

# Washington State Department of Revenue

REQUEST FOR PROPOSALS (RFP)  
Solicitation number: K2073

Feasibility Study Services

Written Response

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# Cover Letter

Thank you for the opportunity to respond to Request for Proposal (RFP) K2073. Integrated Solutions Group, LLC (ISG) is ready and committed to assisting the Washington Department of Revenue (DOR) in establishing Feasibility Study services for the future DOR contact center solution. We have reviewed the RFP and the proposed contract and acknowledge receipt of the RFP appendices.

ISG was established in 1986 to provide advisory consulting services in the form of Quality Assurance and Technical Quality Review Services, Organizational Change Management, Project Management, and Technical Advisory Services to government organizations. As an Olympia-based consulting firm, our commitment to Washington State Government is second to none, with consulting experience and a professional reputation that sets us apart. We bring commitment, consistency, professionalism, and trust to every Feasibility Study engagement.

**Work the Approach; Do Not Jump to Conclusions:** Feasibility Studies are a core service for ISG; we work our feasibility study approach and methodology with due diligence and patience. There is pressure to jump to an answer and build a data set to justify it in a feasibility study. Our approach and methodology will ensure the space to investigate solutions to reveal the best path forward for DOR. We emphasize extensive benchmarking and market research to inform the right solution.

**Feasibility Studies are a core service for ISG:** ISG has provided feasibility study services since its origin in 1986. Feasibility Studies are a core service for ISG. ISG has completed thirteen (13) feasibility studies over the last six years, with three (3) studies carried out this year. The team selected for you is deeply skilled in Information Technology, Contact Centers, and Feasibility Studies, making it a well-rounded delivery team.

**Qualified Feasibility Study Team:** The proposed team has provided Feasibility Study Services for a wide range of the State of Washington's Information Technology Initiatives for twenty-five (25) combined years. Our team approach offers in-depth State experience and agency knowledge that will facilitate Feasibility Study success.

We appreciate the opportunity to respond to this work request and hope to participate in the next steps of your selection process. The contact for this response is Tom Boatright, Principal.



Tom Boatright  
Principal  
Integrated Solutions Group, LLC  
360.915.3965  
[tom.boatright@isg-nw.com](mailto:tom.boatright@isg-nw.com)



Tom Boatright  
Principal, ISG

## Executive Summary

Provide an Executive Summary which includes the following information stated in a concise manner and formatted to facilitate review of the material:

Introductory remarks.

Brief summary of Vendor's and Consultant's experience and history providing feasibility study services similar to this Scope of Work, including number of years of such work. Date Vendor and Consultant(s) are available to start work. Name, title, and signature of person with authority to enter into a Contract on behalf of the Vendor.

Limit the Executive Summary to one page.

Integrated Solutions Group (ISG) proposes to complete a Feasibility Study on behalf of the Department of Revenue, to improve current Contact Center operations. The Feasibility Study aims to identify a recommended technical solution and business process improvements that will decrease hold time, minimize dropped calls, improve customer satisfaction, and modernize DOR's contact center services to serve constituents over the next five years and beyond. With a clear understanding of the business and technical requirements, ISG's team will evaluate different solutions and trends in the marketplace for opportunities and cull lessons learned from similar peer organizations. The final analysis will be presented in a formal Feasibility Study that addresses the requirements of the Office of the Chief Information Officer (OCIO) as identified in Policy 121.

ISG is an Olympia-based consulting firm with approximately 30 senior-level consultants in the areas of Technical Advisory Services, Project Management, Organizational Change Management (OCM), and Quality Assurance (QA). Our firm's composition means we can form multi-disciplinary teams to address complex business and technical problems. We understand state government and how to get things done in the authorizing environment. ISG's principals and staff are residents of Washington committed to delivering quality products and services with integrity and accountability. We are proud of our work and the amount of repeat business based on our track record.

As requested in the RFP, ISG's team is fully prepared to support DOR beginning on December 14, 2022, with a well-rounded and deeply skilled delivery team. The most senior delivery team member, Tom Boatright, has served the Department of Revenue on previous feasibility studies and has nearly three decades of experience delivering feasibility studies in Washington state. Emily Davis and Brenda Hays have been working together, leading well-received feasibility studies over the last year for ISG in Washington state. Emily Davis will serve the team as the day-to-day engagement lead for the feasibility study effort and bring experience in enhancing omnichannel contact centers quality management protocols. Brenda Hays will serve as a Technical Advisor with deep IT knowledge and contact center improvement experience. Robert J. Kennedy has devoted his forty-year career to telephony and modern contact center solution work. This curated team brings a thoughtful balance of technical, feasibility study, OCIO policy, and contact center experience. All members of the team have working on contact center technology projects. All team members have delivered projects governed by OCIO policy 121 with 27 combined years of WA state OCIO feasibility study experience.

Tom Boatright, an Integrated Solutions Group Partner, will serve as the signing authority for this work.

# Written Proposal for Completing the Scope of Work

Provide a detailed description of your planned approach and methodology for meeting the expectations, deliverables and project goals outlined in this Work Request.

Provide an approach and methodology in alignment with the tasks listed in the scope of work and the deliverables described in this Work Request.

Include how many consultants will work on the project, and the names, roles and responsibilities of each.

Describe the internal controls to be used during the course of the project.

Describe your approach to issues and risk management.

Describe who within the Vendor's firm will have prime responsibility and final authority for the work.

If Vendor wishes to propose an alternative set of tasks and/or deliverables to meet the objectives described for this assessment, Vendor may do so by including the information in the proposal. Clearly mark these items as "Alternative Approach". Include a second Schedule B, Deliverable Cost and Timeline, for the Alternative Approach.

Limit this section to no more than five (5) pages.

In this section, ISG will describe our proven feasibility study production approach that a team will deliver<sup>1</sup>, experienced ISG consultants. The ISG delivery team will produce DOR's requested deliverable set within a seventeen-week period from December 14, 2022, to March 31, 2023. ISG's approach will build towards requirements for securing funding such as developing a decision package, an investment plan, and procurement artifacts.

Based on our experience delivering feasibility studies within Washington State, we propose a draft version of a detailed schedule to produce DOR's requested deliverables and objectives in [Appendix A](#). ISG will finalize the draft schedule in collaboration with DOR to achieve Deliverable #1: Project Management Plan and Schedule. The project management plan will outline the project controls used to govern the project and manage risk. The typical protocols that will be included to manage the project risk are:

- An agreed upon project Governance Structure
- Risk Management methods using a Risk, Actions, Issues and Decisions (RAID) log reviewed on a weekly basis to monitor the risk level of the project and agree to mitigation plans collaboratively
- Bi-weekly status reports to gauge project progress and escalate and address any obstacles
- Weekly review of project schedule progress in standing governance meetings
- Standing governance meetings with the DOR Executive Sponsor and Steering committee to align on project delivery approach nuances and progress

Emily Davis will serve as the project Engagement Lead, having led feasibility studies in WA state and produced multiple decision packages in alignment with WA state OCIO policies. The Engagement Advisor will further supplement any guidance required throughout the delivery of the project, Tom Boatright, who has produced nine (9) feasibility studies, and worked on IT projects governed by OCIO policy for 30 years. Rounding out the delivery team is Robert Kennedy, who will serve as the contact center business analyst and Brenda Hays who will serve as the IT business analyst. Robert Kennedy

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<sup>1</sup> The team of four consultants will be: Emily Davis as a Project Manager, Robert Kennedy as an experienced Contact Center BA, Brenda Hays as an experienced IT Business Analyst, and Tom Boatright as a Project Advisor with contact center consulting experience and OCIO IT feasibility study experience.

brings forty years of contact center experience and Brenda Hays brings twenty-five years of Technology experience.

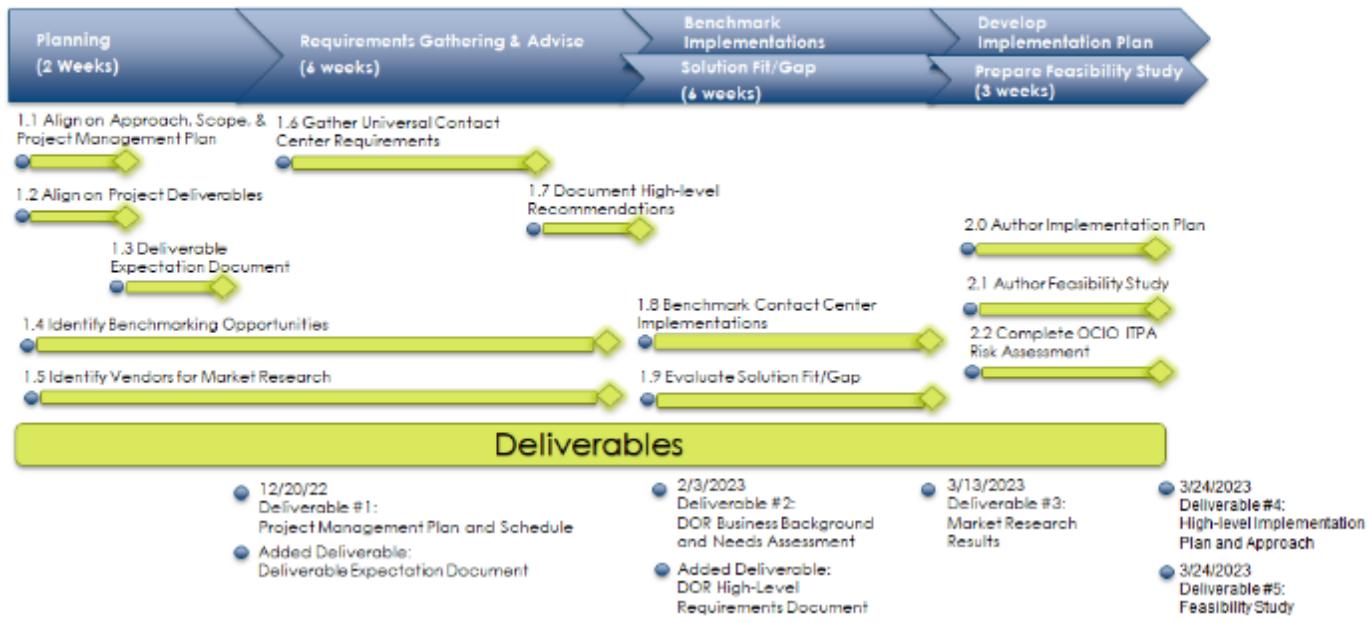
This four-person team is ready to hit the ground running with more than 100 years of combined experience and 30 state and 15 federal agencies served across the team. The team is well-rounded, having deep contact center experience, information technology knowledge, and OCIO governed feasibility study experience.

This strong four-person team will bring years of problem-solving techniques to the table and highly relevant skills, knowledge, and abilities. Emily Davis will manage the day-to-day delivery and has a proven track record of delivering solid feasibility studies that are well received by independent Quality Assurance (QA), WaTech, OCIO, OFM, and her clients.

The robust approach to feasibility studies the ISG delivery team will follow is depicted below and described in detail:

*Figure 1: DOR Contact Center Feasibility Study Approach*

## CRM Solution Implementation Timeline



### Planning

The planning stage will be two weeks, focusing on orienting DOR to ISG's Feasibility Study project delivery approach, pictured above. ISG's Feasibility Study method has also been translated into a DRAFT project schedule for DOR and is included in [Appendix A](#). Planning involves aligning on a Project Management plan<sup>2</sup>; agreeing to the set of DOR contact center business processes<sup>3</sup> that

<sup>2</sup> This initiation document will codify how the full project will be executed, monitored, controlled, and closed. This artifact will incorporate leading practices advocated by the Project Management Body of Knowledge (PMBOK).

<sup>3</sup> Contact Center business processes should be representative of 80% of the contact center operations.

should be mapped to understand DOR contact center operations; targets for benchmarking<sup>4</sup>; and agreeing to the outlines and acceptance criteria for project deliverables. An example of a robust Project Management Plan is included as a deliverable example. (See attached file *Deliverable Example\_Project Management Plan*). In the planning phase, the formal Deliverable Expectations Document (DED) will be prepared to cover all deliverables. The DED will provide an outline, example, and acceptance criteria for all project deliverables before work is started.

### Requirements Gathering & Advice

The ISG delivery team will facilitate interviews by stakeholder group and by feature to get a comprehensive list of technology requirements and core business processes that the DOR Contact Center solution must deliver. During the project's requirements gathering phase, the ISG delivery team will be mapping core business processes with an eye toward how modern contact center solutions can improve operations and facilitate processes in new, efficient, and effective ways. This phase is solely intended to orient the ISG delivery team to DOR operations, needs, and wants and will be accomplished over six weeks.

Key business processes will be identified in collaboration with DOR and documented. These artifacts can be used to supplement the feasibility study, future decision packages, and procurement artifacts. Two options for process documentation are presented in the deliverable example files. ((See attached file *Deliverable Example\_Process Diagram* and *Deliverable Example\_Process Narrative*). Both deliverable examples were produced during similar OCIO policy-governed feasibility studies performed by ISG. The ISG and DOR team will align on the best method for DOR.

When documenting requirements for DOR, ISG will produce a universal requirements document that reflects modern features that are common for contact center technology solutions. An abbreviated excerpt of a universal requirements document is presented in the deliverable examples section of this proposal (See *Deliverable Example\_Universal Requirements Document*). Requirements documentation will be tailored to represent DOR's needs through a series of facilitated discussions with DOR. ISG's experienced team will lead DOR SME's and project leadership through a review of the requirements to rate requirements as high, medium, low, and not applicable. The outcome of this session will serve as a key artifact in future procurement efforts, as a high-level set of requirements for DOR. This requirements list will also serve as a tool for solution fit/gap analysis, as solutions will be rated against this project artifact (See *Deliverable Example\_Fit-Gap Analysis*).

Throughout this phase the ISG delivery team will be capturing improvement opportunities the DOR Contact Center should consider. These will be cataloged as items the organization should consider stopping, starting, or continuing. Recommendations will be culled from thoughtful interviews with DOR staff, the ISG team's contact center knowledge, and benchmarking study learnings. These recommendations will be supported by years of contact center optimization efforts led by Robert Kennedy, Brenda Hays, Emily Davis, and Tom Boatright.

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<sup>4</sup> Benchmarking targets should be similar sized organizations that have gone through a recent contract center modernization and procurement project. These will serve as excellent resources in determining lessons learned, implementation approach, and contact center models.

## Benchmarking Implementations

One of the most powerful activities completed during a feasibility study performed by ISG is benchmarking. The ISG implementation team will leverage its extensive network and experience leading benchmarking efforts during feasibility studies to identify comparable organizations that have recently procured or modernized contact center operations. The team will craft a comprehensive benchmarking interview guide to ensure the breadth of information gathered is sufficient to inform DOR's contact center delivery model, implementation approach, and adequate cost projections. Often benchmarking interviews result in key lessons learned ahead of encountering them firsthand.

An example of a benchmarking interview guide/questionnaire used by Emily Davis and Brenda Hays to conduct a recent feasibility study for The WA Arts Commission is included in the deliverable examples section of this proposal. This tool serves as a guide versus scripted questions and ISG's talented interviewers are practiced at gathering comprehensive information (See *Deliverable Example\_Benchmarking Interview Guide*).

Having the right team to facilitate benchmarking conversations is critical; the ability to collect large amounts of information in an efficient and natural conversational way helps with project efficiency and effectiveness and builds bridges with other organizations going through the same type of contact center modernization effort. In the WA Arts Commission feasibility study a community of organizations emerged that were willing to partner and provide long term guidance beyond the feasibility study. This type of community can help guide DOR for years to come. Furthermore, solid benchmarking work is a critical success factor for any feasibility study. Harnessing the learnings from other organizations is powerful and can ensure key considerations are not missed. The summary artifact prepared for benchmarking is presented in a market research summary (See *Deliverable Example\_Market Research*).

## Solution Fit/Gap Analysis

The solutions fit/gap phase will involve partnering with contact center vendors to be oriented to their contact center solution offerings and gauging overall industry trends for contact center modernization. Each potential vendor solution will be rated against DOR's customized universal requirements document. This will allow the ISG team to evaluate the level of fit and gaps for each potential solution evaluated. This alignment to requirements will produce an overall fit-gap score. A fit/gap summary example is presented in deliverable examples (See *Deliverable Example\_Vendor Fit-Gap Analysis*). Note the deliverable example provided is for a single SaaS based solution; ISG understand there is a request for a minimum of three distinct delivery model options to be evaluated outlined in Section 3B. The results will be validation of viable modernization options.

## Develop Implementation Approach

Choosing the right approach for project implementation is critical to contact center modernization. The approach that is ultimately selected should be revealed by working through the feasibility study process. There should be significant learnings about the culture of the DOR organization during the requirements gathering and process mapping phase. The readiness of DOR, the degree of change, and the culture should inform the pace ISG recommends for implementation. There should be learnings gleaned from the benchmarking phase to fold into the implementation approach design. Constraints and considerations covered with potential contact center modernization vendors should

also inform the implementation approach; these learnings come during the fit/gap analysis phase when the ISG delivery team is interacting vigorously with potential solution vendors.

When designing an implementation approach, there is a need to balance speed and the likelihood of achievement of objectives. Considerations for incentivizing vendor engagement are also important when designing an implementation approach that can be aligned with OCIO-required gated funding. An example of a thoughtful implementation plan and approach is presented in the deliverable examples section for review (See *Deliverable Example\_Implementation Approach*).

### Prepare Feasibility Study

Feasibility studies mark a significant investment by any agency pursuing a technology investment. The resulting product must serve as a foundation to build on. Having an expert feasibility study team will help ensure the effort produces value. Adapting to ensure the study moves your organization as far forward as possible is critical. Some feasibility studies begin with one vision and end with dramatically different recommendations. This is the beauty of allowing an unbiased review by expert consultants. A feasibility study intends to recommend the best next step possible for DOR. ISG's experienced delivery team knows how to focus in and find the best next step. The feasibility study will be informed by thoughtful benchmarking, detailed vendor solution discussions, and learning the DOR needs and wants. An example of a feasibility study is presented in the deliverable examples section for review (See *Deliverable Example\_Feasibility Study*). The feasibility study produced will evaluate improvement opportunities, identify, and assess replacement solution options, estimate replacement costs, and lay out an approach and plan to update and modernize DOR's Contact Center platform that is practical and vetted. The feasibility study will, at a minimum, address: leveraging state central services, modify or expanding the current platforms, or procuring and implementing Contact Center "as a service" via a cloud-based provider. The final analysis will be presented in a formal Feasibility Study that addresses the requirements of the Office of the Chief Information Officer (OCIO) as identified in Policy 121. Lastly, many ISG clients are pleased with the work performed in the feasibility study phase and choose to extend ISG's services to include production of a decision document for funding requests. ISG is committed to DOR's Contact Center Modernization project success and will be committed to helping DOR during the feasibility study phase and through all OCIO Policy 121 stages.

# Deliverable Examples

Provide an example of each deliverable listed in the Deliverable Table from Section 3G of this Work Request plus any alternate deliverables proposed.

Examples may be copies of documents created for previous clients, or templates clearly describing the content typically included. DOR prefers examples which clearly align with the scope of work and deliverables described in this Work Request and the Vendor's proposal. Examples which clearly demonstrate how the complete group of deliverables will provide added value to the objectives of this Work Request will receive the highest scores.

The following deliverable examples produced within feasibility studies are presented for your review as attachments:

Corresponding File Attachment Title	Deliverable Title	Client	Rationale
<b>Deliverable Example_PMP</b>	Project Management Plan	DOR – Managed Unclaimed Property System Feasibility Study	This provides a thorough overview of how projects are governed when led by ISG.
<b>Deliverable Example_Project Schedule</b>	Project Schedule	WA Arts Commission – CRM Feasibility Study	This represents a 15-week implementation for a feasibility study that delivered early. This is tightly matched to DOR's 17-week implementation timeframe.
<b>Deliverable Example_Project Status Report</b>	Project Status Report	WA Arts Commission – CRM Feasibility Study	This status report template would be used, with input, for the DOR Feasibility Study.
<b>Deliverable Example_Context Diagram</b>	Context Diagrams	DOR – Managed Unclaimed Property System Feasibility Study  WA Arts Commission – CRM Feasibility Study	Understanding the full IT ecosystem, a solution must operate within, is critical to the success of a feasibility study. Context diagrams depict how a solution must integrate with existing solutions and systems.  These diagrams demonstrate our skilled teams' ability to identify and communicate the full IT ecosystem a solution must operate within.
<b>Deliverable Example_Process Diagram</b>	Process Diagram	WA Arts Commission – CRM Feasibility Study	This demonstrates our ability to depict high-level business process understanding.
<b>Deliverable Example_Process Narrative</b>	Business Process Narrative	DOR – Managed Unclaimed Property System Feasibility Study	This expresses our ability to document detailed process understanding.

Corresponding File Attachment Title	Deliverable Title	Client	Rationale
<b>Deliverable Example_Benchmarking Interview Guide</b>	Benchmarking Questionnaire	WA Arts Commission – CRM Feasibility Study	Having a scripted interview guide for benchmarking conversations allows the skilled facilitators to guide a holistic conversation, while allowing for a fluid conversation. Each benchmarking conversation will evolve differently, and it is key to collect consistent, comprehensive information. The conversations should feel natural while being facilitated.
<b>Deliverables Example_Universal Requirements Documentation</b>	Universal Requirements Documentation	WA Arts Commission – CRM Feasibility Study	Building the requirements for DOR will be critical to ensure needs are met. This deliverable demonstrates the ISG Team's skill in building out requirements in sufficient enough detail to evaluate options in the marketplace.
<b>Deliverable Example_Market Research Summary</b>	Market Research Deliverable	DOR – Managed Unclaimed Property System Feasibility Study	ISG has delivered excellent market research summaries to DOR; this example was received well for the Unclaimed Property System feasibility study. This excerpt shows how ISG can present a large volume of information in a consumable format.
<b>Deliverable Example_Fit-Gap Analysis</b>	Fit/Gap Analysis	WA Arts Commission – CRM Feasibility Study	Two examples for Fit/Gap are presented. One is a summary table, and one is supporting details for the summary table.
<b>Deliverable Example_Feasibility Study</b>	Feasibility Study	WA Arts Commission – CRM Feasibility Study	This feasibility study was prepared over the course of 15 weeks for the WA Arts Commission. This received approval by the client and an independent Quality Assurance Vendor.

# Consultant(s) Qualifications – Resume for each Consultant submitted for the project.

**Resumes** – For each Consultant, provide a detailed resume with information stated in a concise manner and formatted to facilitate review.

- I. Summarize at the top of the resume the Consultant's years of experience for each item listed in Section 4B, Consultant Knowledge, Experience and Qualifications.
- II. Resumes should detail the consultant's qualifications, experience, knowledge, skills and abilities related to the Scope of Work and requirements stated in this Work Request.
- III. Resumes should be direct and succinct and focus on the consultants' qualifications for the roles and responsibilities the consultant will fulfill for this Scope of Work.
- IV. Limit resumes to five (5) pages.

## Emily Davis, MBA, CCMP

Emily Davis has experience in all categories listed in section 4B; see the below table for specific years of experience.

Knowledge, Skills, and Abilities	Emily Davis – Senior Project Manager
<b>System Replacement Feasibility Studies</b>	1 year of experience
<b>WA OCIO Feasibility Studies</b>	1 year of experience
<b>Scoping Systems Integration Projects</b>	5 years of experience
<b>Articulation of Major Objectives</b>	20 years of experience
<b>IT Investment Planning</b>	20 years of experience
<b>Context Diagrams</b>	5 years of experience
<b>Assessment of Mission Critical Systems</b>	5 years of experience
<b>Architecture of Mission Critical Systems</b>	2 years of experience
<b>Large, Complex Studies</b>	5 years of experience
<b>Evaluation of Risk and Internal Controls</b>	20 years of experience
<b>Analytical Capabilities</b>	20 years of experience
<b>Excellent Communication Skills</b>	20 years of experience
<b>Fairly and Impartially Evaluate Options</b>	20 years of experience
<b>Time Management – Tight Deadlines and Priorities</b>	20 years of experience
<b>Facilitation of Diverse Audiences</b>	20 years of experience
<b>Contact Center Technologies</b>	1 year of experience
<b>Other WA Agency Experience</b>	2 years of experience
<b>Other Government Experience</b>	6 years of experience

# Emily Davis, MBA, CCMP

Role	Organization/Tenure	
Senior Project Manager	ISG Associate Consultant 2021-Present	
Education/Certifications		
<ul style="list-style-type: none"> <li>Certified Scrum Master, International Scrum Institute, 2021</li> <li>Certified Change Management Professional, PROSCI, 2015</li> <li>Master of Business Administration, University of St. Thomas, 2011</li> <li>Bachelor of Business Administration, Marketing/IT, College of William and Mary, 2003</li> </ul>		
Professional Experience		
<b>1. Senior Project Manager, Integrated Solutions Group, 2021</b> <ul style="list-style-type: none"> <li>Provided Feasibility Study support for inaugural CRM Solution for WA Arts Commission.</li> <li>Providing Feasibility Study support or Department of Services for the Blind, Blind Entrepreneurship Program optimization.</li> <li>Delivered three Decision Packages for WA state agencies for upwards of \$15M in funding.</li> <li>Managed a web subscription application launch for mid-size eCommerce company.</li> <li>Led RF Gen/SAP integration for wholesale customers at a mid-size eCommerce company.</li> </ul>		
<b>2. Project Manager, Pivotal Consulting, 2018-2019</b> <ul style="list-style-type: none"> <li>Led project initiation activities for an on-premise Human Resources Information System (HRIS) migration to Oracle Human Capital Management (HCM) cloud-based solution.</li> </ul>		
<b>3. Project Manager, OTB Solutions Consulting, 2018</b> <ul style="list-style-type: none"> <li>Project managed an on-premise enterprise warehouse migration to Amazon Web Services (AWS) cloud-based solution, with several wrap-around IT tools for the WA state Healthcare Authority (HCA).</li> <li>Served as a SCRUM master, employing Agile development principles, tools, and ceremonies.</li> <li>Facilitated data quality and standardization sessions in a highly matrixed organization.</li> </ul>		
<b>4. CMS Program IT Director, Sound Physicians, 2016-2017</b> <ul style="list-style-type: none"> <li>Evaluated, advised, and established IT roadmaps for 2016-2018 for the new line of business.</li> <li>Applied technology solutions to aid in enhancing bundled care delivery innovations with input from operational and healthcare delivery leadership.</li> <li>Managed help desk coordination for in-house and vendor provided support desk tier 1/tier 2.</li> <li>Hired and managed a consulting firm to optimize support desk functions.</li> </ul>		
<b>5. Contract IT Project Manager, Slalom Consulting, 2016</b> <ul style="list-style-type: none"> <li>Supported all phases of the project management lifecycle for three simultaneous IT projects; implemented all projects on time, on budget, and to specifications.</li> </ul>		
<b>6. Contract Program Manager, Alvarez &amp; Marsal, 2015-2016</b> <ul style="list-style-type: none"> <li>Deployed to turn around a delayed Anaplan financial planning software implementation for a high-tech company in Silicon Valley, CA. Rectified the project implementation schedule and delivered new Anaplan financial system.</li> </ul>		
<b>7. Product Manager/Implementation Manager, Prime Therapeutics, 2012-2015</b> <ul style="list-style-type: none"> <li>Supported the Senior Director of Private Exchanges in achieving 10% private exchange market growth through relationship building and innovative pharmacy insurance product launches.</li> <li>Oversaw all operational components for new pharmacy insurance client implementations, overseeing all functional areas including IT implementation teams.</li> </ul>		
<b>8. Program Director/IT Project Manager, UnitedHealth Group (UHG), 2009-2012</b>		

- Created a Culture Office and Executive Advisory Board to direct and deliver a culture transformation program for UnitedHealth Group with an annual operating budget of approximately \$6M.
- Led seven volunteer project/program managers in delivering a portfolio of internal culture transformation projects.

