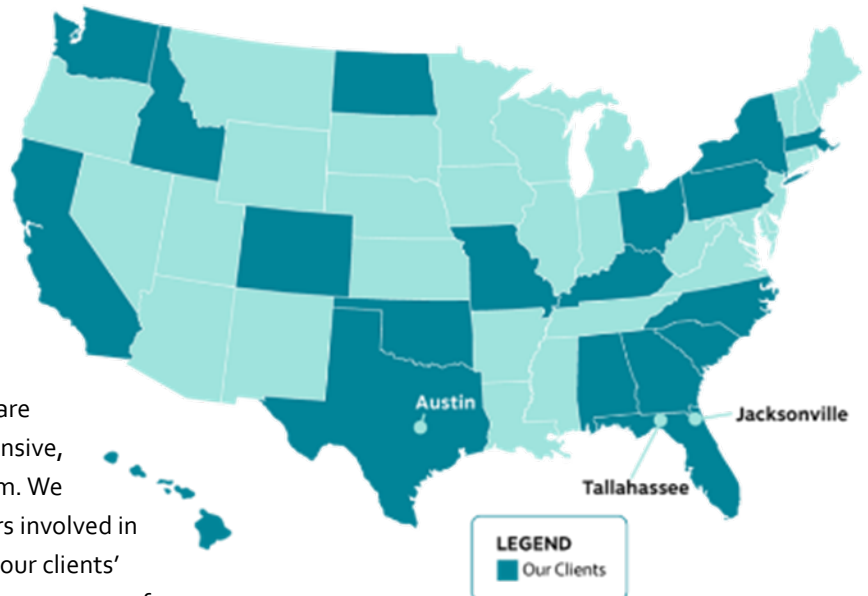
Executive Summary

ISF, Inc., is a nationwide management consulting and information technology firm with a local office and resources in Austin, Texas — one of two states where ISF has chosen to establish offices. ISF employs approximately 100 individuals, including contract resources, and has successfully executed projects in 19 states. The company was established in 1979, and has grown and evolved as the technology needs of public sector organizations have evolved.

Our priority is serving state agencies, so each client benefits from personal service and a fierce dedication to delivering high quality results on every project. Our management and IT consulting capabilities are broad and deep, while still being agile, responsive, and available where and when you need them. We know the steps, challenges, and stakeholders involved in driving decisions, and we can predict where our clients' challenges are going to be. That makes us the smarter, safer choice for IT projects.

Initially founded as a software development company, ISF has added value to our client work by adding our expertise in strategy, process, and technology to deliver comprehensive and holistic professional services that deliver smart IT solutions across the enterprise. ISF brings a proven methodology to our IV&V work, developed over decades of providing oversight on projects for state government clients and our own internal project oversight. ISF has provided IV&V services for our projects since we were founded 43 years ago, and we have performed IV&V for state government clients since before the formal concept of IV&V was established. Most recently, we have provided IV&V services for several significant projects for the Florida Department of Management Services with total project value exceeding tens of millions of dollars. Recent IV&V projects include the following:

- MyFloridaMarketPlace eProcurement Support – Oversight services for the procurement of a new e-procurement system for state purchasing
- SUNCOM IV&V – Oversight of procurement and implementation of a new statewide telecommunications system



Strategy

- Strategic Planning
- Gap Analysis
- Program Planning Roadmaps



Process

- Business Process Innovation
- Independent Verification & Validation (IV&V)
- Efficiency Studies and Assessments



Technology

- Application, Web, and Mobile Development
- Modernization Strategy and Implementation
- Hosting and Support
- Data Management, Analysis and Migration

- Statewide Law Enforcement Radio System IV&V – Oversight of procurement and implementation of a new Statewide Law Enforcement Radio System
- Fleet IV&V – Oversight of the implementation of a new Fleet Management Information System

ISF's rigorous IV&V methodology ensures that the IV&V team assesses the following:

- The client Project Management (PM) Team's adherence to industry best practices to include evaluation of the ten PMBOK project management process areas utilizing the ISF's Assess, Analyze, Recommend methodology.
- Deliverables that include both project management and technical deliverables utilizing the ISF Assess, Analyze, Recommend methodology.
- Project successes and challenges at completion, including a detailed list of all IV&V deliverables completed and project lessons learned, outcomes, and recommendations, as part of the IV&V project closeout process.
- Project progress utilizing the ISF Earned Value Management (EVM) worksheet, or similar 6oGG-1 compliant process and tool, to calculate variance based on planned and actual work completion.
- Project and technical requirements status utilizing the ISF requirements traceability matrix (RTM) worksheet, or similar 6oGG-1 compliant process and tool, traceable to all requirements within the SOW.
- Risk, action item, issue and decision (RAID) status utilizing the ISF RAID log worksheets to track, analyze, and report on all RAID Items.

