



FULLY EXECUTED - REPRINT
Purchase Order No: 4300754963
Original PO Effective Date: 12/13/2022
PO Issue Date: 12/13/2022
Valid From: 12/19/2022 To 12/18/2024

Your SAP Vendor #: 315190

Please Deliver To:
OA - Attn Jason Hebbe
1 Technology Park, CTC
Harrisburg PA 17110 US

Supplier Name/Address:
MATHTECH INC
2465 KUSER RD STE 200
HAMILTON NJ 08690-3303 US

Please Bill To:
Save time, reduce cost, get paid faster:
Email PDF invoice to 69180@pa.gov
<https://www.budget.pa.gov/Programs/Pages/e-Invoicing.aspx>

Supplier Phone Number: 609-689-8520
Supplier Fax Number: 609-689-8505

Or mail paper invoice to:
Commonwealth of Pennsylvania
PO Box 69180, Harrisburg, PA 17106

Purchasing Agent

Name: Deborah Smith
Phone: 717-425-6787
Fax: 717-214-3567

Purchase Order Description:
ETSO Advisory Services Next Gen

This Purchase Order is issued pursuant to the referenced Contract and constitutes the Suppliers authority to deliver the item(s) referenced below at the prices stated below to the location(s) identified above in accordance with the Contract terms and conditions.

Suppliers must provide four mandatory elements on PO invoices: PO Number, Invoice Date, Invoice Number, and Invoice Gross Amount. Failure to comply will result in the return of the invoice. Additional optional information such as supplier name, address, remit to information and PO Line Item information will improve invoice processing.

Item	Material/Service Desc	Qty	UOM	Delivery Date	Net Price	Price Unit	Total
1	320598 D1 Final Current State Report	1.000	Each	12/19/2022	297,000.00	1	297,000.00
>>> Rel. ord. against contract 4400006100 Item 7							

2	320598 D2 Final Sourcing Strategy Report	1.000	Each	12/19/2022	238,000.00	1	238,000.00
>>> Rel. ord. against contract 4400006100 Item 7							

Information:

Total Amount:
SEE LAST PAGE FOR TOTAL OF ALL ITEMS

Currency: USD

Supplier's Signature _____

Title _____

Printed Name _____

Date _____



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Supplier Name:
MATHTECH INC

Item	Material/Service Desc	Qty	UOM	Delivery Date	Net Price	Price Unit	Total
3	320598 D3 Target Operational Support Model >>> Rel. ord. against contract 4400006100 Item 7	1.000	Each	12/19/2022	64,000.00	1	64,000.00
4	320598 Procurement Support Services >>> Rel. ord. against contract 4400006100 Item 7	1,280.000	Each	12/19/2022	235.00	1	300,800.00
5	320598 Procurement Support Services >>> Rel. ord. against contract 4400006100 Item 7	3,320.000	Each	07/01/2023	235.00	1	780,200.00
6	320598 Procurement Support Services >>> Rel. ord. against contract 4400006100 Item 7	1.000	Each	07/01/2024	235.00	1	235.00

General Requirements for all Items:

Header Text

This Purchase Order is written with reference to RFQ 6100056158 under the Master IT ITQ Contract 4400004480 for the IT ITQ 12 Consulting Services-IT General the parent contract. Referencing State Contract 4400006100.

Advisory Services for Net Generation Manage Compute Services.

Agency Contract: Kate Kolb; kkolb@pa.gov 717-772-5848

Vendor Contact: Brooke Warden; bwarden@mathtechinc.com

Information:

Total Amount:
SEE LAST PAGE FOR TOTAL OF ALL ITEMS

Currency: USD



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Supplier Name:
MATHTECH INC

Vendor Memo (General)

ALL INVOICES AGAINST THIS PO MUST BE SUBMITTED TO THE 'PLEASE BILL TO' ADDRESS ON PAGE ONE OF THIS PO TO AVOID DELAYS IN PAYMENT.
VENDOR INVOICE MUST REFERENCE PO NUMBER TO AVOID DELAYS IN PAYMENT. VENDOR INVOICE MUST MATCH PO LINE ITEMS IN ITEM DESCRIPTION, QUANTITIES, RATES, AND OVERALL AMOUNTS TO AVOID DELAYS IN PAYMENT.
For invoice requirements or to view the status of invoices submitted, please visit the following link.
<https://www.budget.pa.gov/Programs/Pages/e-Invoicing.aspx>

No further information for this PO.

Information:

Total Amount:
1,680,235.00

Currency: USD



**Master IT ITQ Services Contract 4400004480
INVITATION TO QUALIFY CONTRACT
RECOMMENDATION FOR BEST VALUE SELECTION**

Date: October 7, 2022

To: Janice Pistor
Chief Procurement Officer
Department of General Services

From: Janis Brown
Issuing Officer

RE: Evaluation of Quotes Submitted in Response to
Advisory Services for Next Generation Managed Compute Services
RFQ # 6100056158

PART I.

The Issuing Office designated to conduct the **Advisory Services for Next Generation Managed Compute Services** best value selection for this project has completed its evaluation in accordance with Commonwealth policies and procedures. As further described below, **Mathtech, Inc.** is recommended as the best value contractor for this project. This memorandum documents that all necessary steps were taken in conducting the best value selection in accordance with the provisions of the **Master Information Technology Services Invitation to Qualify (IT ITQ) 4400004480** Contract Solicitation Requirements and Evaluation Process.

PART II.

A. Method of Selecting Best Value Contractor.

1. The Commonwealth Seeks who will provide Advisory Services for future Next Generation Managed Compute Services Procurement. The Selected Contractor will support the development of a managed compute services strategy and any associated recommendations for that strategy. To develop the strategy, the Selected Contractor will be required to perform an assessment of the Commonwealth's current and future hosting and compute (private and public cloud) service requirements; evaluate and present service management options for the ongoing management and delivering of those services; and develop the sourcing approach.

The Selected Contractor will also be responsible for supporting the Commonwealth with the procurement of the resulting services.

2. Consistent with the Commonwealth's strategic procurement objectives and policies to evaluate contractor technical capabilities, along with cost, in making best value selections from multiple award contracts, Department of General Services (**DGS**), on behalf of Office of Administration (**OA**), issued a Request for Quotation (**RFQ**) to make a best value selection from the **IT ITQ** Contract as authorized by Section 517(f) of the Commonwealth Procurement Code.
- B. **Notice.** Notification of the RFQ was sent through the JAGGAER software tool at <https://solutions.scquest.com/apps/Router/SupplierLogin?CustOrg=CommonwealthPA> on **August 1, 2022** to all of the Contractors qualified in the applicable service commodity or commodity codes.
- C. **Evaluation Committee.** An evaluation committee was established to evaluate the quotes.

PART III.

- A. **Evaluation Criteria.** The Issuing Office established the relative importance of the major evaluation criteria prior to opening the proposals, consisting of technical **65%** and cost **35%**. **NOTE:** Up to three percent **three (3%)** bonus points were available to committing to Domestic Workforce Utilization (**DW**).
- B. **Results of Evaluations.**
1. **Technical Submittal Evaluation.** The evaluation committee reported the results of its technical evaluation to the Issuing Office.
 2. **75% Technical Threshold.** As indicated in the Overall Scoring, **one (1)** Contractor's technical submittal (**International Consulting Acquisition Corp. dba ISG Public Sector**) failed to score at least 75% of the available technical points and were not considered for selection for Best and Final Offers or final selection as the best value contractor.
 3. **Cost Submittal Evaluation.** The Issuing Office opened and scored the cost submittals of those Contractors which passed the 75% technical threshold.
 4. **Domestic Workforce Utilization Evaluation.** The Issuing Office scored commitments to Domestic Workforce Utilization made by those Contractors which passed the 75% technical threshold.

5. Combined Scores: The Issuing Office combined the technical scores, cost scores, and Domestic Workforce Utilization scores of those Contractors which passed the 75% technical threshold.
6. **Best and Final Offers Phase: Three (3) Contractors’ proposals (Mathtech, Inc.), (Slatethorn Consulting, LLC), and (Sourcing Advisory Services LLC dba Integris Applied)** achieved overall combined scores placing them within the competitive range of quotes determined to be reasonably susceptible of being selected to provide the best value to the Commonwealth. As authorized in the RFQ, these Contractors were selected to proceed to a “Best and Final Offers” phase of the evaluation process. All Contractors were accorded fair and equal treatment during discussions and revisions of their quotes. There was no disclosure of any information derived from quotes submitted by competing Contractors.

DGS invited **three (3) Contractors, (Mathtech, Inc.), (Slatethorn Consulting, LLC), and (Sourcing Advisory Services LLC dba Integris Applied)** to submit a BAFO offer for the Cost.

7. **Overall Scoring:** The overall scoring for this RFQ concluded as follows:

<i>Contractor</i>	<i>Technical Score</i>	<i>Cost Score</i>	<i>DW Bonus</i>	<i>Overall Score</i>
Mathtech Inc.	650.00	325.24	30.00	1,005.24
Slatethorn Consulting, LLC	585.00	350.00	30.00	965.00
Sourcing Advisory Services LLC, dba Integris Applied	585.00	254.53	30.00	869.53
<i>Contractor not meeting the 75% Threshold</i>				
International Consulting Acquisition Corp. dba ISG Public Sector	476.67	n/a	n/a	n/a

8. **Highest Overall Scores:** After combining the final technical scores, final cost scores, and final Domestic Workforce Utilization scores in accordance with the relative weights assigned to these areas and fixed prior to the opening of the quotes, the quote submitted by **Mathtech, Inc.** received the highest overall score.
9. **SMALL DIVERSE BUSINESS AND VETERAN BUSINESS ENTERPRISE COMMITMENTS:** The Issuing Office and the Department of General Services’ Bureau of Diversity, Inclusion and Small Business Opportunities (**BDISBO**) identified this procurement as potentially eligible for the setting of Small Diverse Business (**SDB**) and/or Veteran Business Enterprise (**VBE**) participation goals. However, after analyzing the solicitation for subcontracting opportunities and researching available SDB and/or VBE firms to perform commercially useful functions, the Issuing Office and BDISBO

determined that the SDB and/or VBE participation opportunities for the scope of work for this procurement are de minimis. **Therefore, the Issuing Office and BDISBO declined to set SDB or VBE participation goals for this procurement.**

10. Domestic Workforce: As part of its quote, **Mathtech, Inc.** has certified that **100%** of the work for this project will be performed in the United States or member WTO countries.
11. **Contractor Responsibility: Mathtech, Inc.** and its subcontractors required to be disclosed or approved by the Commonwealth have been verified as responsible contractors in accordance with management directives, the Procurement Handbook, and the Procurement Code, as applicable.

PART IV.

Recommendation: As the Issuing Officer, I recommend that **Mathtech, Inc.** be selected as offering the best value to the Commonwealth. This recommended selection is based upon the results of the evaluation and review of the quotes as summarized above. Based on the cost submittal of this Contractor, the value of the purchase order is estimated to be **\$ 1,680,000.00**. **The term of the purchase order will be two (2) years with three (3) additional renewals.**

The term of the purchase order will commence on the Effective Date and will end **two (2)** years after the Effective date. The Commonwealth may renew the Purchase Order for an additional **three (3)** years. The optional renewal years may be exercised in the Commonwealth's sole discretion in single or multiple year increments at any time during the Purchase Order.



10/07/2022

Janis Brown
Issuing Officer

Date

CONTRACTING OFFICER DETERMINATION:

Based upon the results of the evaluation and the above recommendation, I have determined the proposal submitted by **Mathtech, Inc.** is the most advantageous to the Commonwealth.

I disapprove the recommendation.



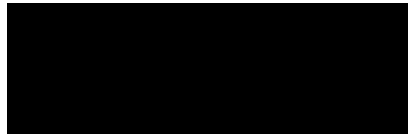
Janice Pistor
Chief Procurement Officer

10/07/2022

Date

AGENCY HEAD AUTHORIZATION:

Based upon the Contracting Officer's determination, I authorize the Issuing Office to proceed with contract negotiations with **Mathtech, Inc.**



10/07/22

Kenneth Hess
Deputy Secretary for Procurement

Date

**Advisory Services for Next Generation Managed Compute Services
RFQ 6100056158
Technical Submittal**

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I-1. Statement of the Project.

- A. The Commonwealth of Pennsylvania's Office of Administration (OA), Office for Information Technology (OIT) is seeking proposals from qualified Contractors to provide strategy and advisory support services in support of its Next Generation Managed Compute Services project.

- B. The Selected Contractor will support the development of a managed compute services strategy and any associated recommendations for that strategy. To develop the strategy, the Selected Contractor will be required to perform an assessment of the Commonwealth's current and future hosting and compute (private and public cloud) service requirements; evaluate and present service management options for the ongoing management and delivery of those services; and develop the sourcing approach. The Selected Contractor will also be responsible for supporting the Commonwealth with the procurement of the resulting services. In addition, there are several optional related services, defined below, that require the Contractor's response, which the Commonwealth may exercise as needed.

- C. The desired overarching strategy is intended to support the Commonwealth for years to come and strives to align with current and emerging support models that are structured in a more cost-effective manner, such as micro-sourcing with a Service Integration and Management - Multi-Supplier Integration (SIAM-MSI) operational model. The Commonwealth is also interested in options to transition from a current traditional Infrastructure and Operations (I&O) / Applications Development (AD) support structure to a Development, Security, and Operations (DEV/SEC/OPS) framework that would better align with current and future application modernization efforts and the use of more cloud native services.

- D. This advisory effort will support the following key service objectives and guiding principles:
 - 1. Provide the overarching strategy for the development and delivery of Managed Compute Services in the Commonwealth.

 - 2. Support the Commonwealth's continued application modernization efforts and cloud initiatives.

 - 3. Provide application workload mobility to Commonwealth Agencies by supporting both Private Cloud/Hosting services as well as secure connections to multiple Public Cloud service providers (CSPs). This hybrid approach provides a smooth path to increased cloud adoption.

 - 4. Reduce the impact of future service transitions, the new target services will build on the foundation of:
 - a) Leverage the **two (2)** Commonwealth owned or leased data centers.

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- b) Commonwealth owned, leased, or as-a-Service technology (server, storage, network).
 - c) Support for all the current technology platforms (e.g., Unisys mainframe, IBM mainframe, IBM p-Series, x86 virtual and physical, Oracle Exadata).
 - d) Commonwealth procured cloud tenants and supporting secure connections (e.g., Azure, AWS, other).
- 5. Services will include service provider level managed services such as 24-7 support desk, account management, capacity planning, service level reporting, and change management reporting.
 - 6. This strategy will also provide for an integrated Service Desk.
 - 7. ITSM Managed Services (e.g., ServiceNow design and configuration support).
 - 8. Procurement strategy will include multiple procurements or lots.
 - 9. Include ongoing PMO and advisory services to manage the implementation and realization of the strategy.
 - 10. Support the Commonwealth with any potential procurements supporting the strategy.

I-2. Term of the Project.

- A. The term of this Project shall commence upon issuance of a Purchase Order to the Selected Contractor (“Effective Date”). The term of the purchase order will commence on the Effective Date and will end **two (2)** years after the Effective date. The Commonwealth may renew the Purchase Order for an additional **three (3) years**. The optional renewal years may be exercised in the Commonwealth's sole discretion in single or multiple year increments at any time during the Purchase Order. The term of this Project may be extended by and at the sole option of the Commonwealth for up to 90 days upon the same terms and conditions where a continued needed exists for the services of the Selected Contractor and there has been no termination under the terms of the Contract or Purchase Order.

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I-3. Requirements.

A. The Selected Contractor will use its industry knowledge, research capabilities, and project management expertise to propose and deliver a strategy and roadmap which will allow stakeholders to make future decisions based on the information delivered. Contractor shall describe how it will meet the requirements as described in this RFQ.

B. Preclusion.

1. Due to the nature of this project, both the Selected Contractor and its sub-Contractors will be precluded from submitting a proposal and from acting as a subcontractor on a prime-contractor's proposal for any procurement(s) which result from the efforts of this RFQ.

C. Contractor Qualifications.

1. Company Overview.

Contractor shall submit a brief statement that explains why it best meets the Objectives and Statement of the Project in this RFQ. Contractor shall describe any additional features, aspects or advantages of its products and services in any relevant area not covered elsewhere in its Proposal. At a minimum, Contractor's overview shall include the following:

- i. Date of its establishment and whether it is a public or private company.
- ii. Principals of company and organization.
- iii. Experience in developing a managed compute services strategy and any associated recommendations for that strategy. To develop the strategy, the Selected Contractor will be required to perform an assessment of the current and future hosting and compute (private and public cloud) service requirements; evaluate and present service management options for the ongoing management and delivery of those services; develop the sourcing approach for projects of similar size and scope.

2. Contractor must include experience in working with other entities or organizations such as state governments to identify their current hosting and compute services environments and enterprise managed operations and with developing an actionable strategy for future services.

3. Contractors shall include:

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- a) Written statements of experience in work for projects similar in type, size and complexity as the Project defined in this RFQ.
- b) Experience in contract negotiations.
- c) Experience shown should be work done by individuals who will be assigned to this Project as well as that of your company.
- d) Studies or projects referred to must be identified and the name of the customer shown, including the name, address, and telephone number of the responsible official of the customer, company, or agency who may be contacted.

Contractor Response

Company Overview

Mathtech is a strategy and consulting services firm with offices in New Jersey, Virginia, and Arizona. With over 50 years of experience serving federal, state, and local government agencies, Mathtech has built a solid reputation for successfully completing projects and working collaboratively with our clients. Mathtech leverages industry-leading methodologies, staff expertise, and a wealth of best practices and tools to deliver consistently clear approaches and solutions for our client's projects.



Mathtech is a privately held company established in 1972 and has been employee-owned since 1986. The company is led by Joseph Roesner and comprises a Federal Government Systems Practice, a State and Local Government Systems Practice, a Communications Systems Practice, and The Fontana Group, a specialized litigation support firm. Steven Young is a Senior Vice President of Mathtech and the State and Local practice leader and will serve as Project Executive for this project.

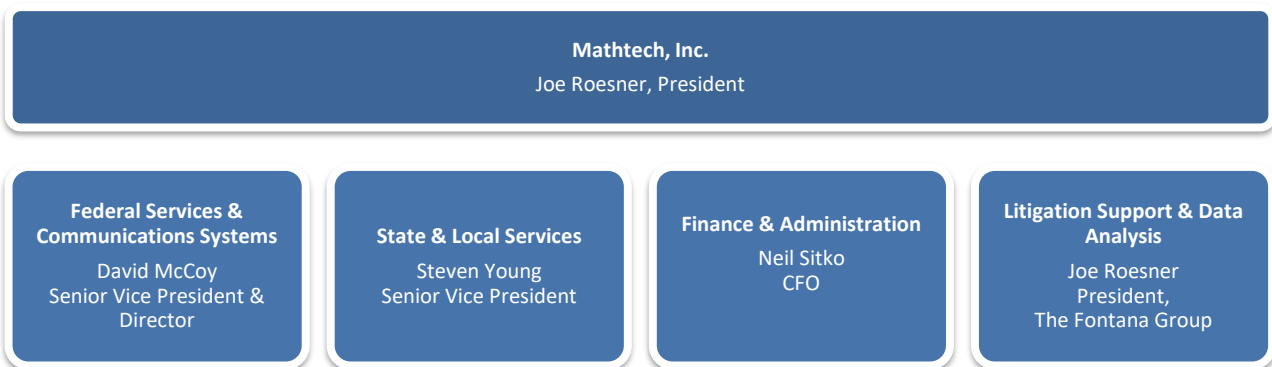


Diagram 1: Mathtech Leadership

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Mathtech provides a full range of consulting services, which cover a wide range of areas, including:



Diagram 2: Mathtech Services

Mathtech has successfully serviced projects across the country, from Washington State to Florida. Our senior management team leads and supports our myriad projects throughout the United States and is always readily available to meet with our state and local clients in person as needed.