**9. Project Manager/Requirements Analyst, Virtual Radiologic Corp., 2008-2009**

- Led implementation of NICE Total View Contact Center Software for 24x7, multi-media/omni channel contact center operation.
- Redesigned business processes and software to improve operations and expand capacity for a newly public 24x7 telemedicine company.
- Developed Technical Requirements Specification documents to inform the precise design of user interfaces and software functionality for the system and database engineering teams.

**10. Senior Consultant, PriceWaterhouseCoopers (PwC) Federal Practice, 2004-2008**

- Managed a program to implement new business practices for client retention/selectivity protocols, modernize human resources information systems (HRIS), adapted organizational structures, and shifted the corporate culture within three PricewaterhouseCoopers' offices located in Puerto Rico, CT, and NY.
- Consulted the Internal Revenue Service (IRS) on an overhaul of executive hiring/succession planning practices.
- Led World Bank benchmarking study on micro lending process improvement in frontier countries.
- Supported Program Management Office leading a team of 150 consultants to benchmark and improve the Department of Veterans Affairs core financial and logistical processes.

**11. Consultant, Grant Thornton Federal Practice, 2003-2004**

- Implemented Office of Management and Budget policies in line with the President's management agenda for Federal Departments, including the U.S. Army, Federal Aviation Administration, and the Department of Energy.

## Brenda Hays, MBA, MMIS

Emily Hays has experience in all categories listed in section 4B; see the below table for specific years of experience.

Knowledge, Skills, and Abilities	Brenda Hays – IT Business Analyst
<b>System Replacement Feasibility Studies</b>	1 year of experience
<b>WA OCIO Feasibility Studies</b>	1 year of experience
<b>Scoping Systems Integration Projects</b>	10 years of experience
<b>Articulation of Major Objectives</b>	25 years of experience
<b>IT Investment Planning</b>	5 years of experience
<b>Context Diagrams</b>	10 years of experience
<b>Assessment of Mission Critical Systems</b>	10 years of experience
<b>Architecture of Mission Critical Systems</b>	10 years of experience
<b>Large, Complex Studies</b>	5 years of experience
<b>Evaluation of Risk and Internal Controls</b>	25 years of experience
<b>Analytical Capabilities</b>	25 years of experience
<b>Excellent Communication Skills</b>	25 years of experience
<b>Fairly and Impartially Evaluate Options</b>	25 years of experience
<b>Time Management – Tight Deadlines and Priorities</b>	25 years of experience
<b>Facilitation of Diverse Audiences</b>	25 years of experience
<b>Contact Center Technologies</b>	5 years of experience
<b>Other WA Agency Experience</b>	1 year of experience
<b>Other Government Experience</b>	2 years of experience

# Brenda Hays, MBA, MMIS

Role	Organization/Tenure
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IT Business Analyst ISG Technical Consultant 2022-Present



## Education/Certifications

- Bachelor of Arts, Technical Communication and Professional Communication, MSU, 2010
- Master of Business Administration, Metropolitan State University (MSU), 2014
- Graduate Certificate in Database Administration, MSU, 2013
- Graduate Certificate in Information Assurance (CNSS National Standards 4011, 4013, 4016, MSU, 2012)
- Certified Six Sigma Greenbelt, UnitedHealth Group, 2012
- Certified ITIL V.3 Foundation, ISACA, 2008
- Master of Management Information Systems, MSU, 2006
- Certified ITIL V.2 Service Level Management Practitioner, ISACA, 2005
- Certified ITIL V.2 Change Management Practitioner, ISACA, 2005
- Graduate Certificate in Project Management, MSU, 2004
- Certified ITIL V.2 Foundation, ISACA, 2004
- Certified Scrum Master, Scrum Alliance, 2016

## Professional Experience

### 1) Contract Technical Advisory Services, Integrated Solutions Group, 2022-Present

- Customer Relationship Management System (CRM) feasibility study Technical Lead. Provided advisory services for acquisition strategy and solution selection for a small state agency.
- Led technical benchmarking of six implementations and assessment of five vendor options.
- Delivered 2023-2025 Decision Package for legislative review in line with State OCIO Policy 121.

### 2) Contract Senior IT Program/Project Manager, Oxford Global Resources, 2022-Present

- Sage Intacct Financial System integration for a banking non-profit to transition from multiple on-premises solutions into one SaaS solution.
- Built and maintained project artifacts: Project Charter, Scope of Work, WBS/Schedule, RAID Log, Status Reports, Communication Plans, and Bi-Weekly Project Metrics.
- Training Materials: Training Manuals, Workbooks, FAQ's.
- User Acceptance Testing: Test Strategy, Test Plan, Testing Scripts, Traceability Matrix
- Established and drives Project Status Review governance meetings.

### 3) Senior IT Program/Project Manager, Cross Cloud Ops, 2021-2022

- Development and Management of international Project Management Office (PMO).
- Provided governance to ensure adherence to quality standards and program deliverables.
- Salesforce and Salesforce Marketing Cloud (SFMC) Program Manager for projects involving onshore and offshore development teams for multiple clients, requiring continual evaluation of program activities, tasks, and sub-projects to drive milestone requirements.
- Served as a SCRUM master, employing Agile development principles, tools, and ceremonies.
- Led software engineering team's daily stand-up sessions, sprint planning, and backlog grooming within JIRA software.
- Facilitated data quality and standardization sessions in a highly matrixed organization.

### 4) Independent Consultant, GTX Consulting, 2018-2021

- Program Manager creating a global Enterprise Disaster Recovery (DR) Program for an international re-insurance company.
- Partnered with the Security and newly formed Business Continuity (BC) teams.

- Development, management, and successful Tabletop and Full-Scale Exercising of end-to-end global program spanning three international data centers and cloud-based architecture.
- Driver and developer of an ITIL based Configuration Management Database (CMDB) to support Resource Consumption efforts, Security mitigation issues, and drive Change Management requirements.
- Established and managed key DR artifacts.
- Windows 10 Upgrade Project Manager completing a successful global rollout.
- YSoft Project Manager rolling out the Follow-Me-Print solution globally.
- Microsoft 365 Project Manager rolling out the SaaS solution globally.
- Project and process management for construction firm integrating best practices for scheduling, scoping, billing, streamlining of field-to-office workflows, and IT support.
- IT consulting services including desktop support, inventory, and recovery solutions for the automotive mechanic industry.

**5) Senior Manager/Consulting Practice Manager, NetSuite + Oracle, 2016-2018**

- Program Manager of the Associate Consultant Program (ACP), a global program utilizing recent college graduates to grow the NetSuite consulting business. Included work in the United States, Canada, England, and Australia. Managed recruiting of 135 yearly new hires.
- Grew ACP tracks to include Project Management and Curriculum Development.
- Extended ACP locations to include Czech Republic, Philippines, China, and Japan.
- Utilized Agile methodology to move from location-based learning to a collaborative global approach, utilizing co-located project teams to complete case studies and application configuration projects.
- Matured program to include continuing education, communication, mentorship, and oversight through three-year participation to Senior level employee.
- Managed promotion and raise process for the 350 program members.
- Coached Practice Managers through New Manager and Millennial Management issues.
- Program Manager of the Management Development Program, a U.S. based program designed to promote Practice Managers from within the consulting organization. Expanded program from a passive educational program to a six-month immersive training program.
- Incorporated Agile methodology to team management, program development, and project delivery utilizing Jira to lead global teams progress utilizing both Kanban and Scrum processes.
- Worked with Oracle to integrate the existing NetSuite program into the Oracle environment aligning business need to enterprise offerings. Assisted and coached NetSuite leadership throughout the 2017 M&A activities.

**6) Partner/Sr. IT Project Manager, Harbinger Partners, 2014-2016**

- Managed multiple Operating Model Transformation projects over a three-year period, utilizing CIM architecture methods.
- Performed management and analysis at a program level, often changing the strategy of the assigned projects to support the business needs of BCBSMN throughout the transition to the Highmark platform.
- Successfully managed the design, development, and implementation of two (2) separate Salesforce.com business instances (Retail/Individual and Wholesale/Group) to be integrated with the new IT partner's downstream tools and data. Twenty-five integration points included in the instances as well as interim work to maintain backfields to the legacy instance for non-migrated business to be utilized through data migration.
- The Front Office Account Installation project delivered the capabilities required to install BCBSMN sold business onto the Highmark platform.
- Successfully managed the design, development, and implementation of an analytical tool to capture information from multiple systems for both migrated and non-migrated businesses.

- Partnered with QA leads to implement cross-program automated testing solutions in addition to project testing.

**7) Disaster Recovery (DR) IT Business Analyst Consultant/OCM Project Manager, Optum IT, 2009 - 2014**

- Managed the DR strategy of UHG's portal applications including architecture recommendations and business requirements. This included business impact, high availability architecture, capacity, growth, documentation, project management, M&A, ITIL compliancy, and annual exercise testing of recovery plans.
- Designed and implemented DR processes and procedures, including DR Plans (DRPs) for re-establishing servers, databases, operating systems, M&A, and critical.
- Performed and analyzed disaster simulations for the prompt restoration of services.
- Provided project management for the development and updating of DRPs in conjunction with the business, application, and infrastructure teams.
- Assisted in the SDLC to ensure projects were designed to ensure DR capabilities were designed in alignment with the business need as assessed by their Business Continuity Plan (BCP) to provide adequate DR capability.
- Provided investigation and analysis of current DR implementations (internal and external) then provided the strategy and recommendations for questioned critical applications.
- Provided project management to the Culture Action Teams (CAT) of Enterprise-Wide Business Processes and Total Rewards as part of the "Our United Culture" Organizational Change Management program.
- Led the Sales and Marketing teams in process improvements ranging from simple communication changes to architecting new ways of managing health plans, as well as promoting new management styles.
- Led a cross-functional team in the identification and solutioning of employee reward opportunities and benefit improvements.

**8) Executive Vice President Business Development, Analytiks International, 2009**

- Guided the growth of operations, systems, and programs of a small SAS consulting firm.
- Partnered with Futrix, an add-on SAS solution, rounding out their North American partners, beginning a new line of business.
- Launched Futrix practice including policies regarding sales and support.
- Implemented and managed solutions agreement with a key client, enabling Analytiks International, Inc. to provide all their SAS performance and development consulting.

**9) Manager, Service Design, Royal Bank of Canada (RBC) Wealth Management, 2007-2009**

- Manager of the Service Design team and program which included Service Quality Management, Service Level Management, Service Catalog Management, Supplier Management, and Disaster Recovery, based on ITIL best practices.
- As part of Access RBC (the then third largest financial services IT project in US history, at \$230M), utilized project management skills to set service expectations by defining, documenting, negotiating, monitoring, measuring, reporting, and reviewing the level of IT services provided, utilizing PMI and Six Sigma methodologies for a CIM architected project.
- Implemented specific and measurable targets for critical services, including those provided by Access RBC.
- Monitored and improved customer satisfaction with the quality of service delivered.
- Managed projects to ensure business needs were being met with the technology implementation, such as Service Desk policies, processes, and utilization of HP Service Desk.
- Ensured that both IT and the business had a clear and unambiguous expectation of the level of service to be delivered.
- Developed proactive measures to improve the levels of service delivered were implemented wherever it was cost-justifiable to do so.
- Provided mentoring, leadership, and training to a new team.

- Relationship Manager between IT and the business providing planning, improvements, and project management of initiatives, Quality of Service Delivery, Roadmap Initiatives, and Point of Escalation.
- Designed and implemented the Service Level management process.
- Provided guidance to the Service Level Coordinators including Service Improvement ideas, Process Improvement ideas, and negotiation assistance.
- Drove the Infrastructure Service Catalog implementation including development of an online service catalog, Service reviews of both internal services, services provided by the parent company, and services provided by vendors, utilizing CIM architecture.
- Acted as the lead project manager for all people, process, M&A, security, and technology changes and enhancements.

#### **10) Manager Information Systems, Mainframe Services, UnitedHealth Group (UHG) IT, 2006-2007**

- Manager of the Mainframe Service Support team responsible for Configuration Management, Problem Management, Incident Management, Change Management, Release Management, Intranet Development, Project Management, Auditing, Disaster Recovery, M&A, Metrics and Reporting, based on ITIL best practices.
- Ensured appropriate project prioritization of all Mainframe Services projects and resourcing in a highly matrixed organization.
- Ensured reliable, timely, and consistent communication of project priorities, statuses, timelines, and deliverables to the business community.
- Interacted with all levels of the business community, including Senior Management.
- Responsible for Knowledge Management of Operational Policy and Procedure throughout the department including management of efficient application.

#### **11) Service Delivery Manager, Mainframe Services, UnitedHealth Group (UHG) IT, 2005-2006**

- Managed all Knowledge Transfer projects for a successful \$104M UHG initiative to insource two mainframe systems, resulting in a savings of \$247M over the first five years.
- Managed customer relationships with UHT Mainframe Services and the business.
- Managed application release including scheduling, escalation, and incident management.
- Point of escalation for production incidents, ran quorum calls, provided support to Severity One and Two incidents, including root cause analysis.
- Change Manager for Mainframe Services, following ITIL best practices.

#### **12) Change Manager/Sr. IT Quality Control Analyst, Ingenix, UnitedHealth Group (UHG) IT, 2004-2005**

- Led Quality Management definition, Metrics Production, Program Management, Project Management, M&A integration, Tiger Team Management, Quality Control, Risk Analysis, Security, Problem and Availability Management.
- Communicated outages to the enterprise, management of War Rooms, leadership of post-mortem sessions, and complete reporting of events.
- Provided information and reporting to all levels of the enterprise, including written and spoken communication.
- Managed process improvement Six Sigma projects as the Green Belt Leader, such as the expedited policies to process systems notifications through the Help Desk for both first call resolution as well as major impact assessment kicking off a Tiger Team.
- Change Manager responsible for scheduling and managing all maintenance windows for four data centers; administration of Change Management website, application, and databases.

#### **13) Technical Writer/Project Manager, Ingenix, UnitedHealth Group (UHG) IT, 2002-2004**

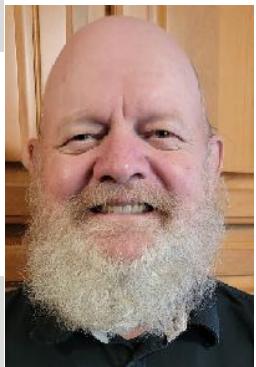
- Project managed a data center physical move.
- Created technical documentation for all data center operating manuals.
- Developed daily, weekly, and monthly metrics for data center operations.

## Robert J. Kennedy

Robert J. Kennedy has experience in all categories except IT Investment Planning listed in section 4B; see the below table for specific years of experience.

Knowledge, Skills, and Abilities	Robert Kennedy – Contact Center Business Analyst
<b>System Replacement Feasibility Studies</b>	20 years of experience
<b>WA OCIO Feasibility Studies</b>	2 years of experience
<b>Scoping Systems Integration Projects</b>	25 years of experience
<b>Articulation of Major Objectives</b>	25 years of experience
<b>IT Investment Planning</b>	No experience
<b>Context Diagrams</b>	25 years of experience
<b>Assessment of Mission Critical Systems</b>	20 years of experience
<b>Architecture of Mission Critical Systems</b>	30 years of experience
<b>Large, Complex Studies</b>	10 years of experience
<b>Evaluation of Risk and Internal Controls</b>	20 years of experience
<b>Analytical Capabilities</b>	15 years of experience
<b>Excellent Communication Skills</b>	25 years of experience
<b>Fairly and Impartially Evaluate Options</b>	20 years of experience
<b>Time Management – Tight Deadlines and Priorities</b>	30 years of experience
<b>Facilitation of Diverse Audiences</b>	15 years of experience
<b>Contact Center Technologies</b>	20 years of experience
<b>Other WA Agency Experience</b>	2 years of experience
<b>Other Government Experience</b>	15 years of experience

# Robert J. Kennedy

Role	Organization/Tenure	
Contact Center Business Analyst	ISG Consultant 2022	
<b>Education/Certifications</b>		

- Community College of the Air Force, Telephone Equipment Installation/Repair
  - Avaya Certified Associate
  - Avaya Courses: Core Components Integration CM 10.1, Core Components Installation CM 10.1, Avaya S8300 Installation and Provisioning Course
  - Accenture Courses: TTC 2310 Operation and maintenance
  - Ribbon SBC Core Support Installation and implementation
  - AT&T Definity G3V4 System Operation and Programming Course
  - Octel Release 3.0 Voice Message System Management Course
  - U.S. Army Courses: Wire Systems Installer/Operator Course, FIBERCOM Optical Connector Termination and Splice, Mitel SX10/20 Installation and Maintenance, Basic Non-Commissioned Officers' Signal Course, and Siemens KN-101 Operation and Maintenance Course
- U.S. Air Force Telephone Equipment Installation and Repair Course

## DOR Project Relevant Experience

### 1) Contract Technical Advisory Services, Integrated Solutions Group, 2022-Present

- Contact Center technology and integration strategic consultant.

### 2) Voice Engineer, Sr. Engineer, March 2022 -Present

- Installing programming and maintaining Ribbon 1K/2K SBCs and Tenors. Building routes to Core 2Ks with embedded CCE's to route all traffic to O365 Cloud based service.

### 3) Continuant, Inc., Sr. Engineer, June 2002 - Present

- Sr. Engineer. Responsible for engineering, installation, and maintenance on Avaya Definity PBX's in complex multi-site configurations in a DCS'ed environment utilizing conventional T-1 and IP connectivity.
- Planned and deployed contact center solutions as a part of the Avaya voice solutions suite.
- Working as Deployment Engineer for Skype On-Line Migration utilizing Ribbon SBCs and Tenors for Egress and Ingress of Analog and PSTN services on a global scale.
- Facilitated vendors quotes to Washington State Emergency Services NG911 proposal.
- Implemented wireless telephone solutions for hospitals utilizing SBCs and Spectralink wireless devices.

### 4) Intermedia Communications, Sr. Application Engineer, June 1993 - June 2002

- Sr. Application Engineer. Responsible for installation, test and turn-up of Frame Relay, ATM, and DSL services utilizing, Cascade 9000, Lucent CBX 500 and Hadax 224 test points in Seattle and Portland. Also worked on test and turn-up for OC-3 backbone for Digex Communications' nationwide network on Cisco 12008 routers
- Technical Operations Manager. Managed voice and data facilities supporting 8 million square of office space in the Seattle area. Supervised 8 technicians in installation and

maintenance for customer base on Definity G3R, G3I, and G3vs series integrated with Octel OV-250 platforms.

**5) Advanced Telcom Management, 1992 - 1993**

- Construction Supervisor. Engineered and supervised the installation, splicing, termination, and certification of cable plant to support apartment complexes in installations from Bellingham, Washington to Roseburg, Oregon.

**6) Signal Battalion, 1987 – 1992**

- Directed and supervised installation, operation and maintenance performed by 25 subordinate personnel on wire systems to include over 11,000 voice circuits connected to single line, key system and PABX systems; cable systems to include 137 miles of aerial, 171 miles of duct/direct buried, 33 miles of coax and 8 miles of Fiber optic cable.

**7) Signal Brigade, 1984 – 1987**

- Wire Systems Installer. Installed and maintained single line, key system, and PBX equipment.

**8) Communications Command, 1982 – 1984**

- Lead Operator. Performed duties as lead operator on Western Electric 701 Switchboard.

## Tom Boatright, CPM

Tom Boatright has experience in all categories listed in section 4B; see the below table for specific years of experience.

Knowledge, Skills, and Abilities	Tom Boatright - Contact Center Advisor
<b>System Replacement Feasibility Studies</b>	25 years of experience
<b>WA OCIO Feasibility Studies</b>	8 years of experience
<b>Scoping Systems Integration Projects</b>	25 years of experience
<b>Articulation of Major Objectives</b>	25 years of experience
<b>IT Investment Planning</b>	25 years of experience
<b>Context Diagrams</b>	5 years of experience
<b>Assessment of Mission Critical Systems</b>	5 years of experience
<b>Architecture of Mission Critical Systems</b>	25 years of experience
<b>Large, Complex Studies</b>	15 years of experience
<b>Evaluation of Risk and Internal Controls</b>	25 years of experience
<b>Analytical Capabilities</b>	25 years of experience
<b>Excellent Communication Skills</b>	25 years of experience
<b>Fairly and Impartially Evaluate Options</b>	25 years of experience
<b>Time Management – Tight Deadlines and Priorities</b>	30 years of experience
<b>Facilitation of Diverse Audiences</b>	25 years of experience
<b>Contact Center Technologies</b>	15 years of experience
<b>Other WA Agency Experience</b>	20 years of experience
<b>Other Government Experience</b>	30 years of experience

# Tom Boatright, CPM

Role	Organization/Tenure	
Executive Consultant	ISG Principal and Officer 2016	
Education/Certification		
BS, Computer Science, Evergreen State College, 1989		
Project Management Certification, University of Washington, 2002		

## Skills and Abilities

- Proven project manager with enterprise-wide projects within Washington State.
- Proven Feasibility Study/Decision Package practitioner within Washington State engagements, many involving multiple agencies, interfacing systems and stakeholder groups.
- Enterprise solutions contractual and financial framework development professional; extensive experience designing, implementing, operating, and managing the contractual and operational models for complex Information Technology cloud-based infrastructure, SaaS and eCommerce solutions.
- Extensive IT systems experience in enterprise infrastructure, SaaS, cloud-based services, and IT device management solutions – feasibility analysis, cost modeling, contractual and operational model development and implementation experience.
- Proven analyst of enterprise systems contractual and financial systems utilizing quality assurance, verification and validation best practices methodology and processes.
- Excellent interpersonal and group facilitation skills. Ability to form highly performing workgroups focused on critical decisions and strategic priorities.
- Excellent written and presentation skills for internal and external audiences including staff, executives, and partner organizations.

## Professional Experience

### 1) Project Manager, HHS Coalition MPI QA/TQR Project, 1/22 - Present

- Lead QA/TQR consultant for the MPI Implementation Project
- Developed QA Project Plan; Baseline Assessment Report; Monthly Reports and presentations to Steering Committee and Sponsors.

### 2) Property Tax and Assessment System Modernization 03/19 -Present

- Lead QA consultant for the PTAS project in King County.
- Participated in the development of QA Plan and Initial readiness assessment - ongoing monthly QA Assessment Reports are beginning.

### 3) Project Manager, King County E911 Systems Modernization Project 03/20 - Present

- Lead QA consultant for the King County E911 Systems Modernization Project
- Participated in the development of QA Plan and Initial readiness assessment - ongoing monthly QA Assessment Reports are beginning.

### 4) Project Manager, DOT UED QA Project 03/21 - Present

- Lead QA consultant for UED Systems Modernization Project
- Participated in the development of QA Plan and Initial readiness assessment - ongoing monthly QA Assessment Reports are beginning.

### 5) MS Office 365 Enterprise Content Management Feasibility Study 1/20 - 8/20

- Led market research against other states and Public Sector implementation of M365.
- Developing a Feasibility Study and Decision Package for utilization of M365.
- Developing a detailed Cost Benefit Analysis, implementation plan and recommended staffing model for implementation and on-going operations.

**6) Laboratory Information Management System QA Project 04/21 – 01/22**

- Lead QA consultant for the LIMS Project at DOH.
- Participated in the development of QA Plan and Initial readiness assessment - ongoing monthly QA Assessment Reports are beginning.

**7) Technical Project Manager, HCA/HHS Coalition Master Person Index Project Roadmap Development Project 03/20 -12/20**

- Conducted market research/vendor marketplace scan/requirements assessment/agency inventory of existing systems and in-depth interviews with implemented systems to assess alternatives and recommend a MPI solution.
- Delivered a MPI Roadmap short and long term that was approved by the HHS coalition. Supported authorizing environment Decision Package, Investment Plan and Request for Procurement Deliverables.

**8) Project Manager, ECY M&M Data Center Migration QA Project, 4/18 – 12/20**

- Lead QA consultant for the Data Migration Project for Ecology.
- Participated in the initial readiness and risk assessments and led the ISG team in on-going monthly reports to remediate risk and meet industry best practices.

**9) Project Manager, DOH Data Center Migration QA Project 09/2019 - 1/22**

- Lead QA consultant for the DCM Project at DOH.
- Participated in the development of QA Plan and Initial readiness assessment - monthly QA reports have been paused due to impacts of Covid - 19 impacts on DOH.

**10) Project Manager, HCA, Enterprise Data Warehouse eDW QA/TQR Project 9/18 – 12/20**

- Lead QA consultant for the eDW QA/TQR Project.
- Participated in the development of QA/TQR Plan and Initial readiness assessment - monthly QA reports and a Lessons Learned/Closeout Report.
- eDW was successfully implemented and in operation at current time.

**11) Project Manager, King County, Jail Management System 07/17 -12/20**

- Lead QA consultant for the King County Jail Management System
- Participated in the development of QA Plan and Initial readiness assessment - ongoing monthly QA Assessment Reports are beginning.

**12) Project Manager, King County Next Generation Transit Infrastructure Implementation Project 11/17 -05/18**

- Lead QA consultant for the King County NextGen QA Project.
- Participated in the development of QA Plan and Initial readiness assessment - ongoing monthly QA Assessment Reports are beginning.
- Unclaimed Property Management System (UCP) Feasibility Study
- Conducted market research and in-depth interviews with 6 similarly implemented systems to assess alternatives and recommend a SaaS/PaaS solution.

**13) Lead QA consultant for the DOC CI ERP Project 12/18 – 12/20.**

- Participated in the development of QA Plan and Initial readiness assessment - ongoing monthly QA Assessment Reports are in process. Tom off boarded from the project in

**14) Project Manager King County, Superior Courts IT Technology Feasibility Study, 2020**

- Conducted market research and in-depth interviews with 6 similarly implemented systems to assess alternatives and recommend a SaaS/PaaS solution.
- Developed detailed Cost Benefit Analysis (CBA), implementation plan and recommended staffing model for implementation and on-going operations.
- Findings of the study were validated in a subsequent Request for Information (RFI) with several industry vendors.

**15) Technical Lead (OCIO Oversight), Department of Revenue, Unclaimed Property Management System (UCP) Feasibility Study, 2018**

- Conducted market research and in-depth interviews with 6 similarly implemented systems to assess alternatives and recommend a SaaS/PaaS solution.
- Developed detailed Cost Benefit Analysis (CBA), implementation plan and recommended staffing model for implementation and on-going operations.
- Findings of the study were validated in a subsequent Request for Information (RFI) with several industry vendors.