Our most recent workforce system and unemployment insurance experience includes work at the Florida Department of Economic Opportunity, where we successfully delivered an analysis of the Reemployment Assistance CONNECT System. For this project, ISF examined and assessed the delivery of reemployment assistance (RA) benefits in the Florida, including an assessment of the CONNECT system, Florida's system providing the intake and processing of RA claims, and identification of recommendations to improve RA claims processes. The project focused in part on identifying gaps and strategies for improving performance of the system, including Department goals to improve organizational agility and create a sustainable culture of continuous improvement, achieve workforce and RA national prominence, and reduce operating costs.

In Florida we also delivered a One Stop Service Tracking (OSST) Modernization Plan/Roadmap for the Agency for Workforce Innovation (AWI), the predecessor of the Department of Economic Opportunity responsible for welfare transition and food stamp employment and training in Florida. ISF took a comprehensive look at OSST and developed a detailed approach to making it a robust, federally compliant, and user-friendly system. The resulting Roadmap guided the modernization of this system over the next several years, as well as identified cost requirements. This project provided ISF the opportunity to become familiar with workforce services, as well as develop a deep understanding of the Welfare Transition and Food Stamp Employment and Training federal programs, and the business rules, state legislation, and federal rules.

We are confident that our combination of workforce system and IV&V experience qualifies us to serve the Texas Workforce Commission with reliable IV&V services that provide insight into risk and needed mitigation strategies, provide independent oversight of outsourced systems vendor performance, and lead to project success for these major technology implementations.

Attachment 3: Executed Offer Form

The firm, fixed price per item listed on **Attachment 4: Pricing Cost Sheet** must remain firm, fixed pricing from the date of Contract award through the end of the Contract period.



June 7, 2022

Signature of person authorized to make this agreement

Date Signed

Mark Burk, Senior Director of Clients and Solutions

Printed name and title of person signing above

RESPONDENT INFORMATION

Respondent Name: ISF, Inc.

Mailing Address: 4601 Touchton Rd. East, Suite 3250

Billing Address:
(if different from above)

City, State & ZIP Code: Jacksonville, FL 32246-4485

Phone No.: (904) 724-2277

E-Mail Address: sales@isf.com

Employer Identification No.: 59-1961607

Texas Identification No.: 1591961607600

To minimize identity theft, every company/individual MUST have an Employer Identification Number (EIN), also known as a federal tax identification number prior to award of a contract. For information on obtaining your EIN, you may call 800-829-4933 or visit the following website:

<https://www.irs.gov/businesses/small-businesses-self-employed/>

The Texas Identification Number is the payee identification number assigned and used by the Texas Comptroller of Public Accounts (CPA) to process payment for goods/services. Enter this number in the space provided above if number is not pre-printed. If this number is not known, please visit <https://fmx.cpa.texas.gov/fmx/login.php?page=/fmx/payment/forms/agy/AP-152/index.php> to set up a Texas Identification Number.

Attachment 5 – Requirements and Minimal Qualifications

Respondent must describe how it will meet all requirements listed in **SOW Attachment 5**.

1. Independent Verification and Validation (IV&V) Minimum Qualifications

- 1.1 Definition of IV&V

Texas Government Code, Chapter 2054 requires State Agencies to acquire IV&V services for all major information resources projects (MIRP). A project is considered a MIRP when the development costs are equal to or more than \$5 million, require more than twelve (12) months to implement, impact one or more other State Agencies, and/or any project so designated by the Texas Legislature.

Respondent must provide IV&V services that meet the following definitions:

- “Independent” indicates that assessments are performed by a third party and not the same vendor or staff developing the product to maintain technical, managerial, and financial independence
- “Verification: confirms TWC is building the product right and it is well engineered in accordance with industry and Agency standards, specifications and the contract with the system vendor.
- “Validation” confirms TWC is building or buying the right product and the product conforms with customer’s requirements.

IV&V services and Deliverables must provide agency management with an independent perspective on project activities and promote early detection of variances in the product, project, vendor services and performance, and systems to ensure all fulfill their intended purposes. This allows a project to implement corrective actions and/or course corrections before issues impact cost, schedule, scope, and quality.

At a minimum, IV&V services must include the following: reviewing, analyzing, evaluating, inspecting, reporting, and monitoring corrective actions for the following project activities:

1. Project management life cycle;
2. data conversion and migration;
3. risk management;
4. software engineering life cycle;
5. system vendor deliverables;
6. system vendor outcomes;
7. project governance; and
8. project oversight.

ISF Response for Requirement number 1.1 Begins

ISF brings a proven methodology to our IV&V work that exceeds the minimum qualifications listed above. Our methodology had been developed over decades of providing oversight on projects for state government clients

and our own internal project oversight. ISF has provided IV&V services for our projects since we were founded 43 years ago, and we have performed IV&V for state government clients since before the formal concept of IV&V was established. Most recently, we have provided IV&V services for several significant projects for the Florida Department of Management Services with total project value exceeding tens of millions of dollars. Recent IV&V projects include the following:

- MyFloridaMarketPlace eProcurement Support – Oversight services for the procurement of a new e-procurement system for state purchasing
- SUNCOM IV&V – Oversight of procurement and implementation of a new statewide telecommunications system
- Statewide Law Enforcement Radio System IV&V – Oversight of procurement and implementation of a new Statewide Law Enforcement Radio System
- Fleet IV&V – Oversight of the implementation of a new Fleet Management Information System