Concerning this Advisory Services Next Generation Managed Compute Services RFQ, Mathtech will leverage the following expertise and experience to ensure a successful outcome with the Commonwealth:

- **Commonwealth of Pennsylvania Experience** – Mathtech’s track record of success in Pennsylvania includes mission-critical projects for PennDOT and the Department of Revenue. For PennDOT, we supported their motor vehicle and driver’s license system modernization strategy, provided subject matter expertise for their RFP development, and provided project oversight. For the Department of Revenue, we provide IV&V services for their full tax administration system modernization.
- **Deep Technology Solution Assessment Experience** - Mathtech has worked with multiple state agencies to evaluate technology services to guide technology planning and implementations. Our approach is focused on the belief that an appropriate solution assessment considers all of a State's technical, business, functional, and management needs. As a result, we have guided many States through structured planning processes to drive assessment and set the tone for well-defined and manageable transformation initiatives.
- **IT Strategy and Architecture** – Mathtech helps agencies develop a flexible strategy to meet technology objectives by leveraging existing and new technology as needed.
- **Requirements Analysis and RFP Development** – Mathtech can develop detailed requirements, write RFPs, and assist in the bidding and evaluation process. We design our RFPs to create manageable, well-defined projects.

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The Mathtech Team

To deliver a world-class solution requires a best-in-class team. The Mathtech Team – comprised of Mathtech and Symbio Ecosystems – is that team. Our combined team provides the insight to hit the ground running based on our recent experiences in Pennsylvania and with the shared technology services programs in Texas, South Carolina, Georgia, and Virginia. The Mathtech Team provides the experience, agility, and depth to operationalize the OIT vision and bring the Next Generation Managed Compute Services to life in Pennsylvania.

The Mathtech Team’s goal is to deliver shared services innovation with our state government clients. In the last several years, we’ve continued to innovate our technology services assessment, sourcing, and governance methodology with our state government clients, and we’re excited to share this with OIT. Our methodology leverages best-practice innovations from the more agile, private sector commercial marketplace and applies these principles and frameworks to meet state government needs.

Simply put, no other firm is as qualified as The Mathtech Team to support OIT with this Next Generation Managed Compute Services initiative. As we demonstrate in this response, we have a proven methodology and track record in delivering the services outlined in this RFQ and more depth in resources on our team with hands-on experience in the multisourcing of next-generation computing services. We have an intense focus on operationalizing your vision with a strong belief in staffing project teams with domain knowledge across the commercial, service delivery, and technology landscape. We share the OIT vision for next-generation technology services and are excited by the opportunity to co-create the strategy and implement the change.

Team Experience

The Mathtech Team is a pioneer in designing, implementing, and operating the “CIO as Broker” multisourcing operating model. Members of the proposed core team have supported the states of Texas, Georgia, and Virginia with transforming into a multisourcing service integrations (MSI) operating model. Our team implemented a second-generation Digital MSI, leveraging the cloud-based ServiceNow platform to automate workflows and provide transparency and dashboard analytics. Additionally, we’ve recently transformed the Texas operating model with evolution to ‘CIO as Partner,’ creating a separate horizontal service layer that provides customer technology advisory services to address the new priorities of legacy modernization, cloud adoption, and growth. Please see the “State Government Experience” section below for descriptions of recent projects where we've had the opportunity to support state government clients with transformational initiatives.

We are staunch advocates of the benefits of the 'common way' MSI framework (see Diagram 3). It provides the structure and processes to efficiently standardize service delivery and customer engagement. The model

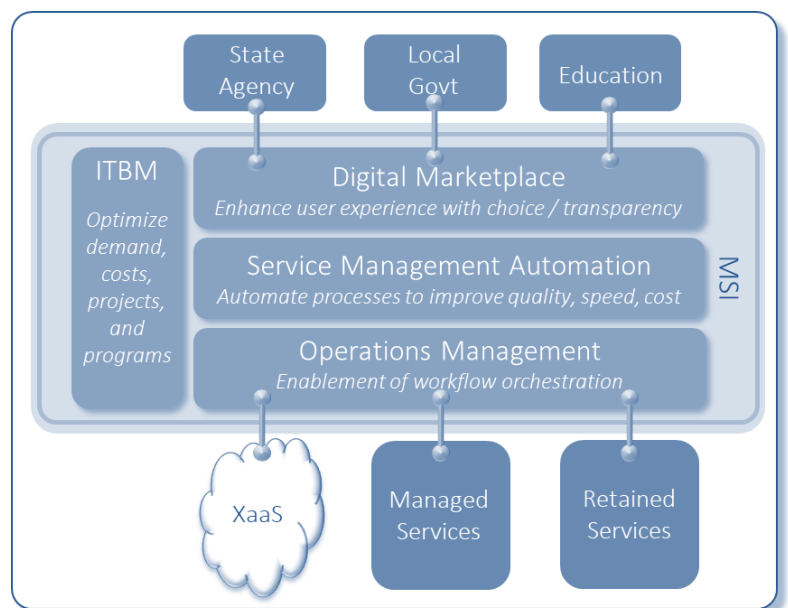


Diagram 3: The MSI Framework

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enables a best-of-breed service provider ecosystem within a seamless customer experience environment facilitated through a digital marketplace. We believe every CIO can benefit from the ITIL maturity, automation, and quality and consistency of data produced by the MSI to aid in providing contemporary, agile technology services.

Our team members have experience from each stakeholder's perspective in the IT services industry: buyer, seller, and third-party advisor. We've helped construct and evolve many of the structures prevalent in outsourcing agreements today, including ITIL-based statements of work, service level methodologies with the ability to earn back performance credits, and consumption-based pricing models. As such, we bring a market-based best practice approach to our clients and, more importantly, the reasoning and incentives behind these frameworks.

State Government Experience

Every industry has nuance, subtlety, and characteristics that cannot be found in other settings. State government is no exception and, one could argue, represents a rather extreme example of industry identity in that state government represents multiple lines of diverse businesses. Fortunately, The Mathtech Team knows this environment very well, specifically working with central IT agencies.

Our team members' state government experience over the last several years is extremely relevant to what OIT is about to embark upon, including the following examples:



State of Texas **Department of Information Resources (DIR)**

- Provided sourcing advisory services, including an assessment of current state, for the Next-Generation Data Center Services (DCS) Shared Technology Services program, including support with strategy and planning, solicitation development, evaluations, clarification and integration sessions, and due diligence, negotiations, disentanglement, transition, and implementation. This initiative included facilitation support services for six separate procurements and the parallel renegotiation to align MSI services.
- Provided sourcing advisory services, including an assessment of current state, for Digital MSI and Texas.gov Portal and Payment Services, including support with strategy and planning, solicitation development, evaluations, clarification and integration sessions, due diligence, negotiations, disentanglement, and transition and transformation.
- Provided financial advisory services in support of the DCS Shared Technology Services governance program and in support of a multi-award network services cooperative contract procurement.
- Facilitated the launch of Hybrid Cloud Services to modernize the DCS program and restructure the operating model.
- Provided subject matter expert support for Managed Application Services RFP development and IT modernization.
- Facilitated the benchmarking review process of DCS, including the restructuring of services and pricing as a result of the benchmark findings.



GEORGIA
TECHNOLOGY
AUTHORITY

State of Georgia **Georgia Technology Authority (GTA)**

- Provided financial advisory services in support of the re-procurement of Managed Network Services (WAN, LAN, and Voice).
- Developed a Multisourcing Service Integration (MSI) re-procurement strategy and assessed IT Service Management (ITSM) tools and processes to identify opportunities for improvement.

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- Performed an assessment of current MSI operations, including a review of performance outcomes and a benchmark of spend compared to other state government MSI services.
- Multiple members of our team provided the following services for GTA:
 - Sourcing advisory services for Hybrid Cloud, Print to Mail, Mainframe, Server, and Managed Security services, including support with strategy and planning, solicitation development, evaluations, clarification and integration sessions, due diligence, negotiations, disentanglement, transition, and implementation.
 - Developed the strategy to restructure governance and the service delivery model to leverage an MSI to enable multisourcing with best-of-breed Service Providers.
 - Facilitated the strategy, development, selection, negotiation, and implementation of the MSI services and Managed Network Services (WAN, LAN, and Voice).
 - Facilitated the creation of a consumption management program for the Georgia Enterprise Technology Services (GETS) program.



Commonwealth of Virginia
Virginia Information Technologies Agency (VITA)

- Supported the implementation of the MSI IT Financial Management (ITFM) solution generating Service Provider invoice reports for eight Service Providers and customer chargeback invoices for agencies. Billed services included private cloud, network, mainframe, end-user compute, security, messaging, MSI, and end-user print services.
- Assessed process flows for budgeting, forecasting, and dispute activities.
- Multiple members of our team provided the following services for VITA:
 - Led the financial workstream across multiple procurements to transform the VITA shared services program from a single Service Provider to an MSI-led multisourcing operating model. The following services were procured as a part of this: private cloud, network, mainframe, end-user compute, security, messaging, MSI, and end-user print services.
 - Developed and maintained VITA budget, forecasting, and chargeback development tools.
 - Led the development, selection, negotiation, and implementation of Mainframe Services with an annual spend of \$18M and a 24% business case savings.



State of Texas
Department of Transportation (TxDOT)

- Provided sourcing advisory services, including an assessment of current state, in a multisourcing environment for Application Services, Enterprise Resource Planning (ERP), Managed Network Services, Traffic Network Services, and Hardware Lifecycle Services, including support with strategy and planning, solicitation development, evaluations, clarification and integration sessions, due diligence, negotiations, disentanglement, and transition and transformation.
- Implemented an IT Business Management (ITBM) solution to support the TxDOT sourcing management organization. Our ITBM platform and service provided performance management and financial management reporting, enabling efficient governance of the multisourcing services ecosystem.

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**State of South Carolina
Department of Administration (Admin)**

- Provided assessment, strategy, and planning services for the Admin Shared Technology Services program to identify the optimal operating model, business model, and sourcing strategy to increase consolidation of agency-managed IT services into the enterprise program. The analysis included the adoption of an MSI-led multisourcing operating model.
- Provided sourcing advisory services, including assessment of current state, for Managed Security Services, including support with strategy and planning, solicitation development, evaluations, clarification and integration sessions, due diligence, negotiations, disentanglement, and transition and transformation.
- Provided sourcing advisory services, including assessment of current state for Digital Government Portal and Payment Services, including support with strategy and planning, solicitation development, evaluations, clarification and integration sessions, due diligence, negotiations, disentanglement, and transition and transformation.
- Provided organizational change management (OCM) services to address stakeholder management, communications strategy and plan, and Admin operational readiness. Our OCM team designed, trained, and supported an Admin sourcing management and governance organization to manage services in a multisourcing model.

In addition to the projects summarized above, the following table presents further examples of our team members' state government assessment, strategy, and procurement assistance experience:

Client	Description	Assessment and Strategy	Procurement Assistance
Pennsylvania Department of Transportation	Supported DMV on a PennDOT project to replace the legacy motor vehicle and driver licensing systems. Performed market analysis, defined procurement strategy, prepared RFQ, and provided ongoing procurement support and project oversight. Currently providing project oversight, IV&V, and overall implementation support.	●	●
Pennsylvania Department of Revenue	Assessed Individual Tax and Program operational needs to identify the future vision, define the system(s) required to support future processing, and review/edit existing requirements from a prior RFP.	●	●
Arizona Department of Administration	Assessed service management operations and designed the multisourcing service integration (MSI) startup strategy.	●	
Colorado Statewide Internet Portal	Assessed the current Digital Government Payment and Portal services, redesigned the business model and sourcing strategy, and facilitated the procurement.	●	●
Wyoming Department of Enterprise Technology Services	Led the technology integration workstream for the state of Wyoming; provided a strategy and roadmap to modernize IT operations with hybrid cloud and network transformation to deliver new services and optimized legacy environments.	●	

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Texas Commission for State Emergency Communications	Conducted an IT department assessment and developed a strategy to outsource tactical services, created policies and procedures; supported procurement efforts for cybersecurity, and managed network services for the Statewide NG9-1-1 Transformation.	●	●
New Jersey Division of Taxation	Analyzed current operations and technologies in consideration of future System Modernization. Services included business process improvement, requirements analysis, RFP development, proposal evaluation, and oversight services and project management support.	●	●
Missouri Department of Transportation/ Department of Revenue	Assist in the procurement of a new fully-integrated Motor Vehicle and Driver Licensing (MVDL) Business and Technology Modernization solution. Conduct research, develop RFP, facilitate the evaluation, and provide program oversight for the implementation project.	●	●
Wyoming Department of Transportation	Assessed current environment, evaluated cost model, and defined future goals to develop a Modernization Strategic Plan. Led the definition and developed the RFP covering all DMV functions. Continue to work with WYDOT and ETS to develop a data dictionary and convert data from the existing DL/MV database.	●	●

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Experience.

4. Contractor must provide **three (3)** detailed examples of projects that your company performed that are similar in nature and scope to the services stated in this RFQ. Contractor shall complete **Appendix A, Project References**. Contractor shall state whether any of the following have occurred:
- a) During the last **five (5)** years, Contractor, a subsidiary or intermediate company, parent company or holding company had a contract terminated for default, or for cause. If so, Contractor shall submit full details including the other contractor party's name, mailing address, telephone number and electronic address.
 - b) During the last **five (5)** years, Contractor, a subsidiary or intermediate company, parent company or holding company has been assessed any liquidated damages under any of its existing or past contracts. If so, indicate the reason for the imposition of liquidated damages and the liquidated damages amount of each incident.
 - c) During the last **five (5)** years, Contractor, a subsidiary or intermediate company, parent company or holding company was the subject of any order, judgment, or decree of any federal or state authority.
 - d) During the last **five (5)** years, Contractor, a subsidiary or intermediate company, parent company or holding company was barred, suspended, or otherwise limited in its right to engage in any business, practice, or activity, or if trading in the stock of Contractor, a subsidiary or intermediate company, parent company or holding company has ever been suspended. If so, Contractor shall submit full details including date(s).

Contractor Response

References

Appendix A, Project References, is included in this document.

None of the items described in 1 a, b, c, or d have occurred.

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5. Contractor should provide a detailed narrative that includes the following:
- a) Project Name;
 - b) Scope and Size of Project;
 - c) Project Start and End Dates;
 - d) Company Name;
 - e) Company Address;
 - f) Contact Person;
 - g) Contact Phone Number; and
 - h) Contact Email Address.

Contractor Response

Project Narratives

To illustrate our experience providing sourcing advisory services to state government clients similar to those requested by OIT, we have provided three recent projects focusing on multisourcing and next-generation technology services.

Texas Department of Information Resources (DIR) – Next Generation Data Center Services

Project #1:	Next-Generation Data Center Services
Services Assessed and Procured:	Private Cloud, Public Cloud Manager, Mainframe, Print-Mail, Security Operations, Technology Solution Services
Estimated Value of Procured Contracts:	\$1.6 billion; annual average = \$200 million
Project Scope:	Strategy and Planning, Operating and Business Model Design, RFP Development, Procurement Assistance, Transition and Transformation Support
Engagement Period:	April 2019 – February 2021
Client Name:	Texas Department of Information Resources (DIR)
Client Address:	300 W. 15 th Street, Suite 1300, Austin, TX 78701
Contact Person:	Colleen Berkeley
Contact Phone Number:	512-475-4659
Contact Email Address:	colleen.berkeley@dir.texas.gov

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Business Challenge

DIR, the State of Texas' central IT agency, sought to re-procure infrastructure and application services in a multisourcing approach that takes full advantage of an MSI model. The state sought a next-generation Shared Technology Services offering that fully integrates private cloud, public cloud, mainframe, network, print mail, enterprise architecture, and applications within a single, secure program. The vision was to provide customers with the full scope of technology services in a secure, reliable, contemporary delivery model that meets business requirements at competitive prices. The addition of application services and customer technology advisory services to the historically infrastructure-only program enables a one-stop shop for legacy modernization, DevOps, and cost optimization to shift spend from run to grow/transform.

Our Approach

The Mathtech Team worked with the client to flesh out the strategy and drafted the requirements of each of the six RFPs to align with the state's Vision and Desired Outcomes and market capabilities while ensuring service component interoperability. The Mathtech Team and the state worked together to complete the procurements on time with a successful transition. We completed this third-generation sourcing transaction, transition, and transformation support services in a remote facilitation capacity. Critical innovations from the Mathtech Team methodology to facilitate the successful procurement of \$1.6 billion in services across six RFPs include:

- **Digital Collaboration** – Complex technology procurements require agility, but the core disciplines underpinning project management (planning, tracking, reporting) are critical. We have developed a digital collaboration toolkit with tracking templates and KPIs focusing on what matters.
- **Build Relationships** – We take the time to know the client executive steering committee members and what is meaningful to each of them. We leverage that forum for key decisions, setting expectations, and honoring differences among the stakeholders.
- **Follow the Money** – With complex technology procurements, the financial business case tells the story. The cost drivers in the solution trace back to a Respondent's interpretation of the requirements. The exceptions to the MSA can tease out the risk premium. The assumptions reveal what is missing. Our methodology ensures alignment between the requirements, terms, and financials and eliminates gaps and overlaps in the solution and pricing.

Our Solution

All six of the RFPs replaced existing contracts that expired on the same date. The Mathtech Team facilitated the completion of requirements for six RFPs, the evaluation, clarification, integration with the MSI, due diligence, incumbent disentanglement plan, and contract negotiations. Our ability to shepherd these procurements to successful outcomes required experience, agility, communication, relationship alignment, and a focus on the essentials. The new services ecosystem includes:

1. **Technology Solution Services:** An enterprise architecture, solution design, and customer technical advisory service.
2. **Private Cloud:** A compute and storage service delivered through a software-defined data center (SDDC).
3. **Public Cloud Manager:** A cloud services expert partner with expanded capabilities to securely leverage cloud services.
4. **Security Operations:** An independent provider setting program security policies/standards, providing centralized access management, monitoring, and vulnerability analysis.
5. **Mainframe:** A lower-cost, true consumption-based mainframe-as-a-service with improved processing resiliency.

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6. **Print, Mail, and Digitization:** An evolved service model to enable digital as-a-service delivery and increased capacity.

Customer Benefits

The state achieved the operational and financial objectives in a highly competitive procurement facilitated within the RFP timeline dates. The key features of the next-generation service include:

- **Modernization:** Service innovation and legacy modernization services to reduce security risk, improve quality of service, and lower run cost.
- **Agility:** Deploy and support IT services to enable customers to meet business objectives on time. Enhanced flexibility to deliver new services that meet business demand with a dynamic and rapidly provisioned infrastructure stack that supports agile development.
- **Reliability:** Provide consistent and secure delivery of services with an integrated security framework and standards across the enterprise. Reduced risk through standard technology stack and auto-identification of issues and self-healing.

Texas Department of Information Resources (DIR) – Digital MSI

Project #2:	Digital MSI
Services Assessed and Procured:	Multisourcing Service Integration, including Service Desk, Marketplace, IT Service Management, IT Business Management
Estimated Value of Procured Contract:	\$147 million over 8 years; annual average = \$18.4 million
Project Scope:	Strategy and Planning, Operating and Business Model Design, RFP Development, Procurement Assistance, Transition and Transformation Support
Engagement Period:	November 2016 – March 2019
Client Name:	Texas Department of Information Resources (DIR)
Client Address:	300 W. 15 th Street, Suite 1300, Austin, TX 78701
Contact Person:	Colleen Berkeley
Contact Phone Number:	512-475-4659
Contact Email Address:	colleen.berkeley@dir.texas.gov

Business Challenge

DIR sought to re-procure the services of a Multisourcing Services Integrator (MSI). The state desired a next-generation Digital MSI to leverage a cloud-based service management platform and extend the service across multiple shared services the central IT agency provided, including infrastructure, applications, security, and the state digital portal. The vision was to evolve into a highly-automated service that aligns the state's shared services to enrich the customer experience and enable the delivery of services at competitive prices.