**16) Technical Lead (OCIO Oversight), Department of Health, Health Enforcement and Licensing Management System (HELMS) Feasibility Study, 2017**

- Conducted market research and in-depth interviews with 6 similarly implemented systems to assess alternatives and recommend a SaaS/PaaS solution.
- Developed detailed Cost Benefit Analysis (CBA), implementation plan and recommended staffing model for implementation and on-going operations.
- Findings of the study were validated in a subsequent Request for Information (RFI) with several industry vendors.

**17) Quality Assurance Consultant, King County Sheriff's Office, Records Management System, 2016-2019**

- Conducted interviews and developed Baseline Quality Assurance report targeting project management process best practices.
- Develop monthly QA assessment reports in compliance with King County Project Review Board requirements and aimed at industry best practices.
- Provide weekly reports on overall project management risks and progress.

**18) Quality Assurance Consultant, DSHS ESA, ESAR Modernization, 2017-2018**

- Technical analyst for the QA project. Participate in client interviews, documentation review and report development.
- Procurement and contract analyst and advisor to QA project for project vendor procurement phase. January 2017 – 2018

**19) Quality Assurance Consultant, DSHS ESA, MAPP Project, 2017-2018**

- Technical analyst for the QA project. Participate in client interviews, documentation review and report development.
- Procurement and contract analyst and advisor to QA project for project vendor procurement phase. May 2017 - 2018

**20) Quality Assurance (QA) Technical Analyst, Integrated Data Hub/Expedited Data Exchange (INH/EDE), Administrative Office of the Courts, 2016-2019**

- Conducted interviews and developed Baseline Quality Assurance report targeting project management process best practices.
- Facilitated working sessions to develop an integrated program schedule across 8 projects/tracks representing 3 different jurisdictions.
- Provide bi-monthly reports on overall project management risks and progress.

**21) Project Manager, Systems Integrator and Call Center Vendor Contract Analysis, WA State HBE, 2016**

- Conducted contract review of current engagements for the systems integrator vendor and the call center operations vendor.
- Conducted comparative market and implementation analysis of similar systems for public and private organizations.
- Prepared contract renegotiation positions and supporting materials.
- Prepared vendor re-procurement timelines including required federal activities and approvals.

**22) Services Vice President Operations, Contractual, Financial, Operations Efficiency Manager/Analyst, Denali Advanced Integration, 2010–2015**

- Amazon – responsible for the development of feasibility, contractual, financial analysis frameworks for the end-to-end systems solution for both the implementation and operations of the Global – Multi Distribution Facilities Software, Multi-Layer Distribution Services, Data Center Services Project.
- Providence Health and Services – responsible for the development of feasibility, contractual, financial analysis frameworks for the end-to-end systems solution for Providence's Project Gabriel. Project Gabriel was an enterprise systems integration project that included contractual, financial analysis, feasibility study, project plan development, project implementation and development of integrated operating plans for the merger of a Providence acquired enterprise Healthcare Provider.
- Microsoft – OEL LAB's – Software Solutions and Staffing – responsible for the development of feasibility, contractual, financial analysis frameworks for customer MBR framework for development, design, implementation, and management.
- Dean Foods – Mobil Device Management (MDM) Support Services – responsible for the development of feasibility, contractual, financial analysis frameworks for enterprise-wide end-to-end MDM modernization and refresh project.
- Conway – Mobil Device Management (MDM) Support Services – responsible for the development of feasibility, contractual, financial analysis frameworks for enterprise-wide end-to-end MDM modernization and refresh project.

**23) Director of Professional Services, Right Systems Inc., 2006–2010.**

- Responsible for 30 to 50 engineering staff and overall professional services performance.
- Development of initial company PMO.

**24) Senior Independent Verification and Validation/Quality Assurance Consultant, Eclipse Solutions, 2005–2006**

- State of Washington, Department of Social and Health Service, ASDA CIMS Project (Project Manager for Quality Assurance Service – ISB Level II (MS Dynamics SQL)).
- State of Washington, Department of Social and Health Service, JRA ACT Plan Development, System Architect Analyst.

**25) Chief Information Officer, Community Trade and Economic Development, 2003–2005**

- Managed Information Technology Division. Responsible for the refresh of Commerce's Information Technology Infrastructure. Oversaw the Development of State Marketing Program WAGOV Commerce website redeveloping and re-hosting project.

**26) Technology Services Manager, Washington State Attorney General's Office, 1998–2003**

- Managed a team of 30 staff. Developed and implemented agency Infrastructure five-year plan and oversaw the resulting refresh project. Technical Services lead for Case Management System rolled to over 1,400 staff and VoIP implementation.

# Vendor Information Response Form – Schedule A

- Complete and sign *Schedule A, Vendor Information Response Form*.
- In Section 4 of *Schedule A*, Vendors should include prior projects most closely aligned with this project and the scope of work described in this Work Request and will best illustrate the Vendor's qualifications for this work.

<b>1. VENDOR INFORMATION</b>	
<b>Official name of the Vendor company</b>	Integrated Solutions Group LLC
<b>Official mailing address</b>	2233 Nut Tree Loop SE, Olympia WA 98501
<b>Federal Tax Identification Number (TIN)</b>	47-3816959
<b>Washington State Uniform Business Identification Number (UBI)</b> <i>If Vendor does not have a UBI number, state commitment to become registered prior to contract signing if selected as the ASV.</i>	603-497-635
<b>Washington State <u>Statewide Payee</u> number</b> <i>If Vendor is not yet registered as a Statewide Payee, state commitment to register and provide DOR the assigned Statewide Payee Number prior to contract signing if selected as the ASV.</i>	47-3816959
<b>Name and job title of the official contact person</b>	Tom Boatright - Principal
<b>Telephone and cell numbers of the contact person</b>	360.915.3965
<b>Email address of the contact person</b>	Tom.boatright@isg-nw.com
<b>Vendor Website Address</b>	www.isg-nw.com

<b>1A. SUPPORTING DIVERSE VENDOR POOL – CERTIFICATIONS</b> PER SECTION 8F OF THE WORK REQUEST, COMPLETE THIS SECTION FOR THE VENDOR.	
<b>Is your firm certified with the Washington State Office of Minority &amp; Women's Business Enterprises? <a href="https://omwbe.wa.gov/">https://omwbe.wa.gov/</a></b>	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, provide MWBE Certification No: _____
<b>Is your firm a self-certified Washington State small, mini, or micro-business as defined? <a href="#">RCW 39.26.010</a></b>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If yes, what is your business size? Small <input checked="" type="checkbox"/> Mini <input type="checkbox"/> Micro <input type="checkbox"/>

<b>Is your firm certified as Veteran Owned with Washington State Department of Veteran Affairs? <a href="https://dva.wa.gov">https://dva.wa.gov</a></b>	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, provide WSDVA Certification No.: _____
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**2. SUBCONTRACTOR** IF VENDOR IS PLANNING TO USE SUBCONTRACTOR(S) FOR ANY PART OF THIS SCOPE OF WORK, COMPLETE THIS SECTION. DOR RESERVES THE RIGHT TO REQUEST ADDITIONAL INFORMATION FOR ANY PROPOSED SUBCONTRACTORS. BY INCLUDING SUBCONTRACTOR(S) AS PART OF YOUR PROPOSAL, VENDOR AGREES TO ASSUME RESPONSIBILITY FOR ALL CONTRACT OBLIGATIONS AND ANY LIABILITY FOR ALL ACTIONS OF SUBCONTRACTORS. ADD ROWS IF MULTIPLE SUBCONTRACTORS ARE ANTICIPATED.

**If Vendor will not be using any subcontractors, check here**

<b>Subcontractor Company Name</b>	GTX Consulting
<b>Brief description of subcontractor company</b>	GTX Consulting is a management consulting firm serving state and federal government, non-profits, and commercial clients.
<b>Name(s) of consultant(s) provided by subcontractor company.</b>	Brenda Hays
<b>Describe the work to be performed by the subcontracted consultant(s)</b>	<ul style="list-style-type: none"> <li>• Technical Lead on an OCIO Policy 121 Feasibility Study for a Customer Relationship Management system</li> <li>• Collected ArtsWA CRM business requirements</li> <li>• Documented 10 core business processes for the organization to accomplish via a CRM system</li> <li>• Conducted benchmarking for six organizations that had recently procured and implemented a CRM Solutions</li> <li>• Prepared a Feasibility Study for ArtsWA</li> <li>• Developed Recommended Implementation Approach</li> <li>• Prepared a Decision Package for ArtsWA ~\$2.3M</li> </ul>
<b>Describe strategies the Vendor will use to manage and monitor the work to be completed by the subcontracted consultant(s)</b>	Brenda Hays will be under direct supervision of experienced project manager, Emily Davis. Brenda Hays and Emily Davis has experience delivering a feasibility study for a Customer Relationship Management system for the WA Arts Commission. Their work was well received by the customer and supported their development of a decision package for approximately \$2.3M.

**2A. Subcontractor - SUPPORTING DIVERSE VENDOR POOL – CERTIFICATIONS** PER SECTION 9D OF THE WORK REQUEST, PROVIDE THE INFORMATION REQUESTED IN THIS SECTION FOR EACH **SUBCONTRACTOR** INCLUDED IN THE PROPOSAL.

<b>Is your firm certified with the Washington State Office of Minority &amp; Women's Business Enterprises?</b> <a href="https://omwbe.wa.gov/">https://omwbe.wa.gov/</a>	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, provide MWBE Certification No: _____
<b>Is your firm a self-certified Washington State small, mini, or micro-business as defined?</b> <a href="#">RCW 39.26.010</a>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If yes, what is your business size? Small <input type="checkbox"/> Mini <input type="checkbox"/> Micro <input checked="" type="checkbox"/>

<b>Is your firm certified as Veteran Owned with Washington State Department of Veteran Affairs? <a href="https://dva.wa.gov">https://dva.wa.gov</a></b>	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, provide WSDVA Certification No.: _____
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*Remainder of page intentionally left blank*

### 3. VENDOR QUALIFICATIONS

1. Vendor company relationship to any telephony/Contact Center system solutions and/or platforms:
  - a. Vendor listed in Section 1 above **is not** associated with any telephony/Contact Center system solution(s)/platform(s) (mark here)  X
  - b. Vendor listed in Section 1 above **is** associated with the following telephony/Contact Center system solution(s)/platform(s):  
(indicate solution(s)/platform(s) here)

*Note: per Work Request Section 1, Vendor Eligibility, the Vendor selected for this work request will not be eligible to provide any solution, product, or primary implementation services should DOR decide to move forward with modernization of its Contact Center platform in the future.*

2. Description of Vendor company, including areas of expertise. Clear and concise explanations are preferred. Do Not direct DOR to other reference materials in lieu of a response here.
  - a. Include a clear description of Vendor experience providing services similar to the work described in Work Request K2073 along with the length of time Vendor has provided this type of service.

ISG has been providing feasibility study services since 1986. In recent years, ISG has completed several Feasibility Studies that comply with OCIO policy 121. In each instance, the alternatives analysis considers market research from other states/organizations to understand costs, lessons learned, and other relevant factors, including implementation strategies.

**Table 1: Recent ISG Experience with Feasibility Studies in WA State**

Project	Client	Description	Year
<b>Health Enforcement and Licensing Management System (HELMS) Feasibility Study</b>	WA Department of Health (DOH)	Analysis of business needs, market research, alternatives analysis, cost benefit analysis and implementation plan for a Software as a Service (SaaS)/Platform as a Service (PaaS) for managing the licensing of 500,000 healthcare providers across 86 professions, almost 12,000 healthcare facilities across 21 facility types, 2,500 educational/training programs, and the public.	2017

<b>Project</b>	<b>Client</b>	<b>Description</b>	<b>Year</b>
<b>Unclaimed Property (UPC) Feasibility Study</b>	WA Department of Revenue (DOR)	Requirements documentation, fit/gap analysis, business processes, market study, Feasibility Study, and Cost Benefit Analysis of solution alternatives for replacing the state's Unclaimed Property System used by financial institutions and insurance companies to report assets, and by the public to search and receive \$69 M annually in unclaimed property.	2018
<b>Pension and Relief Tracking System Feasibility Study</b>	Board of Volunteer Fire Fighters (BVFF)	Requirements and options analysis and Feasibility Study for managing pension contributions, medical claims for job related injuries, and accounting reporting and reconciliation for over 100,000 volunteer fire fighters throughout Washington.	2018
<b>Court Room Technology Feasibility Study</b>	King County Superior	Analysis of industry standards and best of breed technologies with a Feasibility Study for improving business efficiencies for prosecuting and defense attorneys and judges presiding over cases at the Superior Court.	2020
<b>Electronic Health Records (EHR) Feasibility Study</b>	WA Department of Social and Health Services (DSHS)	Market research, cost analysis, solution recommendation, and Feasibility Study based on lessons learned from DSHS and other behavioral health residential hospitals for meeting federal CMS and Joint Commission certification requirements at the state hospitals.	2018
<b>Electronic Health Records (EHR) Feasibility Study</b>	WA Department of Corrections (DOC)	Feasibility Study with recommendations, cost analysis, market study, and implementation plan for meeting EHR requirements for managing inmates' medical needs at DOC facilities statewide.	2021

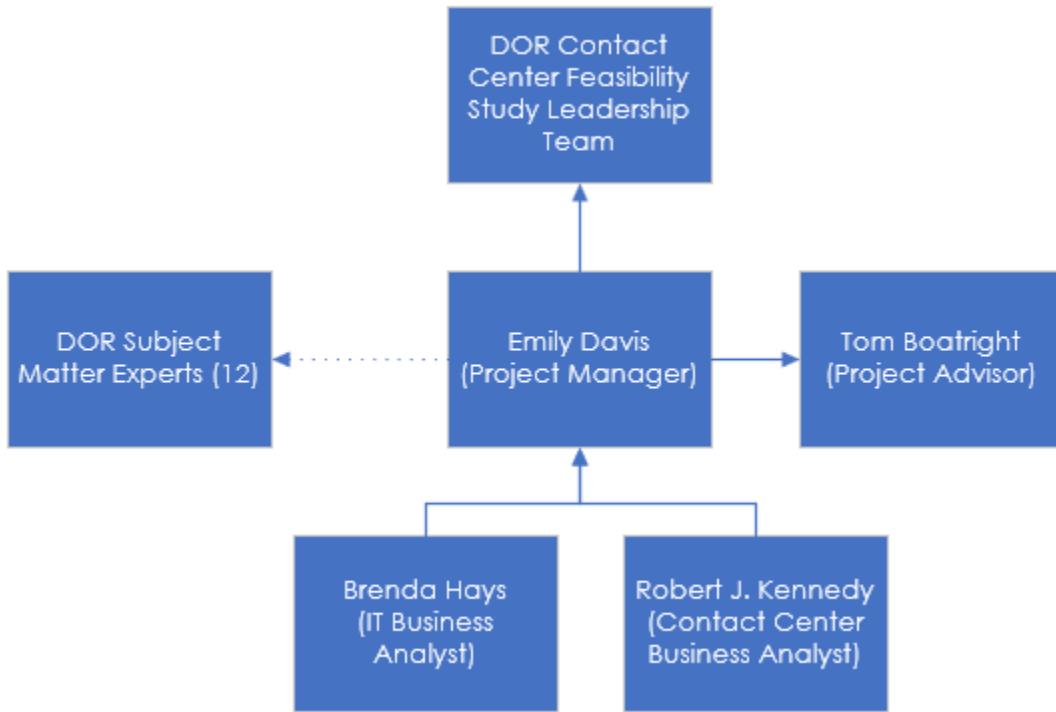
Project	Client	Description	Year
<b>Pension System Administration Feasibility Study</b>	WA Department of Retirement Systems (DRS)	Business Needs and Implementation Plan sections of the Feasibility Study that was instrumental in securing state funding for replacing the DRS CORE system serving 335,000 active and 300,000 inactive public employees, and 200,000 retirees in Washington State.	2021
<b>Microsoft M365 as Enterprise Content Management System</b>	Department of Ecology	Assessed the agency's ability to utilize M365 as the Enterprise Content Management (ECM) system that included a unique element in that ISG was asked to support and assess a proof of concept of the system within Ecology. The study resulted in a complete Feasibility Study as well as a roadmap supporting the agency's path to utilizing MS 365 as an enterprise ECM solution.	2021
<b>Capital Business Management Solution</b>	Office of Financial Management	ISG is conducting a Feasibility Study for OFM's modernization of their Capital Business Management System. The project is in the initial planning and discover phase.	2022
<b>Customer Relationship Management</b>	WA Arts Commission	ISG completed a feasibility study for the WA Arts Commission in line with OCIO policy 121. All deliverables requested by DOR were also produced for ArtsWA as a result of this project.	2022
<b>Master Person Index (MPI)</b>	Health and Human Services Coalition	ISG documented technical requirements, conducted market research, identified a governance model (including a steward organization), and developed a six (6) year road map for a member identify management solution shared by five (5) health and human service agencies in Washington State serving over 2 million low- and moderate-income residents.	2020

3. Describe your staffing model and how you will ensure well-qualified consultants are provided

for this effort.

The individuals proposed in this RFP will be the consultants staffed on this project. These individuals have been hand selected to support the DOR feasibility study. Detailed assignments by individual are included in [Appendix B: Detailed Workload Build-up](#).

The team organizational structure for the project is depicted below:



4. If DOR requested that you replace any of the consultants assigned for this scope of work, how you would approach this to ensure continuity of this project, avoid project delays, and prevent negative impact to the quality of the deliverables?

ISG is an Olympia-based consulting firm with approximately thirty senior level consultants in the areas of Technical Advisory Services, Project Management, Organizational Change Management (OCM), and Quality Assurance (QA). Our firm's composition means we can form multi-disciplinary teams to address complex business and technical problems and have a team of consultant we can source delivery teams from when needed.

If there is a need to replace a team member, ISG will work with DOR to gain approval for all staffing changes. This will include resume reviews and collaborative interviewing.

In terms of knowledge transfer, the delivery team will use thorough project documentation in Microsoft Teams to ensure that any team member has immediate access to project artifacts needed to ramp up quickly. The Project Manager has considerable experience managing and onboarding team members. Rigorous project documentation is a standard practice to ensure seamless knowledge capture and transfer among the team.

Having a project advisor enables the team to pull in Tom Boatright to help deliver work if there is an issue with any project delivery or a need to replace a team member. Consequently, it is

not expected that this type of scenario would arise given the teams commitment to high quality delivery and strong qualifications.

Lastly, two additional consultants, serving in ISG's quality assurance line of business have contact center and strong OCIO Policy 121 project delivery experience. They will serve as informal mentors to the team and if required can be considered for addition to the project delivery team in an urgent situation.

5. How long has your company been in business?

ISG has been operating for 36 years and was founded in 1986.

6. What additional information would you like to share with us about your company profile and how you can meet our business needs described in this work request? (Please limit this to one page or less.)

ISG believes that we offer DOR a strong value proposition for its contact center feasibility study project. We see a three-pronged value proposition:

1. **Strong feasibility study approach:** Feasibility Studies are a core service for ISG; we work our feasibility study approach with a commitment to due diligence and patience. There is pressure to jump to an answer and build a data set to justify it in a feasibility study. We recommend allowing the space to authentically investigate solutions and trust our thorough approach to reveal the correct answer for DOR. We emphasize extensive benchmarking and market research to inform the right solution.
2. **Feasibility studies are a core service for ISG:** ISG has provided feasibility study services since its origin in 1986 with positive feedback. This is a core service for ISG. ISG has completed thirteen (13) feasibility studies over the last six years with three (3) studies carried out this year. This commitment to strong feasibility work will benefit DOR and ensures this project is a top priority for ISG.
3. **Qualified contact center feasibility study team:** The team selected for DOR is deeply skilled in IT, contact center solutions, and feasibility studies making it a well-rounded delivery team. The proposed team has provided feasibility study services for a wide range of State of Washington's Information Technology Initiatives for twenty-five (25) combined years.

ISG is proud of its reputation for high quality work and dedicated service to WA state agencies. This reputation and protecting this reputation are of the utmost importance to ISG. We believe the team proposed can accomplish this work with ease, adding significant value to DOR's contact center modernization efforts.

7. Do you have any debarments or terminations for cause within the past three years?

No  Yes

If yes, please explain in detail.

8. Do you have any former state employees working for your company? If so, please list candidate's name, agency they worked for, dates of work for the agency, and their position in your company.

## Disclosure of State Employment

Integrated Solutions Group, LLC currently employs three (3) individuals who have worked for the State of Washington in the last 24 months. They are **Erika Anderson, Candice Leonard, and Krista Hornish**. None of these individuals retired using the 2008 Early Retirement Factors (ERF). Each of these individuals separated from State of Washington Employment in 2022.

**Erika Anderson a Quality Assurance Analyst** for ISG, was formerly employed by the State of Washington from 2017-2022. Ms. Anderson held positions at WaTech, DNR, DOH, and DSHS/DCYF during this timeframe. A summary of Ms. Anderson's positions with the State of Washington in the last 24 months is below.

Proposed duties under any resulting contract: N/A

Agency	Position Held	Dates Held	Description of Duties
<b>Washington Technology Solutions</b>	Senior IT Policy and Management Consultant	2020-2022	<p>Served as an Oversight Consultant for the Office of the Chief Information for Washington State's Technology Agency (WaTech) serving all state agencies.</p> <p>Managed a portfolio of over twenty concurrent projects under the Gated and Non-Gated funding models across multiple biennia, providing recommendations for project approvals and oversight requirements for high risk and high impact projects using the IT Project Assessment tool, team knowledge and personal experience.</p> <p>Worked closely with project sponsors, external Quality Assurance, and agency directors to mitigate risk, resolve issues, make course corrections, and deliver business value.</p> <p>Partnering with the Office of Financial Management (OFM) budget assistants to the Governor, served as product owner for the system interface (technology budget) used by state agencies to report spending plans, ensure transparency, and demonstrate responsible use of tax-payer funds.</p> <p>Developed a workflow application on the Salesforce platform with staff and a Salesforce integrator for the Office of CIO.</p>

<b>Washington State Department of Natural Resources (DNR)</b>	Senior IT Project Manager	2019-2020	<p>Provided project leadership to new cross-enterprise projects that included infrastructure and financial systems, beginning with the establishment of Investment Plans, project governance and leadership, and funding options for pursuing new technologies.</p> <p>Created a centralized PMO knowledge portal providing project management guidance and oversight to inter-agency project leaders using my SharePoint development skills. This portal guides new and seasoned project leaders, and it includes leadership discussions, OCIO oversight policies and processes, and DNR IT Division assistance.</p>
<b>Washington State Department of Health (DOH)</b>	Senior IT Project Manager	2018-2019	<p>Provided senior-level IT project management leadership for the Dept. of Health Disease Control and Health Statistics division successfully implementing Washington Disease Reporting System (WDRS) and Washington Health and Life Events System (WHALES). These COTS solutions are highly complex and configurable, requiring the building of strong relationships and teamwork amongst five business domains, vendor resources, and technology and user groups to complete the system implementation.</p> <p>Assigned tasks, tracked progress, resolved conflicts, and brought the project team together at critical project milestones.</p> <p>Reported project progress, risks, issues, user readiness, and schedules to the Office of Chief Information Officer requiring clear, concise communication.</p> <p>Mentored team members in both the business and technology in developing a structured and sustainable long-term maintenance and operations lifecycle.</p> <p>Provided many best practices, mentored other project managers, and contributed towards PMBOK standards adoption, as a member of the organization's Project Management Office</p>
<b>Washington State Department of Social</b>	Technical Project Manager, Scrum Master	2017-2018	<p>Senior Technology Project Manager and Scrum Master for the technology solutions that support the state of Washington's Child Welfare and Foster parent programs. The solutions included mobile and desktop</p>

<b>and Health Services (DSHS) now part of DCYF</b>		<p>applications with over seven thousand users statewide in field and headquarter offices.</p> <p>Coaching and implementing the organization's transformation to Agile development using the scrum framework.</p> <p>Bringing project management best practices to the organization's PMO, encouraging transparent communication using SharePoint as a communication center, taking a systems approach to release planning across the organization, and incorporating the business needs, priorities, and user feedback into all aspects of software delivery.</p>
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**Candice Leonard, a Senior Project Manager** for ISG, was formerly employed by the State of Washington from 2019-2022. Ms. Leonard held positions at OMWBE and Washington State Ferries during this timeframe. A summary of Ms. Anderson's positions with the State of Washington in the last 24 months is below.

Proposed duties under any resulting contract: N/A

Agency	Position Held	Dates Held	Description of Duties
<b>Washington State Office of Minority and Women Owned Business Enterprises (OMWBE)</b>	Project Manager	2021-2022	<p>Responsible for statewide implantation of the Access Equity Project to implement statutory requirements into Executive and Small Cabinet Agencies as well as Higher Education as outlined in 39.19 and Executive Order 22-01.</p> <p>Responsible for coordination of key staff within OMWBE, along with three key vendors to deliver the business transformation and COTS solution.</p>
<b>Washington State Ferries</b>	Systems and Projects Manager	2019-2020	<p>Served as Operations Lead on major enterprise projects that span across departmental lines.</p> <p>Directed and collaborated with large and small teams while controlling process flow and project outcomes.</p> <p>Responsible for effective utilization of multi-departmental resources, successful enhancements of delivery services and public interfaces, and efficient communications with internal and external customers improving the overall quality of service for WSF customers.</p>

**Krista Hornish, an OCM Consultant for ISG**, was formerly employed by the State of Washington from 2018-2019 and 2021-2022. Ms. Hornish held positions at DOL and DNR during this timeframe. A summary of Ms. Hornish's positions with the State of Washington in the last 24 months is below.

Proposed duties under any resulting contract: N/A

<b>Agency</b>	Position Held	Dates Held	Description of Duties
<b>Washington State Department of Licensing (DOL)</b>	OCM Lead	2021-2022	Responsible for leading change management efforts on various project teams within the Department of Licensing.
<b>Washington State Department of Natural Resources (DNR)</b>	Sr. Human Resources Consultant	2018-2019	Responsible for employee engagement and retention, leadership coaching, employee investigations, and labor relations.

9. No owners of Integrated Solutions Group retired under the ERF, and none are receiving compensation as a result of the contracted service.

**4. VENDOR'S REFERENCES AND EXPERIENCE AND QUALIFICATIONS** (THESE ARE VENDOR COMPANY REFERENCES; NOT REFERENCES FOR THE INDIVIDUAL CONSULTANT(S) PROPOSED FOR THIS WORK REQUEST. DOR IS MOST INTERESTED IN REFERENCES FOR PROJECTS THAT ARE CLOSELY ALIGNED WITH THE SCOPE OF WORK DESCRIBED IN THIS WORK REQUEST).  
 RESPONSES TO THIS SECTION SHOULD HIGHLIGHT AND DETAIL THE VENDOR'S QUALIFICATIONS AND EXPERIENCE RELATED TO THE SCOPE OF WORK AND REQUIREMENTS STATED IN THIS WORK REQUEST.  
 NOTE: VENDOR SUBMISSION OF THIS FORM CONSTITUTES PERMISSION FOR DOR TO CONTACT THE REFERENCES IDENTIFIED BELOW CONCERNING PAST PERFORMANCE.  
 LIMIT TO 3 REFERENCES; NO MORE THAN 1 PAGE PER REFERENCE. THE FORMAT FOR VENDOR REFERENCES BEGINS ON THE NEXT PAGE.