ISF's rigorous IV&V methodology ensures that the IV&V team assesses the following:

- The client Project Management (PM) Team's adherence to industry best practices to include evaluation of the ten PMBOK project management process areas utilizing the ISF's Assess, Analyze, Recommend methodology.
- Deliverables that include both project management and technical deliverables utilizing the ISF Assess, Analyze, Recommend methodology.
- Project successes and challenges at completion, including a detailed list of all IV&V deliverables completed and project lessons learned, outcomes, and recommendations, as part of the IV&V project closeout process.
- Project progress utilizing the ISF Earned Value Management (EVM) worksheet, or similar 6oGG-1 compliant process and tool, to calculate variance based on planned and actual work completion.
- Project and technical requirements status utilizing the ISF requirements traceability matrix (RTM) worksheet, or similar 6oGG-1 compliant process and tool, traceable to all requirements within the SOW.
- Risk, action item, issue and decision (RAID) status utilizing the ISF RAID log worksheets to track, analyze, and report on all RAID Items.

ISF Response for Requirement number 1.1 Ends

1.2. Respondent Organizational Team Experience with IV&V

Respondent must demonstrate that the Respondent Organizational Team assigned to work on the Awarded Contract meets the required amount of experience and minimum skill level listed in Table 1. Recent is defined as September 1, 2015 through the date of the Response. Experience in activities listed in Table 1 may have been acquired concurrently or in parallel. Minimum team skill level is specified as follows: 0-None, 1-Freshman, 2 -Sophomore, 3-Junior, 4-Senior, or 5 -Master.

Key for Skill Level Definitions in Tables 1.

| Skill Level | Definition |
|-------------|--|
| 0 | No one on Respondent team has experience in the specified activity |

| | |
|---|--|
| 1 | At least one person on Respondent team has one (1) year experience in the specified activity |
| 2 | At least one person on the team has two (2) years of experience in the specified activity |
| 3 | At least one person on the team has three (3) years of experience in the specified activity as a project lead |
| 4 | At least one person on the team has four (4) years of experience in the specified activity as a project manager and/or as an IV&V manager |
| 5 | At least one person on the team has four (4) years of experience in the specified activity as a project manager and/or as an IV&V manager and is certified as a project management professional (PMP) and/or holds other industry-recognized certifications or credentials. |

ISF Response for Requirement number 1.2 Begins

ISF is pleased to propose a team that includes four certified Project Management Professionals, and nearly 100 years of collective IV&V experience on a broad range of large and complex technology implementations in state government. We are therefore confident that our Organizational Team Experience, described in Table 1, exceeds the TWC required amount of recent experience and achieves the Master level in all types of activities described below.

ISF Response for Requirement number 1.2 Ends

Table 1. IV&V Organizational Team Experience

| ID | Types of Activities | Required Amount of Recent Experience (Years) | Required Minimum Skill Level 5-Master 4-Senior 3-Junior 2-Sophomore 1-Freshman 0-None | ISF Response |
|----|---|--|---|--------------|
| a | Planning a Project | 4 | 4 | 5 |
| b | Developing a Work Breakdown Structure | 4 | 4 | 5 |
| c | Identifying a Project Critical Path | 4 | 4 | 5 |
| d | Developing Business Requirements | 3 | 3 | 5 |
| e | Developing System Requirements | 3 | 3 | 5 |
| f | Creating a Requirements Traceability Matrix | 3 | 3 | 5 |
| g | Applying a Systems Development Life Cycle | 3 | 3 | 5 |
| h | Developing a Thorough Test Plan | 3 | 3 | 5 |
| i | Performing Business Analysis | 4 | 4 | 5 |
| j | Performing Systems Analysis | 4 | 4 | 5 |
| k | Performing Process Improvement | 3 | 3 | 5 |

| ID | Types of Activities | Required Amount of Recent Experience (Years) | Required Minimum Skill Level 5-Master 4-Senior 3-Junior 2-Sophomore 1-Freshman 0-None | ISF Response |
|----|---|--|---|--------------|
| l | Developing Criteria for Successful Outcomes | 3 | 3 | 5 |
| m | Developing Criteria for Quality Outcomes | 3 | 3 | 5 |
| n | Making Observations | 3 | 3 | 5 |
| o | Interviewing Participants and Stakeholders | 3 | 3 | 5 |
| p | Assessing Return on Investment | 4 | 4 | 5 |
| q | Managing Human Resources | 3 | 3 | 5 |
| r | Gathering and Analyzing Data | 3 | 3 | 5 |
| s | Performing Risk Management | 4 | 4 | 5 |
| t | Drawing Conclusions | 4 | 4 | 5 |
| u | Making Recommendations | 4 | 4 | 5 |
| v | Developing Corrective Action Plans | 4 | 4 | 5 |
| w | Writing Reports of Findings, Conclusions, and Recommendations | 4 | 4 | 5 |
| x | Presenting Findings, Conclusions, and Recommendations to varied levels of staff during meetings | 4 | 4 | 5 |
| y | Writing progress or status reports. | 3 | 3 | 5 |

1.3. Respondent Organizational Team Experience with Business Programs

Respondent must state whether at least one (1) person on the Respondent Organizational Team assigned to work on the Awarded Contract has recent work experience with or knowledge of the government programs listed in Table 2. Recent is defined as September 1, 2015 through the date of the Response.