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Our Approach

The Mathtech Team has a long history and hands-on experience with the MSI model, supporting multiple state central IT agencies. Members of our team not only facilitated the design, procurement, and governance of the first-generation MSI in Texas, but the solution architect/delivery lead from the awarded Service Provider is now on our team. With this second-generation MSI model, the Mathtech Team helped the state completely redesign the operating model, business model, and entire RFP requirements to align with the market's evolving digital and automation capabilities. We built a detailed cost model to generate a financial forecast based on the new requirements. We provided full procurement assistance support, including strategy, requirements design and development, transaction, transition, and implementation support. Critical innovations from the Mathtech Team that helped facilitate this evolution to a digital service integration model include:

- **Domain Expertise** –We staff our team with IT domain expertise to supplement the client subject matter experts to ensure the solution is operational. For example, our team included a ServiceNow subject matter expert on this MSI engagement to help develop the requirements and assess the responses to ensure the full capabilities of automation and digital integration were captured and realized. As a result, we optimized the MSI scope and simplified the integration of a multisource ecosystem, creating improved workflows, lower delivery costs, enhanced service delivery for customers—and more efficient supplier management for the MSI and state.
- **Connect the Dots** – Ensure direct connections and clear linkages between the Vision, Desired Outcomes, Evaluation Criteria, Requirements, Service Levels, Critical Deliverables, and KPIs.
- **Test Drive** – Clarification and integration sessions are often the pivotal moments in a procurement. The buyer and seller meet to discuss the solution, price, and exceptions to terms. The accelerated learnings these sessions provide to both parties are invaluable. The Service Provider delivery team is front and center, providing the state an opportunity to engage directly with the team, test their assumptions and dependencies, clarify the benefits and risks of the solution, identify gaps and overlaps, and observe and experience the relational dynamics within the team and with the state participants.

Our Solution

The new Digital MSI requirements that The Mathtech Team co-created with the client included:

- **Marketplace**
 - Accessible service catalog with mobile access and near real-time analytics
 - Self-provisioning with a comparison of services and pricing by the MSI
 - Orchestration of direct private and public cloud resource provisioning
 - Advanced service desk platform with an automated agent and advanced remote control
- **Service Management**
 - Automated ITIL functions, centralized communications, and a single system of record
 - Automation of low-risk, frequently executed changes initiated from the service catalog
 - Automated identification and validation of CIs and analytic dashboards
 - Reactive and analytics-driven proactive problem management
- **Business Management**
 - Performance analytics with real-time workflow data with visibility of projects and tasks
 - Financial transparency with visibility into spending, service usage, and business goals tracking
 - Metrics and data analytics that assist with informed consumption management decisions

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■ **Operations Management**

- Automated data quality management to improve analytics and operational effectiveness
- Event aggregation and automated response actions to increase service availability
- Enablement of self-provisioning and workflow orchestration
- A service catalog-based cloud resource orchestration system to order and bill usage

Customer Benefits

The state achieved the operational and financial objectives in a highly competitive procurement facilitated within the RFP timeline dates. The key features of the service include:

A healthy business model for all stakeholders that:

- Equitably distributes the savings of process automation, economies of scale
- Significantly reduces the cost of MSI services to single digit % of total IT services

An agile services ecosystem that:

- Rewards innovation by efficiently onboarding New Services, Customers, and Service Providers
- Lowers switching costs by eliminating termination charges and payment of one-time charges in Year 1
- Enables efficient management of a complex supplier ecosystem

A system that enables speed to value that:

- Streamlines self-provisioning and automated invoicing and chargeback processes
- Utilizes predictive analytics to accelerate the identification and resolution of issues.

A compelling customer experience that:

- Provides a consolidated catalog and reporting of shared services for stakeholders
- Improves customer service with transparency of services, performance, and financials

Maryland Motor Vehicle Administration – Enterprise Modernization

Project #3:	Enterprise Management System Project Management Office Services
Services Assessed and Procured:	Enterprise Application Implementation Services, Hosting & Disaster Recovery Services, IT Operations & System Support Services
Estimated Value of Procured Contracts:	\$95M
Project Scope:	<ul style="list-style-type: none"> ■ Agency Modernization Strategy ■ Business Process Assessment and Improvement ■ IT Strategy and Architecture Development ■ Requirements Analysis and RFP Development ■ Procurement Support ■ Data Discovery, Quality Analysis & Remediation, Migration Support ■ Project Management Oversight ■ System Testing
Engagement Period:	June 2013 – March 2021
Client Name:	Maryland Motor Vehicle Administration
Client Address:	One Orchard Road, Glen Burnie, MD 21060
Contact Person:	Clarence Edwards

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Contact Phone Number:	410-787-7976
Contact Email Address:	cedwards@mdot.state.md.us

Business Challenge

The MVA was “frozen in time” and unable to substantially improve customer service and operations while at the same time struggling with outdated and high-maintenance legacy applications and infrastructure. The MVA engaged The Mathtech Team to support its full-scale agency modernization effort, including replacing all enterprise systems and platforms and providing disaster recovery services.

Our Approach

The Mathtech Team designed a modernization project that holistically included representation from all stakeholders and business operations and led the MVA through envisioning future operations to strategy, design, implementation, business process improvement, and full enterprise system migration.

Methodologies used included:

- **Vision Session Strategy & OCM Methodology** – Vision Sessions were used to bring all operational areas together to develop a vision of future operations, processes, and customer service functions. This vision was the foundation for the modernization strategy and the beginning of Organizational Change Management
- **Future System Blueprinting** – The Blueprinting tool was used to establish requirements and a design for future systems. The Blueprint components were developed into projects and mapped to procurement efforts.
- **Strategic PMO Project Management Methodology** – The methodology was used to implement a PMO that would manage the modernization effort and all other agency initiatives.
- **Project Success RFP Framework** – The framework was used to develop comprehensive RFPs that included technical requirements, functional requirements, and the full range of implementation and support services.
- **Holistic Procurement** – The Mathtech Team used a range of SharePoint and Microsoft tools to develop a system to support the procurement, Q&A, evaluation, and final award for contracts totaling over \$80M
- **Data Modernization Methodology** – The Mathtech Team led a discovery and documentation effort of all agency data, including both large enterprise databases and Access and Excel data stores. Documentation continued with a data quality analysis, remediation, and support for data migration into the new enterprise applications.
- **Six Perspective Requirements Analysis & Process Improvement** – The Mathtech Team worked with the MVA to lead the creation of a complete Process Catalog, including business rules, workflows, and other process documentation. In addition, the team used its ODR (Business Process Improvement) methodology to identify process changes that must be addressed during the modernization effort.

The Mathtech Team collaborated with leadership and staff through all phases of the project to assess current challenges, develop solutions, and implement them.

Our Solution

- **PMO & Governance** – The Mathtech Team collaborated with MVA staff and leadership to develop and implement a PMO and project governance model. The PMO is fully compliant with the

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Maryland SDLC. In addition, a SharePoint site was developed to manage Project Management Plans for every MVA project, including support for SDLC artifacts.

- **Enterprise Architecture Group** – The Mathtech Team established an enterprise architecture function and governance model for the MVA, including a modernization blueprint and plans to coordinate Information, Applications, and Infrastructure. The EA group defines standards, projects, and modernization activities for achieving the overall future IT Vision.
- **Improved Processes** – A range of process improvements were implemented that increased service delivery channels, reduced data entry, increased data quality, and improved productivity.
- **New Enterprise System** – The new systems fully supported Operations, Licensing, Financials, Customer Portal, Document Management, Reporting and Analytics, Workflow, and Hosted DR

Customer Benefits

- **Modern Technologies & Infrastructure** – The MVA was fully evolved to modern, maintainable technologies that support future enhancements. The systems include both on-premise systems as well as a completely hosted and secure disaster recovery solution.
 - **Reliable Disaster Recovery & Failover** – The new system provided unprecedented protection and security. Encryption keys and vaults provided security for the MVA data, including highly sensitive PII.
 - **Highly Adaptable Systems** – The new systems allow the MVA to quickly implement new services and business functions in a timeframe not attainable using legacy systems.
 - **Clean Data** – The process implemented by The Mathtech Team allowed the new system to come online with cleaner and more consistent data than ever previously achieved.
 - **Improved Customer Service** – The new system includes a customer portal that puts many more services online and provides new channels and tools for customers to complete transactions.
 - **Enhanced Staff Skills** – The ongoing collaboration between MVA staff and The Mathtech Team allowed for knowledge transfer and skill development, enabling less skilled team members to grow and support the project and ongoing operations.
-

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Personnel.

6. The Selected Contractor shall specify each executive and professional it determines necessary to accomplish the requirements of this Project, including any personnel employed by a subcontractor. In so specifying, the Selected Contractor shall use **Appendix B, Personnel Experience by Key Position**, to identify key personnel.

7. The Selected Contractor must provide the names and resumes of the individuals who will be assigned to this project showing a minimum of **five (5)** years of experience and demonstrating the qualifications and skills required to successfully develop and implement the project.

Contractor Response

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The Mathtech Team Resumes

Steven Young

Executive Project Director

Steve has over 30 years of experience designing and implementing business management, decision support, and data management systems to improve operations' efficiency, quality, and manageability. He is an accomplished system architect, IT strategist, and management consultant with significant experience in the public sector and commercial finance and manufacturing organizations. Steve has a strong technical background covering all system design, development, and deployment aspects, including distributed, cloud and hosted, client/server, Internet, and mainframe-based technologies. He is an accomplished project manager and a certified PMP. He frequently works with State agency leadership to design and execute modernization programs, including technology and business process improvement. Steve has presented at the PA TechCon conference for 6 of the past 7 years on topics including Journey Mapping, Project Management, IT Operations, Change Management, and Customer Service.

Education:

- Computer Engineering, Drexel University

Certifications:

- Project Management Professional

Key Areas of Expertise:

- Project Visioning and Strategy
- Large Scale Project Management
- Application Architecture and IT Planning
- Requirements Analysis and RFP Development
- Business Process Improvement

Select Credentials:

- Currently leading Agency modernization and strategic planning services for Missouri, Wyoming, and Montana, and he recently completed one in Maryland. These activities include designing future operations, developing strategic plans, developing requirements and facilitating procurements. These projects included both system and data modernization, and the migration to hosted solutions.
- Currently oversees modernization and strategic planning services for the New Jersey Division of Family Development to develop a modernization strategy, including a future system blueprint, next-generation database, requirements analysis, incremental modernization, and long-term support tools, including the migration of development and hosting activities to AWS
- Led modernization and strategic planning services for the Illinois Secretary of State by creating a holistic vision for integrated operations and customer services, a future system's blueprint, a roadmap for improving IT and business operations, and overall system requirements.
- Developed a strategy for the Washington Department of Licensing to redesign and modernize their IT organization resulting in a "next generation" IT department. The project included research and benchmarking of similar IT organizations and an analysis of the agency goals, structure, staffing, skill sets, and operating models. This project was part of DOL's larger modernization effort, for which Mathtech also provided guidance.
- Established and led a PMO and project oversight team that included architecture, requirements analysis, BPR, data modelling, database design, RFP development, and testing functions to oversee the implementation of a \$67M government system for the New Jersey Motor Vehicle Commission.

OIT Next Generation Managed Compute Role Description

- Coordinate and collaborate with the core team regularly and work in concert with the Project Director to address project issues, ensure quality delivery, and serve as an executive point of contact for OIT.

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Kyle Cox
 Project Director

Kyle Cox has over 20 years of public and private sector program leadership and outsourcing experience across various industries, including Technology, Services, Basic Materials, and Consumer Goods. He has experience as a buyer, supplier, and advisor, leading and participating in creating and nurturing ITO service relationships. Kyle began his technology career as an industry service manager in a Fortune 250 company, where he led Infrastructure and Application service delivery organizations. He then transitioned to the supplier side of the relationship, focusing on solution offerings, business development, and flexible deal structures. He was involved in multiple engagements as a buyer and advisor to outsource managed services, leading the assessment, strategy, execution, negotiations, and governance of the relationship and commercial elements of the plan.

Education:

- Master of Business Administration, University of Texas at Arlington
- Bachelor of Science in Business Information Systems, University of Texas at Arlington

Certifications:

- ITIL
- PMP

Key Areas of Expertise:

- Program, Project, and Portfolio Leadership
- Sourcing Management and Governance
- Technology and Business Process Sourcing
- Business Transformation
- Technology Service Delivery
- RFX Development and Negotiations

Select Credentials:

- Led Program Management Office as Project Director during the TxDOT Multisourcing Transformation, Texas DIR Next-Gen Data Center Services, Digital MSI (Multisourcing Service Integration), and Texas.gov, Digital Government Portal and Payment Service procurements and transition of services.
- Led the design and establishment of a multisourcing governance organization and process structure to optimize spend and institutionalize supplier governance operations for ITO and Global Business Services.
- Led multiple Applications and Infrastructure service sourcing transactions and relationships from assessment to benefit realization, including combinations of insourcing, staff augmentation, and managed outsourcing.
- Led organizational change management initiatives associated with process transformation, mergers & acquisitions, ERP implementations, GBS consolidation, and sourcing efforts, focusing on value creation and nurturing healthy, mutually beneficial service relationships.

OIT Next Generation Managed Compute Role Description

- Provide OIT leadership with strategic and tactical advisory support to meet objectives and deliver outcomes on time; providing the single point of vendor accountability and communication
- Ensure program level continuity across all phases of the program: Strategy (Pre-Solicitation), Procurement / Solicitation, Transition, Steady State
- Ensure program level continuity and integration across the service components and procurement tracks, including program management, communications, OCM, and financial management
- Provide input to the project management team to update and maintain the project plan
- Provide guidance on risks and issues, including mitigation strategies and remedies
- Provide subject matter expertise on market-based commercial terms and conditions
- Coordinate due diligence, including setting objectives, assessing the plan, and driving issues to closure

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George Assenheimer
Operating Model Director

With more than 25 years of IT and operations experience, George specializes in designing and operating shared technology services with a focus on service integration and management (SIAM). He has led the design, development, and implementation of governance frameworks, service integration tools, IT performance management and chargeback solutions for commercial and government clients. George has held positions of CIO, COO, CTO, and various IT roles, including architecture planning, solution design, and software development.

Education:

- Masters in Telecommunications, University of Dallas
- Master of Business Administration in Finance, Dallas Baptist University
- Bachelor of Business Administration in Computer Information Systems, Texas State University

Certifications:

- Expert-level ITIL

Key Areas of Expertise:

- Service Delivery Model Design and Implementation
- Multisourcing Service Integration (MSI)
- Service Management
- Infrastructure and Network Services
- Applications Development and Maintenance

Select Credentials:

- Lead Operating Model Director for the solution workstream supporting the Texas DIR Next-Gen Data Center Services, Digital MSI, and Texas.gov Digital Government Portal and Payment Service procurements.
- Lead Operating Model Director for the South Carolina Department of Administration shared technology services transformation program that includes strategic planning in support of service consolidation and multisourcing as well as sourcing advisory services for Digital Government Portal and Payment Service and Managed Security Services procurements,
- Architected, implemented, and operated an MSI solution enabling effective IT governance for a large public sector client supporting 28 state agencies.
- Designed, implemented, and operated a project office for a large regional utility client overseeing solutioning, proposals, project implementation, and executive governance.
- Designed and implemented ITIL-based service management capabilities, standard processes, and management dashboards across a top-tier North American application and infrastructure Service Provider operations.
- Led the IT integration and transformation for an energy company, enabling the merger of two organizations through streamlined processes and the rationalization of applications.
- As COO of a telecom company, designed and led a program to improve profit margins by over 53% through sustainable revenue and cost improvements.

OIT Next Generation Managed Compute Role Description

- Provide OIT leadership with strategic and tactical advisory support to meet objectives and deliver outcomes on time
- Accountable for the overall design and integrity of the solution and the integration of the service components with the service integrator
- Support the Incumbent Disentanglement workstream with a focus on service integration and management
- Provide quality assurance of Solution team deliverables
- Accountable for developing and prioritizing the minimum viable product solution and rollout strategy
- Provide guidance on Solution and Integration risks and issues, including mitigation strategies and remedies

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Shaun Daly
Business Model Director

Shaun Daly has over 25 years of information technology outsourcing (ITO) and business process outsourcing (BPO) experience across various industries, including the Public Sector, Healthcare, Travel and Transportation, Utilities and Energy, and Commercial Real Estate. He has expertise in service integration and management (SIAM) and the financial aspects of sourcing. He has experience as both a supplier and an advisor, leading and participating in creating and nurturing ITO and BPO service relationships from both perspectives.

Shaun's advisory experience includes numerous engagements of varying sizes across multiple industries, with recent experience in large, complex multisourcing service relationships. He began his advisory career with TPI (now ISG), where he was involved in multiple engagements and led the strategy, execution, and governance of the relationship and commercial elements of the plan. Before TPI, Shaun served in positions of increasing responsibility for suppliers of ITO and BPO services, including ACS (now Atos) and American Airlines Sabre Computer Services (now Sabre).

Education:

- Master of Business Administration, University of Texas at Dallas
- Bachelor of Science in Business Administration, Creighton University

Certifications:

- ITIL

Key Areas of Expertise:

- Business Transformation
- Multisourcing Service Integration (MSI)
- Business Model Design
- Technology and Business Process Sourcing
- Sourcing Management and Governance

Select Credentials:

- Lead Business Model Director for the commercial workstream in support of the Texas DIR Next-Gen Data Center Services, Digital MSI, and Texas.gov Digital Government Portal and Payment Service procurements,
- Lead Business Model Director for the South Carolina Department of Administration shared technology services transformation program that includes strategic planning in support of service consolidation and multisourcing as well as sourcing advisory services for Digital Government Portal and Payment Service and Managed Security Services procurements,
- Led the assessment and strategic planning with the Georgia Technology Authority (GTA) for a next-generation service management platform and MSI-led operating model,
- Supported the Commonwealth of Virginia MSI implementation and integration with eight service providers providing infrastructure services,
- Led the design and execution of one of the first service relationships that included the use of a multisourcing service integrator (MSI), and
- Led business development teams at ACS (now Atos), supporting M&A and outsourcing pursuits to grow business from \$300 million to \$2 billion over five years.

OIT Next Generation Managed Compute Role Description

- Provide OIT leadership with strategic and tactical advisory support to meet objectives and deliver outcomes on time
- Accountable for the overall design of the commercial model, including the agreement structure, pricing terms and resource unit model, and business case analysis framework
- Responsible for Finance team preparations, facilitation, and documentation of key events, including evaluations, clarification, integration, and negotiation sessions
- Support the Incumbent Disentanglement workstream with a focus on commercial elements (e.g., contract, pricing, business case)
- Provide quality assurance of Business and Finance team deliverables
- Provide guidance on financial risks and issues, including mitigation strategies and remedies

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Jerry Price

Service Architect

With more than 24 years of industry experience, Jerry Price has held increasingly strategic roles throughout his career in IT infrastructure and services, including Delivery Architect, Solution Architect, and Senior Solution Director. Jerry has filled multiple management positions, including pre-sales and operations lead for the North American division of Atos. He has led many infrastructure outsourcing initiatives, from design and implementation through successful completion. He has extensive experience in evaluating technologies, services and the formation and implementation of business and technology strategies.