<b>4.1 Contact Person for Reference</b>	<b>Email</b>	<b>Phone Number(s)</b>
Cathie Ott	<a href="mailto:Cathie.Ott@hca.wa.gov">Cathie.Ott@hca.wa.gov</a>	360.725.2116
<b>Dates of Work Performed</b>	<b>Company Name &amp; Address</b>	<b>Description &amp; Size of Company</b>
2002 through Present	Health Care Authority 626 8th Ave SE, Olympia, WA 98501	<b>Mission:</b> Provide equitable, high-quality health care through innovative health policies and purchasing strategies.  <b>Vision:</b> A healthier Washington est. 2,300 FTE's
<b>Description of Scope of Work</b>		
<ul style="list-style-type: none"> <li>• Master Person Index QA/TQR Project (Project Management), provided quality assurance and technical quality assurance to overall project delivery in line with OCIO Policy 121.</li> <li>• Enterprise Data Warehouse QA/TQR Project, provided quality assurance to overall project delivery in line with OCIO Policy 121.</li> <li>• Master Person Index Roadmap Project (Project Management), provided project management services in line with Project Management Body of Knowledge (PMBOK) best practices.</li> <li>• HBE Healthplanfinder Project (Project Management), provided project management services in line with Project Management Body of Knowledge (PMBOK) best practices.</li> </ul>		

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<b>4.2 Contact Person for Reference</b>	<b>Email</b>	<b>Phone Number(s)</b>
Cristie Fredrickson	<a href="mailto:Cristie.fredrickson@ofm.wa.gov">Cristie.fredrickson@ofm.wa.gov</a>	360.742.8712
<b>Dates of Work Performed</b>	<b>Company Name &amp; Address</b>	<b>Description &amp; Size of Company</b>
2010 through Present	Office of Financial Management 302 Sid Snyder Ave SW STE 300, Olympia, WA 98504	The Office of Financial Management provides vital information, fiscal services, and policy support that the governor, Legislature, and state agencies need to serve the people of Washington.  est. 1,300 FTE's
<b>Description of Scope of Work</b>		
<ul style="list-style-type: none"> <li>• eTime QA Project, provided quality assurance to overall project delivery in line with OCIO Policy 121.</li> <li>• eHUB QA Project, provided quality assurance to overall project delivery in line with OCIO Policy 121.</li> <li>• ECY M&amp;M QA Project, provided quality assurance to overall project delivery in line with OCIO Policy 121.</li> <li>• DSHS ESAR QA, provided quality assurance to overall project delivery in line with OCIO Policy 121.</li> <li>• DSHS MAPP QA, provided quality assurance to overall project delivery in line with OCIO Policy 121.</li> <li>• ECY M365 Feasibility Study, provided a feasibility study for a Microsoft 365 implementation.</li> <li>• OFM One Washington Program, provided project management services in line with Project Management Body of Knowledge (PMBOK) best practices.</li> </ul>		

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<b>4.3 Contact Person for Reference</b>	<b>Email</b>	<b>Phone Number(s)</b>
Bill Kehoe	<a href="mailto:bill.kehoe@cts.wa.gov">bill.kehoe@cts.wa.gov</a>	360.791.9861
<b>Dates of Work Performed</b>	<b>Company Name &amp; Address</b>	<b>Description &amp; Size of Company</b>
2007 through Present	Consolidated Technology Services	<p><b>Mission:</b> Advancing Washington's technology strategies and services.</p> <p><b>Vision:</b> Trusted leader and technology partner of choice.</p> <p>est. 1,200 FTE's</p>
<b>Description of Scope of Work</b>		
<ul style="list-style-type: none"> <li>Washington State QA Project Portfolio of Projects, quality assurance to a large subset of WA state IT projects governed by OCIO Policy 121.</li> <li>King County Sheriff's Office Records Management QA/TQR, provided quality assurance and technical quality assurance to overall project delivery in line with OCIO Policy 121.</li> <li>AOC INH-EDE QA/TQR, provided quality assurance and technical quality assurance to overall project delivery in line with OCIO Policy 121.</li> </ul>		

## **CERTIFICATIONS AND ASSURANCES**

I/we make the following certifications and assurances as a required element of the proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related work order: I/we agree as follows.

1. Vendor certifies that each submission, response, and all information provided by Vendor to the Washington State Department of Revenue (DOR) pursuant to the Work Request are true, accurate and correct, and that Vendor has not omitted any material facts that would make the response, submission and/or information incomplete or misleading.
2. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for restricting competition. However, I/we may freely join with other persons or organizations for presenting a single proposal.
3. The attached proposal is a firm offer for a period of 90 days following receipt, and it may be accepted by DOR without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 90-day period.
4. In preparing this proposal, I/we have not been assisted by any current or former employee of the state of Washington whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. If there are exceptions to these assurances, I/we have described them in full detail on a separate page attached to this document.
5. I/we understand that the Department will not reimburse me/us for any costs incurred in the preparation of this proposal or any stages of the selection process.
6. I/we understand all proposals become the property of the DOR, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.
7. All objections, issues, and exceptions to the terms of the Contract, including all Attachments, Schedules and/or Exhibits, are set forth in the Issues List that is included as an attachment of this proposal.
8. All areas of the proposal materials marked as confidential are set forth in the Confidential Information List that is included as an attachment of this proposal.
9. Unless otherwise required by law, the prices and/or cost data, which have been submitted, have not been knowingly disclosed by the Vendor and will not knowingly be disclosed by him/her prior to announcement of the ASV, directly or indirectly, to any other Vendor or to any competitor.
10. No attempt has been made or will be made by the Vendor to induce any other person or firm to submit or not to submit a proposal for restricting competition.
11. I/we grant the Department the right to contact references and others, who may have pertinent information regarding the ability of the Vendor and Consultants to perform the services contemplated by this Work Request.
12. Submission of this form and the attached proposal verifies Vendor compliance with Section 4 of [RCW 39.26.160](#).

**On behalf of the Vendor submitting this work request proposal,** I certify under penalty of perjury under the laws of the State of Washington that the foregoing is true and correct. **We are submitting a scanned or electronic signature on this form.**

*This form must be signed and dated by a corporate officer of a corporation, or a principal, manager, partner, or other individual representative of the Vendor with the authorization to execute and legally bind the Vendor.*

<b>Name and Title</b>	Tom Boatright, Partner	<b>Date:</b>	10/7/2022
<b>Signature</b>			

## Deliverable Cost and Timeline – Schedule B

- Complete one Schedule B for the deliverables list identified by DOR on the form and in Section 3G of this Work Request. Complete all columns for each deliverable. Additional deliverables proposed as beneficial to DOR may be added and must be clearly marked as "for consideration".
- If Vendor is also proposing an alternate set of tasks and deliverables, as described in Section 5.2 of this Work Request, complete a separate Schedule B identified as Alternate Approach.
- Vendors are encouraged to provide their best rate in response to this Work Request. The hourly rates to perform the work are not to exceed the rates in effect in the Vendor's master contract as approved by DES on the date Vendor responds to this Work Request. Rates in excess of the DES master contract rates will be deemed non-responsive and the proposal will not be scored.
- Please note: If you have identified additional deliverables that would be beneficial to DOR, please add them to the table above for consideration. Mark them as "for consideration".
- DOR's intent is to identify Vendors with the necessary knowledge and experience at the lowest cost. \* **Maximum Hourly Rate**
- The hourly rates to perform the work are not to exceed the rates in effect in the vendor's master contract as approved by DES on the date vendor responds to this Work Request. We encourage vendors to submit their best rate in response to this Work Request. Rates in excess of these DES master contract rates will be deemed non-responsive and the proposal will not be scored.

### Schedule B Deliverable Cost and Timeline

<b>Deliverables</b>  (Deliverables are stated at summary level here. See section 3F, Deliverables, of Work Request for details of each deliverable).	<b>*Hourly Rate</b>	<b>Number of Hours</b>	<b>Compensation per Deliverable</b>	<b>Timeline to complete deliverable</b>
<b>Deliverable 1.</b>  Project Management Plan and Schedule.	\$215.00	30.98	\$6,661.20	12/14 - 12/20/2022
<b>Deliverable 2.</b>  DOR Business Background and Needs Assessment.	\$215.00	385.00	\$70,835.70	12/14 - 2/3/2023
<b>Deliverable 3.</b>  Market Research Results Documentation.	\$215.00	208.00	\$39,517.40	12/14 – 3/13/2023
<b>Deliverable 4.</b>  High-level Implementation Plan and Approach.	\$215.00	35.00	\$6,433.70	3/14 - 3/24/2023
<b>Deliverable 5.</b>  Completed Feasibility Study and Presentation.	\$215.00	91.00	\$16,144.70	3/14 - 3/24/2023

<b>Deliverables</b>  (Deliverables are stated at summary level here. See section 3F, Deliverables, of Work Request for details of each deliverable).	<b>*Hourly Rate</b>	<b>Number of Hours</b>	<b>Compensation per Deliverable</b>	<b>Timeline to complete deliverable</b>
<b>Totals</b>	<b>Weighted Average Blended Hourly Rate:</b>  \$186.25	<b>Total number of hours</b>  749.98	<b>Total compensation</b>  \$139,592.70	<b>Total numbers of weeks</b>  15.5 weeks  12/14/2022 - 3/31/2023

- Please note: If you have identified additional deliverables that would be beneficial to DOR, please add them to the table above for consideration. Mark them as "for consideration".
- DOR's intent is to identify Vendors with the necessary knowledge and experience at the lowest cost.
- \* **Maximum Hourly Rate**
- The hourly rates to perform the work are not to exceed the rates in effect in the vendor's master contract as approved by DES on the date vendor responds to this Work Request. We encourage vendors to submit their best rate in response to this Work Request. Rates in excess of these DES master contract rates will be deemed non-responsive and the proposal will not be scored.

\*See [Appendix B](#) for a detailed workload build up.



Tom Boatright  
Principal, ISG

# Contract Issues List – Schedule C

Vendor must review the draft Contract. Vendors are to use Schedule C, Contract Issues List, to submit any issues, concerns, exceptions, or objections to any of the terms or conditions contained in the draft Contract.

The Issues List will be used initially to determine the responsiveness of the Proposals. Proposals contingent upon DOR making substantial changes to material terms in the Contract will be determined to be non-responsive. DOR will consider the number and nature of the items on the Vendor's Issues List in determining the likelihood of completing a contract with the Vendor. Unresolved issues regarding the material business terms of the Contract may affect DOR's selection of Vendors to advance to the next stage of the procurement.

The Schedule C response form must be submitted to DOR in an unrestricted, editable Microsoft Word format.

If there are no issues, concerns, exceptions or objections to the Contract terms and conditions, state "No Issues" on the first row of this form. A response of "No Issues" will be taken to mean the Draft Contract is accepted as written. DOR reserves the right to negotiate any part of the Contract with the ASV.

<b>Vendor Name:</b> <b>Integrated Solutions Group</b>
---

ISG has no issues with DOR Sample Contract.

# Consultant References – Schedule D

*Note, these references are for each Consultant, not the Vendor.*

- Complete Schedule D, Consultant Reference Form, to provide three references for projects similar to the scope of work described in this Work Request.
- Submit a Schedule D for **each** Consultant proposed for this Work Request.
- Limit to three (3) references per Consultant, and no more than one (1) page per reference.

## Schedule D Consultant Reference Form Emily Davis

<b>1. VENDOR NAME:</b>	<b>INTEGRATED SOLUTIONS GROUP</b>
<b>2. CONSULTANT NAME:</b>	<b>EMILY DAVIS</b>

### **3. CONSULTANT'S REFERENCES** (THESE ARE INDIVIDUAL **CONSULTANT REFERENCES**, NOT REFERENCES FOR THE VENDOR COMPANY)

DOOR IS MOST INTERESTED IN REFERENCES FOR PROJECTS THAT ARE CLOSELY ALIGNED WITH THE SCOPE OF WORK DESCRIBED IN THIS WORK REQUEST.

RESPONSES TO THIS SECTION SHOULD BE CONCISE AND CLEARLY DEMONSTRATE AND DETAIL THE CONSULTANT'S QUALIFICATIONS AND EXPERIENCE RELATED TO THE SCOPE OF WORK AND REQUIREMENTS STATED IN THIS WORK REQUEST.

NOTE: SUBMISSION OF THIS FORM CONSTITUTES PERMISSION FOR DOOR TO CONTACT THE REFERENCES IDENTIFIED BELOW CONCERNING PAST PERFORMANCE.

**LIMIT TO 3 REFERENCES; NO MORE THAN 1 PAGE PER REFERENCE.**

<b>1. Contact Person</b>	<b>Email</b>	<b>Phone Number(s)</b>
Annette Roth	annette.roth@arts.wa.gov	360-252-9982
<b>Dates of Work Performed</b>	<b>Company Name &amp; Address</b>	<b>Description &amp; Size of Company</b>
6/24/2022-9/20/2022	WA Arts Commission (ArtsWA)	<p><b>Mission:</b> The Arts Commission is a catalyst for the arts, advancing the role of the arts in the lives of individuals and communities throughout the state.</p> <p><b>Vision:</b> The arts thrive and are celebrated throughout Washington State, and are woven into the fabric of vital and vibrant communities.</p> <p>35+ Employees</p>
<b>Role, Responsibilities, and Description of Scope of Work Performed</b>		

- Project Managed an OCIO Policy 121 Feasibility Study for a Customer Relationship Management system
- Collected ArtsWA CRM business requirements
- Documented 10 core business processes for the organization to accomplish via a CRM system
- Conducted benchmarking for six organizations that had recently procured and implemented a CRM Solutions
- Prepared a Feasibility Study for ArtsWA
- Developed Recommended Implementation Approach
- Prepared a Decision Package for ArtsWA ~\$2.3M

<b>2. Contact Person</b>	<b>Email</b>	<b>Phone Number(s)</b>
Deane Shellman	deane.shellman@arts.wa.gov	360-252-9985
<b>Dates of Work Performed</b>	<b>Company Name &amp; Address</b>	<b>Description &amp; Size of Company</b>
6/24/2022-9/20/2022	WA Arts Commission (ArtsWA)	<p><b>Mission:</b> The Arts Commission is a catalyst for the arts, advancing the role of the arts in the lives of individuals and communities throughout the state.</p> <p><b>Vision:</b> The arts thrive and are celebrated throughout Washington State, and are woven into the fabric of vital and vibrant communities.</p> <p>35+ Employees</p>

#### **Role, Responsibilities, and Description of Scope of Work Performed**

- Project Managed an OCIO Policy 121 Feasibility Study for a Customer Relationship Management system
- Collected ArtsWA CRM business requirements
- Documented 10 core business processes for the organization to accomplish via a CRM system
- Conducted benchmarking for six organizations that had recently procured and implemented a CRM Solutions
- Prepared a Feasibility Study for ArtsWA
- Developed Recommended Implementation Approach
- Prepared a Decision Package for ArtsWA ~\$2.3M

<b>3. Contact Person</b>	<b>Email</b>	<b>Phone Number(s)</b>
Michael MacKillop	michael.mackillop@dsb.wa.gov	206-906-5520
<b>Dates of Work Performed</b>	<b>Company Name &amp; Address</b>	<b>Description &amp; Size of Company</b>

6/7/2022-Present	Department of Services for the Blind	<b>Mission:</b> Inclusion, Independence, and Economic Vitality for People with Visual Disabilities.  95+ Employees
<b>Role, Responsibilities, and Description of Scope of Work Performed</b>		
<ul style="list-style-type: none"> <li>• Actively conducting a Feasibility Study for Blind Entrepreneur Program expansion and optimization in WA state</li> <li>• Developed 22-23 supplemental budget decision package ~\$800k</li> <li>• Development 23-25 Biennium decision package for ~\$12M</li> </ul>		

## Schedule D Consultant Reference Form Brenda Hays

<b>1. VENDOR NAME:</b>	<b>INTEGRATED SOLUTIONS GROUP</b>
<b>2. CONSULTANT NAME:</b>	<b>BRENDA HAYS</b>

**3. CONSULTANT'S REFERENCES** (THESE ARE INDIVIDUAL **CONSULTANT REFERENCES**, NOT REFERENCES FOR THE VENDOR COMPANY)

DOR IS MOST INTERESTED IN REFERENCES FOR PROJECTS THAT ARE CLOSELY ALIGNED WITH THE SCOPE OF WORK DESCRIBED IN THIS WORK REQUEST.

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**LIMIT TO 3 REFERENCES; NO MORE THAN 1 PAGE PER REFERENCE.**

<b>1. Contact Person</b>	<b>Email</b>	<b>Phone Number(s)</b>
Annette Roth	annette.roth@arts.wa.gov	360-252-9982
<b>Dates of Work Performed</b>	<b>Company Name &amp; Address</b>	<b>Description &amp; Size of Company</b>
6/24/2022-9/20/2022	WA Arts Commission (ArtsWA)	<p><b>Mission:</b> The Arts Commission is a catalyst for the arts, advancing the role of the arts in the lives of individuals and communities throughout the state.</p> <p><b>Vision:</b> The arts thrive and are celebrated throughout Washington State and are woven into the fabric of vital and vibrant communities.</p> <p>35+ Employees</p>
<b>Role, Responsibilities, and Description of Scope of Work Performed</b>		

- Technical Lead on an OCIO Policy 121 Feasibility Study for a Customer Relationship Management system
- Collected ArtsWA CRM business requirements
- Documented 10 core business processes for the organization to accomplish via a CRM system
- Conducted benchmarking for six organizations that had recently procured and implemented a CRM Solutions
- Prepared a Feasibility Study for ArtsWA
- Developed Recommended Implementation Approach
- Prepared a Decision Package for ArtsWA ~\$2.3M

<b>2. Contact Person</b>	<b>Email</b>	<b>Phone Number(s)</b>
Deane Shellman	deane.shellman@arts.wa.gov	360-252-9985
<b>Dates of Work Performed</b>	<b>Company Name &amp; Address</b>	<b>Description &amp; Size of Company</b>
6/24/2022-9/20/2022	WA Arts Commission (ArtsWA)	<p><b>Mission:</b> The Arts Commission is a catalyst for the arts, advancing the role of the arts in the lives of individuals and communities throughout the state.</p> <p><b>Vision:</b> The arts thrive and are celebrated throughout Washington State and are woven into the fabric of vital and vibrant communities.</p> <p>35+ Employees</p>

#### **Role, Responsibilities, and Description of Scope of Work Performed**

- Technical Lead on an OCIO Policy 121 Feasibility Study for a Customer Relationship Management system
- Collected ArtsWA CRM business requirements
- Documented 10 core business processes for the organization to accomplish via a CRM system
- Conducted benchmarking for six organizations that had recently procured and implemented a CRM Solutions
- Prepared a Feasibility Study for ArtsWA
- Developed Recommended Implementation Approach
- Prepared a Decision Package for ArtsWA ~\$2.3M

<b>3. Contact Person</b>	<b>Email</b>	<b>Phone Number(s)</b>
Julie Moreau	jlmoreau02@gmail.com	763-242-4700
<b>Dates of Work Performed</b>	<b>Company Name &amp; Address</b>	<b>Description &amp; Size of Company</b>

1/2002 – 1/2009	UnitedHealth Group 9900 Bren Road East UnitedHealth Group Center Minnetonka, MN 55343	U.S. Based Healthcare and Wellness company. Est: 150,000
<b>Role, Responsibilities, and Description of Scope of Work Performed</b>		
<ul style="list-style-type: none"> <li>• Managed the DR strategy of UHG's portal applications including architecture recommendations and business requirements. This included business impact, high availability architecture, capacity, growth, documentation, project management, M&amp;A, ITIL compliancy, and annual exercise testing of recovery plans.</li> <li>• Designed and implemented DR processes and procedures, including DR Plans (DRPs) for re-establishing servers, databases, operating systems, M&amp;A, and critical.</li> <li>• Performed and analyzed disaster simulations for the prompt restoration of services.</li> <li>• Provided project management for the development and updating of DRPs in conjunction with the business, application, and infrastructure teams.</li> <li>• Assisted in the SDLC to ensure projects were designed to ensure DR capabilities were designed in alignment with the business need as assessed by their Business Continuity Plan (BCP) to provide adequate DR capability.</li> <li>• Provided investigation and analysis of current DR implementations (internal and external) then provided the strategy and recommendations for questioned critical applications.</li> <li>• Provided project management to the Culture Action Teams (CAT) of Enterprise-Wide Business Processes and Total Rewards as part of the "Our United Culture" Organizational Change Management program.</li> <li>• Led a cross-functional team in the identification and solutioning of employee reward opportunities and benefit improvements.</li> <li>• Led the Sales and Marketing teams in process improvements ranging from simple communication changes to architecting new ways of managing health plans, as well as promoting new management styles.</li> <li>• Led Quality Management definition, Metrics Production, Program Management, Project Management, M&amp;A integration, Tiger Team Management, Quality Control, Risk Analysis, Security, Problem and Availability Management.</li> <li>• Communicated outages to the enterprise, management of War Rooms, leadership of post-mortem sessions, and complete reporting of events.</li> <li>• Provided information and reporting to all levels of the enterprise, including written and spoken communication.</li> <li>• Managed process improvement Six Sigma projects as the Green Belt Leader, such as the expedited policies to process systems notifications through the Help Desk for both first call resolution as well as major impact assessment kicking off a Tiger Team.</li> <li>• Change Manager responsible for scheduling and managing all maintenance windows for four data centers and administration of Change Management website, application, and databases.</li> <li>• Project managed a data center physical move.</li> <li>• Created technical documentation for all data center operating manuals.</li> <li>• Developed daily, weekly, and monthly metrics for data center operations.</li> </ul>		

Schedule D Consultant Reference Form Robert J. Kennedy

**Schedule D**  
**Consultant Reference Form**

<b>1. VENDOR NAME:</b>	INTEGRATED SOLUTIONS GROUP
<b>2. CONSULTANT NAME:</b>	ROBERT J. KENNEDY

**3. CONSULTANT'S REFERENCES** (THESE ARE INDIVIDUAL **CONSULTANT REFERENCES**, NOT REFERENCES FOR THE VENDOR COMPANY)

DOOR IS MOST INTERESTED IN REFERENCES FOR PROJECTS THAT ARE CLOSELY ALIGNED WITH THE SCOPE OF WORK DESCRIBED IN THIS WORK REQUEST.

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**LIMIT TO 3 REFERENCES; NO MORE THAN 1 PAGE PER REFERENCE.**

<b>1. Contact Person</b>	<b>Email</b>	<b>Phone Number(s)</b>
Gasper Gulotta	gasper.gulotta@isg-nw.com	206-434-5607
<b>Dates of Work Performed</b>	<b>Company Name &amp; Address</b>	<b>Description &amp; Size of Company</b>
10/2015 to 3/2016	Continuant 5050 20th St E, Fife, WA 98424	Continuant is a Managed Services Provider (MSP) and Systems Integrator operating in the enterprise of Unified Communications and Collaboration (UCC) space. The organization specializes in PBX Maintenance and Migration, Microsoft Teams Calling and Meeting Rooms, and Audio and Visual systems.  300+ employees

**Role, Responsibilities, and Description of Scope of Work Performed**

Developed roadmap for RFP for the State of Washington NG911 project through the Washington state Emergency Management Division. Performed proof of concept on technologies for the proposal.

<b>2. Contact Person</b>	<b>Email</b>	<b>Phone Number(s)</b>
Jim Paige	jamespaige@comcast.net	206-859-0895

<b>Dates of Work Performed</b>	<b>Company Name &amp; Address</b>	<b>Description &amp; Size of Company</b>
11/2017 to 11/2019	Continuant 5050 20th St E, Fife, WA 98424	Continuant is a Managed Services Provider (MSP) and Systems Integrator operating in the enterprise of Unified Communications and Collaboration (UCC) space. The organization specializes in PBX Maintenance and Migration, Microsoft Teams Calling and Meeting Rooms, and Audio and Visual systems.  300+ employees
<b>Role, Responsibilities, and Description of Scope of Work Performed</b>		
<ul style="list-style-type: none"> <li>Worked design and implementation on Microsoft Teams deployment in a global environment supporting 26,000 users in 82 countries.</li> <li>Designed and deployed 1400 agent call center on Avaya 6.3 Communications Manager.</li> </ul>		
<b>3. Contact Person</b>	<b>Email</b>	<b>Phone Number(s)</b>
Brian Hall	bhall@hallcom1.com	253-213-6185
<b>Dates of Work Performed</b>	<b>Company Name &amp; Address</b>	<b>Description &amp; Size of Company</b>
2/17 to current	Continuant 5050 20th St E, Fife, WA 98424	Continuant is a Managed Services Provider (MSP) and Systems Integrator operating in the enterprise of Unified Communications and Collaboration (UCC) space. The organization specializes in PBX Maintenance and Migration, Microsoft Teams Calling and Meeting Rooms, and Audio and Visual systems.  300+ employees
<b>Role, Responsibilities, and Description of Scope of Work Performed</b>		
<ul style="list-style-type: none"> <li>Provided Level of Effort (LOE) documentation for design through implementation of voice over IP solutions installations, upgrades, and deployments. This LOE documentation served companies with a broad reach from centralized data centers that were US based and non-US based.</li> </ul>		

Schedule D Consultant Reference Form Tom Boatright

**Schedule D**  
**Consultant Reference Form**

<b>1. VENDOR NAME:</b>	INTEGRATED SOLUTIONS GROUP
<b>2. CONSULTANT NAME:</b>	TOM BOATRIGHT

**3. CONSULTANT'S REFERENCES** (THESE ARE INDIVIDUAL **CONSULTANT REFERENCES**, NOT REFERENCES FOR THE VENDOR COMPANY)

DOOR IS MOST INTERESTED IN REFERENCES FOR PROJECTS THAT ARE CLOSELY ALIGNED WITH THE SCOPE OF WORK DESCRIBED IN THIS WORK REQUEST.

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**LIMIT TO 3 REFERENCES; NO MORE THAN 1 PAGE PER REFERENCE.**

1. Contact Person	Email	Phone Number(s)
Cathie Ott	<a href="mailto:Cathie.Ott@hca.wa.gov">Cathie.Ott@hca.wa.gov</a>	360.725.2116
Dates of Work Performed	Company Name & Address	Description & Size of Company
2015 through Present	Health Benefit Exchange	<p><b>Mission:</b> Provide equitable, high-quality health care through innovative health policies and purchasing strategies.</p> <p><b>Vision:</b> A healthier Washington est. 2,300</p>
<b>Role, Responsibilities, and Description of Scope of Work Performed</b>		

- Master Person Index QA/TQR Project (Project Management), provided quality assurance and technical quality assurance to overall project delivery in line with OCIO Policy 121.
- Enterprise Data Warehouse QA/TQR Project, provided quality assurance to overall project delivery in line with OCIO Policy 121.
- Master Person Index Roadmap Project (Project Management), provided project management services in line with Project Management Body of Knowledge (PMBOK) best practices.
- HBE Healthplanfinder Project (Project Management), provided project management services in line with Project Management Body of Knowledge (PMBOK) best practices.