ISF Response for Requirement number 1.3 Begins

ISF is pleased to propose a team with extensive experience delivering complex information technology projects in local, state, and federal government in Texas and throughout the U.S. ISF brings a proven methodology to our IV&V work, developed over decades of providing oversight on projects for state government clients and our own internal project oversight. As such, we are confident that our proposed team will provide exceptional services to TWC staff across all program areas.

ISF Response for Requirement number 1.3 Ends

Table 2. Business Program Experience or Knowledge

| ID | Program Name | Preferred Amount of Experience (In Years) | Type of Experience C-Contractor E-Employee V- Vendor | Preferred Knowledge Level 5-Worked as a direct service-delivery employee of the program for at least 2 years 4-Provided IV&V services to program for at least 2 years 3-Reviewed a policy and procedures manual 2-Reviewed governing legislation 1-Did Internet Research 0-None | ISF Response |
|----|---------------------------|---|---|---|--------------|
| a | Child Care Program | 3 | Any | 5 | 5 |
| b | Unemployment Insurance | 3 | Any | 5 | 3 |
| c | Vocational Rehabilitation | 3 | Any | 5 | 3 |
| d | Workforce | 3 | Any | 5 | 3 |

2. Independent Verification and Validation (IV&V) REQUIREMENTS

2.1 IV&V Methodology Requirements

Respondent must state whether they use the methodology requirements listed in Table 4 by entering Yes or No in the third column. For each “Yes” response, Respondent must briefly explain how the methodology is applied.

Table 3. Methodology Requirements

| ID | Methodology Requirement must: | Yes / No | Brief explanation of application of methodology |
|----|--|----------|---|
| a | use pre-defined checklists | Yes | ISF has developed an internal IV&V methodology checklist to use as a guide in assessing project health, an Excel spreadsheet with tabs that align to best practices in project management and the elements of the IV&V Management Plan. Adjustments to the checklist will depend on specific IV&V project requirements. The objectives of the assessment are to review each evaluation area identified in the checklists, as well as any additions based on the specific contract, and to develop an evaluation summary, describing the project’s capacity and ability to perform in each evaluation area according to the relevant standards and guidelines, including templates and best practices. |
| b | follow Institute of Electrical and Electronics Engineers (IEEE) or Capability Maturity | Yes | ISF staff have extensive experience and certifications in industry best practices including the Institute of Electrical and Electronic Engineers (IEEE) Standards |

| ID | Methodology Requirement must: | Yes / No | Brief explanation of application of methodology |
|----|--|----------|--|
| | Model Integrated (CMMI) or other industry-recognized model for IV&V. | | for IV&V services, the Project Management Institute (PMI), and Capability Maturity Model Integration (CMMI). Our IV&V expertise covers all aspects of the requested IV&V services. |
| c | apply Project Management Institute (PMI) Project Management Body of Knowledge (PMBOK) for IV&V | Yes | ISF adheres to industry best practices including evaluation of the nine Project Management Body of Knowledge (PMBOK) project management process areas, utilizing the ISF's Assess, Analyze, and Recommend process within the Execute phase of the project. |
| c | apply DIR Texas Project Delivery Framework | Yes | The ISF team proposed to provide the requested IV&V services has extensive experience serving Texas state agencies and will apply the DIR Texas Project Delivery Framework. |
| e | apply professional standards and ethics | Yes | ISF has proposed a team of senior project management professionals who have experience providing independent and objective third-party oversight adhering to the highest level of professional standards and ethics. |
| f | maintain objectivity on all IV&V services | Yes | As an independent provider of IV&V, quality assurance, and oversight services for more than four decades, ISF affirms that it will provide an independent, objective, third-party view of project efforts with the intent of protecting the State's interests. |
| g | protect TWC information | Yes | ISF is experienced in handling confidential data on behalf of Texas agencies, and certifies in this response that it is in compliance with all applicable laws, regulations, and policies related to the protection of confidential information in the State of Texas. |
| h | maintain confidentiality of findings and release results to system vendors only with IT Contract Manager approval. | Yes | ISF agrees to maintain confidentiality of all findings, with release subject to approval of the IT Contract Manager. |

2.2 Respondent Service Delivery Requirements

After Contract Award, Respondent must meet all requirements in Table 4 Service Level Requirements. In a case where the Awarded Vendor does not meet a service delivery requirement, TWC will advise the Respondent, and at TWC's sole discretion may allow the Respondent up to five (5) calendar days to correct the service level. TWC may reject requests for payment of deliverables and withhold payment of the deliverable(s) for poor quality or late service delivery.