Education:

- Bachelor of Arts in Political Science, Western Michigan University

Key Areas of Expertise:

- Cloud computing (IaaS, PaaS)
- Digital data center strategy and operations
- Automation and cognitive capabilities
- ITSM and enterprise system management
- Middleware, mobile device management, and client and server virtualization
- Multisourcing Service Integration (MSI)
- Applications management

Select Credentials:

- Lead Service Architect for the solution workstream in support of the TxDOT Multisourcing Transformation and the Texas DIR Next-Gen Data Center Services procurement,
- Supported the Commonwealth of Virginia MSI implementation and integration with eight service providers providing infrastructure services,
- Led the transition service management, data center, cloud, and application outsourcing services for a large communications and media company, including the design and implementation of an operating model for engineering and solution design, work intake and demand management, commercial constructs, and overall governance,
- As Senior Solution Director, led solution strategy, detailed solutioning, costing and pricing, and contract negotiations on an \$800 million infrastructure transaction,
- Led the Engineering & Architecture for Tier 1 Service Provider with oversight and responsibility for Product Lifecycle Management, PMO, Solution Engineering, Architecture, and Implementation,
- Created North American Cloud Services offering, solution, and costing models for Tier 1 Service Provider.
- Led a data center transformation that optimized staffing and solutioning, reducing the internal cost to deliver by over 50%.

OIT Next Generation Managed Compute Role Description

- Facilitate Service Provider Q&A process
- Support solution evaluation process and facilitate Clarification Session preparation process
- Support Clarification Sessions and capture necessary changes for Amended Response instructions
- Coordinate inbound due diligence, including setting objectives, assessing the plan, and driving issues to closure
- Accountable for developing and prioritizing the minimum viable product solution and rollout strategy
- Support Integration Session planning and facilitation
- Provide guidance on Solution and Integration risks and issues, including mitigation strategies and remedies
- Facilitate solution workstream final negotiations

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John Klein

Service Architect

John Klein has over 30 years of technical and leadership experience leveraging vision, strategy, and emerging technology to achieve business value and deliver a competitive advantage. John’s experience includes over twenty years of Enterprise Applications and Enterprise Systems, including modernization, migration, and progressive future growth. He approaches the big picture in optimizing processes across the enterprise, establishing guiding principles, articulating strategy, and developing vision. John routinely plans and oversees business-related IT programs and initiatives ranging from \$20-\$75 million, spanning 2-45 countries, requiring 40-250 technical staff, and affecting 1,000's to 10,000's of end-users. John maintains solid knowledge of IT solutions for business problems in highly regulated industries, including government, telecommunications, pharmaceuticals, medical devices, discrete manufacturing, petrochemicals, and healthcare insurance.

Education:

- Master of Science, Electrical Engineering, Syracuse University
- Master of Science, Computer Engineering, Syracuse University
- Bachelor of Science, Computer Science/Information Science, State University of New York

Certifications:

- PMI-ACP
- CSM

Select Credentials:

- Provided technical solution expertise, procurement support, and technical implementation oversight for a next-generation ECM solution for the Maryland Motor Vehicle Administration.
- Provided web content management system product evaluation and business case for a chemical supplies distributor with \$1 million/day in sales.
- Provided technology briefings at the Maryland Motor Vehicle Administration Enterprise Architecture Governance Board.
- Provided guidance to a mid-sized business on employee and company BYOD responsibilities, including decision involving supported devices and platforms, device sharing, data protection, ongoing maintenance and support, requisite applications, scheduled maintenance and platform upgrades, connectivity, acceptable use, device sharing, help desk, policy and procedure documents, and infrastructure.
- Evaluated infrastructure architecture, frameworks, facilities and operations management, and disaster recovery and business continuity plans, including design/facilities/procedures to ensure continuity of operations.
- Performed and reviewed gap analysis and related documentation against state requirements and document recommendations and results.

Key Areas of Expertise:

- Assessing Emerging Technologies
- Creating Technology Roadmaps
- Portfolio Management
- RFP Development and Negotiations
- Processes Optimization
- Technology Strategies
- Enterprise Applications

OIT Next Generation Managed Compute Role Description

- Facilitate Service Provider Q&A process
- Support solution evaluation process and facilitate Clarification Session preparation process
- Support Clarification Sessions and capture necessary changes for Amended Response instructions
- Coordinate inbound due diligence, including setting objectives, assessing the plan, and driving issues to closure
- Accountable for developing and prioritizing the minimum viable product solution and rollout strategy
- Support Integration Session planning and facilitation
- Provide guidance on Solution and Integration risks and issues, including mitigation strategies and remedies
- Facilitate solution workstream final negotiations

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Clay Newman

Financial Advisor

Clay Newman has over twenty years of professional services experience across various industries, including Public Sector, Not-for-Profit, and Insurance. He has executive-level experience as a Chief Financial Officer, driving growth and organizational change management. Clay provides a unique combination of financial and technical expertise, leading organizations through transformational change. He has years of experience in the sourcing management and governance of technology outsourcing relationships, including the support of a billion-dollar state government infrastructure agreement. Clay provided leadership in designing, testing, and implementing the contract's chargeback, procurement, and cost allocation components. Additionally, Clay routinely facilitated executive-level updates to provide financial reporting and guidance for issue resolution. He played a key role in working with the Legislative Budget Board to develop funding allocations for all agencies in the general appropriations act.

Education:

- Master of Accounting, Texas State University
- Bachelor of Business Administration, Texas State University

Certifications:

- Certified Public Accountant

Key Areas of Expertise:

- Financial Data Modelling
- Government Budgeting and Grant Administration
- IT Strategy
- Multisourcing Service Integration (MSI)

Select Credentials:

- Key advisor on multiple large, complex state government information technology outsourcing (ITO) relationships, driving project management and business case analysis in the financial workstreams.
- As CFO of a non-profit entity, oversaw organizational growth from \$8 million to over \$43 million. He was key in implementing organization infrastructure updates, including systems, business processes, and technology integration.
- Lead Financial Analyst with a state government centralized IT agency in the sourcing management of a large, complex infrastructure outsourcing agreement, working with customers and Service Providers to ensure the achievement of financial objectives.
- As Budget Director of a large state government agency, managed a \$1 billion budget to administer unemployment insurance and workforce development programs. Coordinate with multiple departments, including IT, to ensure successful implementation of major initiatives; and
- As Senior Auditor, planned and performed complex audit plans based on Governmental Auditing Standards.

OIT Next Generation Managed Compute Role Description

- Develop, update, and maintain the financial base case representing current or forecasted spend for the in-scope services.
- Develop financial business case models that compare respondent pricing proposals to the base case, including normalization to the bids that account for exceptions and omissions.
- Develop and execute the data gathering strategy and maintain data integrity through the process.
- Work closely with the Solution team and subject matter experts to validate price-impacting assumptions.
- Support the financial due diligence process.
- Identify high-priority business case “big rocks” and coordinate with business and solution teams to ensure topics are addressed in clarification, integration, and negotiation sessions.
- Facilitate financial sessions during clarification, integration, and negotiation sessions.

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I-4. Tasks.

1. The Selected Contractor shall perform all activities necessary to perform the tasks below while meeting Contract requirements. All deliverables are subject to OA written approval.
2. Contractors shall describe its structured approach to performing the tasks and major deliverables below in its response. Contractors shall identify all activities that shall be performed and work products that shall be developed during the performance of this engagement. Responses must include proposed approach and tool(s) to be used to accomplish these tasks.
3. All tasks and major deliverables are subject to Commonwealth approval and will require an iterative process of development and review to receive approval and payment. These checkpoints will be conducted at the end of each phase following an Executive Briefing.
4. Contractors are required to provide at least **one (1)** example of each of the tasks and major deliverables required to complete this engagement. To protect the confidentiality of your clients, you may edit screen shots to remove client or sensitive information.
5. Phase and task summary.
 - a) The following is a summary of the project tasks, and associated deliverables.

Phase	Tasks	Deliverables
A. Strategy and Requirements	Knowledge/Data Gathering <ul style="list-style-type: none"> • Project Startup and Management • Current State Review/Assessment • Current Spend and Contract Analysis • Pricing Structure and Chargeback Analysis • Application Portfolio Review • EDC / WDC Operational and Capacity Review 	D1 Final Current State Report
	Sourcing Strategy and Requirements <ul style="list-style-type: none"> • Market Comparison Report • Requirements Gathering Sessions • Sourcing Strategies • Future State Options • Procurement Support Services Plan 	D2 Final Sourcing Strategy Report
	Governance and Service Integration and Management (SIAM) Strategy and Design	D3 Target Operational Support Model

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B. Procurement Support Services	Procurement Support Services Management <ul style="list-style-type: none"> • RFP Supplier Forum/Pre-proposal Conference Support • RFP Development • RFP Question & Answer Support • RFP Response Evaluation Support • RFP Negotiation Strategy • RFP Negotiation Support 	
C. Additional Services	<ul style="list-style-type: none"> • Transition/Transformation Support • Maturity/Readiness Assessments 	

6. Detailed task requirements and requested responses are listed below.

A. Strategy and Requirements.

1. Knowledge/Data Gathering.

a) Project Startup and Management.

i. The Selected Contractor will be required to meet and align with OIT leadership key stakeholders, schedule and establish regular project team meetings, refine, and finalize the project plan, and provide consistent communication to stakeholders. The purpose of the alignment task is to provide additional insight or new information (such as new inflight migration or modernization efforts) and to include stakeholders in the entire process.

ii. At a minimum, the Selected Contractor will be required to:

- (1) Meet with OA/OIT leadership to initiate review of objectives and expected outcomes for the Project.
- (2) Facilitate a Project Kick-Off meeting with all stakeholders to describe project objectives and stakeholder participation.
- (3) Provide a detailed project plan which includes all tasks and major deliverables.
- (4) Provide a communication plan designed for all stakeholders.

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- (5) Provide a bi-weekly executive team status briefing (to include risk matrix updates).
 - (6) Log and track key decisions.
 - (7) Provide interim draft work products for review prior to final major deliverable submission.
 - (8) Conduct an Executive Briefing following completion of each phase.
 - (9) Provide a list of all key resources that will be responsible (e.g. Lead Strategy Advisor, Lead PM, etc.) for completing all the tasks and major deliverables included as part of this engagement.
 - (10) Review section **I-5 Project Management and Reporting** below for additional information on project management and reporting requirements.
- iii. Estimated Timeline.
- (1) The Selected Contractor will present their proposed timeline based upon experience with similar engagements. The Commonwealth will work with the Selected Contractor to develop a mutually agreeable schedule based upon the actual contract start dates.
- iv. The Selected Contractor should describe its structured approach and timeline for completing **Task A.1.a Project Startup and Management** above and provide at least **one (1)** example of the work product(s) resulting from this effort.

Contractor Response

Knowledge/Data Gathering

Assessment Methodology

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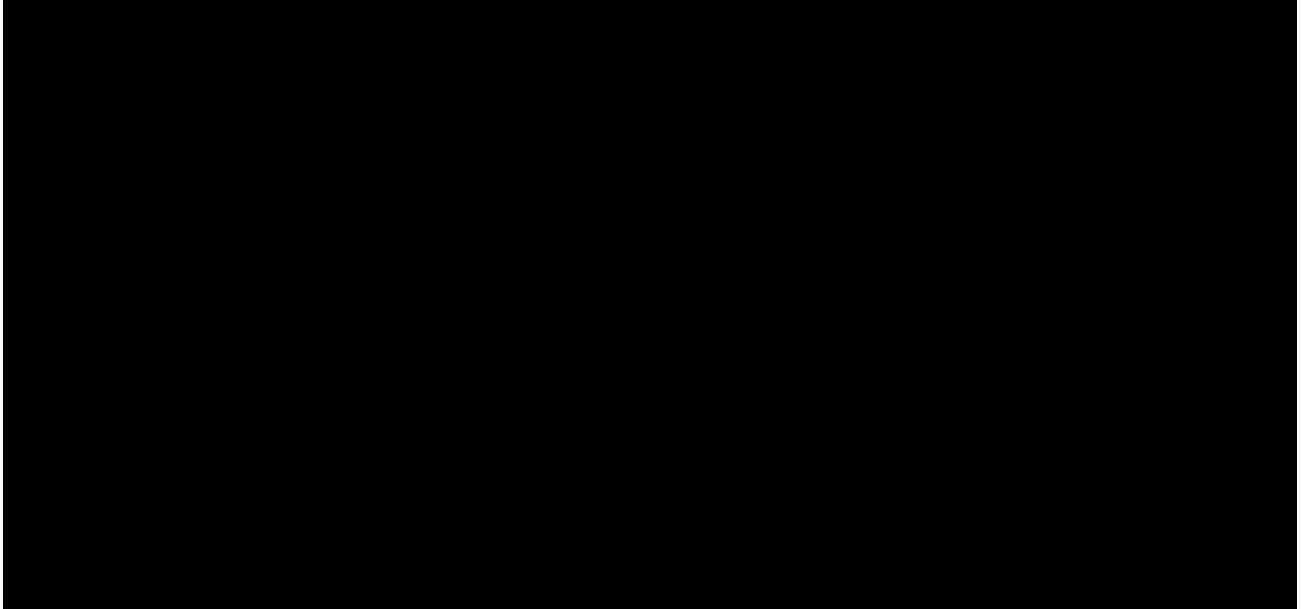
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The Strategy and Requirements timeline below assumes a November 7, 2022, start date, and concludes on March 24, 2023. The estimated due dates for the three deliverables are provided in the timeline. We have accounted for the end-of-year holiday season in recognition that resources from both parties may not be available. We have provided a more detailed timeline as a separate file in our RFQ response.



Assessment Process and Deliverables

The assessment includes the following activities and deliverables:



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The following is an example work product from a kickoff presentation:

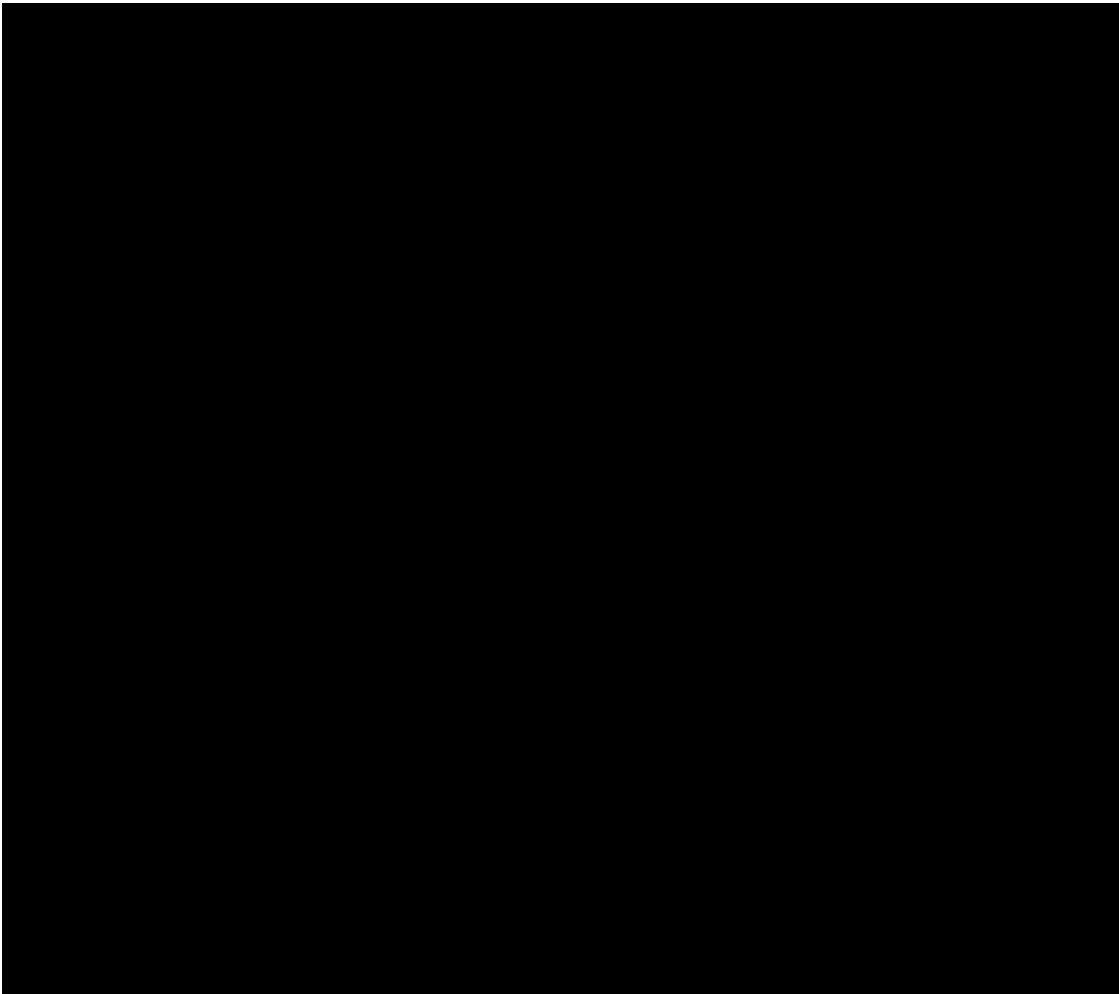


Diagram 8: Work Product from a Kickoff Presentation

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- b) Current State Review/Assessment.
 - i. The Selected Contractor will be responsible for conducting a current state review and assessment of the Commonwealth's existing and planned hosting and compute services.
 - ii. The Selected Contractor should, as part of this task:
 - (1) Review Appendix E, Service Objectives and Current Environment (provides a high-level overview).
 - (2) Conduct technical and business-focused interviews with Delivery Centers and Independent Agencies to assess, review, and validate current state hosting and compute services landscape and future needs.
 - (3) Document findings, including, but not limited to, lessons learned, gaps, strengths and weaknesses, challenges, and risks and constraints
 - iii. The Selected Contractor should describe its structured approach and timeline for completing task **A.1.b Current State Review/Assessment** and provide at least **one (1)** example of the work product(s) resulting from this effort.