<b>2. Contact Person</b>	<b>Email</b>	<b>Phone Number(s)</b>
Cristie Fredrickson	<a href="mailto:Cristie.fredrickson@ofm.wa.gov">Cristie.fredrickson@ofm.wa.gov</a>	360.742.8712
<b>Dates of Work Performed</b>	<b>Company Name &amp; Address</b>	<b>Description &amp; Size of Company</b>
2010 through Present	Office of Financial Management	The Office of Financial Management provides vital information, fiscal services and policy support that the governor, Legislature, and state agencies need to serve the people of Washington.  est. 1,300

#### **Role, Responsibilities, and Description of Scope of Work Performed**

- eTime QA Project, provided quality assurance to overall project delivery in line with OCIO Policy 121.
- eHUB QA Project, provided quality assurance to overall project delivery in line with OCIO Policy 121.
- ECY M&M QA Project, provided quality assurance to overall project delivery in line with OCIO Policy 121.
- DSHS ESAR QA, provided quality assurance to overall project delivery in line with OCIO Policy 121.
- DSHS MAPP QA, provided quality assurance to overall project delivery in line with OCIO Policy 121.
- ECY M365 Feasibility Study, provided a feasibility study for a Microsoft 365 implementation.
- OFM One Washington Program, provided project management services in line with Project Management Body of Knowledge (PMBOK) best practices.

<b>3. Contact Person</b>	<b>Email</b>	<b>Phone Number(s)</b>
Vincent Barrailler	<a href="mailto:bill.kehoe@cts.wa.gov">bill.kehoe@cts.wa.gov</a>	360.791.9861
<b>Dates of Work Performed</b>	<b>Company Name &amp; Address</b>	<b>Description &amp; Size of Company</b>
2015 through Present	Health Benefit Exchange	<p><b>Mission:</b> Provide equitable, high-quality health care through innovative health policies and purchasing strategies.</p> <p><b>Vision:</b> A healthier Washington</p> <p>Est Size: 1,300</p>
<b>Role, Responsibilities, and Description of Scope of Work Performed</b>		
<ul style="list-style-type: none"> <li>• System Integrator/Call Center Contract Assessment and Recommendations Project (Project Management) – Tom Boatright</li> <li>• Tom was the Project Manager for ISG's support of HBE's assessment and recommendations for the Exchanges renegotiations of their System Integrator and Call Center Contracts.Master Person Index Project (Quality Assurance and Technical Quality Review) – Tom Boatright <ul style="list-style-type: none"> <li>◦ Tom is the Project Manager for the MPI QA/TQR Project. Tom leads project delivery and interfaces with the Coalition Governance and Initiative Stakeholders.</li> </ul> </li> <li>• Master Person Index Roadmap Project (Project Management) – Tom Boatright <ul style="list-style-type: none"> <li>◦ Tom was the Technical Project Manager for the MPI Roadmap Project. Tom led and was responsible for ISG team delivery and was the primary lead for technical project deliverables.</li> </ul> </li> </ul>		

# Vendor Certification Executive Order 18-03 Worker's Rights form – Schedule E

Vendors must include with their Proposal a completed and signed Workers' Rights Certification, Schedule E

## SCHEDULE E VENDOR CERTIFICATION EXECUTIVE ORDER 18-03 – WORKERS' RIGHTS WASHINGTON STATE GOODS & SERVICES CONTRACTS

Pursuant to the Washington State Governor's Executive Order 18-03 (dated June 12, 2018), the Washington State Department of Revenue is seeking to contract with qualified entities and business owners who certify that their employees are not, as a condition of employment, subject to mandatory individual arbitration clauses and class or collective action waivers.

I hereby certify, on behalf of the firm identified below, as follows (check one):

**No MANDATORY INDIVIDUAL ARBITRATION CLAUSES AND CLASS OR COLLECTIVE ACTION WAIVERS FOR EMPLOYEES.** This firm does NOT require its employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses or class or collective action waivers.

OR

**MANDATORY INDIVIDUAL ARBITRATION CLAUSES AND CLASS OR COLLECTIVE ACTION WAIVERS FOR EMPLOYEES.** This firm requires its employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses or class or collective action waivers.

I hereby certify, under penalty of perjury under the laws of the State of Washington, that the certifications herein are true and correct and that I am authorized to make these certifications on behalf of the firm listed herein.

FIRM NAME: INTEGRATED SOLUTIONS GROUP  
firm



Name of Vendor – Print full legal entity name of

By:

Signature of authorized person

Tom Boatright

Print Name of person making certifications for firm

Title: Principal

Title of person signing certificate

Place: Olympia, WA

Print city and state where signed

Date: 10/07/2022

# Vendor Certification Wage Theft Prevention form – Schedule F

Vendors must include with their Proposal a completed and signed Wage Theft Prevention Certification, Schedule F.

## SCHEDULE F VENDOR CERTIFICATION

### WAGE THEFT PREVENTION – RESPONSIBLE BIDDER CRITERIA WASHINGTON STATE GOODS & SERVICES CONTRACTS

Prior to awarding a contract, agencies are required to determine that a bidder is a ‘responsible bidder.’ See RCW 39.26.160(2) & (4). Pursuant to legislative enactment in 2017, the responsible bidder criteria include a contractor certification that the contractor has not willfully violated Washington’s wage laws. See Chap. 258, 2017 Laws (enacting SSB 5301).

I hereby certify, on behalf of the firm identified below, as follows (check one):

**NO WAGE VIOLATIONS.** This firm has NOT been determined by a final and binding citation and notice of assessment issued by the Washington Department of Labor and Industries or through a civil judgment entered by a court of limited or general jurisdiction to have willfully violated, as defined in [RCW 49.48.082](#), any provision of RCW chapters [49.46](#), [49.48](#), or [49.52](#) within three (3) years prior to the date of the above-referenced solicitation date.

OR

**VIOLATIONS OF WAGE LAWS.** This firm has been determined by a final and binding citation and notice of assessment issued by the Washington Department of Labor and Industries or through a civil judgment entered by a court of limited or general jurisdiction to have willfully violated, as defined in [RCW 49.48.082](#), any provision of RCW chapters [49.46](#), [49.48](#), or [49.52](#) within three (3) years prior to the date of the above-referenced solicitation date.

I hereby certify, under penalty of perjury under the laws of the State of Washington, that the certifications herein are true and correct and that I am authorized to make these certifications on behalf of the firm listed herein.

FIRM NAME: INTEGRATED SOLUTIONS GROUP

Name of Vendor – Print full legal entity name of firm

By:



Signature of authorized person

Tom Boatright

Print Name of person making certifications for firm

Title: Principal

Title of person signing certificate

Place: Olympia, WA

Print city and state where signed

Date: 10/07/2022

## Confidential Information List – Schedule G

*Vendors must include with their Proposal a completed Confidential Information list, Schedule G. If there is no information in the proposal which the Vendor desires to claim as confidential, state "No Confidential Information" on the first row of this form. When this form is submitted with a response of "No Confidential Information", DOR will not review the proposal for any Confidential Information notations.*

**Vendor Name: Integrated Solutions Group**

ISG is not requesting any RFP content submitted to be considered confidential information.

# Appendix A: Draft Implementation Schedule

Task Name	Duration	Start	Finish	Predecessors	Resource Names
Project Start	0 days	Wed 12/14/22	Wed 12/14/22		
Finalize the project work plan	10 days	Wed 12/14/22	Wed 12/28/22		
Draft Approach Document	5 days	Wed 12/14/22	Tue 12/20/22		Emily Davis
Document Project Management Plan	5 days	Wed 12/14/22	Tue 12/20/22		Emily Davis
Develop Deliverable Outlines & Formats	4 days	Wed 12/14/22	Mon 12/19/22		
Background & Needs Assessment	4 days	Wed 12/14/22	Mon 12/19/22		Emily Davis
Market Research Results	4 days	Wed 12/14/22	Mon 12/19/22		Emily Davis
High-level Implementation Plan and Approach	4 days	Wed 12/14/22	Mon 12/19/22		Emily Davis
Feasibility Study	4 days	Wed 12/14/22	Mon 12/19/22		Emily Davis
Write Deliverable Expectations Document (DED)	5 days	Tue 12/20/22	Tue 12/27/22	6,7,8,9	Emily Davis
Deliverable 1: Project Management Plan and Schedule	5 days	Tue 12/20/22	Wed 12/28/22	3	
Submit Deliverable 1: Project Management Plan and Schedule	0 days	Tue 12/20/22	Tue 12/20/22		Emily Davis
Approval	5 days	Wed 12/21/22	Wed 12/28/22	12	DOR - ES,CM
Gather & Document Requirements	40 days	Wed 12/14/22	Fri 2/10/23		
Document Business Processes for Current State	30 days	Wed 12/14/22	Fri 1/27/23		
Align on Core Processes to Document	5 days	Wed 12/14/22	Tue 12/20/22		Emily Davis
Document Core Processes	25 days	Wed 12/21/22	Fri 1/27/23	16	Robert Kennedy,Brenda Ingwald
Gather Requirements	25 days	Wed 12/14/22	Fri 1/20/23		
By Stakeholder	25 days	Wed 12/14/22	Fri 1/20/23		
By Priority Features	25 days	Wed 12/14/22	Fri 1/20/23		
Draft Contact Center Universal Requirements Document	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Ingwald
Align Problems and Requirements	2 days	Mon 1/23/23	Tue 1/24/23	61	
Long Hold Times	2 days	Mon 1/23/23	Tue 1/24/23	61	Emily Davis,Robert Kennedy,Brenda Ingwald
Disconnected Calls	2 days	Mon 1/23/23	Tue 1/24/23	61	Emily Davis,Robert Kennedy,Brenda Ingwald
Customer Satisfaction	2 days	Mon 1/23/23	Tue 1/24/23	61	Emily Davis,Robert Kennedy,Brenda Ingwald
Other Identified Challenges	2 days	Mon 1/23/23	Tue 1/24/23	61	Emily Davis,Robert Kennedy,Brenda Ingwald
Facilitate Universal Requirements DOR Customization Session	3 days	Wed 1/25/23	Fri 1/27/23	63,64,65	Emily Davis,Robert Kennedy,DOR SMEs,Brenda Ingwald
Validate Mapping of Requirements to Impacted Stakeholder	3 days	Wed 1/25/23	Fri 1/27/23	63,64,65	Emily Davis,Robert Kennedy,DOR SMEs,Brenda Ingwald
Document Recommendations To-date	5 days	Mon 1/30/23	Fri 2/3/23	67,68	Emily Davis,Robert Kennedy,Brenda Ingwald
Deliverable 2: DOR Business Background and Needs Assessment	5 days	Fri 2/3/23	Fri 2/10/23		
Submit Deliverable 2: DOR Business Background and Needs Assessment	0 days	Fri 2/3/23	Fri 2/3/23	69	Emily Davis
Approval	5 days	Mon 2/6/23	Fri 2/10/23	71	CM,DOR-ES
Task Name	Duration	Start	Finish	Predecessors	Resource Names
Conduct Market Research	60 days	Wed 12/14/22	Mon 3/13/23		
Identify Benchmarking Opportunities	35 days	Wed 12/14/22	Fri 2/3/23	71FF	Emily Davis,DOR-ES
Benchmark 1-15 Organizations	20 days	Mon 2/6/23	Mon 3/6/23	74	Emily Davis,Robert Kennedy,Brenda Ingwald
Document Market Research	5 days	Tue 3/7/23	Mon 3/13/23	75	Emily Davis,Robert Kennedy,Brenda Ingwald
Conduct Fit/Gap Analysis	35 days	Mon 1/30/23	Mon 3/20/23		
Facilitate Vendor/Solution Assessment Against Universal Requirements Document	30 days	Mon 1/30/23	Mon 3/13/23	67	Emily Davis
Build Out Cost Benefit Analysis	30 days	Mon 1/30/23	Mon 3/13/23	67	Emily Davis
Deliverable 3: Market Research Results Documentation	5 days	Mon 3/13/23	Mon 3/20/23		
Submit Deliverable 3: Market Research Results Documentation	0 days	Mon 3/13/23	Mon 3/13/23	76,78	Emily Davis
Approval	5 days	Tue 3/14/23	Mon 3/20/23	81	DOR - ES,CM
Develop an Implementation Plan	14 days	Tue 3/14/23	Fri 3/31/23		
Approach	8 days	Tue 3/14/23	Thu 3/23/23	81	Emily Davis,Robert Kennedy,Brenda Ingwald
Timeline	8 days	Tue 3/14/23	Thu 3/23/23	81	Emily Davis,Robert Kennedy,Brenda Ingwald
Lessons Learned	8 days	Tue 3/14/23	Thu 3/23/23	81	Emily Davis,Robert Kennedy,Brenda Ingwald
Present Implementation Approach to DOR Steer Co.	1 day	Fri 3/24/23	Fri 3/24/23	86	
Deliverable 4: High-level Implementation Plan and Approach	5 days	Fri 3/24/23	Fri 3/31/23		
Submit Deliverable 4: High-level Implementation Plan and Approach	0 days	Fri 3/24/23	Fri 3/24/23	87	Emily Davis
Approval	5 days	Mon 3/27/23	Fri 3/31/23	89	DOR - ES,CM
Deliver Feasibility Study	14 days	Tue 3/14/23	Fri 3/31/23		
Draft Feasibility Study	8 days	Tue 3/14/23	Thu 3/23/23	81	Robert Kennedy,Emily Davis,Brenda Ingwald
Complete OCIO ITPA Tool - Risk Assessment	8 days	Tue 3/14/23	Thu 3/23/23	81	Emily Davis,Robert Kennedy,Brenda Ingwald
Present Feasibility Study to DOR Steer Co.	1 day	Fri 3/24/23	Fri 3/24/23	92	Emily Davis,Robert Kennedy,Brenda Ingwald
Deliverable 5: Completed Feasibility Study	5 days	Fri 3/24/23	Fri 3/31/23		
Submit Deliverable 5: Completed Feasibility Study	0 days	Fri 3/24/23	Fri 3/24/23	94	Emily Davis
Approve	5 days	Mon 3/27/23	Fri 3/31/23	96	DOR - ES,CM
Project End	0 days	Fri 3/31/23	Fri 3/31/23		

## Appendix B: Detailed Workload Build-up



Workload Build Up by Deliverable						Workload by Resource (Unit of Measure = Hours)			
Task Name	Duration	Start	Finish	Predecessors	Resource Names	Emily Davis	Robert Kennedy	Brenda Hays	Tom Boatright
Finalize the project work plan	10 days	Wed 12/14/22	Wed 12/28/22		Emily Davis				
Draft Approach Document	5 days	Wed 12/14/22	Tue 12/20/22		Emily Davis	8			
Document Project Management Plan	5 days	Wed 12/14/22	Tue 12/20/22		Emily Davis	8			
Develop Deliverable Outlines & Formats	4 days	Wed 12/14/22	Mon 12/19/22		Emily Davis	2.24			
Background & Needs Assessment	4 days	Wed 12/14/22	Mon 12/19/22		Emily Davis	2.24			
Market Research Results	4 days	Wed 12/14/22	Mon 12/19/22		Emily Davis	2.24			
High-level Implementation Plan and Approach	4 days	Wed 12/14/22	Mon 12/19/22		Emily Davis	2.24			
Feasibility Study	4 days	Wed 12/14/22	Mon 12/19/22		Emily Davis	2.24			
Write Deliverable Expectations Document (DED)	5 days	Tue 12/20/22	Tue 12/27/22	6,7,8,9	Emily Davis	6.02			
<b>Deliverable 1: Project Management Plan and Schedule</b>	<b>5 days</b>	<b>Tue 12/20/22</b>	<b>Wed 12/28/22</b>	<b>3</b>					
Submit Deliverable 1: Project Management Plan and Schedule	0 days	Tue 12/20/22	Tue 12/20/22		Emily Davis				
Approval	5 days	Wed 12/21/22	Wed 12/28/22	12	GOR - ES,CM				
					Deliverable Cost	30.98			
						\$6,661.20			

Task Name	Duration	Start	Finish	Predecessors	Resource Names	Workload by Resource (Unit of Measure = Hours)			
						Emily Davis	Robert Kennedy	Brenda Hays	Tom Boatright
Gather & Document Requirements	40 days	Wed 12/14/22	Fri 2/10/23						
Document Business Processes for Current State	30 days	Wed 12/14/22	Fri 1/27/23						
Align on Core Processes to Document	5 days	Wed 12/14/22	Tue 12/20/22		Emily Davis				
Document Core Processes	25 days	Wed 12/21/22	Fri 1/27/23	16	Robert Kennedy,Brenda Hays	55	55	55	8
Gather Requirements	25 days	Wed 12/14/22	Fri 1/20/23						
By Stakeholder	25 days	Wed 12/14/22	Fri 1/20/23						
DOR IT	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	2	2	2	
Contact Center Employees	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	2	2	2	
Non-Contact Center DOR Employees	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	2	2	2	
Future: Overflow Contact Center DOR Employees	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	2	2	2	
Designated SME's (12)	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	2	2	2	
By Priority Features	25 days	Wed 12/14/22	Fri 1/20/23						
Automation	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Automated Call Distribution	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Internet Faxing	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Advanced Call Routing	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Integrated Predictive Dialing	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Quality of Service (VoIP)	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Outbound Caller ID - Configurable	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Virtual Queuing/Scheduled Call Back	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Scalability to Non Call Center DOR Employees	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Inbound/outbound/long distance	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Chatbot Framework (Bot and Live)	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Artificial Intelligence	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Physical Location Requirements	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Security	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Data Privacy	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Compatible with DOR's Computing Environment	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Scalability for 5 year User and Call Volumes	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
SSO for Agents	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Call Monitoring and Recording for Quality Assurance	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Reliability of Connectivity	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Support Model with High Availability	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Reporting & Analytics	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	

**Workload by Resource  
(Unit of Measure = Hours)**

Task Name	Duration	Start	Finish	Predecessors	Resource Names	Emily Davis	Robert Kennedy	Brenda Hays	Tom Boatright
Interactive Voice Response	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Natural language voice recognition	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Agent Coaching/Agent Shadowing	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Integration with on-Prem/Cloud	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Workforce Management	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
CTI Integration - Customer "Pops"	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
IVR Integration with Backoffice	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Extensibility - Integration Expansion Opportunities	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Support for Standardized Services (VOIP, SIP, and DOR's current IP PBX)	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Integration with Telephony	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Voicemail	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
E911 FCC Requirements	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Self-Service	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	1	1	1	
Draft Contact Center Universal Requirements Document	25 days	Wed 12/14/22	Fri 1/20/23		Robert Kennedy,Brenda Hays	8	8	8	2
<b>Align Problems and Requirements</b>	<b>2 days</b>	<b>Mon 1/23/23</b>	<b>Tue 1/24/23</b>	<b>61</b>					
Long Hold Times	2 days	Mon 1/23/23	Tue 1/24/23	61	Emily Davis,Robert Kennedy,Brenda Hays	1	1	1	
Disconnected Calls	2 days	Mon 1/23/23	Tue 1/24/23	61	Emily Davis,Robert Kennedy,Brenda Hays	1	1	1	
Customer Satisfaction	2 days	Mon 1/23/23	Tue 1/24/23	61	Emily Davis,Robert Kennedy,Brenda Hays	1	1	1	
Other Identified Challenges	2 days	Mon 1/23/23	Tue 1/24/23	61	Emily Davis,Robert Kennedy,Brenda Hays	4	4	4	4
Facilitate Universal Requirements DOR Customization Session	3 days	Wed 1/25/23	Fri 1/27/23	63,64,65	Emily Davis,Robert Kennedy,Brenda Hays,DOR SMEs	3	3	3	
Validate Mapping of Requirements to Impacted Stakeholder	3 days	Wed 1/25/23	Fri 1/27/23	63,64,65	Brenda Hays,Emily Davis,Robert Kennedy,DOR SMEs	3	3	3	
Document Recommendations To-date	5 days	Mon 1/30/23	Fri 2/3/23	67,68,69	Emily Davis,Robert Kennedy,Brenda Hays	2	2	2	2
<b>Deliverable 2: DOR Business Background and Needs Assessment</b>	<b>5 days</b>	<b>Fri 2/3/23</b>	<b>Fri 2/10/23</b>						
Submit Deliverable 2: DOR Business Background and Needs Assessment	0 days	Fri 2/3/23	Fri 2/3/23	70	Emily Davis				
Approval	5 days	Mon 2/6/23	Fri 2/10/23	72	CM,DOR-ES				
					Deliverable Cost	\$ 70,835.70	123	123	16

Workload Build Up by Deliverable							Workload by Resource (Unit of Measure = Hours)			
Task Name	Duration	Start	Finish	Predecessors	Resource Names	Emily Davis	Robert Kennedy	Brenda Hays	Tom Boatright	
Conduct Market Research	60 days	Wed 12/14/22	Mon 3/13/23							
Identify Benchmarking Opportunities	35 days	Wed 12/14/22	Fri 2/3/23	71FF	Emily Davis,DOR-ES		15			
Benchmark 1-15 Organizations	20 days	Mon 2/6/23	Mon 3/6/23		74	Emily Davis,Robert Kennedy,Brenda Hays		20	25	25
Document Market Research	5 days	Tue 3/7/23	Mon 3/13/23		75	Emily Davis,Robert Kennedy,Brenda Hays		8	8	8
Conduct Fit/Gap Analysis	35 days	Mon 1/30/23	Mon 3/20/23							
Facilitate Vendor/Solution Assessment Against Universal Requirements Document	30 days	Mon 1/30/23	Mon 3/13/23		67	Emily Davis		25	25	25
Build Out Cost Benefit Analysis	30 days	Mon 1/30/23	Mon 3/13/23		67	Emily Davis		18		4
<b>Deliverable 3: Market Research Results Documentation</b>	<b>5 days</b>	<b>Mon 3/13/23</b>	<b>Mon 3/20/23</b>							
Submit Deliverable 3: Market Research Results Documentation	0 days	Mon 3/13/23	Mon 3/13/23	76,78	Emily Davis					
Approval	5 days	Tue 3/14/23	Mon 3/20/23		81	DOR - ES,CM				
							86	58	58	6
						Deliverable Cost	\$ 39,517.40			
<b>Develop an Implementation Plan</b>	<b>14 days</b>	<b>Tue 3/14/23</b>	<b>Fri 3/31/23</b>							
Approach	8 days	Tue 3/14/23	Thu 3/23/23		81	Emily Davis,Robert Kennedy,Brenda Hays		4	1	1
Timeline	8 days	Tue 3/14/23	Thu 3/23/23		81	Emily Davis,Robert Kennedy,Brenda Hays		4	2	2
Lessons Learned	8 days	Tue 3/14/23	Thu 3/23/23		81	Emily Davis,Robert Kennedy,Brenda Hays		4	4	1
Present Implementation Approach to DOR Steer Co.	1 day	Fri 3/24/23	Fri 3/24/23		86			6		
<b>Deliverable 4: High-level Implementation Plan and Approach</b>	<b>5 days</b>	<b>Fri 3/24/23</b>	<b>Fri 3/31/23</b>							
Submit Deliverable 4: High-level Implementation Plan and Approach	0 days	Fri 3/24/23	Fri 3/24/23		87	Emily Davis				
Approval	5 days	Mon 3/27/23	Fri 3/31/23		89	DOR - ES,CM				
						Deliverable Cost	\$ 6,433.70	18	7	7
										3

Workload Build Up by Deliverable						Workload by Resource (Unit of Measure = Hours)			
Task Name	Duration	Start	Finish	Predecessors	Resource Names	Emily Davis	Robert Kennedy	Brenda Hays	Tom Boatright
<b>Deliver Feasibility Study</b>	<b>14 days</b>	<b>Tue 3/14/23</b>	<b>Fri 3/31/23</b>						
Draft Feasibility Study	8 days	Tue 3/14/23	Thu 3/23/23	81	Robert Kennedy,Brenda Hays,Emily Davis	24	24	24	8
Complete OCIO ITPA Tool - Risk Assessment	8 days	Tue 3/14/23	Thu 3/23/23	81	Emily Davis,Robert Kennedy,Brenda Hays	1	1	1	
Present Feasibility Study to DOR Steer Co.	1 day	Fri 3/24/23	Fri 3/24/23	92	Emily Davis,Robert Kennedy,Brenda Hays	8			
<b>Deliverable 5: Completed Feasibility Study</b>	<b>5 days</b>	<b>Fri 3/24/23</b>	<b>Fri 3/31/23</b>						
Submit Deliverable 5: Completed Feasibility Study	0 days	Fri 3/24/23	Fri 3/24/23	94	Emily Davis				
Approve	5 days	Mon 3/27/23	Fri 3/31/23	96	DOR - ES,CM				
					Deliverable Cost	\$ 16,144.70			
Project End	0 days	Fri 3/31/23	Fri 3/31/23		Workload Totals	290.5	213	213	33

## Benchmarking Interview Guide

This was an example benchmarking interview guide used to facilitate benchmarking interview sessions for the WA Arts Commission for their feasibility study for a new CRM solution.

Benchmarking sessions were completed for six organizations having recently purchased and implemented CRM solutions using this questionnaire.

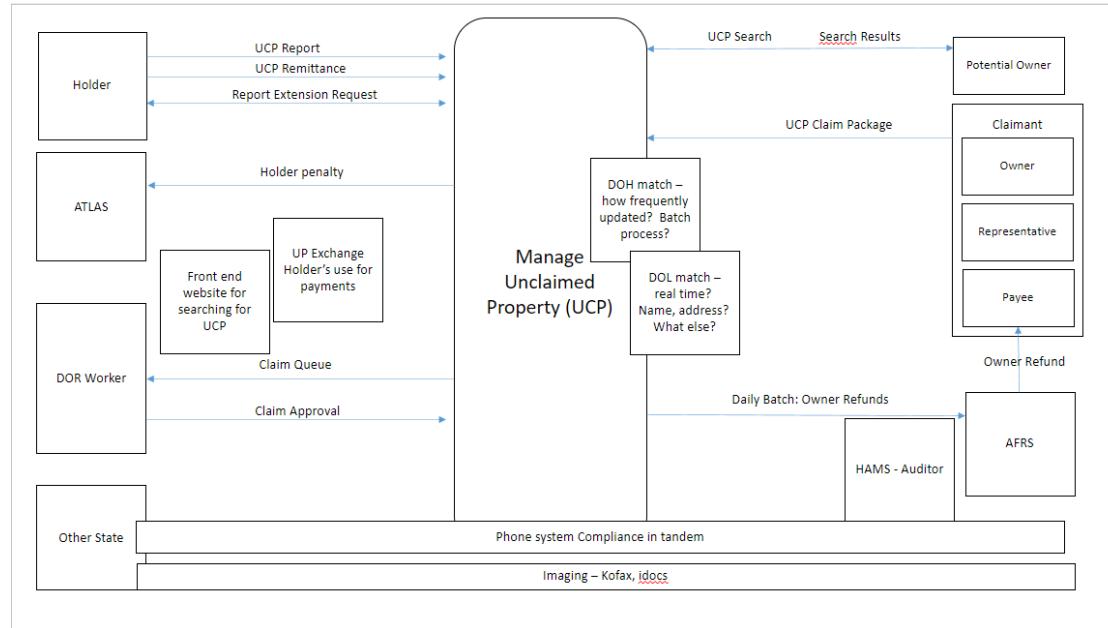
<b>Category</b>	<b>Question/Talking Point</b>
<b>Organization</b>	Please describe your organization? How you self-organize, who you serve... # of historical and active Employees: # of art assets: # of programs/department teams: State Budget Last 5 years: # of historical and active grantees: # of historical and active vendors: # of Historical and active Board Members: Rough Order of Magnitude (ROM) Average # of Outreach Campaigns per quarter across all programs:
<b>Implementation</b>	Vendor(s) and Platform?  How was the system procured?  Is the solution in place shared across organizations and functional areas?  Is there a project dashboard or charter that we might be able to see?
<b>Business Functionality</b>	Please describe the business functionality of the System and how it supports the following core processes. If you do not use the solution for the following process, please state that as well.  Grants Adjudication Contracts Management Art Collection Management Contact Management Outreach Campaigns Vendor Management Invoice Management Reporting Capabilities Data Management Data Quality Management
<b>Technical Functionality</b>	Application Layer, Configurable and modular  Please describe the systems security features, role based, NIST FedRAMP, other?  Please describe the OS platform, database, and development platform of the system?