Many IV&V documents will be shared with authorized agency employees and implementation vendor(s) for further reviews. Therefore, quality, clarity and conciseness are of utmost importance,

since the recipient of the deliverable may not be as familiar with TWC project details as the participants.

ISF Response for Requirement number 2.2 Begins

ISF agrees that it will meet all requirements in Table 4 Service Level Requirements, which are incorporated into this signed response.

ISF Response for Requirement number 2.2 Ends

Table 4. Service Level Requirements

| ID | Service Level Requirement |
|----|---|
| a | Must adhere to the Awarded Contract |
| b | Must meet all agreed-upon deadlines |
| c | Must meet technical requirements for Deliverables as follows: <ul style="list-style-type: none"> • Use Word, PowerPoint, and/or Excel • use the same title as identified in Attachment 6 • include the submission date in mm/dd/year format as a header or footer on every page • include version control number as a header or footer on every page • include the page number as a header or footer on every page except page 1 • use Verdana font • use Font size of 11 or larger • use consistent formatting and numbering • all Project communication, notes, presentations, documentation, and other supporting materials must be fully accessible as described in Attachment 1, Section 11.4. • use proper Business English (complete sentences, proper grammar, accurate punctuation, correct spelling). |
| d | Must meet substantive requirements for Deliverables as follows: <ul style="list-style-type: none"> • Include a bulleted executive summary • include a statement of Deliverable purpose • include explanation of how information was gathered • include list of findings based upon industry-accepted standards and fact-based evidence • include list of conclusions for each finding based upon industry-accepted standards, ethics, and objectivity • include recommendations for corrective action or course correction traced to conclusions. |
| e | Must meet Communication Requirements as follows: <ul style="list-style-type: none"> • be prepared for meetings and provide agenda prior to meetings hosted by IV&V • Coordinates with the TWC Project Manager to jointly plan and execute tasks (external Communication plan, cutover weekend plan, contingency plan, war room plan, internal communication plan, implementation team escalation plan, etc.) |

2.3 Cybersecurity Requirements

Respondent must explain how they will meet the following requirements:

1. Fully cooperate with the TWC Chief Information Security Officer (CISO) and security team in all matters related to cybersecurity policies and procedures relevant to this SOW.
2. Respondent must ensure the protection of TWC confidential information, including Sensitive Personal Identifiable Information (SPII) from unauthorized disclosure, unauthorized access, and misuse, at a minimum in accordance with the NIST Special Publication 800-122, Guide to Protecting the Confidentiality of PII.
3. Respondent's proposed services and output (Deliverables, Tasks) must comply with TWC's requirement that all data remain in the United States and meet stringent Data Privacy and Cybersecurity requirements.
4. All information gathered and developed under this SOW must remain and be stored, processed, accessed, viewed, transmitted, and received, always and exclusively within the forty-eight (48) contiguous United States.
5. Confidential information, including SPII must be returned to TWC before the last day of the Contract term.
6. Respondent must not use or sell account, Deliverables, requirements, or other information acquired during the solicitation and/or after Contract Award, and will provide a written policy to ensure data privacy and security to TWC.

ISF Response for Requirement number 2.3 Begins

ISF is experienced in handling confidential data on behalf of Texas agencies, and certifies in this response that it is in compliance with all applicable laws, regulations, and policies related to the protection of confidential information in the State of Texas.

Confidential Information is defined as any communication or record (whether oral, written, electronically stored or transmitted, or in any other form) provided to or made available to ISF or that ISF may create, receive, maintain, use, disclose or have access to on behalf of the Texas Workforce Commission that consists of or includes any or all of the following:

- Education records as defined in the Family Educational Rights and Privacy Act, 20 U.S.C. §1232g; 34 C.F.R. Part 99
- Federal Tax Information as defined in Internal Revenue Code §6103 and Internal Revenue Service Publication 1075;
- Personal Identifying Information (PII) as defined in Texas Business and Commerce Code, Chapter 521;
- Protected Health Information (PHI) in any form including without limitation, Electronic Protected Health Information or Unsecured Protected Health Information as defined in 45 C.F.R. §160.103;
- Sensitive Personal Information (SPI) as defined in Texas Business and Commerce Code, Chapter 521;
- Social Security Administration Data, including, without limitation, disclosures of information made by the Social Security Administration or the Centers for Medicare and Medicaid Services from a federal system of records for administration of federally funded benefit programs under the Social Security Act, 42 U.S.C., Chapter 7;
- All privileged work product;

- All information designated as confidential under the constitution and laws of the State of Texas and of the United States, including the Texas Health & Safety Code and the Texas Public Information Act, Texas Government Code, Chapter 552.

ISF will comply with the specific Cybersecurity Requirements described above and apply all ISF privacy and security policies and procedures to safeguard confidential client and company information.

ISF will use the minimum information necessary to perform the obligations described in the scope of work or service description in the base contract.

ISF will not use, disclose, create, maintain, store, or transmit Texas Workforce Commission data outside of the United States.