Contractor Response

Current State Review/Assessment

Estimated timeline:

Assessment Process and Deliverables (continued)

The assessment includes the following activities and deliverables:

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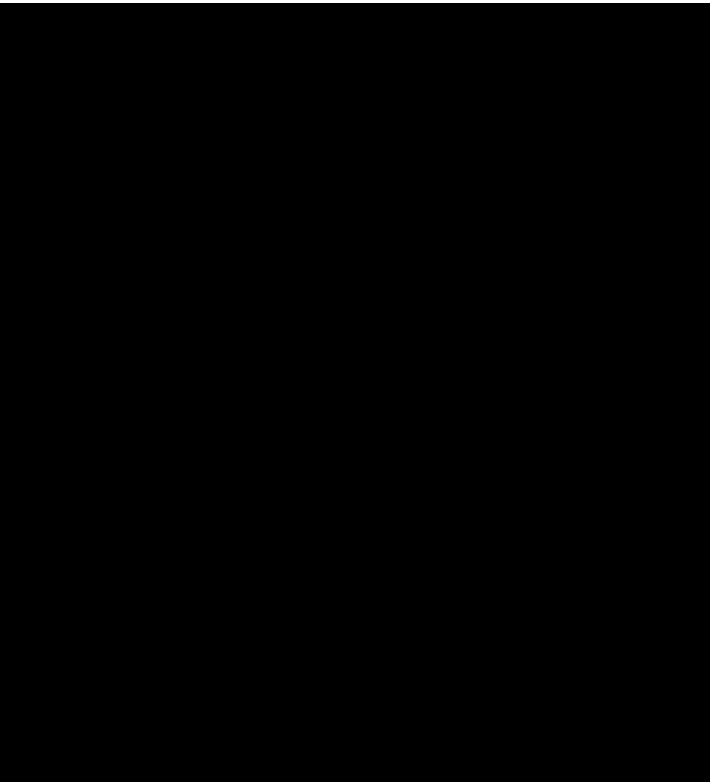
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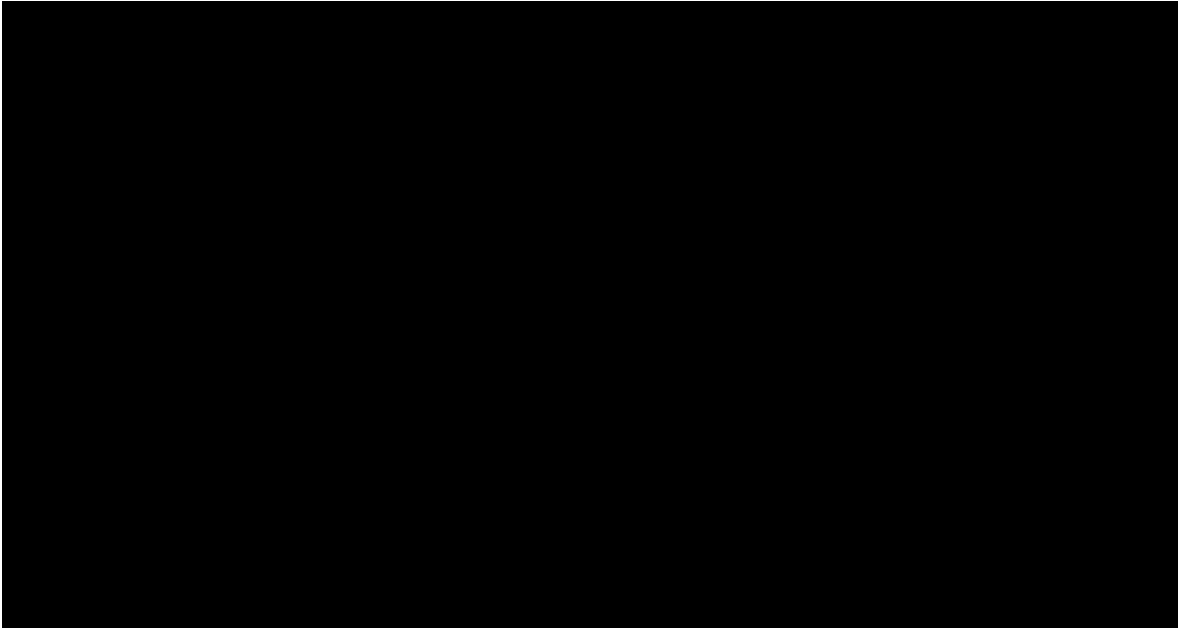


Diagram 12: Current State Review Work Product

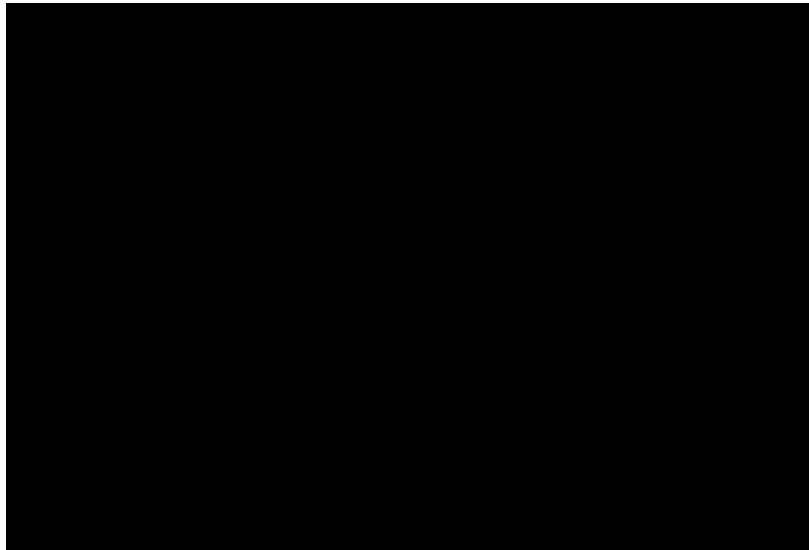
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- c) Current Spend and Contract Analysis.
 - i. The Selected Contractor will be responsible for conducting a current spend and contract analysis of the Commonwealth's existing hosting and compute services to provide data that can be used as a baseline to measure improvements, and to also provide reliable data for deciding future state strategies to realize short- and long-term savings.
 - ii. Contractor should review **Appendix E, Service Objectives and Current Environment** Additional detailed information will be made available to the Selected Contractor upon start of the engagement.
 - iii. Current Spend Analysis.
 - (1) The Selected Contractor will conduct an analysis of the current spend (Direct Spend and Indirect Spend) for hosting and compute services. This analysis should include, but is not limited to, total spend and a breakdown for each of the following categories: software, hardware, networking and storage, facilities (space and power), IT staff, managed services, etc. This analysis will be used to create a base case for current hosting and compute services costs and used in the development of the future state options.
 - iv. Contract Analysis.
 - (1) The Selected Contractor will conduct an analysis of the contracts currently in effect. The analysis should include, but is not limited to, a review of contractual terms and conditions and structure of the contract to assess options, extensions, and potential negotiation positions.
 - v. The Selected Contractor should describe its structured approach and timeline for completing **Task A.1.c. Current Spend and Contract Analysis** and provide at least **one (1)** example of the work product(s) resulting from this effort.

Contractor Response

Current Spend and Contract Analysis

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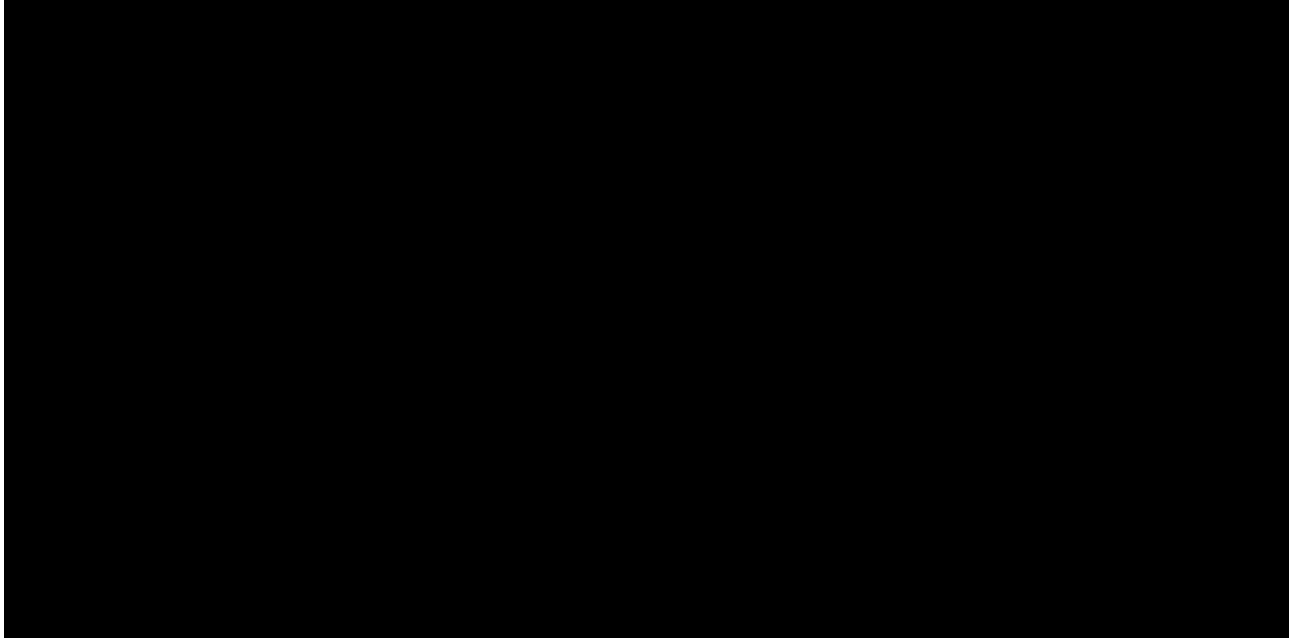
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- The following is an example work product from a contract analysis review:



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- d) Pricing Structure and Chargeback Analysis.
 - i. The Selected Contractor will be responsible for conducting a pricing structure and chargeback analysis of the Commonwealth's existing enterprise services to provide data that can be used to support future buying behaviors and align incentives in the Commonwealth's best interest.
 - ii. The Selected Contractor will conduct a pricing structure and chargeback analysis that includes, but is not limited to, the following:
 - (1) A detailed analysis of current pricing structures for enterprise services. This includes current outsourced services as well as those internally sourced.
 - (2) For the internally delivered services, the Selected Contractor will review the current catalog of services and the associated chargeback model and pricing methodology for internally delivered services.
 - (3) A comparison of pricing structures to identify anomalies, between current pricing structures and market pricing.
 - (4) Short term recommendations to improve buying strategies.
 - (5) Short term recommendations on the service catalog and associated chargeback structure and methodology.
 - (6) Long term recommendations for pricing and chargeback to shape future state delivery model.
 - iii. The Selected Contractor should describe its structured approach and timeline for completing task **A.1.d Pricing Structure and Chargeback Analysis** and provide at least **one (1)** example of the work product(s) resulting from this effort.

Contractor Response

Pricing Structure and Chargeback Analysis

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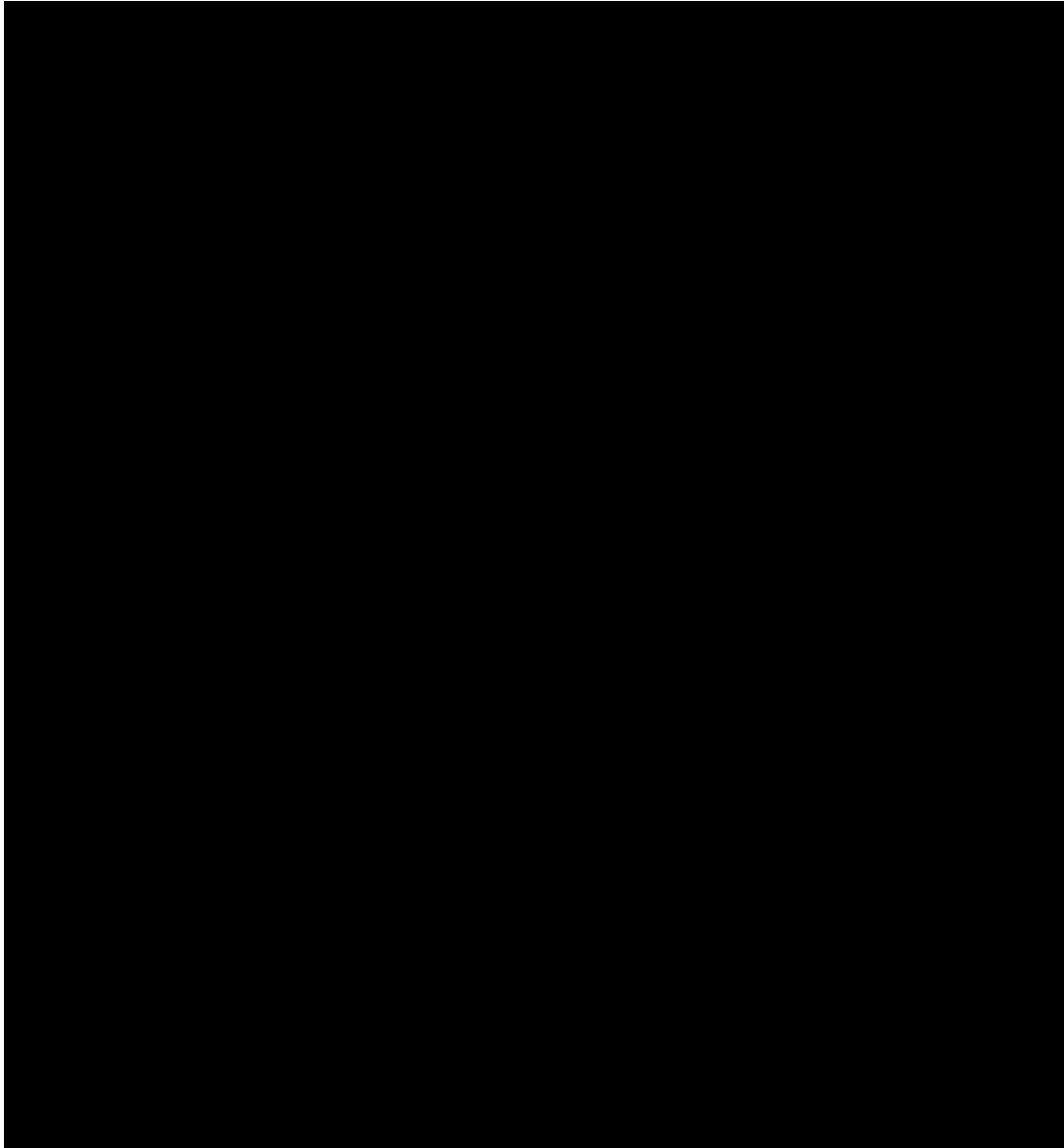
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- e) Application Portfolio Review.
 - i. The Selected Contractor will be responsible for reviewing the Commonwealth’s current application portfolio. See **Appendix E, Service Objectives and Current Environment** for a summary of the current application inventory. Additional application detail will be made available to the Selected Contractor upon start of the engagement. This assessment should include an analysis of current inventory, risks and constraints, and potential migration strategy (high-level).
 - ii. The analysis and report should include, but not be limited to, the following:
 - (1) Where the applications are currently hosted.
 - (2) The core application infrastructure components, technologies, and platforms.
 - (3) Key business application interdependencies with other applications or services that would dictate the physical hosting location of those services for application performance or data security concerns.
 - (4) Application migration disposition and recommended target environments.
 - (5) Review and summary of the current disaster recovery capabilities of the core business applications.
 - iii. The Selected Contractor should describe its structured approach and timeline for completing task **A.1.e Application Portfolio Review** and provide at least **one (1)** example of the work product(s) resulting from this effort.

Contractor Response

Application Portfolio Review

- [REDACTED]
- [REDACTED]
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- [REDACTED]
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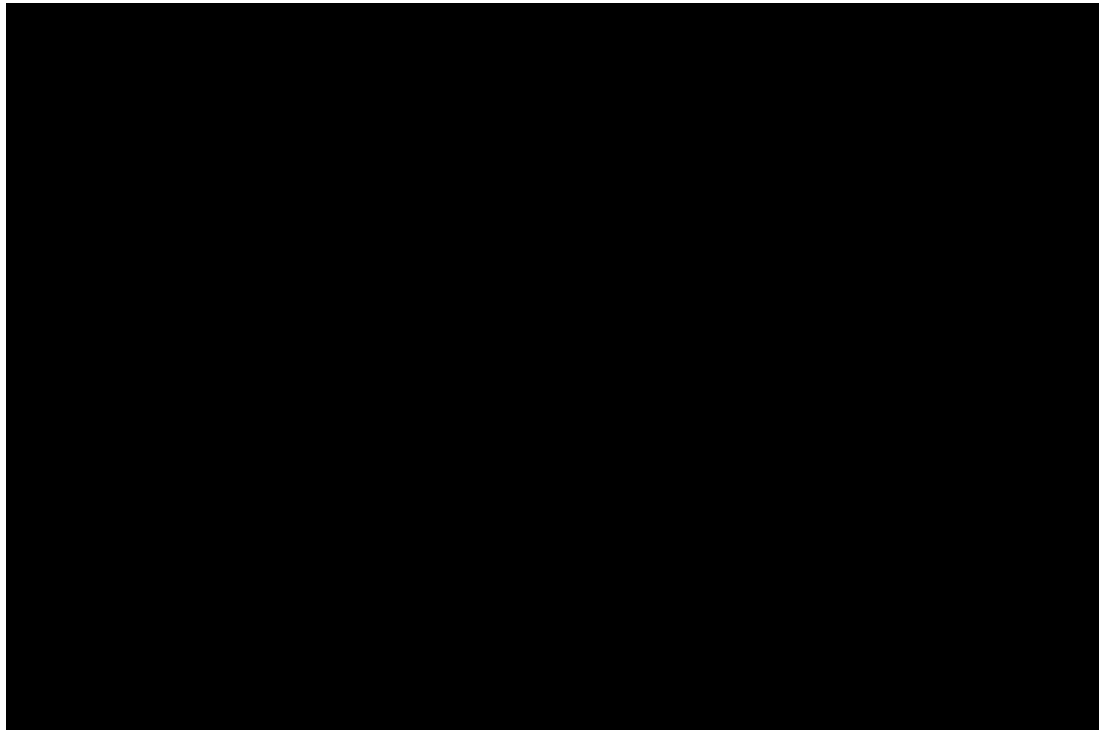
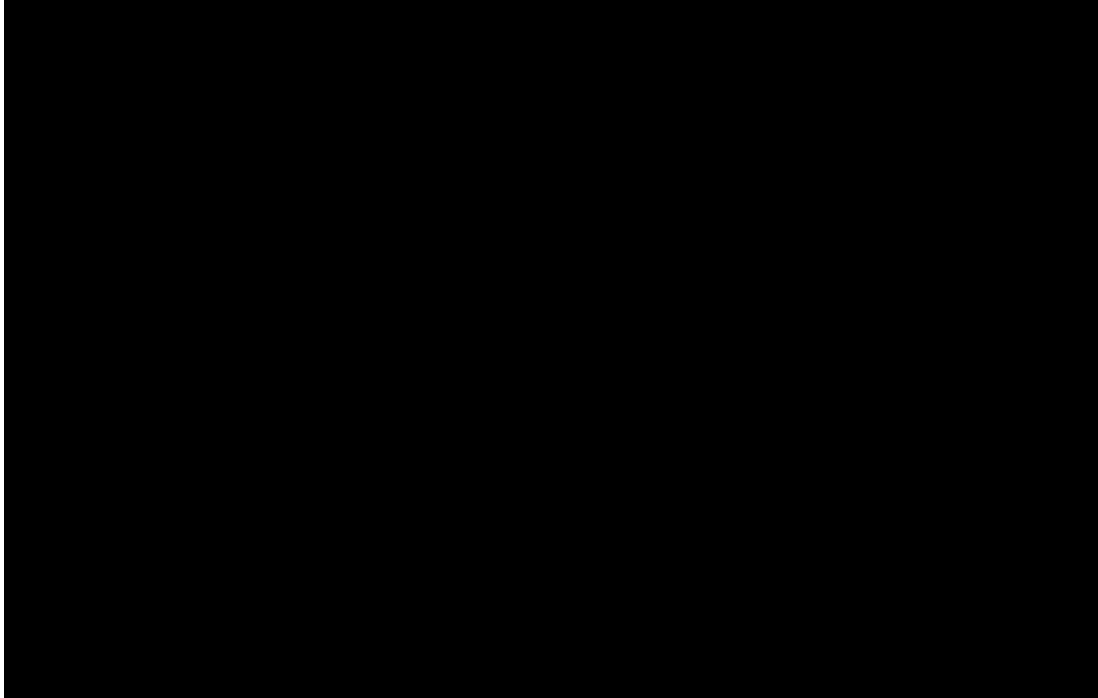
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- f) EDC / WDC Operational and Capacity Review.
 - i. The Selected Contractor will be responsible for reviewing the Commonwealth’s Enterprise Data Center (EDC) and the West Data Center (WDC) facilities and operations. See **Appendix E, Service Objectives and Current Environment** for a summary of the EDC and WDC. Additional detailed information on the EDC/WDC facilities and staffing will be made available to the Selected Contractor upon start of the Contract. This review should include an analysis of current EDC/WDC facilities and operations.
 - ii. The analysis and report should include, but not be limited to, the following:
 - (1) Review the current facilities (EDC/WDC) from a physical capacity perspective and determine the ability of the facilities to support additional application workloads and technology infrastructure.
 - (2) Review the current facilities (EDC/WDC) from a technology capacity perspective and determine the ability of the facilities to support additional application workloads. This should include a summary of technology, existing maintenance agreements, and technology refresh cycles.
 - (3) Review the current facilities (EDC/WDC) from a staffing perspective to determine the ability of the facilities to support additional future technologies and application workloads.
 - iii. Provide a summary of costs associated with maintaining the EDC/WDC that includes facility, technology, and staffing.
 - iv. The Selected Contractor should describe its structured approach and timeline for completing task **A.1.f EDC / WDC Operational and Capacity Review** and provide at least **one (1)** example of the work product(s) resulting from this effort.