<b>Category</b>	<b>Question/Talking Point</b>
	Does the solution interface with external applications?
<b>Costs</b>	Please describe the staffing and costs for the implementation:  What were the in-kind staffing costs?
	What was the actual, total project cost versus the budgeted project cost?
	Please describe the organizational structure, costs of M&O, and annual licensing?
<b>Contract</b>	What are the agreement terms: licensing, SaaS, PaaS, hosting and product, modified?
	Vendor performance?
<b>Size Comparison</b>	Number of Users?  Number of Art Pieces Managed? Number of Grants? Number of Grant Applications?
	Transactions Per Month/year?
	Reporting Users?
<b>Complexity Comparison</b>	Number of data exchanges  Types of data exchanges
	Degree of integration
<b>Implementation</b>	Timeline for Implementation?  Phased implementation? How?
	State Team and Vendor team utilized?
	Resourcing Lessons learned?
<b>Level of Effort</b>	On-going solution operation?  OCM requirements?
<b>Lessons Learned</b>	What are the lessons learned from Implementation and M&O?

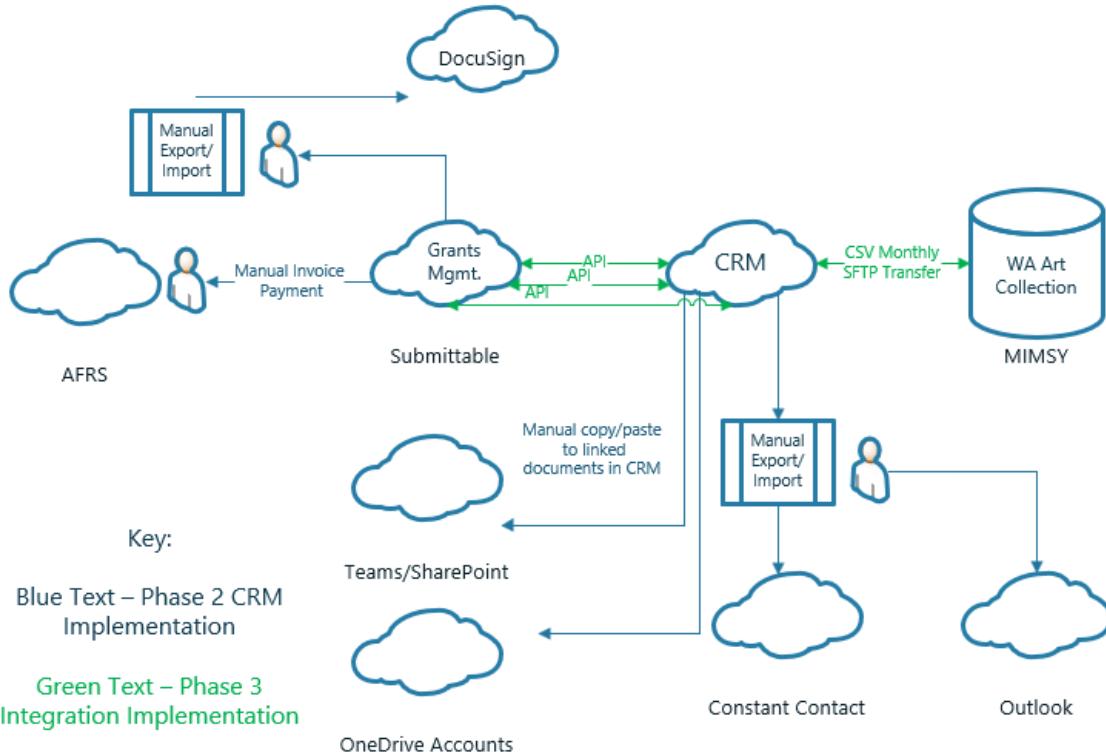
## Context Diagrams

Below are two examples of context diagrams produced by two ISG feasibility study projects.

### Example 1: DOR Manage Unclaimed Property Context Diagram



### Example 2: Arts WA Constituent Management Diagram





# WA State Arts Commission

Customer Relationship Management Feasibility Study

August 31, 2022

Version 6.0

## Document Source

This document, excluding any Appendices, is controlled through the Project Change Management process. To verify this document is the latest release, contact the project team for the latest release number and date. This document will be reviewed and updated periodically, during phase changes, and as needed. This document contains a revision history log. When changes occur, the document's revision history log will reflect an updated version number as well as the date, the owner making the change, and the change description will be recorded in the revision history log of the document.

## Revision History

<b>Version No.</b>	<b>Date</b>	<b>Author</b>	<b>Summary of Changes</b>
<b>1.0</b>	8/14/2022	ISG	Initial Draft
<b>2.0</b>	8/23/2022	ISG	Internal Quality Review
<b>3.0</b>	8/26/2022	ISG – ArtsWA - QA	Incorporation of Comments
<b>4.0</b>	8/31/2022	ISG	Incorporated comments received from the Decision Package and IT Addendum review.
<b>5.0</b>	9/9/2022	ISG	<ul style="list-style-type: none"> <li>• Updated the feasibility study to reflect updates to program representative staffing at 7 representatives.</li> <li>• Update CBA</li> <li>• Updated Risk Section with ITPA tool scoring</li> </ul>
<b>6.0</b>	9/13/2022	External QA Review	<ul style="list-style-type: none"> <li>• Edits to CBA section.</li> </ul>

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## Executive Summary

The Washington Arts Commission (ArtsWA) has a unique public service role focused on being a catalyst for the arts and advancing the role of the arts in the lives of individuals and communities throughout the state.

This Feasibility Study aims to evaluate and recommend alternatives for a Customer Relationship Management (CRM) software solution that, through an integrated, modular tool, meets the statutory requirements and business needs of ArtsWA. This feasibility study has concluded that there are several viable options in the market and has shifted to focus on how best to acquire services as the next, productive step in implementing a CRM software solution.

The arts should thrive, be celebrated throughout Washington State, and be woven into the fabric of vital and vibrant communities. A modern CRM tool will help enable ArtsWA to achieve its mission and vision using data-driven decision-making and modern operations practices that are efficient and effective; this technology change will move the organization away from its manual, time consuming tasks and make room for a strategic focus and improved customer service.

## Business Objectives

In addition to furthering the ArtsWA mission and vision, the objectives of this CRM investment are to:

- Enable the WA Arts Commission to, in near-real time, be able to evaluate who in Washington is being served and in what ways through the efficient application of technology.
- Once able to holistically see its constituents and gaps in outreach, ArtsWA hopes to gain new insights about how to better serve all Washingtonians.
- Having an enterprise view with consistently collected and stored data will enable higher quality decision-making.
- From an internal operations perspective, a CRM system will help ArtsWA build and transition to consistent work methods across programs and enable a more standard, high-quality experience for its stakeholders. For example, consistently tracking any desired accommodations needed by constituents.
- Moving from disparate data sources housed on local drives and shared drives to a centralized CRM will enable ArtsWA to be more responsive to inquiries from various constituents. This will change the response capabilities from days to minutes.
- In partnership with WaTech, ArtsWA is working on migrating off local share drives to cloud-based, efficient data storage solutions. A thoughtful migration of ArtsWA data is expected to be more cost-effective, scalable, and secure.
- Position ArtsWA to grow capacity through technology instead of continue labor growth.

## Recommendation

To meet ArtsWA's business needs for a Customer Relationship Management (CRM) software solution, this feasibility study recommends Software as a Service (SaaS) that is modular, configurable, and provides industry leading shared services for reporting, security, interface

and data exchanges, document management, and workflow management. There are multiple solutions in the market that meet ArtsWA's needs.

Furthermore, WA state Department of Enterprise Services (DES) encourages the use of strategic sourcing through Master Services Agreements for readily available goods and services; this enables strategic sourcing for WA state agencies and departments. For a CRM, there are options that meet ArtsWA's needs on DES master services agreements. Therefore, it is recommended that ArtsWA purchase using DES contract vehicles. For example, both Salesforce and Microsoft Dynamics solutions licensing are available through approved resellers and Systems Implementors can be contracted via DES master services agreements. This purchasing method provides access to solutions that meet all statutory, technical, and functional requirements and achieves the objective of strategic sourcing through DES.

For a complete discussion of the recommendation, refer to [Proposed Solution](#) and [Major Alternatives Considered](#). Detailed cost estimates are provided in the [Cost/Benefits Analysis](#) section and [Appendix C: Cost Build Up](#).

## Industry Overview

There are several platforms and vendors in the marketplace that are modular, configurable and include best of breed shared services. Some have been or are currently being implemented by other Washington agencies as well as other states Public Arts Commissions.

It was possible to benchmark six implementations in the marketplace to inform ArtsWA's understanding of the industry. These conversations deepened the confidence that CRM solutions are available; CRM solutions will meet ArtsWA's needs; and there are other state Art Commissions willing to help guide WA Arts Commission with future CRM implementation work.

The industry has two types of CRM implementation models. One model is where the implementation is done by the software provider (i.e., ClaritySoft). The second model is where implementations are done by authorized resellers who are also system implementers. The convenience contract allows access to the second model of implementations. The estimated costs are informed by those convenience contracts and conversations with authorized resellers.

## Expected costs

Cost Components	DDI Year 1 2023-2024	DDI Year 2 2024-2025	M&O* 2025-2026	M&O** 2026-2027	M&O 2027-2028
CRM Implementation	\$184,710.00	\$184,710.00			
Integration Costs		\$38,500.00		\$28,000.00	
In Kind Labor Costs	\$141,350.38	\$141,350.38			
Project Manager (.5 FTE)	\$208,000.00	\$208,000.00			
Data Consultant 4 (.5 FTE)	\$53,177.00	\$53,177.00	\$53,177.00	\$53,177.00	\$53,177.00

Cost Components	DDI Year 1 2023-2024	DDI Year 2 2024-2025	M&O* 2025-2026	M&O** 2026-2027	M&O 2027-2028
Organizational Change Management (.5 FTE)	\$208,000.00	\$208,000.00			
Quality Assurance (.35 FTE)	\$145,600.00	\$145,600.00			
Licensing Costs	\$44,100.00	\$44,100.00	\$44,100.00	\$44,100.00	\$44,100.00
Risk Management	\$18,471.00	\$18,471.00	\$18,471.00	\$18,471.00	\$18,471.00
Continuous Improvement	n/a	n/a	\$55,413.00	\$55,413.00	\$55,413.00
<b>Total Costs</b>	<b>\$1,003,408.38</b>	<b>\$1,041,908.38</b>	<b>\$171,161.00</b>	<b>\$199,161.00</b>	<b>\$171,161.00</b>

\* ArtsWA is expected to migrate off AFFRS to a Workday Financial solution approximately in or around 2025-2026, as part of the One WA program. There are no financial integrations recommended at this time for this software solution. Enhancements could come in the longer term for vendor management.

\*\*ArtsWA is expected to migrate to a Workday Grants solution, as part of the One WA program, in 2026-2027. This will require a reworked grant system integration solution. It is also expected that ArtsWA will also upgrade its art collections management system (MIMSY) in 2026-2027, requiring an updated Application Programming Interface (API) integration. Two API integrations are budgeted for this work.

## Benefits

There are many benefits to moving from manual processes to an efficient CRM software system. The key benefits this feasibility study highlights are that a CRM system:

- Enables building standard work methods to improve customer service
- Creates the opportunity for higher quality, data-driven decision making that is referenceable
- Enables new insights with enterprise-level data aggregation
- Improves response times to inquiries
- Houses data in a cost-effective, scalable, and secure manner while removing dependence on local share drives WaTech aims to retire
- Enables growth in ArtsWA capacity to serve through technology

## Risks

ArtsWA has been growing its program offerings and should scale to its expanded portfolio of programs in a systematic way through the implementation of a Customer Relationship Management (CRM) solution. The top five risks for consideration are:

1. Adoption Risk
2. System Implementation (SI) Quality
3. Dependence on One Washington
4. Interoperability Risk
5. Adequate Reporting Risk

These risks and their mitigation methods are outlined in the Risk Management section of this report. In addition to these implementation risks, ArtsWA completed the IT Project Assessment Tool and identified an overall project score of 45<sup>1</sup>. It is anticipated that this project will be viewed as a Major Project with a need for external quality assurance (QA). As such, ArtsWA has engaged QA throughout the feasibility study process and to complete a readiness assessment.

## Background and Needs Assessment

### Business environment

ArtsWA is beginning to experience a deepened understanding of its operations and the organization is ready for its first CRM. Technology has been applied to how ArtsWA manages its Grants with Submittable. This positive experience along with ArtsWA award winning implementation success with its niche museum asset management tool, MIMSY SQL database, have created the inspiration to pursue funding for its first CRM solution. ArtsWA has the interest and the ability to drive a CRM solution implementation.

There has been growth in the organization in employees and the desire to offer expanded programming for Washingtonians. ArtsWA is at a growth inflection point where manual, age-old processes are reaching their limits. Applying technology to how the organization interacts with Board Members, Legislators, Washingtonians, and other constituents is needed to systematically build a service level and an even more effective way of serving taxpayers. A modern relationship management tool can help deepen ArtsWA understanding of its stakeholders and serve as a foundation for deeper relationships.

### Business need(s)

Since 2017, ArtsWA has grown by 50%. ArtsWA has added 14 new positions and launched 4 new statewide programs. The systems in place five years ago were marginal in their efficiency at that time. Now, with the addition of new staff and programs, and more anticipated, it is increasingly urgent that ArtsWA have an adequate system for managing constituent information.

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<sup>1</sup> <https://ocio.wa.gov/it-projects/it-project-assessment-tool>

## Current State

ArtsWA is currently managing constituents through a set of contact spreadsheets that are not integrated and contain non-standard data. When a constituent connects with one area of the organization, it is unclear where else they are involved with ArtsWA programs. The lack of centralized, easily accessible data degrades the ability to provide comprehensive customer service. Furthermore, having a single constituent or organization working with multiple ArtsWA programs is common. ArtsWA wants to drive consistently collected information, such as language accommodations opportunities. Having a CRM solution can prove incredibly useful as a central repository for secure data collection and retrieval.

To illustrate the challenge, if staff in the Creative Districts program want to find information on arts organizations that have received grants from the agency within the past five years in Bremerton, they must make a request for the info from staff in the Grants to Organizations program. The Grants Management staff then must cull through multiple spreadsheets with that data, and then provide it in another spreadsheet. This is an inefficient way of doing business that could be streamlined by having a centralized database. ArtsWA desires an integrated software solution that can be used and accessed by multiple ArtsWA programs simultaneously. This will enable the agency to be more effective and efficient in its operations and provide better services to the state's creative economy.

## Business opportunities

The WA Arts Commission is eager to transform its disparate data sets into actionable information. Authorizing funds to purchase a CRM solution helps capitalize on many opportunities. The top 5 opportunities enabled by a CRM solution are presented below in table 1.

Table 1: Top 5 Business Opportunities

Business Opportunities	CRM Solution
Deeper Understanding of Our Operations	Data is a major asset and when used and treated as such, <b>new insights can be gained that influence organizational strategy and tactics. (Specifically, around Equity Diversity and Inclusion (EDI)).</b>
We have an opportunity to begin to measure and set our service standards	<b>Building consistent work methods and a single data source</b> to serve constituents is easier to accomplish with a centralized, modern system like a CRM that can help enable and enforce standards. This system will also serve as a source of truth for contact data versus multiple sources of the same information stored throughout the organization.
Improved decisions with data to support decisions	Having an enterprise lens will enable <b>higher quality decision-making</b> that is data driven.

Speeding up our answers with technology	Having a systematized way of collecting, storing, and mining data will enable the WA Arts Commission to <b>respond faster to inquiries</b> from the public, constituents, and legislators. It can also enable a workflow for the release of information inquiries with effective approval steps. This also <b>allows for time to be spent working on more strategic activities.</b>
Enabling WA IT Roadmap with efficient technology	Having a SaaS CRM to hold data about historical and current relationships allows for the WA Arts Commission to <b>store important data in a cost-effective, scalable, and secure manner while removing dependence on local store drives which WaTech aims to retire.</b>

## *Business service goals*

ArtsWA aims to respond to its constituents in a rapid and sensitive manner. One area the CRM solution can help ArtsWA with is by enabling the organization to begin to systematize and standardize operations. This foundation will help put in place tools to begin to measure and improve service goals. Having tools that do not have metadata about processes and do not enable workload tracking and activity do not currently enable easy service level understanding. A CRM is foundational in this regard. ArtsWA can begin to be more strategic in how it raises its service levels, when a CRM foundation exists.

## *Statutory requirements*

This feasibility study took a very conservative approach to statutory compliance and included requirements that would enable the system to secure category 4 data<sup>2</sup>. This includes requiring data to be encrypted at rest and in transit. Statutory requirements demanded the ability to have a SAML based single sign on capability. This also required the ability to support modern, REST API integrations.

Lastly, the organization has housed many of its data on spreadsheets in its G: and H: shared drives. The organization needs to migrate its data from shared drives to other, appropriate locations. One key location could be a CRM solution. Other data will be purged in line with the retention policy application and the remainder of the data will be migrated to SharePoint and other existing systems with proper role-based security administration.

The statutory requirements for this CRM solution center on the ability to protect data; this data is better protected inside a secure SaaS solution than on the current shared drives being retired by WaTech.

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<sup>2</sup> [https://www.eac.gov/sites/default/files/eac\\_assets/1/28/WA\\_SOS\\_RFI\\_2016\\_04\\_Exhibit\\_A\\_OCIO\\_Security.pdf](https://www.eac.gov/sites/default/files/eac_assets/1/28/WA_SOS_RFI_2016_04_Exhibit_A_OCIO_Security.pdf)

## Objectives

The WA Arts Commission is eager to transform its disparate data sets into a strategic asset. The CRM solution helps address many challenges. The top 5 problems addressed by a CRM solution are listed below in table 2.

Table 2: Top 5 Business Problems Addressed by a CRM Solution

Business Problems	CRM Solution
We do not know what we do not know because we have not had the ability to see our enterprise-level data aggregated.	When data is used and treated as a major asset, it can yield <b>new insights that influence organizational strategy and tactics. (Specifically, around Equity Diversity and Inclusion (EDI))</b> .
ArtsWA does not have a system to enable consistent delivery or automation to reinforce a standard process.	<b>Building consistent work methods and a single data source</b> to serve constituents is easier with a centralized, modern system like a CRM. This system is designed to enable and enforce standards. It will also serve as a “source of truth” for contact data, instead of multiple sources of the same information stored throughout the organization. This creates a foundation for building out self-service methods for constituents.
Lack of near-real-time data aggregating enterprise activity and Commission impact. Data must currently be searched out, manipulated, aggregated, and evaluated from disparate sources.	Having an enterprise lens will enable <b>higher quality decision-making</b> that is data driven.
ArtsWA is not able to be immediately responsive when inquiries are sent by constituents and legislators. Requests are labor-intensive and time-consuming to execute.	A systematized way of collecting, storing, and mining data will allow ArtsWA to be <b>more responsive to inquiries</b> from the public, constituents, and legislators. It can also enable a workflow for the release of information inquiries with effective approval steps.
Excessive amounts of data are housed in share drives. These drives need to be retired and their contents migrated to the cloud.	With a SaaS CRM, ArtsWA can <b>store important data in a cost-effective, scalable, and secure manner and remove dependence on local store drives that WaTech aims to retire.</b>

## Impacts

The CRM is expected to have the following major impacts for ArtsWA:

- The Executive and Administrative 'teams' ability to manage the Board of Director contacts and outreach will be matured with a CRM solution.
- The Finance and Operations department will be able to better track the vendors ArtsWA works with, through systematic tracking of who has worked with the organization historically and is available to serve the organization in the future.
- The Community Development program will be able to better track its interactions with Creative District contacts and track participants in the Change Leader Institute efficiently.
- The CRM solution will also be able to track Community investments by county, legislative district, and zip code.
- The Arts in Education program will also be prepared to better support its programs: Creative Start and Poetry Out Loud by having a holistic view of who interacts with the programs and from where in WA. Arts in Education will also have better information about all who interact with its program.
- Grants to Organizations will be able to import grants activity relative to the individuals who have applied for grants and received grants historically with sufficient demographic information to enable holistic reporting. This includes programs like: Grants to Organizations and Wellness, Arts & Military.
- Arts in Public Places will be able to be mapped to counties, legislative districts, and zip codes, enabling ArtsWA to easily communicate where WA art collection pieces are displayed across the state.
- Outside ArtsWA itself, implementing a CRM will also reduce the organization's dependence on its shared drives, which is a shared objective with WaTech. This is enabled with the opportunity to migrate data from spreadsheets on shared drives into a state-of-the-art CRM solution.

## Organizational Effects

ArtsWA Staff and Commissioners drew on their professional values to align the ArtsWA Strategic Plan with their work and vision. They used words like high-caliber, nimble, innovate, and leadership to describe ArtsWA's strengths and aspirations. These leaders wanted to increase impact through programs that support real constituent needs. Leadership named equity as fundamental for communities, arts organizations, and artists to succeed. To be equitable, an organization must understand its footprint in a state. This requires a system like a CRM.

A use case for a CRM was articulated as one county government official reached out wanting to know how many grants had been awarded for Thurston County for a given period. ArtsWA had to go through a deep data aggregation process that took up to a week to respond. The CRM solution, when integrated fully, is expected to provide this answer in near real time. ArtsWA expects more inquiries like this as it continues to add programs; a CRM will allow the

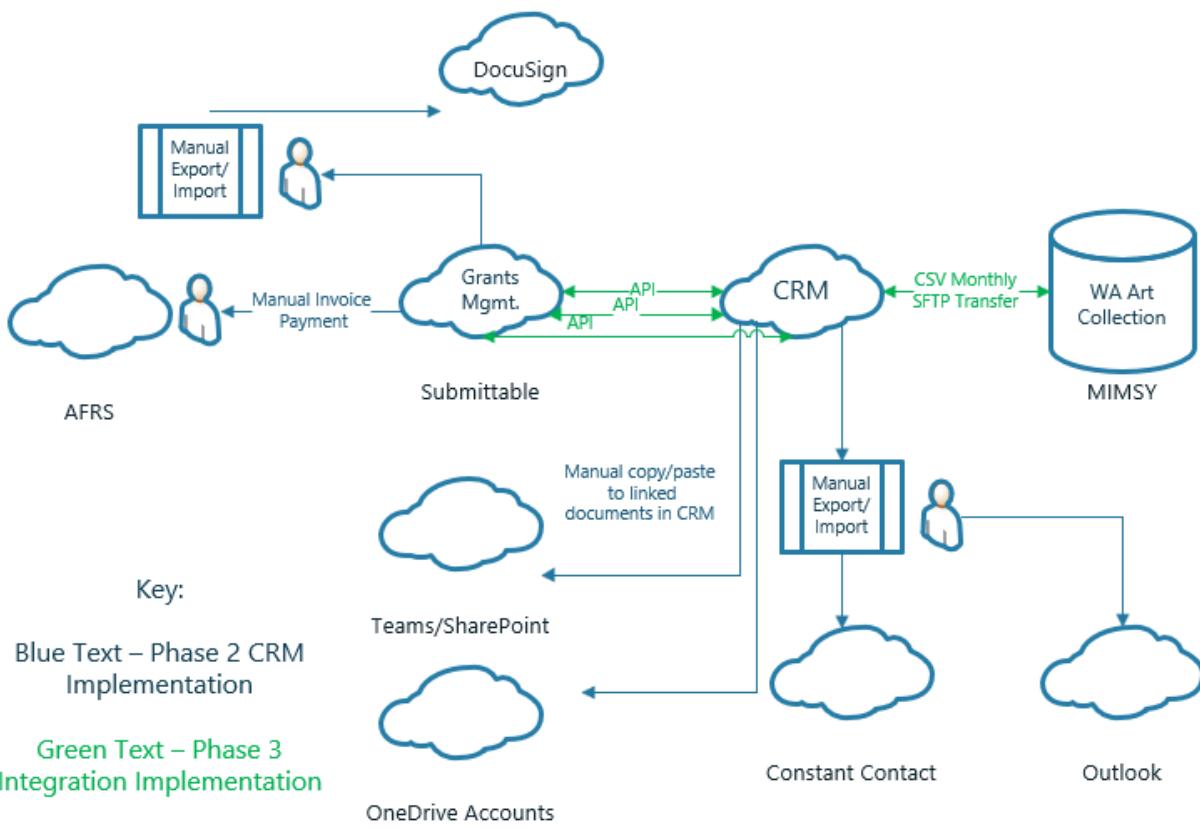
organization to leverage technology instead of adding additional staff to respond to growing inquiries about its operations.

Additionally, during the feasibility study, there were multiple instances where different programs shared that they do various activities differently with respect to how contacts are tracked, updated, and shared. Building a standardized process to help facilitate work will also help drive more consistent outcomes and reduce duplication of work to update contacts. A CRM enables the organization to move to one source of truth for information about constituents.

To facilitate the organization's adoption of the CRM solution, the leadership team will be staffing the CRM implementation project with representatives from each program and hiring a new Data Consultant 4 to serve as the ongoing System Administrator. These roles will be actively involved in the design and implementation. The style of implementation – one with prototyping and program representatives involved – also helps encourage adoption. To ensure broad awareness and actively drive adoption, an Organizational Change Management (OCM) resource is recommended half-time through the life of the program. Having a thoughtful, tailored change management strategy and tactical communications plan will prove highly effective for this style of systems implementation that touches every user in ArtsWA.

## Proposed Solution

The proposed solution is a CRM solution as the central system of the agency. This system will integrate with two other core systems in the agency: Submittable grant management software hosted in the cloud and the MIMSY SQL database that houses the WA state arts collection as a museum-style asset management tool. MIMSY is hosted on local servers and is an SQL database. The other components of ArtsWA's IT ecosystem in play are Constant Contact, DocuSign/Adobe Sign, Microsoft SharePoint, Microsoft Outlook, and Microsoft365 Teams. There are several systems that will use exported CRM data but will not have full integrations. The conceptual drawing of how the CRM system will fit into the existing IT Ecosystem is pictured below:



## CRM Solution Options

Six CRM SaaS Solutions were evaluated as part of benchmarking within this feasibility study. Each of the five vendors, with Microsoft presenting two options, were assessed against a set of requirements that represent typical CRM features in the industry. These requirements were aligned to ArtsWA needs through detailed interviews with ArtsWA programs. The full set of potential CRM requirements were deemed universal CRM requirements. ArtsWA did not require all potential features and a custom list was established with their needs.