ISF Response for Requirement number 2.3 Ends

2.4 Electronic Information Resources (EIR) Accessibility Requirements

Respondent must explain how they will meet the following requirements:

All deliverables provided to TWC must comply with the Accessibility Standards defined in the Texas Administrative Codes (TAC) 1 TAC 206, 1 TAC 213, and in the Worldwide Web Consortium WCAG 2.1 AA. Respondent must provide verifiable evidence of compliance.

ISF Response for Requirement number 2.4 Begins

Accessibility is addressed in all phases of ISF projects. We provide training to developers, analysts, and project managers, and we tailor our accessibility approach to client requirements.

As part of our onboarding process, we have developed a training course in Accessibility and Security that is delivered to all new staff members. This course includes content on development, testing, and quality control practices for accessibility to be used for every development project we undertake. We also provide recurring training to existing staff. All training is delivered by knowledgeable senior staff.

Given that accessibility is a standard part of our process, we track accessibility issues using our standard defect tracking tools and processes. Using our proven development methodology and project management tools and practices, we carefully document and address each concern, using tools such as issue logs, tracking logs, and frequent status meetings to ensure each concern is addressed, keeping the project on time, in scope, and within budget.

ISF Response for Requirement number 2.4 Ends

2.5 Location Requirements

Respondent must explain how they will meet the following requirements:

1. All Awarded Vendor personnel, including any sub-contractors must be physically located within the forty-eight (48) contiguous United States and preferably within the State of Texas.
2. All Awarded Vendor personnel, including any sub-contractors must be able to perform all work remotely and interact with TWC personnel via MicroSoft Teams.
3. TWC will not provide office space for Awarded Vendor personnel.

ISF Response for Requirement number 2.5 Begins

All proposed personnel for this engagement are physically located within the forty-eight (48) contiguous United States, and the team includes resources within the State of Texas.

All proposed personnel for this engagement are able to perform all work remotely and interact with TWC personnel via Microsoft Teams.

ISF will not require any office space from TWC.

ISF Response for Requirement number 2.5 Ends

2.6 Organizational Information

Respondent must provide their proposed organizational reporting hierarchy for key staff:

- 1) Organization chart for Respondent’s proposed staff who will provide management oversight and Project Management for all engagements.
- 2) One (1) summary table, with a row for each proposed Project participant, including the following: Participant name, role or position in current employment, employer name (i.e., Offeror or subcontractor name), key function(s) in current role/position, years of experience for role/position, proposed role on this Project, and years of experience with IV&V.