Contractor Response

EDC / WDC Operational and Capacity Review

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DELIVERABLE: D1 Final Current State Report.

2. Sourcing Strategy and Requirements.

a) Market Comparison Report.

i. In addition to the data collected from the Commonwealth, the Selected Contractor shall conduct market research and develop a Market Comparison Report that supports the analysis and recommendations used for potential future state options.

ii. This research may include, but is not limited to, the following:

(1) Managed Service Providers (MSP).

(a) Private Hosting providers;

(b) Public Cloud providers and

(c) Shared approaches (Provider/Customer) to managed services.

(2) Hybrid Cloud Providers.

(a) Government Trend (State/Federal) and

(b) Partnerships (Advantages/Disadvantages).

(3) Cloud Service Broker.

(a) Internal / External;

(b) Competitive Landscape; and

(c) Government Trend (State/Federal).

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- (5) Container Orchestration and Management.
 - (a) Major Players (include As-A-Service Providers);
 - (b) Feature Comparison; and
 - (c) Strengths / Weaknesses.
- iii. The Selected Contractor should describe its structured approach and timeline for completing **Task A.2.a Market Comparison Report** and provide at least **one (1)** example of the work product(s) resulting from this effort.

Contractor Response

Market Comparison Report

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- c) Sourcing Strategies.
 - i. The Selected Contractor should document and review different sourcing approaches with the Commonwealth stakeholders.
 - ii. This should include, but is not limited to, the following:
 - (1) SIAM-MSI Approach.
 - (a) Based on the market analysis and requirements gathered, provide a review of the different approaches to the management of multiple Suppliers (Internal/External).
 - (2) Sourcing Matrix (retained/sourced).
 - (a) Provide a matrix of sourcing options available to the Commonwealth.
 - (3) Contractual Options and Considerations.
 - (a) What options are available for contracting with potential providers.
 - iii. Sourcing options reviewed should also include considerations to transition from a current traditional I&O/AD support structure to a DEV/SEC/OPS framework.
 - iv. The Selected Contractor should describe its structured approach and timeline for completing **Task A.2.c Sourcing Strategies** and provide at least **one (1)** example of the work product(s) resulting from this effort.

Contractor Response

Sourcing Strategies

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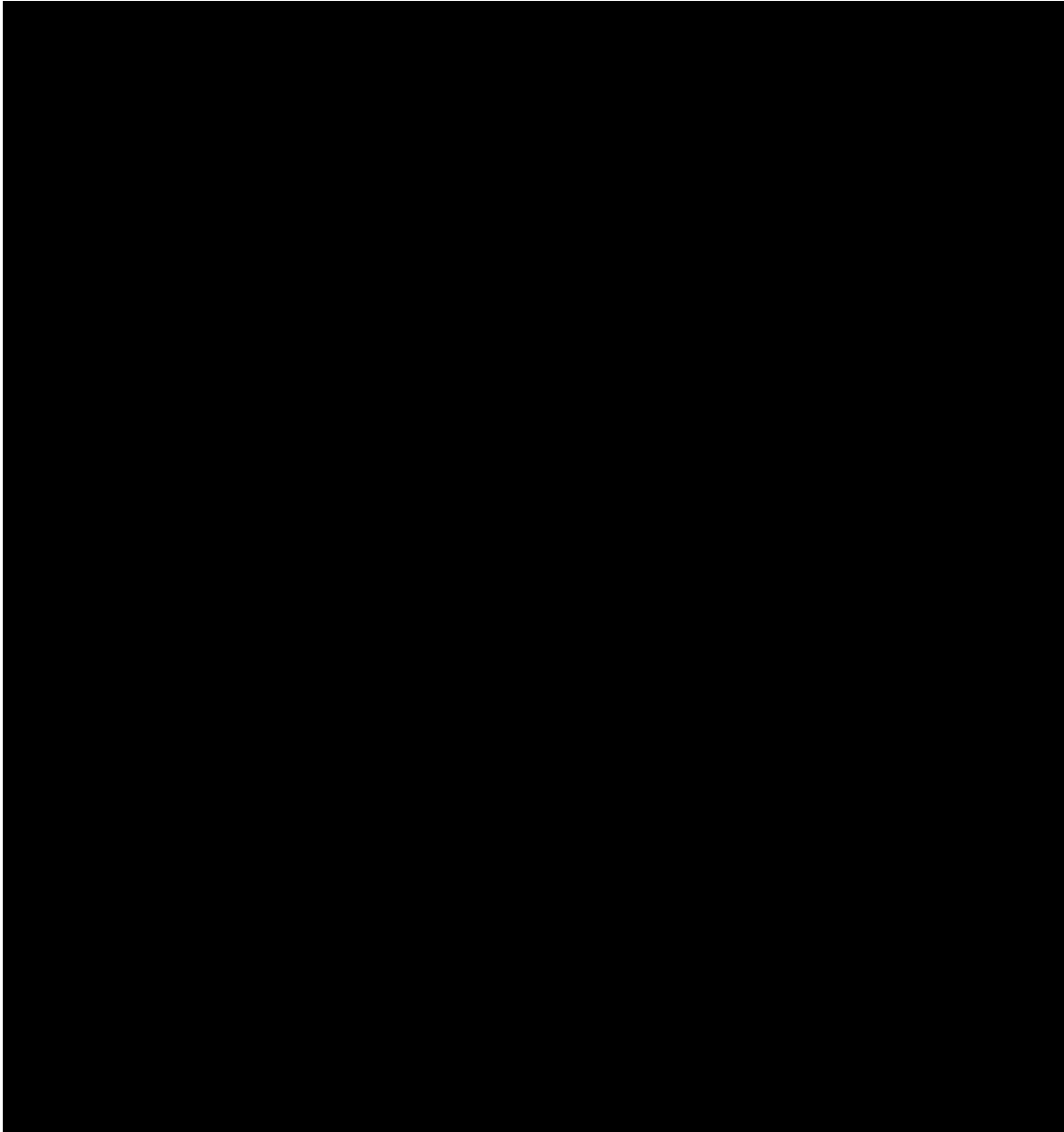
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- d) Future State Options.
 - i. The Selected Contractor shall collect enough information to provide the Commonwealth with recommended sourcing options. Each option should clearly describe what services are to be retained by the Commonwealth and which are to be sourced by other channels. The options should be reviewed with the key stakeholders to help the Commonwealth arrive at a consensus on what the future target operating model and sourcing direction should be.
 - ii. This should include, but is not limited to, the following for each option recommended:
 - (1) Sourcing Strategy and Timeline;
 - (2) Retained / Outsourced Services;
 - (3) Business Case;
 - (4) Budget Impact (**five (5)** and **ten (10)** - year TCO comparison);
 - (5) Objectives and Constraints;
 - (6) Impact and Benefits;
 - (7) Application migration impact;
 - (8) Modernization Opportunities; and
 - (9) Target Operating Models.
 - iii. The selected Contractor should describe its structured approach and timeline for completing **Tasks A.2.d Future State Options** and provide at least **one (1)** example of each of the work product(s) resulting from this effort.

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- iv. The selected Contractor should provide a report summarizing its results and available options. The report shall be reviewed with the Commonwealth stakeholders. The e should include the documented target sourcing approach to be used for the procurement phase of the project.

Contractor Response

Future State Options

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- e) Procurement Support Services Plan.
 - i. Based on the selected sourcing and procurement strategy the Selected Contractor shall develop a Procurement Support Services Staffing Plan that identifies the resources, schedule, and hours required to execute the Procurement Support Services Phase of the project.
 - ii. The plan will identify the contractor staff required to support each of the Procurement Support Services tasks (e.g.; RFP Supplier Forum/Pre-proposal Conference Support, RFP Development, RFP Question & Answer Support, RFP Response Evaluation Support, RFP Negotiation Strategy, RFP Negotiation Support).
 - iii. This mutually agreed to plan shall be included in the final **DELIVERABLE: D2 Final Sourcing Strategy Report** and used as the agreed to scope of services for the Procurement Support Services phase of the project.

Contractor Response

Procurement Support Services Plan

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The Mathtech Team will work with the OIT core team to ensure the overall program's success and the integrity of the integrated solution and customer experience. Our Subject Matter Expert (SME) team of on-demand resources with specialized, in-depth domain knowledge will be leveraged for Organizational Change Management and specific functional or technology needs.

Organization Chart

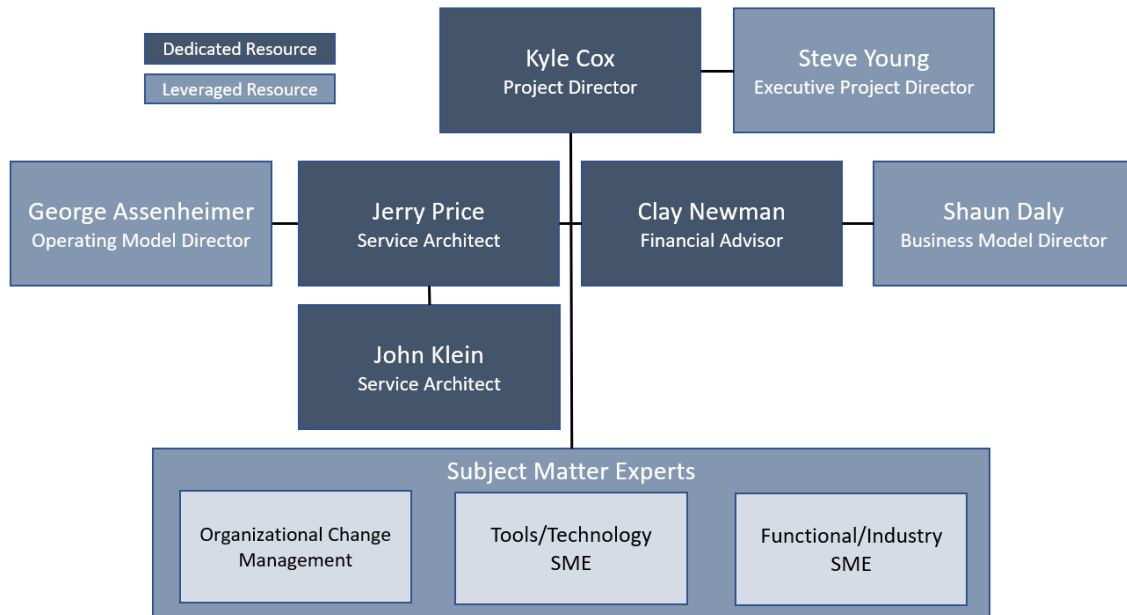


Diagram 28: The Mathtech Team

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3. **Governance and Service Integration and Management (SIAM) Strategy and Design.**

- a) For the Commonwealth selected option, the Selected Contractor should provide a governance and service operating model that supports the selected future target state environment. Assess the Commonwealth's current managed operations capabilities (governance, people, process, technology) and provide a roadmap that will support the anticipated multi-supplier hybrid multi-cloud

environment. This review should include organization structure and role design. It should also include, but not be limited to, the following:

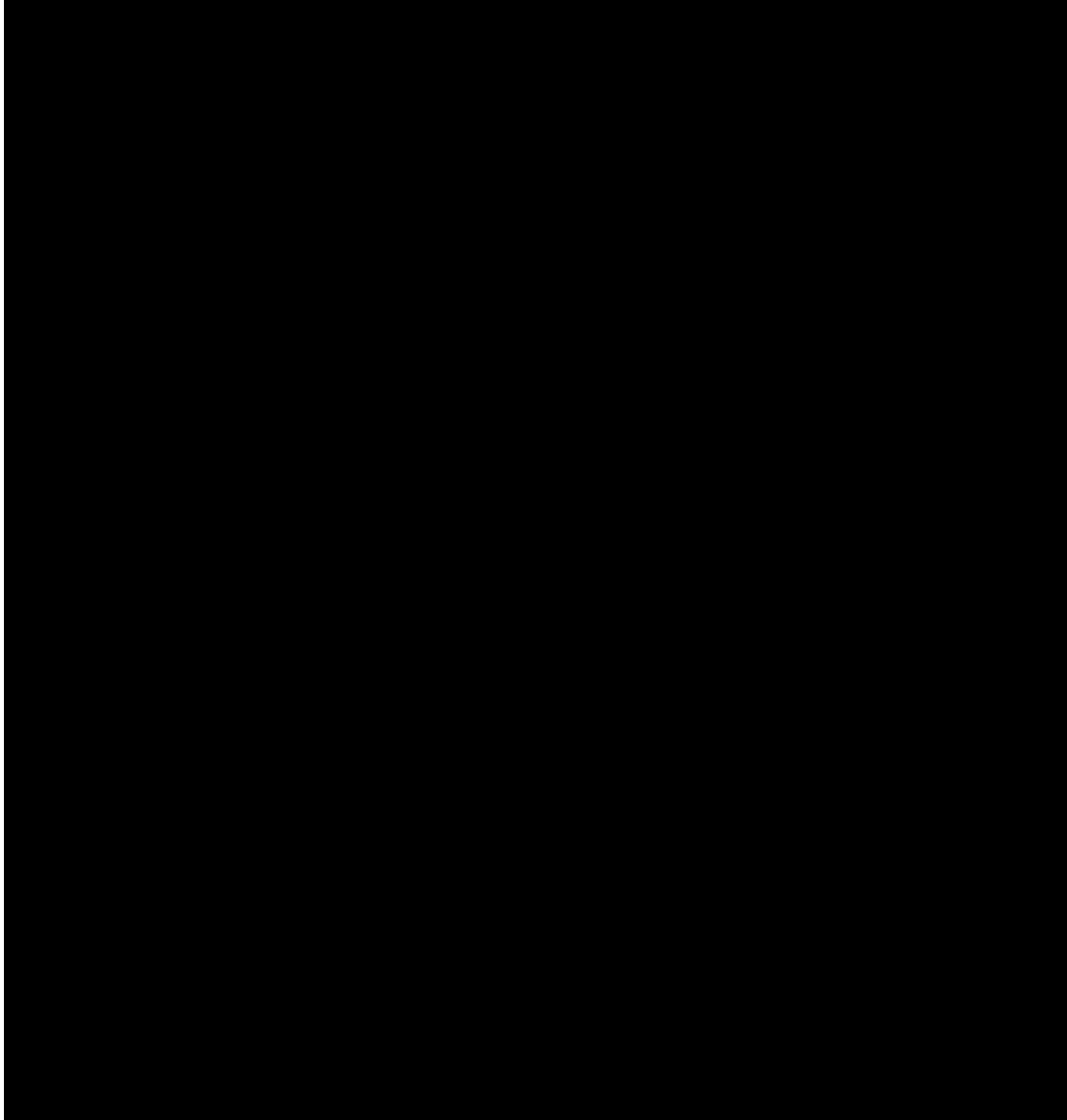
- b) Service operations and management should also include considerations to transition from the current traditional separate Infrastructure and Operations (I&O) and Applications Development (AD) support structure to a DEV/SEC/OPS framework that will better align with the Commonwealth's current and future application modernization efforts and the use of more cloud native services.
- c) The Target Operational Support Model for service integration and management should be based on the Commonwealth's requirements and the selected support option.
- d) The Selected Contractor should describe its structured approach and timeline for completing **A.3 Governance and Service Integration and Management (SIAM) Strategy and Design** and provide at least **one (1)** example of the work product(s) resulting from this effort.
- e) The Selected Contractor will provide a Target Operational Support Model that will describe how the Commonwealth will govern and support the planned managed service environment. This report should include an Executive Summary. Contractor will be required to conduct an Executive Briefing at the completion of this phase.
- f) The Selected Contractor should describe its structured approach and timeline for completing this **DELIVERABLE D3 Target Operational Support Model** and provide at least **one (1)** example of the work product(s) resulting from this effort.

Contractor Response

Governance and SIAM Strategy and Design

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DELIVERABLE: D3 Target Operational Support Model.

B. Procurement Support Services.

1. Procurement Support Services Plan Management.

- a) The Selected Contractor will staff and support this phase based on the agreed to Procurement Support Services Plan.
- b) The Selected Contractor shall manage their resource utilization within the agreed upon number of hours and associated blended hourly rate.
- c) The Selected Contractor will provide weekly and monthly reports that identify the resources and hours utilized and planned for the next reporting period.
- d) Any adjustments to the Procurement Support Services Plan will need to be mutually agreed to using the Contract Change Request Process.

Contractor Response

Procurement Support Services

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2. RFP Supplier Forum/Pre-proposal Conference Support.

- a) The Selected Contractor will provide support for the development of a RFP Supplier Forum/Pre-proposal Conference that would proceed the release of any future RFP(s).
- b) This support would include, but not be limited to, the following:
 - i. Development of RFP Supplier Forum/Pre-proposal Conference documents;
 - ii. Support with vendor questions; and
 - iii. Response summary.
- c) The Selected Contractor shall describe its structured approach and timeline for completing **Task B.2. RFP Supplier Forum/Pre-proposal Conference Support** and provide at least **one (1)** example of the work product(s) resulting from this effort.

Contractor Response

RFP Supplier Forum/Pre-proposal Conference Support.

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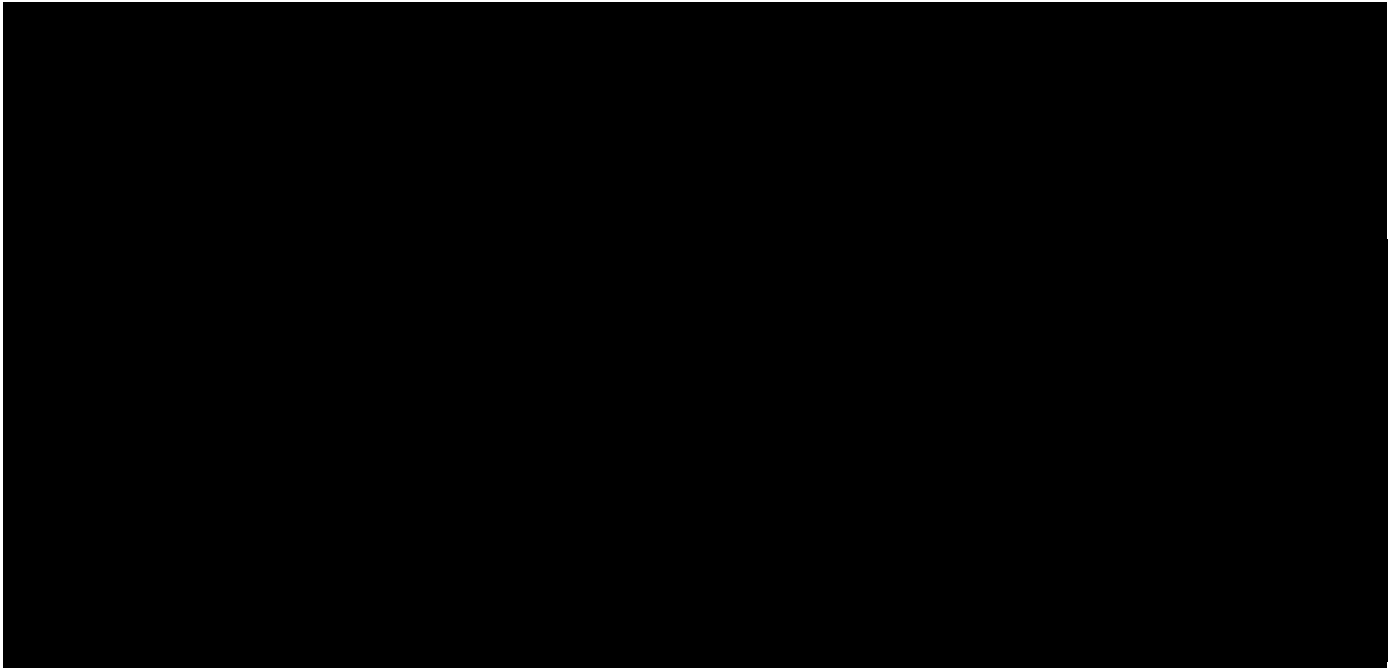


Diagram 30: Pre-Proposal Conference Work Product

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3. RFP Development.