The universal CRM requirements were weighted as High, Medium, Low, or not at all important to the WA Arts Commission. The requirements for statutory compliance required 100% for consideration as a feasible solution. The remaining requirements were categorized as functional and technical. Each vendor was scored using weights against the requirements matrix.

Each Vendor's sales team evaluated their solutions against the universal CRM requirements with detailed questions and answers following through multiple vendor conversations via email and over the phone.

The Summary Scoring is outlined below:

Vendor*	Salesforce (Appendix C)	Microsoft Power Platform (Appendix D)	Microsoft Dynamics (Appendix E)	Monday.com (Appendix F)	SAP CRM (Appendix G)
Functional Requirements	99%	64%	74%	93%	90%
Statutory Requirements	100%	100%	100%	100%	100%
Technical Requirements	97%	96%	96%	91%	97%

\*As noted in [Appendix H](#), ClaritySoft was removed from consideration due to Statutory deficiencies.

## Major functions to be provided

- **Contact/Constituent Tracking and Reporting:** The CRM Solution will enable the organization to track the historical and current constituents and their relationship with ArtsWA, whether they are organizations or individuals. This central system will also enable a sole source of truth for contact information improving the data management and enhancing the quality of information the organization uses for outreach.
- **Outreach Campaigns:** The CRM solution will support outreach campaigns by enabling ArtsWA to export current contacts into an importable file format for use with Constant Contact software. Many CRM solutions also have options to enable competing technology in the place of the Constant Contact software used today. It is conceivable that over time ArtsWA may explore those features and compare them to their current constant contact solution for potential long-term use. This is not recommended immediately, and instead should occur after the stabilization and optimization phase concluding in year two.
- **Vendor Tracking and Reporting:** The CRM Solution will enable the organization to track the historical and current vendors serving ArtsWA, whether they are organizations or individual artists.
- **Reporting:** ArtsWA would like to enable systematic reporting with a CRM solution. Specifically, ArtsWA would like to build the ability to pull a report that shows its holistic activities occurring across various geographic attributes (I.e., county, legislative district, and/or zip code). An example is presented in [Appendix A: Future Reporting Mockup](#).
- **Data Management:** Having centralized CRM software will allow for consistent tracking of data with role-based security that controls who can update data and how approvals are needed.
- **Art Collection Management Reporting:** The CRM system will be used to develop reports about where art pieces are located, specifically in what legislative districts the art is displayed. This will be enabled by a simple export and import job that will be automated between MIMSY and the CRM. This data will then have a report that illuminates all the art in a respective county, legislative district, or zip code. (See sample report in [Appendix A](#))
- **Grants Management Reporting:** The CRM system will be used to develop reports about grant applications through a thoughtful integration from the Submittable grants management system into the CRM solution. This can be achieved through an interface from the Grants Management solution to the CRM. Submittable will remain the system of record for grants activities, but the CRM solution will serve as an aggregating system for holistic reporting through an API integration. There will be minimal development with regards to grants management because of the expected Workday Grants solution coming from the One WA technology project.

## High-level implementation strategy

The implementation strategy is recommended to be four six-month phases:

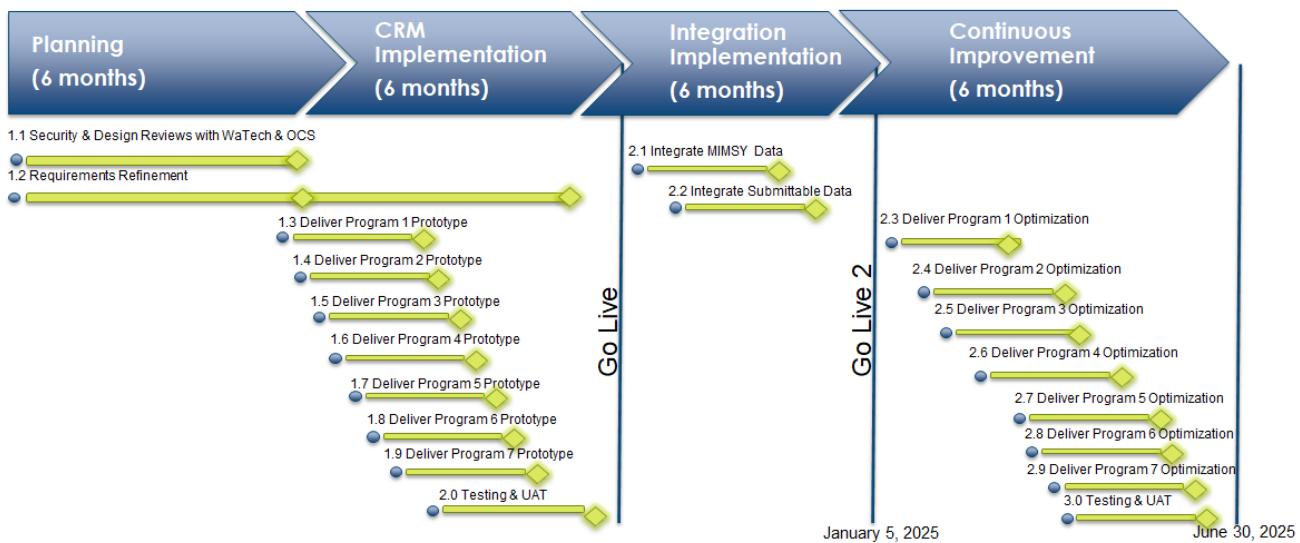
- **Planning:** The planning phase should be where detailed requirements/user stories for the CRM are refined by a selected Systems Implementor (SI) versed in CRM implementations.

- **CRM Implementation:** The CRM Implementation phase is where the SI builds prototypes against the previous phase's requirements. The implementation approach should include successive prototype production in a sandbox environment for iterative Program feedback. The prototype should be demonstrated for future users and feedback should be given against a tangible prototype.
- **Integration Implementation:** The third phase of the implementation is where the CRM should be integrated with the grants management solution followed by the MIMSY art collection solution. These interfaces have been investigated in detail as a part of the feasibility study. The MIMSY integration should be based on a script to export a data file to an SFTP site and a script to ingest the data from the SFTP site. The Submittable grants management integration should be an API integration between Submittable and the CRM using REST API protocols; this should not be an integration with 3<sup>rd</sup> party Zapier.
- **Stabilization and Optimization:** Once the broader IT ecosystem is integrated, the programs should have an opportunity to refine their solution in the final phase. This approach allows for learning, application, and quick wins, with a CRM solution in place within one year and fully refined solution by the end of year two.

Throughout all phases of the implementation plan outlined here, the team expects to have external Quality Assurance (QA) professionals providing oversight in addition to OCIO oversight. This will help to ensure the quality of the project progress in all stages. Each month the QA team will provide an updated view on the progress of the project with recommendations and accolades as appropriate. The Quality Assurance team has participated in the review of the feasibility study, see attached, and have provided ongoing guidance to achieve a high-quality output. The QA team provided constructive feedback for this decision package and the team has incorporated all feedback received. The QA team has also produced a readiness report, see attached, that speaks to how the organization should approach readiness for the CRM project. This proactive inclusion of QA demonstrated ArtsWA's commitment to delivering a high-quality project in all stages of the project delivery.

The implementation approach is depicted below and was estimated based on inputs from the benchmarking study conducted as part of the ArtsWA feasibility study. The typical timeline for implementation was 2.5 years; the below timeline was moderately adjusted to two years; this was because the average implementation timeframe for benchmarked organizations were lengthened due to COVID.

## CRM Solution Implementation Timeline



## Major Alternatives Considered

Market research concluded several viable options exist in the marketplace for a CRM as well as Systems Implementors that meet ArtsWA's needs. As such, the feasibility of a SaaS solution was proven very quickly and the feasibility study focus shifted into exploring what options should be considered for acquiring a SaaS solution to enable the CRM solution to progress in the most effective manner. The SaaS options are presented in more detail in appendices [C](#) through [H](#).

The alternatives for acquisition are presented in Table 3.

Table 3: Acquisition Options

Procurement Options	Pros	Cons	Comments
Department of Enterprise Services (DES) Mater Contract Purchase	<ul style="list-style-type: none"> <li>• Price of Acquisition Approach</li> <li>• Speed of Acquisition Cycle</li> <li>• Meets Commission's Requirements</li> <li>• Proven implementations exist with vendors on the convenience contract</li> <li>• Strategic Sourcing discounts are available</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced Competition</li> </ul>	The organizations on the DES convenience contract meet the 'organization's needs.
Open RFP	<ul style="list-style-type: none"> <li>• Meets Commission's Requirements</li> <li>• Increases Competition</li> <li>• Access to More Systems Implementation Vendors</li> </ul>	<ul style="list-style-type: none"> <li>• Cost of the Acquisition Approach</li> <li>• Slower Acquisition Cycle</li> </ul>	There are two organizations that are not represented on the DES convenience contract that can meet the 'organization's needs that were evaluated during the market research and fit-gap analysis.

## Conformity with Agency IT Standards

The movement to a CRM solution that is SaaS supports the WaTech's Strategic Goal #2<sup>3</sup>: Strengthen IT Architecture and Security by migrating to secure cloud solutions where possible. In addition, implementing a centralized CRM helps the organization migrate away from its dependence on share drives, which are slated to be retired.

This effort will help formalize the management of data and retention policies that the organization is allowed to gather and store. Moving from manual processes and disparate

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<sup>3</sup> [Strategic Plan brief\\_111220.pdf \(wa.gov\)](#)

data sources to a modern system will help build a highly secure, source of truth. This shift to a centralized source of truth is in line with ArtsWA's objective for technology modernization.

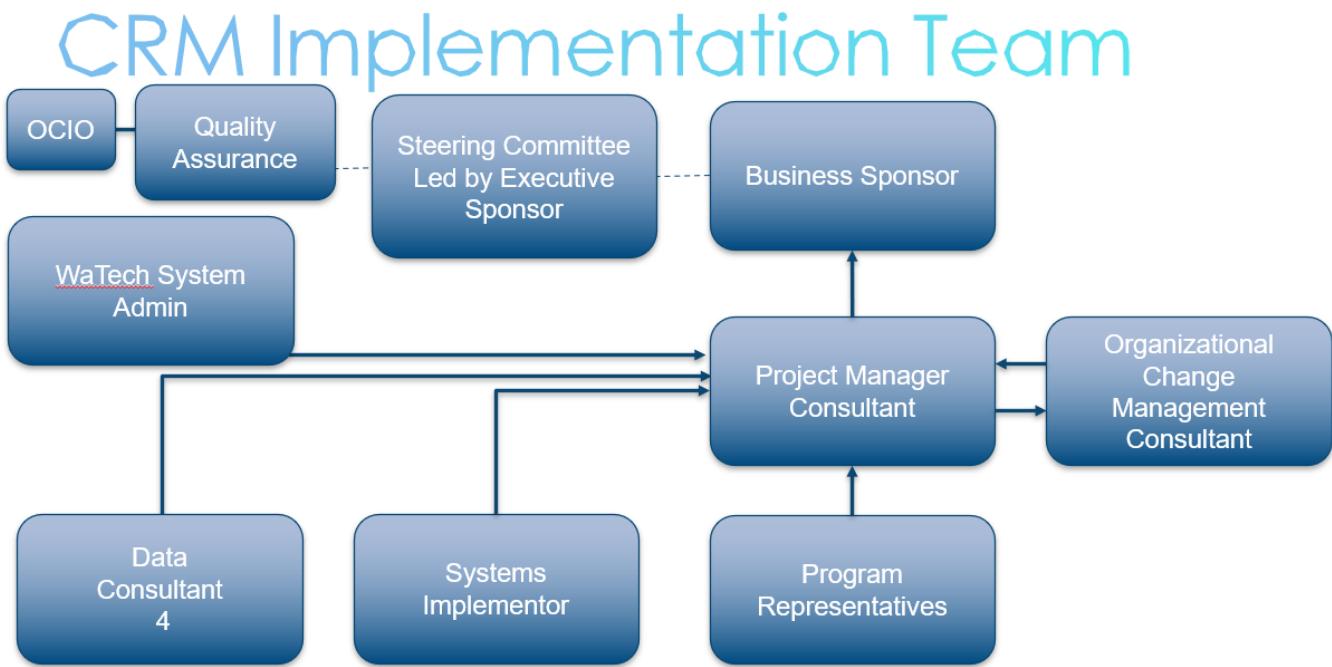
Moving to a cloud-based SaaS solution will enhance ArtsWA's security of data by moving to a Service Organization Control 2 (SOC2) compliant application that is Security Assertion Markup Language (SAML) 2.0 compliant for security protocols. In addition, many vendors offer servers that are hosted in Federal Risk and Authorization Management program (FedRAM) secure locations.

## Project Management and Organization

At this time, the Arts Commission does not have a centralized Project Management Office(PMO), or an individual versed in IT project management. They do not have a desire, as a small agency, to build an IT PMO. As such, there is a recommendation to acquire professional project management services to assist ArtsWA in implementing this IT project on ArtsWA's behalf. Where possible, acquiring a vendor that is also versed in Organizational Change Management would prove incredibly useful. The project requires 50% of a Full Time Equivalent (FTE)to deliver the project management aspects and 50% of an FTE to deliver the organizational change management consulting services.

The project manager should apply the best practices of Project Management Body of Knowledge and be versed in leading IT projects. The OCM professional should apply leading change management strategies and tactics.

The recommended project team organizational structure is pictured below:



The Data Consultant, WaTech System Admin, and Systems Implementor will serve as the technical arm of the delivery team. The Program Representatives will serve as the representative end users. The Project Management and OCM Consultant will work in tandem to deliver the project and ensure the adoption of the new CRM solution upon deployment. The Quality Assurance consultant will be independent and provide oversight of the implementation in line with leading quality assurance practices.

Organizing the project into four phases is presented in the next section of this feasibility study.

## Estimated Timeframe and Work Plan

The implementation timeframe is depicted below and was estimated based on inputs from the benchmarking study conducted as part of the ArtsWA feasibility study. The typical timeline for implementation was 2.5 years; the below timeline was moderately adjusted to two years. This was because the average implementation timeframe for benchmarked organizations were lengthened due to COVID.

Four six-month phases are recommended and should correspond with four gated funding points beginning from July 5, 2023. These gates are tentative until funding is secured and the OCIO, Office of Financial Management (OFM) and the assigned consultant agree to these gates.

Funding Gates Recommended:

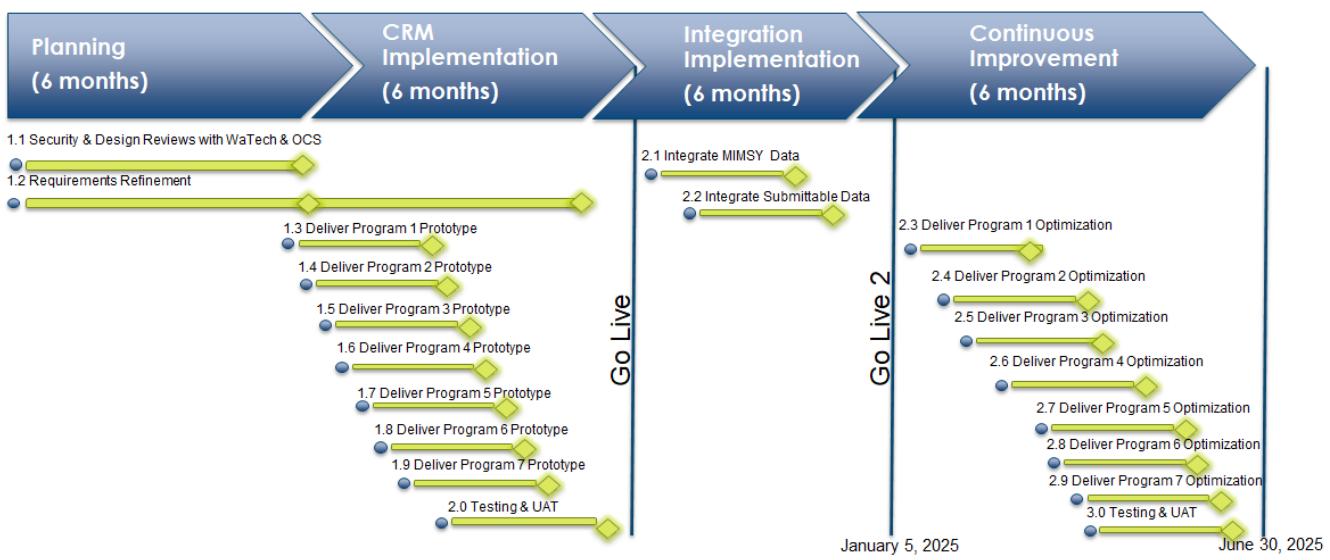
**Gate 1** – 100% Technical and Functional Requirements Complete at 6 months (continuous improvement will occur during prototyping), but the gate will occur at 6 months.

**Gate 2** – At one year, Five Program Prototypes Configured in the Sandbox environment; MIMSY Integration Design Documents approved by Office of Cyber Security; Submittable Integration Design Documents approved by Office of Cyber Security; and complete Testing of All Prototypes Production Release of five programs.

**Gate 3** – At 18 months, the MIMSY integration and Submittable integration should be complete.

**Gate 4** - At two years, the five original program configurations should be optimized with expanded grants and MIMSY data.

### CRM Solution Implementation Timeline



The first phase of the implementation should be planning, this will include a phase where the project management steps are put into place along with the OCM (Organizational Change Management) strategy and plan. During Planning requirements definition is the only gated funding requirement. Project Management and OCM dollars should be allocated in four equal

parts at each gate to ensure continuity of project delivery. The gates speak to deliverables the systems implementer should deliver in six month increments.

The CRM Implementation phase is designed to be a staggered delivery of seven program prototypes that are built in rapid succession after the long requirements gathering phase. This phase of the project should be highly interactive with end users having the opportunity to see prototypes come to life and try them out in the development sandbox.

Integration Implementation phase is devoted to connecting a functioning CRM to ArtsWA's broader IT (Information Technology) ecosystem. This will involve exporting a flat file to an SFTP site from MIMSY and an ingestion script. For the integration to Submittable, it is recommended to build an API solution.

The last phase, Stabilization and Optimization, will focus on aspects of the CRM that need to be fine-tuned after having used it in production for six months and connecting it to MISMY and Submittable. This is deemed stabilization and optimization because it is expected to be the focus of this phase.

The following roles will be involved in the project during the various tasks pictured in the above implementation timeline.

Role	Executive Sponsor	Business Sponsor	Data Consultant 4	Project Mgr.	Org. Change Mgr.	Quality Assurance	Program Representatives	Systems Implementer
1.1	X	X	X	X	X	X		X
1.2	X	X	X	X	X	X	X	X
1.3	X	X	X	X	X	X	X	X
1.4	X	X	X	X	X	X	X	X
1.5	X	X	X	X	X	X	X	X
1.6	X	X	X	X	X	X	X	X
1.7	X	X	X	X	X	X	X	X
1.8	X	X	X	X	X	X	X	X
1.9	X	X	X	X	X	X	X	X
2.0	X	X	X	X	X	X	X	X
2.1	X	X	X	X	X	X	X	X

Role	Executive Sponsor	Business Sponsor	Data Consultant 4	Project Mgr.	Org. Change Mgr.	Quality Assurance	Program Representatives	Systems Implementer
2.2	X	X	X	X	X	X	X	X
2.3	X	X	X	X	X	X	X	X
2.4	X	X	X	X	X	X	X	X
2.5	X	X	X	X	X	X	X	X
2.6	X	X	X	X	X	X	X	X
2.7	X	X	X	X	X	X	X	X
2.8	X	X	X	X	X	X	X	X
2.9	X	X	X	X	X	X	X	X
3.0	X	X	X	X	X	X	X	X

## Cost/Benefit Analysis (CBA)

The current cost of staff time spent working on activities that will be streamlined by a CRM are detailed below:

POSITION TITLE/CLASSIFICATION	Range	Step	SALARY	BENEFITS	OTHER	TOTAL	Time Currently Spent on CRM Activities (% of FTE)	Cost to Arts WA	SALARY	BENEFITS	OTHER
WMS Band II	WMS2	F	85,456	28,082	1,200	114,738	15%	\$ 17,210.70	\$ 12,818.40	\$ 2,581.61	180
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	25%	\$ 23,951.25	\$ 17,385.00	\$ 5,987.81	300
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	25%	\$ 23,951.25	\$ 17,385.00	\$ 5,987.81	300
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	25%	\$ 23,951.25	\$ 17,385.00	\$ 5,987.81	300
PROGRAM SPECIALIST 2	42	K	50,256	21,409	1,200	72,865	50%	\$ 36,432.50	\$ 25,128.00	\$ 18,216.25	600
PROGRAM SPECIALIST 2	42	K	50,256	21,409	1,200	72,865	50%	\$ 36,432.50	\$ 25,128.00	\$ 18,216.25	600
COMMUNICATIONS CONSULTANT 3	51	G	56,856	22,660	1,200	80,716	50%	\$ 40,358.00	\$ 28,428.00	\$ 20,179.00	600
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	50%	\$ 47,902.50	\$ 34,770.00	\$ 23,951.25	600
FISCAL ANALYST 2	44	K	52,776	21,886	1,200	75,862	25%	\$ 18,965.50	\$ 13,194.00	\$ 4,741.38	300
FISCAL ANALYST 3	42	K	50,256	21,409	1,200	72,865	25%	\$ 18,216.25	\$ 12,564.00	\$ 4,554.06	300
PROGRAM SPECIALIST 2	42	J	48,996	21,170	1,200	71,366	15%	\$ 10,704.90	\$ 7,349.40	\$ 1,605.74	180
WMS Band III	WMS3	F	96,635	30,202	1,200	128,037	10%	\$ 12,803.70	\$ 9,663.50	\$ 1,280.37	120
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	15%	\$ 14,370.75	\$ 10,431.00	\$ 2,155.61	180
ADMINISTRATIVE ASSISTANT 4	46	G	50,256	21,409	1,200	72,865	15%	\$ 10,929.75	\$ 7,538.40	\$ 1,639.46	180
PROGRAM SPECIALIST 2 (Vacant)	42	K	50,256	21,409	1,200	72,865	40%	\$ 29,146.00	\$ 20,102.40	\$ 11,658.40	480
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	10%	\$ 9,580.50	\$ 6,954.00	\$ 958.05	120
Total \$ 374,907.30 \$ 266,224.10 \$ 129,700.86 \$ 5,340.00											

The total cost of in-kind labor being used to deliver work products that will be supported by a CRM solution is estimated at approximately \$374,907.30 annually. The time to complete activities that are being done manually should decline by a minimum of 50% with the efficiency gained from a CRM. This capacity for current staff could be applied to future programs being stood up as well.

For example, WMS Band II that spends 15% of their time tracking and aggregating data will be reduced to approximately 7.5% of their work time. This will result in approximately 50% time savings for administrative work. This time can be spent on more value-added tasks for ArtsWA. This efficiency is depicted in detail below, reducing the administrative labor costs to approximately \$187,453.65 per year:

POSITION TITLE/CLASSIFICATION	Range	Step	SALARY	BENEFITS	OTHER	TOTAL	Time Currently Spent on CRM Activities (% of FTE)	Cost to Arts WA	SALARY	BENEFITS	OTHER
WMS Band II	WMS2	F	85,456	28,082	1,200	114,738	8%	\$ 8,605.35	\$ 6,409.20	\$ 645.40	90
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	13%	\$ 11,975.63	\$ 8,692.50	\$ 1,496.95	150
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	13%	\$ 11,975.63	\$ 8,692.50	\$ 1,496.95	150
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	13%	\$ 11,975.63	\$ 8,692.50	\$ 1,496.95	150
PROGRAM SPECIALIST 2	42	K	50,256	21,409	1,200	72,865	25%	\$ 18,216.25	\$ 12,564.00	\$ 4,554.06	300
PROGRAM SPECIALIST 2	42	K	50,256	21,409	1,200	72,865	25%	\$ 18,216.25	\$ 12,564.00	\$ 4,554.06	300
COMMUNICATIONS CONSULTANT 3	51	G	56,856	22,660	1,200	80,716	25%	\$ 20,179.00	\$ 14,214.00	\$ 5,044.75	300
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	25%	\$ 23,951.25	\$ 17,385.00	\$ 5,987.81	300
FISCAL ANALYST 2	44	K	52,776	21,886	1,200	75,862	13%	\$ 9,482.75	\$ 6,597.00	\$ 1,185.34	150
FISCAL ANALYST 3	42	K	50,256	21,409	1,200	72,865	13%	\$ 9,108.13	\$ 6,282.00	\$ 1,138.52	150
PROGRAM SPECIALIST 2	42	J	48,996	21,170	1,200	71,366	8%	\$ 5,352.45	\$ 3,674.70	\$ 401.43	90
WMS Band III	WMS3	F	96,635	30,202	1,200	128,037	5%	\$ 6,401.85	\$ 4,831.75	\$ 320.09	60
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	8%	\$ 7,185.38	\$ 5,215.50	\$ 538.90	90
ADMINISTRATIVE ASSISTANT 4	46	G	50,256	21,409	1,200	72,865	8%	\$ 5,464.88	\$ 3,769.20	\$ 409.87	90
PROGRAM SPECIALIST 2 (Vacant)	42	K	50,256	21,409	1,200	72,865	20%	\$ 14,573.00	\$ 10,051.20	\$ 2,914.60	240
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	5%	\$ 4,790.25	\$ 3,477.00	\$ 239.51	60
<b>Total</b> \$ 187,453.65 \$133,112.05 \$ 32,425.22 \$ 2,670.00											

Table 4: Cost of Growth with CRM and Without CRM

Scenarios	Cost of Labor Spent on CRM Activities						
	FY 2022			FY 2023			
Current State without CRM	\$345,761.30			\$584,334.30 <ul style="list-style-type: none"> <li>• New Recovery Program</li> <li>• New TCAP Program</li> <li>• Expanded AIE Program</li> </ul>			
Future State with CRM	50% x \$345,761.30 = \$172,880.65			50% x \$584,334.30 = \$292,171.65 <ul style="list-style-type: none"> <li>• Ability to adjust workload to accommodate program growth</li> </ul>			
<b>Total Cost Avoidance</b>	\$172,880.65			\$292,171.65			

The below table details the FY2023 proposed growth in labor and the time they will spend on CRM-like activities that could be avoided through the use of a CRM solution:

POSITION TITLE/CLASSIFICATION	Range	Step	SALARY	BENEFITS	OTHER	TOTAL	Time Currently Spent on CRM Activities (% of FTE)	Cost to Arts WA
WMS Band II	WMS2	F	85,456	28,082	1,200	114,738	15%	\$ 17,210.70
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	25%	\$ 23,951.25
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	25%	\$ 23,951.25
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	25%	\$ 23,951.25
PROGRAM SPECIALIST 2	42	K	50,256	21,409	1,200	72,865	50%	\$ 36,432.50
PROGRAM SPECIALIST 2	42	K	50,256	21,409	1,200	72,865	50%	\$ 36,432.50
COMMUNICATIONS CONSULTANT 3	51	G	56,856	22,660	1,200	80,716	50%	\$ 40,358.00
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	50%	\$ 47,902.50
FISCAL ANALYST 2	44	K	52,776	21,886	1,200	75,862	25%	\$ 18,965.50
FISCAL ANALYST 3	42	K	50,256	21,409	1,200	72,865	25%	\$ 18,216.25
PROGRAM SPECIALIST 2	42	J	48,996	21,170	1,200	71,366	15%	\$ 10,704.90
WMS Band III	WMS3	F	96,635	30,202	1,200	128,037	10%	\$ 12,803.70
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	15%	\$ 14,370.75
ADMINISTRATIVE ASSISTANT 4	46	G	50,256	21,409	1,200	72,865	15%	\$ 10,929.75
WMS Band I	WMS1	F	69,540	25,065	1,200	95,805	10%	\$ 9,580.50
PROGRAM SPECIALIST 2 (AIM)	42	K	50,256	21,409	1,200	72,865	40%	\$ 29,146.00
WMS Band I (TCAP)	WMS1	F	69,540	25,065	1,200	95,805	25%	\$ 23,951.25
PROGRAM SPECIALIST 2 (REC)	42	K	50,256	21,409	1,200	72,865	50%	\$ 36,432.50
MANAGEMENT ANALYST 4 (REC)	60	F	69,264	25,012	1,200	95,476	25%	\$ 23,869.00
PROGRAM SPECIALIST 2 (TCAP)	42	K	50,256	21,409	1,200	72,865	50%	\$ 36,432.50
PROGRAM SPECIALIST 2 (TCAP)	42	K	50,256	21,409	1,200	72,865	50%	\$ 36,432.50
PROGRAM SPECIALIST 2 (AIE)	42	K	50,256	21,409	1,200	72,865	50%	\$ 36,432.50
ADMINISTRATIVE ASSISTANT 3 (AIE)	40	F	42,420	19,923	1,200	63,543	25%	\$ 15,885.75
							Total	\$ 584,343.30

The capacity that would be saved from a CRM solution in FY2023 would equate to 1.25 of an FTE. If ArtsWA avoided the hiring of one Program Specialist 2 for a program the annual cost savings would equate to \$72,865.00.