ISF Response for Requirement number 2.6 Begins

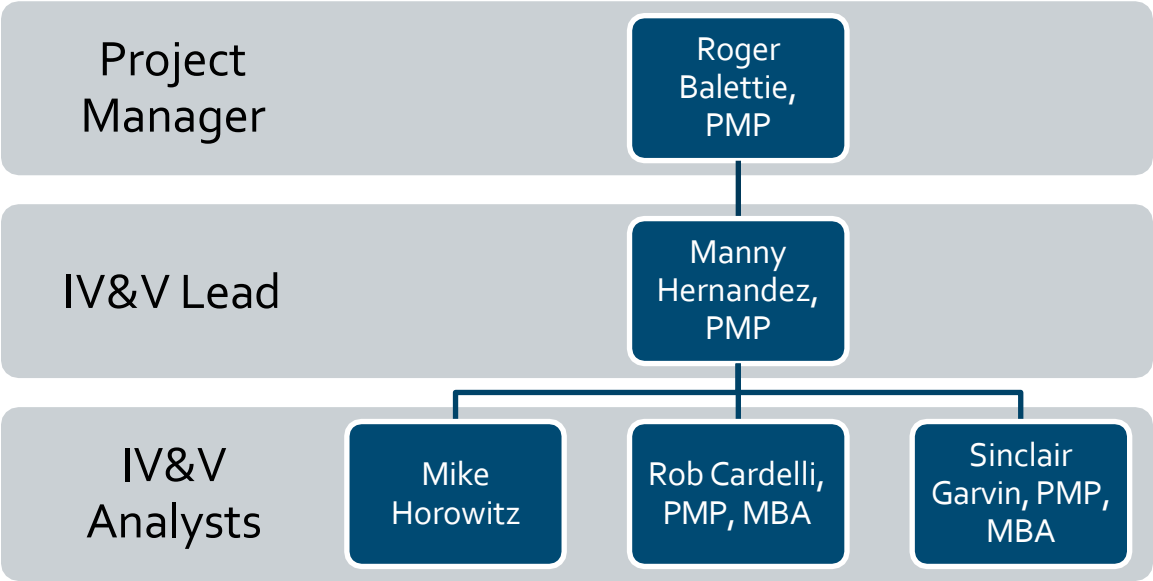


FIGURE 1: ORGANIZATION CHART FOR KEY STAFF

| Name | Role/Position | Employer | Key Function | Years of Experience | IV&V Experience |
|---------------------------|-----------------|-------------------|---|---------------------|-----------------|
| Roger Balettie, PMP | Project Manager | ISF, Inc. | Project manager accountable for successful performance of the project and contract. He will plan and direct the project to ensure all tasks are completed on time, on budget, and to the client's satisfaction. | 20+ | 0 |
| Manny Hernandez, PMP | IV&V Lead | ISF, Inc. | Develop and apply validation and verification monitoring processes, tools, templates, and methodologies using industry standard best practices methodologies in risk and issue analysis and management. | 30+ | 20+ |
| Mike Horowitz | IV&V Analyst | SOAL Technologies | Under direction of the IV&V lead provide IV&V services to provide value-added assessments throughout the lifecycle of the project. | 15+ | 10+ |
| Rob Cardelli, PMP, MBA | IV&V Analyst | SOAL Technologies | Provide IV&V services to provide value-added assessments throughout the lifecycle of the project. | 20+ | 15+ |
| Sinclair Garvin, PMP, MBA | IV&V Analyst | SOAL Technologies | Provide IV&V services to provide value-added assessments throughout the lifecycle of the project. | 15+ | 10+ |

ISF Response for Requirement number 2.6 Ends**2.7 Liquidated Damages**

In submitting an Offer in response to this SOW, the Respondent agrees that the measure of damages in the event of a default or breach by Awarded Vendor may be difficult or impossible to calculate. In the event that Awarded Vendor fails to perform Services or complete the obligations under this SOW and associated Task Order in a timely manner, TWC may require Awarded Vendor to pay, as liquidated damages and not as a penalty, an amount equivalent to the amount of one (1) times the hourly rate(s) of each Awarded Vendor Project Team member assigned to the Task Order for each calendar day the Awarded Vendor is out of compliance. TWC will have the right to collect liquidated damages against the Awarded Vendor upon demand payment. In addition, if at any time there are amounts payable to the Awarded Vendor under the Contract, TWC will have the right to deduct and/or withhold the amount of liquidated damages assessed by TWC against the Awarded Vendor from the amounts payable to the Awarded Vendor.

ISF Response for Requirement number 2.7 Begins

ISF agrees to abide by the terms of Sec. 2.7 Liquidated Damages as described above.

ISF Response for Requirement number 2.7 Ends



Attachment 11: References

Failure to provide the following information at the time and date this RFO closes will result in the disqualification of your firm's offer from consideration for an award resulting from this procurement.

Provide the following Offeror reference information:

Did Offeror's company contract with TWC within the last five (5) years? ISF Response: No

REFERENCE 1.

| | | | |
|--|----------------------------|-------|----------|
| 4050 Esplanade Way | Tallahassee, FL 32399-0950 | | |
| Street address of the organization to which the service was provided | City | State | Zip Code |
| Camila Hornung, PMP, MBA | (850) 487-1805 | | |
| Name of Point of Contact | Telephone Number | | |
| Florida Department of Management Services | Camila.Hornung@dms.fl.gov | | |
| Name of the organization to which service was provided | Email Address | | |
| 10/15/2018 to 6/29/2021 | \$399,000 | | |
| Start and End Dates of the engagement | Cost of the engagement | | |

Short description of the work, including whether the outcome was successful:

IV&V for SUNCOM. For this project, ISF assisted DMS in the procurement and implementation for establishing new contracts for telecom providers to offer their services to state and local government organizations through the SUNCOM online marketplace. In Phase I (Procurement), ISF assisted DMS in the development of procurement documents, delivering a risk identification report, Requirements Traceability Matrix (RTM), project assessment, and review of solicitation documents. During Phase 2 (Implementation), ISF performed IV&V on the DMS project management process. For this phase, we delivered biweekly project status reports and meetings, review of prospective contractor BAFOs and PM document packages, validation of vendor readiness requirements, phase gate assessment reports for each vendor, and a final report.

ISF's support of the SUNCOM procurement helped the State of Florida meet its goal to realize cost savings through economies of scale, volume discounts, and a centralized pool of engineering and technical expertise focused on delivering telecommunications solutions.

**REFERENCE 2.**

| | | |
|--|------------------------|----------------|
| 4050 Esplanade Way | Tallahassee, FL | 32399-0950 |
| Street address of the organization to which the service was provided | City | State Zip Code |
| Lance Dyal | (850) 410-0102 | |
| Name of Point of Contact | Telephone Number | |
| Florida Department of Management Services | Lance.Dyal@dms.fl.gov | |
| Name of the organization to which service was provided | Email Address | |
| 9/14/2016 to 6/29/2020 | \$522,000 | |
| Start and End Dates of the engagement | Cost of the engagement | |

Short description of the work, including whether the outcome was successful:

SLERS IV&V: ISF provided third-party oversight for solicitation of a large-budget statewide communications system implementation. ISF provided project management and planning, technical expertise, solicitation response evaluation, procurement negotiations, consultation with the Joint Task Force on State Agency Law Enforcement Communications as needed, and quarterly updates on project progress to the chair of the Senate Appropriations Committee, the chair of the House Appropriations Committee, and the Governor's Office of Policy and Budget. The Florida Department of Management Services (DMS), was tasked to implement a statewide communications system and to create the Joint Task Force on State Agency Law Enforcement Communications. The Department also oversees the Statewide Law Enforcement Radio System (SLERS), a single, unified digital radio network that meets the radio voice communications needs of state law enforcement officers and other participating agencies throughout the state.