- a) The Selected Contractor shall develop, in coordination with the Commonwealth's project team, the procurement documents that are recommended in the Final Sourcing Strategy Report.
- b) This should include, but is not limited to, the following:
 - i. Detailed Requirements;
 - (1) Statement of Work (SOW) and Service Level Objectives.
 - ii. Exhibits and Appendices; and
 - iii. Pricing Structures/Units.
- c) The Selected Contractor should describe its structured approach and timeline for completing **Task B.3 RFP Development** provide at least **one (1)** example of the work product resulting from this effort.

Contractor Response

RFP Development

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4. RFP Question & Answer Support.

- a) The Selected Contractor will be required to assist the Commonwealth in evaluating and responding to vendor questions during the RFP release process.
- b) The Selected Contractor should describe its structured approach and timeline for completing task **B.4 RFP Question & Answer Support** and provide at least **one (1)** example of the work product resulting from this effort.

Contractor Response

RFP Question & Answer Support

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5. **RFP Response Evaluation Support.**

- a) The Selected Contractor will be required to provide subject matter expertise to support the Commonwealth in the evaluation of potential vendors.
- b) The Selected Contractor may be asked to examine the following key areas:
 - i. Overall impression;
 - ii. Financial stability;
 - iii. Length of time in business;
 - iv. Recommendations from similar customers;
 - v. Understanding of the requirements; and
 - vi. Ability to meet the requirements.
- c) The Selected Contractor shall describe its structured approach and timeline for completing task **B.5 RFP Response Evaluation Support** and provide at least **one (1)** example of the work product resulting from this effort.

Contractor Response

RFP Response Evaluation Support

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6. **RFP Negotiation Strategy.**

- a) The Selected Contractor will be required to develop negotiation strategies for the future procurement(s) resulting from this engagement, inclusive of technical submittal, costs and terms and conditions.
- b) The Selected Contractor should describe its structured approach and timeline for completing task **B.6 RFP Negotiation Strategy** and provide at least **one (1)** example of the work product resulting from this effort.

Contractor Response

RFP Negotiation Strategy

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7. RFP Negotiation Support.

- a) At the discretion of the Commonwealth, the Selected Contractor shall be required to assist the Commonwealth with negotiating a contract or contracts for the compute and hosting services procurement. The Selected Contractor must assist with negotiating all aspects of the contract, including terms and conditions.

- b) The Selected Contractor should describe its structured approach and timeline for completing task **B.7 RFP Negotiation Support** and provide at least **one (1)** example of the work product(s) resulting from this effort.

Contractor Response

RFP Negotiation Support

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8. Procurement Support Services Report.

- a) During the Procurement Support Services Phase, the Selected Contractor will provide a Monthly Procurement Support Services Report that includes the following tasks and accomplishments for the month:
 - i. RFP Supplier Forum/Pre-proposal Conference Support;
 - ii. RFP Development;
 - iii. RFP Question & Answer Support;
 - iv. RFP Response Evaluation Support;
 - v. RFP Negotiation Strategy; and
 - vi. RFP Negotiation Support
- b) This Procurement Support Services report shall include the number of hours per resource assigned to each specific **Task** referenced in **B.2 – B.7**.
- c) The Selected Contractor should describe its structured approach and timeline for completing this **Monthly Procurement Support Services Report** and provide at least one **(1) example** of the work product(s) resulting from this effort.

Contractor Response

Procurement Support Services Report

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C. ADDITIONAL SERVICES.

1. Description.
 - a) The Selected Contractor must be capable of providing the Additional Services.
 - b) The Selected Contractor must include a response in their proposal and the cost submittal; however, it is at the Commonwealth's discretion to exercise the Additional Services. Please be advised the Additional Services will not be evaluated and scored in **Appendix F, Cost Submittal**.
 - c) Additional Service is an item or service requested by OA with pricing not to be evaluated. Contractor Proposals shall include a Proposal for all Additional Services listed in this subsection I.4.C
 - d) Evaluation of Additional Services.
 - i. Additional Services will be evaluated under the technical evaluation criteria set forth in Subsection of the Event Description in RFQ 6100056158 but will not be evaluated under the cost evaluation criteria set forth in Subsection of the Event Description in RFQ 6100056158.
 - e) All cost information should be included in **Appendix F, Cost Submittal**, in the tab titled "Additional Services." If price is not stated in **Appendix F, Cost Submittal**, in the tab titled "Additional Services," it will be assumed to be at "No Charge."

Contractor Response

Additional Services

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2. Transition/Transformation Support.

- a) The Selected Contractor should be capable of providing resources to assist the Commonwealth with Transition and/or Transformation Support for new contracts and/or services resulting from this sourcing strategy engagement. This additional service may be exercised solely at the Commonwealth's discretion. There is no specific deliverable for this work as it will be billed on a time and materials basis.

- b) The Selected Contractor should describe its structured approach and timeline for providing Transition and/or Transformation Support and provide at least **one (1)** example of the work product(s) resulting from this effort.

Contractor Response

Transition/Transformation Support

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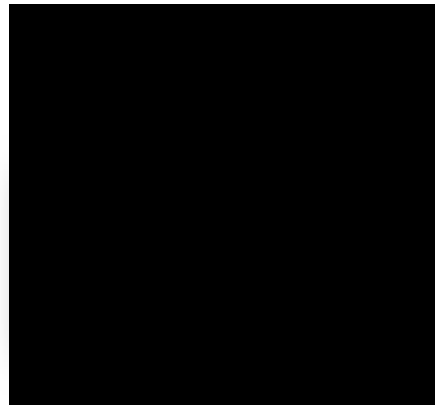
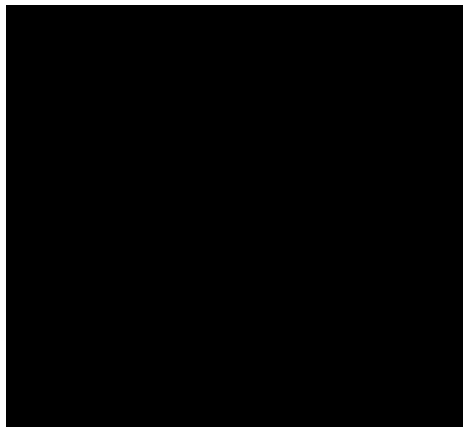
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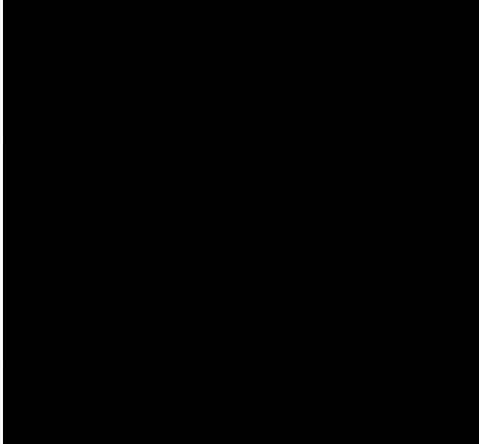
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3. Maturity/Readiness Assessments.

- a) The selected Contractor should focus on the Commonwealth's readiness and capability expressed through its people, processes, data, and technologies.
- b) The Commonwealth's maturity directly relates to the ability to execute in a hybrid, multi-cloud hosting and compute services model and may influence sourcing strategy options.
 - i. Organizational Capability Assessment.
 - (1) Assess current state of the Commonwealth's people, process, and technology for adopting a cloud brokerage strategy. This assessment should include interim and future end state organization models and staffing impacts.
 - ii. Cybersecurity Assessment.
 - (1) Assess current state of the Commonwealth's cybersecurity program and practices when planning for a multi-cloud security strategy. This assessment should include analysis of the Commonwealth's current security architecture model and interim and future end state security architecture models and staffing impacts
 - iii. Data Governance Assessment.
 - (1) Assess current state of the Commonwealth's Data Management program and practices. This assessment should include the analysis of the Commonwealth's current program and interim and future end state data governance model and staffing impacts.

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iv. Application Migration Assessment.

- (1) Assess current state of the Commonwealth's application portfolio to help determine what the future hosting options are for each application. See **Appendix E, Service Objectives and Current Environment** for a summary of the current application inventory. Additional application detail will be made available to the selected Contractor upon start of the engagement.

- 4. The Selected Contractor should describe its common engagement for conducting maturity assessments, structured approach, typical deliverables, and timeline for completing each of these Additional Services and provide at least **one (1)** example of the work product(s) resulting from this effort.

Contractor Response

Maturity/Readiness Assessments

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I-5. Project Management and Reporting.

A. The selected Contractor shall provide project management services throughout the life of the project. Contractors shall submit its project management methodology which it proposes to use for this project. A draft project plan outlining the methodology and major milestones for each task should be prepared and submitted with the proposal. The draft plan should address some or all the following areas.

1. Project Management Plan.

a) The project management plan shall include, but not be limited to, the following:

i. Project Plan.

(1) The project plan must describe the scope of work for the project and how the scope shall be managed. The project plan shall act as a confirmation of project scope, phasing, implementation objectives, and be detailed enough to ensure the product is delivered on time within projected estimates, and meets all requirements as specified in the RFQ. The project plan must include, but is not limited to:

- (a) Project Scope Statement;
- (b) Scope Management Process;
- (c) Major Milestones /Deliverables;
- (d) Work Breakdown Structure (WBS); and
- (e) Timeline.

b) Other areas to address in the Project Management Plan.

i. Requirements Management.

(1) The plan must describe the process and approach to manage and address requirements throughout the life of the project.

ii. Risk Management.

(1) The plan must describe the approach used to manage risk throughout the life of the project, how contingency plans are implemented, and how project reserves are allocated to handle the risks. The plan shall include the

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methods for identifying risks, tracking risks, documenting response strategies, and communicating risk information.

iii. Issue Management.

- (1) The plan must describe the approach for capturing and managing issues throughout the life of the project to ensure the project is moving forward and avoids unnecessary delays.

iv. Change Control Management.

- (1) The plan must describe the approach to effectively manage changes throughout the life of a project. The plan shall include the process to track change requests from submittal to final disposition (submission, coordination, review, evaluation, categorization), the method used to communicate change requests and their statuses (approved, deferred, or rejected), the escalation process if changes cannot be resolved by the review team, and the process for project re-baselining.

v. Communications Management.

- (1) The plan must describe the communications process that shall be used throughout the life of the project. The process must include the tools and techniques that shall provide timely and appropriate generation, collection, distribution, storage, retrieval, and disposition of project information.

Contractor Response

Project Management Plan

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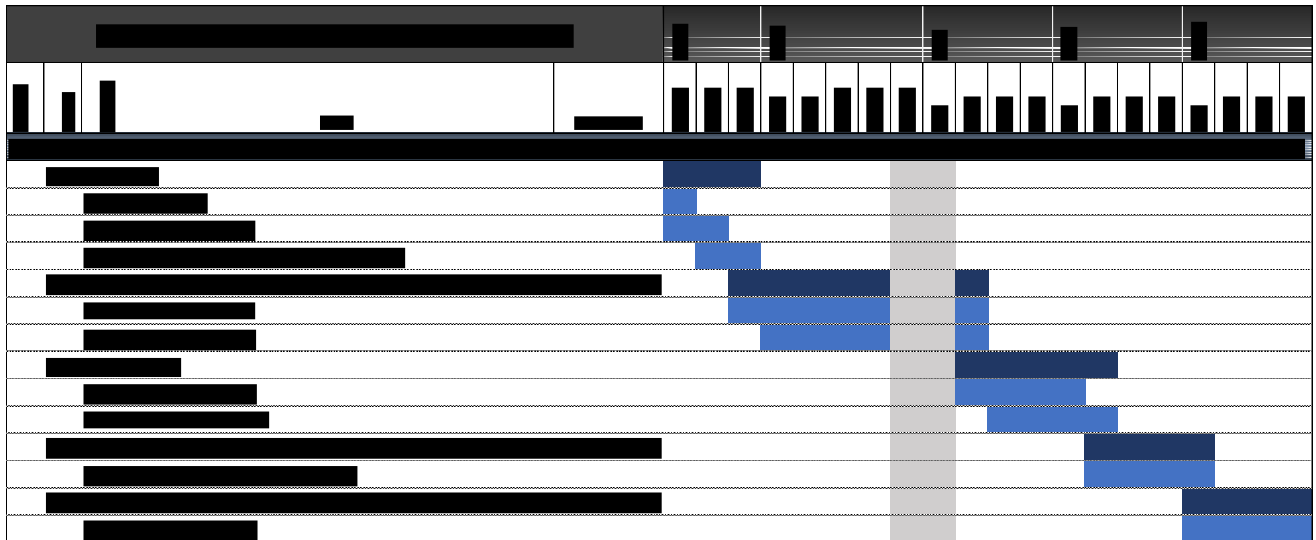


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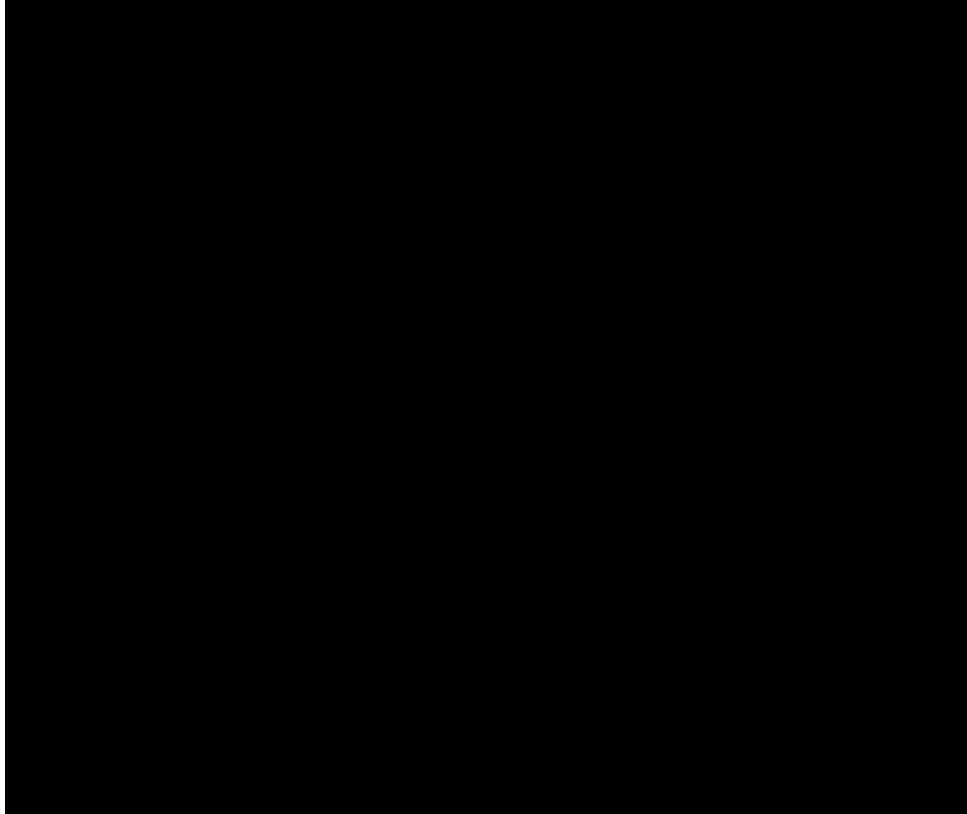
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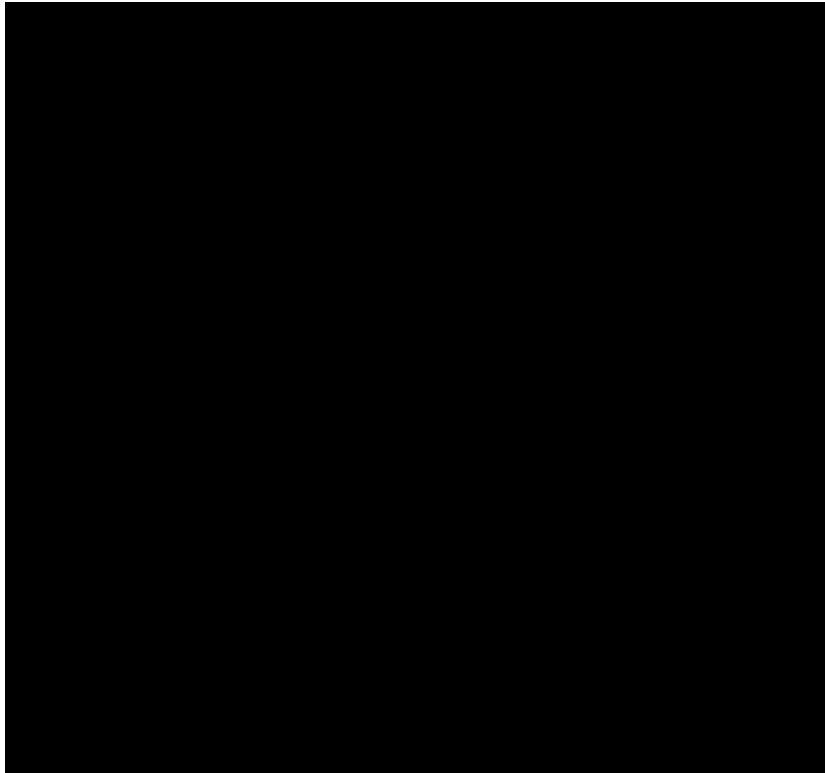
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2. Task Plan.

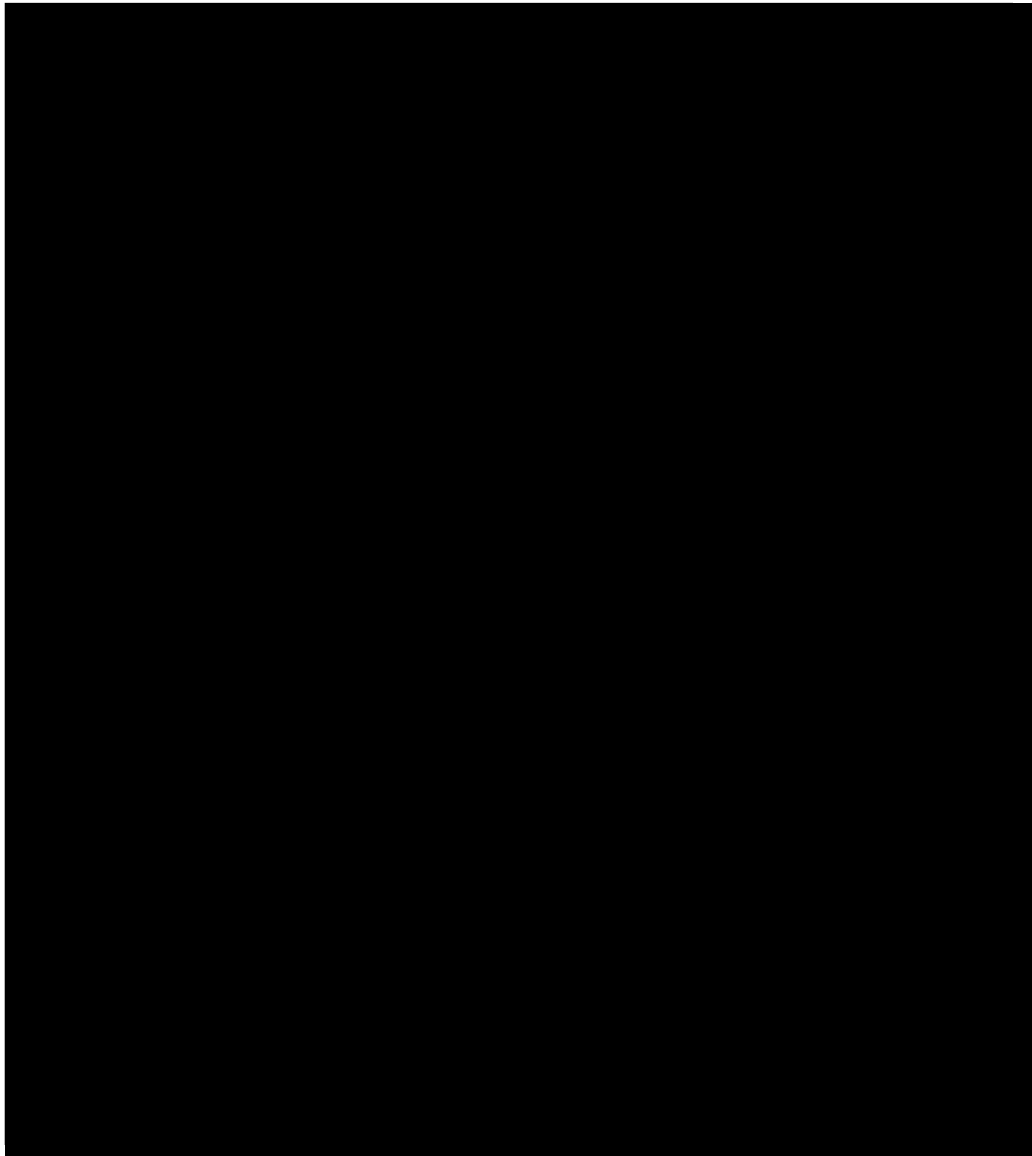
- a) A work plan for each task that identifies the work elements of each task, the resources assigned to the task, and the time allotted to each element and the deliverable items to be produced. Where appropriate, a PERT or GANTT chart display should be used to show project, task, and time relationship.

Contractor Response

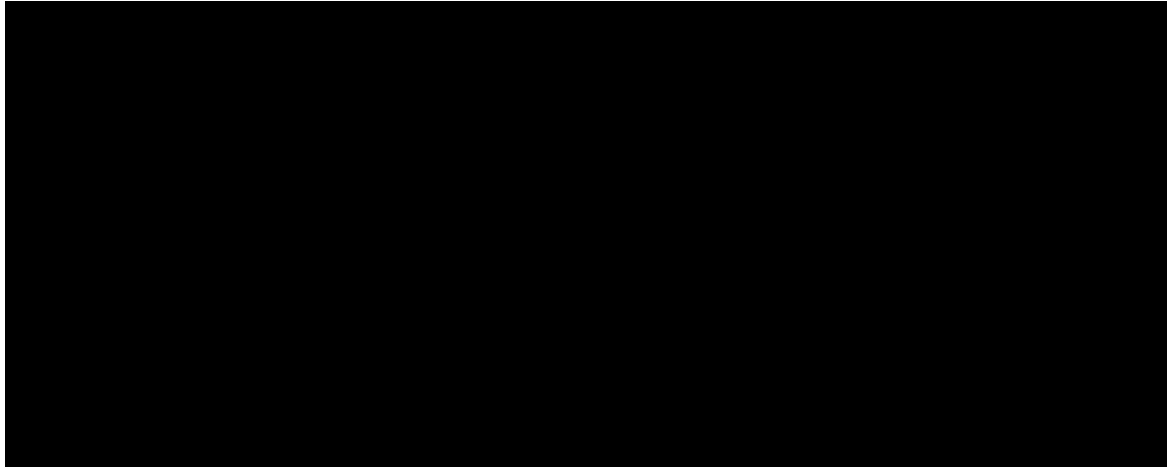
Task Plan

Throughout the project, The Mathtech Team will consist of 6 resources. The following Task Plan aligns with the Project Plan and Gantt Chart provided as part of our proposal.

Many of the tasks below are executed in parallel, so they do not add up to 6 resources.



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3. Status Report.
- a) The selected Contractor must provide weekly written status reports depicting progress in terms of milestones and accomplishments, issues/potential issues related to the progress of the project and other pertinent information related to the overall effort. Executive level status reports will also be required during this engagement.
 - b) The selected Contractor must also provide a monthly status report that summarizes the progress and accomplishments, issues/potential issues related to the progress of the project.

Contractor Response

Status Report

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4. Problem Identification Report.

- a) An “as required” report, identifying problem areas. The report should describe the problem and its impact on the overall project and on each affected task. It should list possible courses of action with advantages and disadvantages of each and include Contractor recommendations with supporting rationale.

Contractor Response

Problem Identification Report

[Redacted content]

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5. Change Control Report.

- a) To monitor change status, the selected Contractor shall submit with their monthly status report a monthly change control report that includes, but is not limited to, a risk and issue log, change management log, and change schedule. The monthly change control report shall highlight all completed changes and the status of pending change requests. The reports shall indicate if the team is adhering to all approved changes during the execution. Deviations from the plan shall be indicated and corrective action recommended.

Contractor Response

Change Control Report

[Redacted content]

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[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
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<p>[REDACTED]</p>	<p>[REDACTED]</p>
<p>[REDACTED]</p>	<p>[REDACTED]</p>
<p>[REDACTED]</p>	<p>[REDACTED]</p>
<p>[REDACTED]</p>	<p>[REDACTED]</p>

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Appendix A – Project References

Reference One –State of Texas Department of Information Resources (DIR)

Name of Client & Project Title	State of Texas Department of Information Resources (DIR) Next-Generation Data Center Services Strategy, Procurement, and Transition/Implementation Assistance	
Contract Value	\$4,788,001	
Nature and Scope of Project:	<p>Describe the project in enough detail to explain its similarity to the Commonwealth's project. Include the reference size, scope and industry, per the requirements section in Technical Submittal I-3.D. What is it specifically about this project that makes it a good representative project of the vendor's work?</p> <p>DIR, the State of Texas' central IT agency, sought to re-procure infrastructure and application services in a <u>multisourcing</u> approach that takes full advantage of an MSI model. The state sought a next-generation Shared Technology Services offering that fully integrates private cloud, public cloud, mainframe, network, print mail, enterprise architecture, and applications within a single, secure program. The vision was to provide customers with the full scope of technology services in a secure, reliable, contemporary delivery model that meets business requirements at competitive prices. The addition of application services and customer technology advisory services to the historically infrastructure-only program enables a one-stop-shop for legacy modernization, DevOps, and cost optimization to shift spend from run to grow/transform.</p> <p>The scope was essentially the same as this Commonwealth RFQ. <u>Symbio</u> (Mathtech subcontractor) worked with the client to flesh out the strategy and drafted the requirements of each of the six RFPs to align with the state's Vision and Desired Outcomes and market capabilities while ensuring service component interoperability. <u>Symbio</u> and the state worked together to complete the procurements valued at \$1.6 billion on time with a successful transition.</p> <p>See more information in our response to Technical Submittal section I-3.D.2.</p>	
Project Duration:	Start Date Year: 2019	End Date Year: 2021
Nature of the Client:	<p><u>Description of client and organizational unit that project was managed by.</u></p> <p>DIR is the central IT organization of the State of Texas. The Chief Procurement Office was accountable for the <u>project</u> and we worked closely with leadership and staff from the Chief Operating Office, Chief Technology Office, Chief Financial Office, Chief Information Security Office, Chief of Staff Office, and the General Counsel's Office.</p>	

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Nature of Client Audience:	<p>1. Description of project users and/or client/customer audience.</p> <p>2. DCS services are available for all Texas state agencies, colleges, universities, and local entities.</p>			
Number of Users:	<p>3. The DCS program serves seventy-seven (77) customers, including both designated customers (state agencies that are legislatively mandated to use the DCS services) and Discretionary customers (state agency and other governmental entities who have opted to use the DCS services).</p>			
# & Composition of Vendor Employees & Consultants Assigned:	<p>4. Vendor Project Manager/Key Consultant on Project Team:</p> <p>5. Describe start-up, peak and ongoing level of vendor efforts</p>			
	6.	7. FTEs		
	8. Function	9. Strategy/ 10. Plan 11. Progress	11. Procurement	12. Transition and Transformation
	13. PMO	14. 1.0	15. 2.0	1.5
	16. Service Architects	17. 2.0	18. 2.0	19. 1.5
	20. Financial Advisory	21. 1.5	22. 2.0	23. 1.5
	24. SMEs	25. 0.5	26. 1.0	27. 0.5
	28. Total 32.	29. 5.0	30. 7.0	31. 5.0

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Reference Two – State of Texas Department of Information Resources (DIR)

Name of Client & Project Title	State of Texas Department of Information Resources (DIR) Digital MSI (Multisourcing Service Integration) Strategy, Procurement, and Transition/Implementation Assistance	
Contract Value	\$1,559,000	
Nature and Scope of Project:	<p>Describe the project in enough detail to explain its similarity to the Commonwealth's project. Include the reference size, scope and industry, per the requirements section in Technical Submittal I-3.D. What is it specifically about this project that makes it a good representative project of the vendor's work?</p> <p>DIR sought to re-procure the services of a <u>Multisourcing Services Integrator (MSI)</u>. The state desired a next-generation Digital MSI to leverage a cloud-based service management platform and extend the service across multiple shared services provided by the central IT agency, including infrastructure, applications, security, and the state digital portal. The vision was to evolve to a <u>highly-automated</u> service that aligns the state's shared services to enrich the customer experience and enable the delivery of services at competitive prices.</p> <p>This project speaks to our unique experience with an MSI-led operating model, which OIT is contemplating as part of the Next Generation Managed Compute vision. <u>Symbio</u> has a long history and hands-on experience with the MSI model, supporting multiple state central IT agencies. Members of our team not only facilitated the design, procurement, and governance of the first-generation MSI in Texas, but the solution architect/delivery lead from the awarded Service Provider is now on our team. With this second-generation MSI model, <u>Symbio</u> helped the state completely redesign the operating model, business model, and entire set of RFP requirements to align with the market's evolving digital and automation capabilities. We built a detailed cost model to generate a financial forecast based on the new requirements. We provided full procurement assistance support, including strategy, requirements design and development, transaction, transition, and implementation support.</p> <p>See more information in our response to Technical Submittal section <u>I-3.D.2</u>.</p>	
Project Duration:	Start Date Year: 2017	End Date Year: 2019
Nature of the Client:	<p>Description of client and organizational unit that project was managed by.</p> <p>DIR is the central IT organization of the State of Texas. The Chief Procurement Office was accountable for the project, and we worked closely with leadership and staff from the Chief Operating Office, Chief Technology Office, Chief Financial Office, Chief Information Security Office, Chief of Staff Office, and the General Counsel's Office.</p>	
Nature of Client Audience:	<p>Description of project users and/or client/customer audience.</p> <p>DCS services are available for all Texas state agencies, colleges, universities, and local entities.</p>	

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Reference Three – State of Maryland Motor Vehicle Administration

Name of Client & Project Title	Maryland Motor Vehicle Administration (MVA) Enterprise Management System Project Management Office Services
Contract Value	\$19,754,145
	<p>Describe the project in enough detail to explain its similarity to the Commonwealth's project. Include the reference size, scope and industry, per the requirements section in Technical Submittal I-3.D. What is it specifically about this project that makes it a good representative project of the vendor's work?</p> <p>The MVA was "frozen in time" and unable to substantially improve customer service and operations while at the same time struggling with outdated and high-maintenance legacy applications and infrastructure. The MVA engaged Mathtech to support its full-scale agency modernization effort, including replacing all enterprise systems and platforms and providing disaster recovery services.</p> <p><i>Describe in a couple of sentences what specifically makes this a good reference for this opportunity...</i></p> <p>This reference demonstrates many critical factors that are important for any large State government IT project but especially for this project:</p> <p>Strong Customer Collaboration – the MVA leadership considers us their partners in achieving success, knowing that we bring the skills, candor, and dedication to move them forward.</p> <p>Large Agency Modernization – this project is a holistic example of the complexity of modernizing both operations and infrastructure. It is impossible to move, change, or replace enterprise applications without impacting the business. The Mathtech Team guided and managed this agency-wide effort to a high level of success and user acceptance.</p> <p>Problem Solving – this project had a very big goal, but there was no single perfect methodology or plan that was known from Day 1. This project evolved and saw challenges that ranged from technical to political. The Mathtech Team collaborated and solved them all.</p> <p>Flexibility – as challenges arose, Mathtech's scope evolved to address ever-changing needs.</p> <p>Project Management – This was a large, multi-year enterprise project, and The Mathtech Team managed it carefully and completely while also establishing a permanent PMO function.</p> <p>Vendor Management – This project was full of powerful vendors that often pushed back, and The Mathtech Team was able to keep all parties working together collaboratively.</p> <p>Hosted Infrastructure – This solution included collaborating with vendor and State resources to establish a fully hosted fail-over and DR site on AWS requiring applications and data to be synced, sized, and properly encrypted.</p> <p>Procurement – This project included very large procurements (>\$80M). The Mathtech Team led the approach, drafted the RFP, navigated many political challenges and procurement policies and perspectives, and ensured that the State got the results and contracts it needed.</p> <p>See more information in our response to Technical Submittal section I-3.</p>

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Project Duration:	Start Date Year: June 2013	End Date Year: March 2021		
Nature of the Client:	<p>The Maryland Motor Vehicle Administration is a business unit under the direction of the Maryland Department of Transportation.</p> <p>The project was managed by Steven Young who is a proposed member of this team along with John Klien who was another lead team member. The project was managed by MVA's executive leaders and one of their senior Project Directors</p>			
Nature of Client Audience:	<p>The client was the entire MVA agency including all administrative and operational staff as well as their business partners (dealers, Law Enforcement, Insurance companies, other jurisdictions) and private citizens and businesses.</p>			
Number of Users:	<p>Internal System Users and Partners: ~2000 + Maryland Driving Public and Businesses</p>			
# & Composition of Vendor Employees & Consultants Assigned:	<p>The Mathtech Team took on a wide range of responsibilities including process mapping and re-engineering, Project Management, Requirements Analysis, Procurement, Enterprise Architecture and Data Modernization.</p>			
		FTEs		
	Function	Strategy/ Planning	Procurement	Transition and Transformation
	PMO	2.0	2.0	2.0
	Service Architects	2.0	2.0	2.0
	Financial Advisory	.5	.5	.5
	SMEs	4	6	6
Total	8.5	10.5	10.5	
Client Contact Information:	<p>Provide the name, title, address and telephone number of at least two references or contact persons that the Commonwealth can contact to inquire about the vendor's performance and indicate the role these individuals had in relation to the assignment or project. The references/contact persons should be individuals who were key stakeholders or project leaders and who can validate the vendor's role and responsibilities and who can comment on the quality of the vendor's performance. Two (2) contacts required.</p> <p>Reference Contacts: Name: Clarence Edwards Title: Project Lead Department: Motor Vehicles Administration Full Address: One Orchard Road, Glen Burnie, MD 21060 Telephone: 410-787-7976 Email: cedwards@mdot.state.md.us Relation/Role to Project: State Project Manager/Contract Manager</p>			

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	<p>Name: Bruce Chaliou Title: Assistant Director of Project Management Department: Motor Vehicles Administration Full Address: One Orchard Road, Glen Burnie, MD 21060 Telephone: (410) 787-7976(O) Email: bchailou@mdot.maryland.gov Relation/Role to Project: State Project Manager with full engagement and leadership</p>
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Appendix B – Personnel Experience by Key Position

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APPENDIX B, PERSONNEL EXPERIENCE BY KEY POSITION

POSITION <small>(Include at least one row for all positions identified as Key Positions in Section I-3.E of the RFQ Technical Submittal, as well as any additional positions you've identified as integral to the work delineated in your proposal.)</small>	PERSONNEL NAME <small>(Identify by first/last name the person who will fulfill this position.)</small>	COMMITMENT <small>(Provide the percentage of this person's time to be committed to the proposed project.)</small>	# YEARS PRIOR EXPERIENCE IN POSITION <small>(List the number of years this person has acted in the same role on prior projects similar in nature to the proposed project.)</small>	OTHER RELEVANT EXPERIENCE <small>(Provide a brief narrative of other experience this person has had that may be relevant to his/her role in the proposed project.)</small>	EDUCATION <small>(List all postsecondary degrees completed for this person.)</small>	OTHER PROFESSIONAL QUALIFICATIONS <small>(List any certifications and/or professional memberships for this person that may be relevant to this position.)</small>	DIGITAL ACCESSIBILITY EXPERIENCE (WEB CONTENT ACCESSIBILITY GUIDELINES (WCAG), SECTION 508) <small>Provide a brief narrative of this experience this person has had that may be relevant to his/her role in the proposed project.)</small>
Account Director	Steven Young	20%	25	Served as Project Director and provided Executive Oversight and project management services on numerous large state government transformations, including modernization projects for Maryland Motor Vehicle Administration, Wyoming Department of Transportation, New Jersey Department of Motor Vehicles. Developed numerous RFPs and provided implementation strategic planning and oversight.	<ul style="list-style-type: none"> Computer Engineering, Drexel University 	PMP	
Project Director	Kyle Cox	100%	20	Project Director on several large, state government transformations, including Texas DIR Next-Gen Data Center Services, Texas DIR Digital MSI, and TxDOT Multisourcing Transformation. All	<ul style="list-style-type: none"> Master of Business Administration, University of Texas at Arlington Bachelor of Science in Business Information 	ITIL, PMP	

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APPENDIX B, PERSONNEL EXPERIENCE BY KEY POSITION

				projects included Strategy and Planning, Procurement Support, and Transition/Transformation Support.	Systems, University of Texas at Arlington		
Operating Model Director	George Assenheimer	25%	25	Operating Model Director on several large, state government transformations, including Texas DIR Next-Gen Data Center Services, Texas DIR Digital MSI, and South Carolina Shared Services Transformation. All projects included Strategy and Planning, Procurement Support, and Transition/Transformation Support. Supported Virginia (VITA) MSI implementation.	<ul style="list-style-type: none"> Masters in Telecommunications, University of Dallas Master of Business Administration in Finance, Dallas Baptist University Bachelor of Business Administration in Computer Information Systems, Texas State University 	ITIL	
Business Model Director	Shaun Dely	25%	25	Business Model Director on several large, state government transformations, including Texas DIR Next-Gen Data Center Services, Texas DIR Digital MSI, and Georgia Technology Authority Shared Services Transformation. All projects included Strategy and Planning, Procurement Support, and Transition/Transformation Support. Supported Virginia (VITA) MSI implementation.	<ul style="list-style-type: none"> Master of Business Administration, University of Texas at Dallas Bachelor of Science in Business Administration, Creighton University 	ITIL	
Service Architect	Jerry Price	100%	24	Project Director on several large, state government transformations, including Texas DIR Next-Gen Data Center Services, TxDOT Multisourcing Transformation. Both projects included Strategy and Planning, Procurement Support, and Transition/Transformation Support.	<ul style="list-style-type: none"> Bachelor of Arts in Political Science, Western Michigan University 		

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APPENDIX B, PERSONNEL EXPERIENCE BY KEY POSITION

				Supported Virginia (VITA) MSI implementation.			
Service Architect	John Klein	100%	25	Served as Lead Architect on several government transformation projects, including Maryland Motor Vehicles Administration and New Jersey Motor Vehicles Commission. Provided Quality Assurance services for state agencies, including New Jersey Department of Health.	<ul style="list-style-type: none"> • Master of Science, Electrical Engineering, Syracuse University • Master of Science, Computer Engineering, Syracuse University • Bachelor of Science, Computer Science/Information Science, State University of New York 	PMI-ACP	
Financial Advisor	Clay Newman	80%	20	Project Director on several large, state government transformations, including Texas DIR Next-Gen Data Center Services, Texas DIR Digital MSI, and TxDOT Multisourcing Transformation. All projects included Strategy and Planning, Procurement Support, and Transition/Transformation Support.	<ul style="list-style-type: none"> • Master of Accounting, Texas State University • Bachelor of Business Administration, Texas State University 	Certified Public Accountant	