ISF provided the following services to the Department:

- Project planning and management
- Consultation and providing technical expertise to the Department
- Assisting in the evaluation of responses
- Negotiating with procurement respondents
- Consult with the Joint Task Force on State Agency Law Enforcement Communications as needed
- Provide quarterly updates on project progress to the chair of the Senate Appropriations Committee, the chair of the House Appropriations Committee, and the Governor's Office of Policy and Budget

ISF provided expert oversight throughout the implementation process, ensuring that the commitments made by the vendor during the procurement of the system were honored throughout implementation.

With IV&V consulting services provided by ISF, the Department was able to successfully navigate the procurement process for a new SLERS system, and provide updates to the Florida Legislature and the Governor's Office. The SLERS contract was estimated at \$980 million over the 19-year period from 2017 to 2036.

REFERENCE 3.

| | | |
|--|------------------------|----------------|
| 4050 Esplanade Way | Tallahassee, FL | 32399-0950 |
| Street address of the organization to which the service was provided | City | State Zip Code |
| Daniel May | (850) 414-5790 | |
| Name of Point of Contact | Telephone Number | |
| Florida Department of Management Services | Daniel.May@dms.fl.gov | |
| Name of the organization to which service was provided | Email Address | |
| 9/16/2018 to 6/29/2019 | \$103,000 | |
| Start and End Dates of the engagement | Cost of the engagement | |

Short description of the work, including whether the outcome was successful:

IV&V for MyFloridaMarketPlace (MFMP) Procurement: ISF provided procurement oversight for replacement of the Florida Department of Management Services' MyFloridaMarketPlace (MFMP) portal, the State of Florida's e-procurement system.

ISF provided IV&V services to develop a procurement vehicle to migrate the existing MFMP application to a new platform to improve access to applications and data. ISF performed IV&V monitoring activities to review and validate process, procedures, issues, deficiencies, and risks associated with the procurement documents. ISF provided an independent, objective, third-party view of procurement development efforts, including vendor engagement, contract management, project oversight, status reporting, risk assessment, quality assurance, and system performance monitoring.

The migration of MFMP to a new platform is a critical project for the State of Florida, because the legacy MFMP platform is a highly-customized solution that operates on an Oracle database environment that reached the end of its support in 2015 and is no longer receiving updates to patch security flaws in the database software. As the MFMP code base stagnated, browser incompatibilities arose and system functionality deteriorated. MFMP allows for the registration of vendors, management and display of contracted catalogs of products, the location of products by buyers, order placement, purchase approvals, invoice reconciliations and payment approvals. MFMP includes business intelligence capabilities that allow users to analyze spend using various reporting capabilities in the analysis module. Through its integration with the state's accounting system, MFMP offers supply management, purchase order, invoice reconciliation, and accounts payable functionality.

ISF's procurement support helped the State of Florida successfully implement a modern web-based e-procurement platform, serving both agencies and vendors.



**Your Vision
Our Expertise**

**Solving
the Future**

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4601 Touchton Rd E
Suite 3250
Jacksonville, FL 32246
Voice: 904-724-2277

ISF – Tallahassee
3800 Esplanade Way
Suite 220
Tallahassee, FL 32311
Voice: 850-671-1000

ISF – Austin
815A Brazos Street
#368
Austin, TX 78701
Voice: 850-671-1023

www.isf.com

June 7, 2022

Paul Hesser, CTCD
Texas Workforce Commission
Procurement and HUB Services
101 E 15th Street
Austin, TX 78778-0001

Re: Solicitation Number 3202200017

Dear Mr. Hesser:

ISF, Inc. (Federal Tax ID #59-1961607) is pleased to provide our Best and Final Offer (BAFO) to the Texas Workforce Commission's Statement of Work for IV&V Services. This BAFO includes the revised pricing that we have previously submitted to TWC, along with the documents that comprise ISF's complete response to the solicitation.

ISF is highly qualified to provide the requested services, and is an approved provider under Texas Department of Information Resources DBITS Contract No. DIR-CPO-4953 for the Technology Category IT Assessments, Planning, Independent Verification and Validation (IV&V), and Market Research, Procurement Advisory, and Contract Implementation Services.

We are pleased to include a team that includes four certified Project Management Professionals, and nearly 100 years of collective IV&V experience on a broad range of large and complex technology implementations in state government. ISF brings a proven methodology to our IV&V work that has been developed over decades of providing oversight on projects for state government clients and our own internal project oversight.

This letter and the accompanying proposal documents are signed by Mark Burk, Senior Director of Clients and Solutions, who is authorized to bind ISF, Inc. in a contract with TWC. ISF looks forward to working with the Texas Workforce Commission on this important project. Please do not hesitate to contact me if I can provide any additional information.

Sincerely,

A handwritten signature in blue ink that reads 'Mark Burk'. The signature is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Mark Burk
Senior Director of Clients and Solutions