This cost avoidance would be less than the annual Maintenance and Operations (M&O) costs for a CRM solution long term, however, with additional growth in program activities the compounded ability to avoid future hiring would offset these maintenance costs. After three avoided hires, the average M&O costs would be fully offset. This is a practical expectation for ArtsWA in the long term.

Across the full enterprise, the new free time, that would have otherwise been spent tracking, aggregating data, and building information, can be used to strategize about how best to move ArtsWA's mission forward with the new information gleaned from a CRM. Beyond labor savings, the benefit from this investment is purely opportunity cost to further the ArtsWA mission.

## Risk Management

Implementation risks are outlined in this section along with their mitigation strategies. In addition to these risks, ArtsWA completed the IT Project Assessment Tool for agencies and identified an overall project score of 454. It is anticipated that this project will be viewed as a Major Project with a need for external quality assurance (QA). As such, ArtsWA has engaged QA throughout the feasibility study process and to complete a readiness assessment.

The following key risks should be managed actively throughout the life of the project with external QA oversight per OCIO Policy 121:

- **Adoption Risk:** Building a system and adopting the use of a system are two different outcomes. ArtsWA understands that changing human behavior is challenging and breaking habits that have formed over two decades requires expertise. A key mitigation strategy for this project is procuring an OCM resource that can help enable rapid adoption. Having the OCM resource in place alongside the project's full duration will also help to encourage a thoughtful change management strategy. The implementation is designed to allow flexibility in the system, which helps guide adoption. Having program representatives guide and influence prototypes in two phases will be helpful to ensure the system is designed with future user input. This high involvement approach will also lessen resistance to adoption.
- **System Implementation (SI) quality:** throughout the benchmarking work it became clear that although many technology solutions are very mature and effective, there have been inconsistencies in the quality of Systems Implementors hired to implement CRM Solutions. The CRM solution is only as effective as it is configured and designed to be for organizations. As such, it is recommended that ArtsWA leverage the Department of Enterprise (DES) Master Services Agreements to secure support for Cloud Solution. These suppliers have been vetted for quality and security capabilities. This

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<sup>4</sup> <https://ocio.wa.gov/it-projects/it-project-assessment-tool>

prequalification mitigates risks and controls costs through strategic sourcing by avoiding open RFP costs.

- **Dependence on One Washington:** The future implementation of Workday via the One WA Program is expected by the ArtsWA and OFM. ArtsWA assumes it will have the opportunity to implement Workday Financials and Workday Grants Management solutions in the future upon completion of the One WA program. It is estimated that ArtsWA would be able to implement the financial and grants solutions in phase 1A and 1B, respectively. The mitigation step is that ArtsWA is currently using Agency Financial Reporting System (AFRS) for its financials and Submittable for its grant solution, with three contracts in place for up to three years for its grants management software, Submittable. This feasibility study assumes the CRM will need to be integrated to existing systems and then reintegrated when Workday is implemented as a part of the successful transition to Workday.
- **Interoperability Risk:** The WA Arts IT ecosystem is intended to be integrated to accommodate a seamless set of workflows. At this time, there is some risk in the market regarding how to seamlessly integrate with Submittable and be able to report in a holistic way on grants management depending on the CRM solution selected. This risk was experienced and shared by the AZ Commission of the Arts that originally implemented with Submittable and Salesforce using a 3<sup>rd</sup> party integration solution called Zapier. The design of the AZ Arts Commission solution did not allow for adequate historical reporting and limited their horizon to the last three years versus the last five years. The AZ Arts Commission is moving their Grants Management workflow into a new solution because of how their CRM was architected. This risk can be addressed through manual reporting workarounds or leveraging an API-based integration that is designed more thoughtfully to enable reporting. The ArtsWA implementation should not use Zapier and should use an API to avoid this risk. Submittable and the CRMs (Customer Relationship Management) on convenience contract have REST API's.
- **Design for Reporting:** Several of the 'Commissions' objectives center on the ability to get data into a CRM and then reported on for decision making and analysis. Having solid requirements for what data needs to be reported on will help inform how the CRM solution should be configured and integrated with other systems. The organization is aware of the need to ensure that reporting requirements are defined and a key focal point. Beginning with the end in mind during the implementation will be key to mitigating this risk. An example report is included in [Appendix A](#) to provide an example goal for a county report.

## Conclusion

This Feasibility Study aims to evaluate and recommend alternatives for a Customer Relationship Management (CRM) software solution that, through an integrated, modular tool, meets the statutory requirements and business needs of ArtsWA. Several CRM solutions in the market meet ArtsWA needs. As such, the recommendation from this feasibility study is that the

ArtsWA team should use a master services agreement to procure their CRM system with the Department of Enterprise Services (DES) vetted vendors. Minor, incremental benefits are possible through an open bid process; however, they are not guaranteed. The added RFP (Request for Proposals) costs, estimated at approximately \$200,000.00 for a consulting fee, are not justified at this time. Lastly, the estimated costs represented in this feasibility study were derived from thoughtful benchmarking reviews as well as market input from potential vendors. The CRM solution is a solid investment, meeting the precise needs of the organization. The strategic sourcing of a solution by partnering with DES limits costs to the fullest extent.

## Appendix A: Future Reporting Mockup

*This sample report is for illustrative purposes.*

### Pierce County Activity Report: 2022

588 pieces of art are displayed in Pierce County: [588 Artworks](#)

333 active vendors have worked with the Arts Commission in 2022 from Pierce County.

1200 grant applications have been submitted from Pierce County.

200 grant awards have been made in Pierce County for a total of \$200,000.

## Appendix B: Cost Build Up

Implementation	Configuration	Configuration Multiplier	Duration (Weeks)	Total DDI Implementation Costs	Adjusted Cost	Licensing Costs
AZ Arts Commission	Low	1.25	6	\$ 24,000.00	\$ 30,000.00	\$ 2,340.00
WA Department of VA	High	0.75	312	\$ 1,600,000.00	\$ 1,200,000.00	Data Not Provided
SC Arts Commission (3 years)	Med	1	156	\$ 68,000.00	\$ 68,000.00	\$ 31,000.00
South Arts	Med	1	44	\$ 39,100.00	\$ 39,100.00	Data Not Provided
IL Arts Commission	Med	1	130	\$ 510,000.00	\$ 510,000.00	Data Not Provided
Average			130	\$ 448,220.00	\$ 369,420.00	

- Costs of a CRM SaaS implementation is a function of how much configuration a CRM solution requires. Low configuration solutions are lower cost. Higher configuration solutions are higher costs. Arts WA is expected to have a moderate or medium level of configuration, based on the way the organization completed its ranking of the universal CRM requirements matrix.
- Cost estimates for the systems implementation were derived from interviews with organizations that recently procured and implemented a CRM solution. Each organization's costs were adjusted to reflect the level of configuration they chose for their solution. If they were low configuration, to enable a normalized review they were increased by 25%. If a solution was highly configured, their costs were lowered by 25%. This is pictured below as a "configuration multiplier". This ultimately reduced the implementation average from \$448,200.00 to \$369,420.00. We expect this to be a reasonable cost over the course of the two years allocated for implementation. This is then split by two to arrive at the annual cost of \$184,710.00 per implementation year. A risk management factor was assigned as 10% of the total implementation costs to account for fluctuations in this figure that will arise from the unknown unknown as recommended by the Project Management Body of Knowledge (PMBOK) discipline.

O&M	Configuration	Configuration Multiplier	O&M Costs	O&M Cost Adjusted
AZ Arts Commission	Low	1.25	\$ 18,500.00	\$ 23,125.00
WA Department of VA	High	0.75	Data Not Provided	Data Not Provided
SC Arts Commission (3 years)	Med	1	\$ 15,000.00	\$ 15,000.00
South Arts	Med	1	\$ 80,000.00	\$ 80,000.00
IL Arts Commission	Med	1	\$ 60,000.00	\$ 60,000.00
Average			\$ 43,375.00	\$ 44,531.25

- A cost estimate for the Operations and Maintenance work, called continuous improvement in the budget build up, were estimated at 15% of the total implementation cost for three years following the implementation. This will account for continuous improvements and stabilization that will occur in an enterprise-wide system like a CRM. This O&M estimate was moderately higher than the average O&M costs adjusted for configuration pictured below of \$44,531.25 coming in at \$55,413.00.

Implementation	Configuration	Duration (Weeks)
AZ Arts Commission	Low	6
WA Department of VA	High	312
SC Arts Commission (3 years)	Med	156
South Arts	Med	44
IL Arts Commission	Med	130
<b>Average</b>		<b>130</b>

- Some implementation timeframes were dramatically delayed due to COVID. The average implementation lasted 2.5 years from the five benchmarked organizations. This lengthy timeframe was assumed to reflect several COVID delays and thus a shorter horizon for implementation was selected of two years. Implementation timelines varied greatly, and this is a conservative, realistic timeline that is in line with the organizations that have similar levels of moderate configuration.
- Integration costs were estimated based on the method of integration expected and conversations with vendors that would be involved in delivering the integration. They have been estimated as follows:

	DDI Year 1 (2023-2024)	DDI Year 2 (2024-2025)	O&M (2025-2026)	O&M (2026-2027)	O&M (2027-2028)
<b>Integration Costs</b>					
Integration Cost 1 (MIMSY to CRM SFTP Axill Costs - Export)		\$ 3,500.00			
Integration Cost 2 (MIMSY to CRM WaTech Costs - Import)		\$ 3,500.00			
Integration Cost 3 (Submittable to CRM API)		\$ 11,500.00			
Integration Cost 4 (Workday Grants & CRM API)				\$ 14,000.00	
Integration Cost 5 (MIMSY Upgrade & CRM API)				\$ 14,000.00	

## Appendix C: Vendor – Salesforce

Salesforce ranked the highest in all 3 categories, including Functional, Technical, and Statutory Requirements.

Some areas of note where Salesforce met requirements where others were unable:

### Functional Requirements (High and Medium Priority)

- The solution enables businesses to track keywords about prospects and competitors for social listening. (High Priority)
- The solution enables field representatives to check-in their locations for client meetings to keep other team members informed.
- The solution provides easy browser pages for leads to self-identify.
- The solution allows setting up triggers to automatically add leads and contacts from social media based on customer interaction.
- The solution provides interactive org charts to keep track of contacts and visualize relationships among contacts.
- The solution helps generate detailed reports such as deals closed in the current month, daily revenue, sales stages, etc.
- The solution provides users the ability to generate interactive content or playbooks, outlining how their products operate as well as policies and procedures detailing how to support them. These playbooks are accessible directly from a contact, account, or opportunity record.
- The solution provides real-time widgets to connect with contact pages and interact with them on social networks.
- The solution provides a process to identify and cultivate potential contacts
- The solution automates the delivery of digital leads and intelligently route them based on a variety of factors.
- The system provides the organization and tracking of prospects, goals, and quota.
- The system provides an outreach method that connects the agency with potential leads from referrals or other marketing channels.
- The system provides the ability to track sales processes, manage pipelines, and do competitive analysis.

### Technical Requirements (High Priority)

- The solution integrates with accounting software Workday, which is on the State of Washington horizon, enabling future-proofing of the solution.
- In addition to a community support forum for the user community to interact and provide assistance, Salesforce has a robust training environment, available to anyone for free.
- The solution integrates with sales data and intelligence platforms such as D&B Hoovers, ZoomInfo, InsideView, etc. to provide information and insights about prospects, accounts, and contacts, and then perform activities to search company lists, identify potential customers based on custom criteria, or use the contact information to

approach them. It gathers the company and contact data from various sources, including news, specialty data vendors, social media, web, crowd-sourcing, and more.

- The vendor offers help desk support via instant message and chat.

#### Statutory Requirements (Critical)

Salesforce was able to meet all Statutory Requirements and is currently in use within the State of Washington ecosystem.

## Appendix D: Vendor – Microsoft Power Platform

Microsoft Power Platform ranked the lowest (5<sup>th</sup>) of solutions deemed appropriate based on critical requirements. While this solution offers great flexibility, it is unable to perform multiple high priority functions the other solutions could provide. There was no requirement Microsoft Power Platform could meet that was not attainable by another solution.

For this study, we have removed the Microsoft Power Platform deficiencies in the Appendices as they only provided noise to the study.

Utilizing Microsoft Power Platform would require technical knowledge to build a CRM solution that the Washington Arts Commission does not possess introducing additional risk and cost. Therefore, we do not recommend any further investigation into Microsoft Power Platform other than a potential add-on to Microsoft Dynamics for future functionality.

## Appendix E: Vendor – Microsoft Dynamics

Microsoft Dynamics ranked fourth in all 3 categories, including Functional, Technical, and Statutory Requirements.

Some areas of note where Microsoft Dynamics met requirements where others were unable:

### Functional Requirements (High and Medium Priority)

- The solution enables businesses to track keywords about prospects and competitors for social listening. (High Priority)
- The solution provides easy browser pages for leads to self-identify.
- The solution enables field representatives to check-in their locations for client meetings to keep other team members informed.
- The solution provides interactive org charts to keep track of contacts and visualize relationships among contacts.
- The solution helps generate detailed reports such as deals closed in the current month, daily revenue, sales stages, etc.
- The solution provides users the ability to generate interactive content or playbooks, outlining how their products operate as well as policies and procedures detailing how to support them. These playbooks are accessible directly from a contact, account, or opportunity record.
- The solution provides real-time widgets to connect with contact pages and interact with them on social networks.
- The solution provides a process to identify and cultivate potential contacts
- The solution automates the delivery of digital leads and intelligently route them based on a variety of factors.
- The system provides the organization and tracking of prospects, goals, and quota.
- The system provides an outreach method that connects the agency with potential leads from referrals or other marketing channels.
- The system provides the ability to track sales processes, manage pipelines, and do competitive analysis.

### Technical Requirements (High Priority)

- The solution has a community support forum for the user community to interact and provide assistance.

### Statutory Requirements (Critical)

Microsoft Dynamics was able to meet all Statutory Requirements and is currently in use within the State of Washington ecosystem.

## Appendix F: Vendor – Monday.com

Monday.com ranked third overall across all 3 categories, including Functional, Technical, and Statutory Requirements.

Some areas of note where Monday.com met requirements where others were unable:

### Functional Requirements (High and Medium Priority)

- The solution enables businesses to track keywords about prospects and competitors for social listening. (High Priority)
- The solution enables field representatives to check-in their locations for client meetings to keep other team members informed.
- The solution provides easy browser pages for leads to self-identify.

### Technical Requirements (High Priority)

- The solution has a community support forum for the user community to interact and provide assistance.

### Statutory Requirements (Critical)

Monday.com was able to meet all Statutory Requirements, but is not currently in use within the State of Washington ecosystem. This will require additional funding and time to enable Monday.com to complete the required IT design reviews and approvals.

## Appendix G: Vendor – SAP

SAP ranked second in all 3 categories, including Functional, Technical, and Statutory Requirements.

Some areas of note where SAP met requirements where others were unable:

### Functional Requirements (Medium Priority)

- The solution allows setting up triggers to automatically add leads and contacts from social media based on customer interaction.
- The solution provides interactive org charts to keep track of contacts and visualize relationships among contacts.
- The solution helps generate detailed reports such as deals closed in the current month, daily revenue, sales stages, etc.
- The solution provides users the ability to generate interactive content or playbooks, outlining how their products operate as well as policies and procedures detailing how to support them. These playbooks are accessible directly from a contact, account, or opportunity record.
- The solution provides real-time widgets to connect with contact pages and interact with them on social networks.
- The solution provides a process to identify and cultivate potential contacts
- The solution automates the delivery of digital leads and intelligently route them based on a variety of factors.
- The system provides the organization and tracking of prospects, goals, and quota.
- The system provides an outreach method that connects the agency with potential leads from referrals or other marketing channels.
- The system provides the ability to track sales processes, manage pipelines, and do competitive analysis.

### Technical Requirements (High Priority)

- The solution has a community support forum for the user community to interact and provide assistance.

### Statutory Requirements (Critical)

SAP was able to meet all Statutory Requirements, but is not currently in use within the State of Washington ecosystem. This will require additional funding and time to enable Monday.com to complete the required IT design reviews and approvals.

## Appendix H: Vendor – ClaritySoft

ClaritySoft was ranked fourth in Functional and Technical requirements until it was determined they could not meet the Statutory Requirements.

ClaritySoft was removed from the study, but historical information on the requirements remains for purposes of this feasibility study.

## Fit/Gap Analysis

Additional market research can be done directly with vendors who choose to self-assess against a universal requirements matrix, given as a deliverable example earlier.

### Example 1: Vendor Summary Alignment Table

Six CRM SaaS Solutions were evaluated as part of benchmarking within this feasibility study. Each of the five vendors, with Microsoft presenting two options, were assessed against a set of requirements that represent typical CRM features in the industry. These requirements were aligned to ArtsWA needs through detailed interviews with ArtsWA programs. The full set of potential CRM requirements were deemed universal CRM requirements. ArtsWA did not require all potential features and a custom list was established with their needs.

The universal CRM requirements were weighted as High, Medium, Low, or not at all important to the WA Arts Commission. The requirements for statutory compliance required 100% for consideration as a feasible solution. The remaining requirements were categorized as functional and technical. Each vendor was scored using weights against the requirements matrix. Each Vendor's sales team evaluated their solutions against the universal CRM requirements with detailed questions and answers following through multiple vendor conversations via email and over the phone.

The Summary Fit/Gap Scoring is outlined below:

Vendor*	Salesforce	Microsoft Power Platform	Microsoft Dynamics	Monday.com	SAP CRM
Functional Requirements	99%	64%	74%	93%	90%
Statutory Requirements	100%	100%	100%	100%	100%
Technical Requirements	97%	96%	96%	91%	97%

## Deliverable Example: Fit/Gap Analysis



### Example 2: Detailed Universal Requirements Matrix with Vendor Data

Supporting documentation was prepared for each vendor evaluated against the universal requirements matrix. Here is an excerpt from the statutory requirements section of the universal requirements document being used to assess Fit/Gap. Vendors who could not meet statutory requirements were not categorized as a feasible solution.

Main Category	Sub Category	Requirement	Salesforce	Microsoft Power Platform	Microsoft Dynamics	Monday.com	ClaritySoft	SAP CRM Solution
Platform Security	Data at Rest Encryption	The solution encrypts all types of idle data at rest, such as relational databases, file stores, backup copies of databases, etc. using various encryption technologies.	Yes	Yes	Yes	Yes	No	Yes
Platform Security	Two Factor Authentication	The solution allows configuring two-factor authentication for all the users or a group of users using various methods like security questions, one-time passcodes, security tokens, etc. *OCIO Policy requires the use of Enterprise Active Directory or Secure Access Washington for authentication. The system will need to be able to use single sign-on using ADFS or SAML.	Yes	Yes	Yes	Yes	Yes	Yes
Platform Security	Compliance	OCIO Policy#141.10 Compliance	Yes	Yes	Yes	Yes	No	Yes
Platform Security	Compliance	SOC2 Compliant	Yes	Yes	Yes	Yes	Yes	Yes

### Example 3: Salesforce Detailed Fit/Gap Analysis

Salesforce ranked the highest in all 3 categories, including Functional, Technical, and Statutory Requirements. Some areas of note where Salesforce met requirements where others were unable:

#### Functional Requirements (High and Medium Priority)

- The solution enables businesses to track keywords about prospects and competitors for social listening. (High Priority)
- The solution enables field representatives to check-in their locations for client meetings to keep other team members informed.
- The solution provides easy browser pages for leads to self-identify.
- The solution allows setting up triggers to automatically add leads and contacts from social media based on customer interaction.
- The solution provides interactive org charts to keep track of contacts and visualize relationships among contacts.

- The solution helps generate detailed reports such as deals closed in the current month, daily revenue, sales stages, etc.
- The solution provides users the ability to generate interactive content or playbooks, outlining how their products operate as well as policies and procedures detailing how to support them. These playbooks are accessible directly from a contact, account, or opportunity record.
- The solution provides real-time widgets to connect with contact pages and interact with them on social networks.
- The solution provides a process to identify and cultivate potential contacts
- The solution automates the delivery of digital leads and intelligently route them based on a variety of factors.
- The system provides the organization and tracking of prospects, goals, and quota.
- The system provides an outreach method that connects the agency with potential leads from referrals or other marketing channels.
- The system provides the ability to track sales processes, manage pipelines, and do competitive analysis.

### Technical Requirements (High Priority)

- The solution integrates with accounting software Workday, which is on the State of Washington horizon, enabling future-proofing of the solution.
- In addition to a community support forum for the user community to interact and provide assistance, Salesforce has a robust training environment, available to anyone for free.
- The solution integrates with sales data and intelligence platforms such as D&B Hoovers, ZoomInfo, InsideView, etc. to provide information and insights about prospects, accounts, and contacts, and then perform activities to search company lists, identify potential customers based on custom criteria, or use the contact information to approach them. It gathers the company and contact data from various sources, including news, specialty data vendors, social media, web, crowd-sourcing, and more.
- The vendor offers help desk support via instant message and chat.

### Statutory Requirements (Critical)

Salesforce was able to meet all Statutory Requirements and is currently in use within the State of Washington ecosystem.

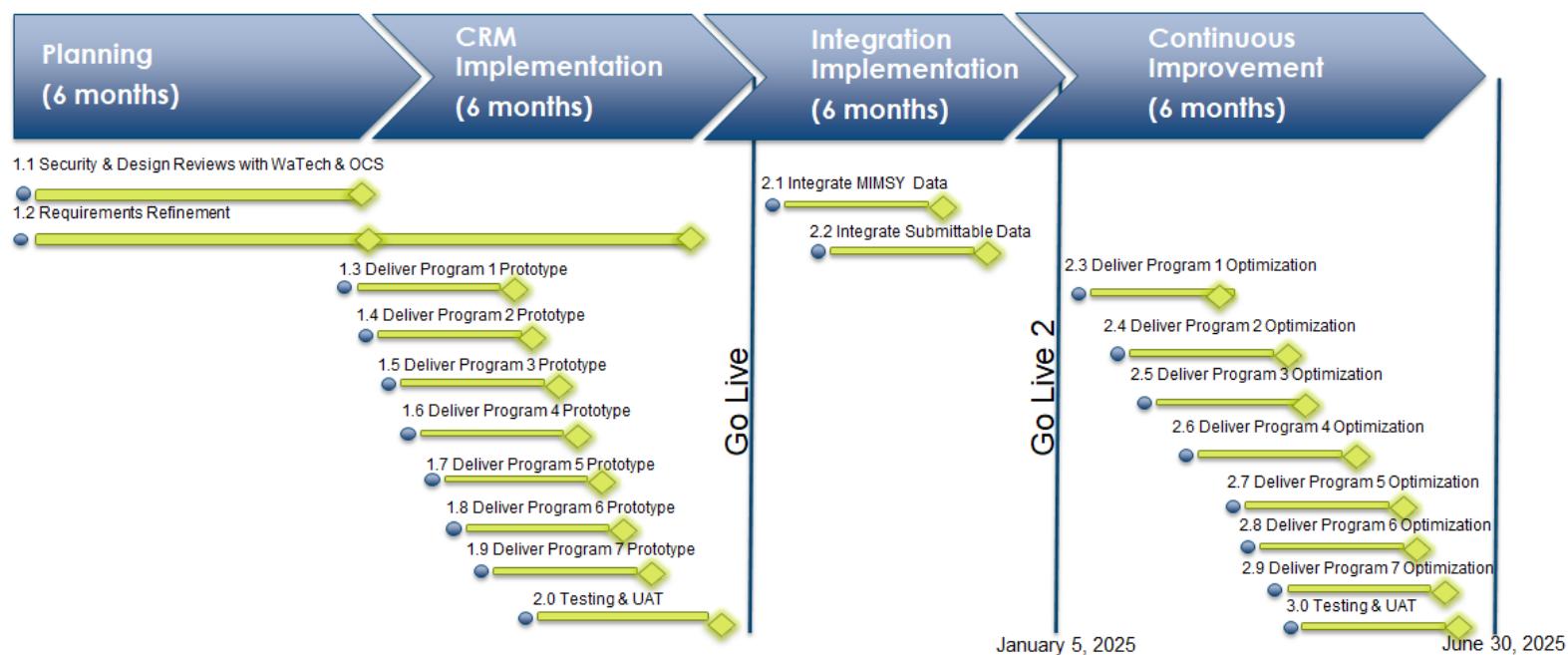
## Deliverable Example: Implementation Plan and Approach

### Implementation Plan and Approach

The recommended implementation plan approach proposed recently for the WA Arts Commission feasibility study was informed by experienced project and change management leaders who have led CRM implementations in previous years. This implementation approach was also supported by independent Quality Assurance consultants. The approach was further informed by benchmarking six organizations that recently purchased and implemented CRM solutions.

The implementation approach is depicted below and was estimated based on inputs from the benchmarking study conducted as part of the ArtsWA feasibility study. The typical timeline for implementation was 2.5 years; the below timeline was moderately adjusted to two years; this was because the average implementation timeframe for benchmarked organizations were lengthened due to COVID.

### CRM Solution Implementation Timeline



## Deliverable Example: Implementation Plan and Approach

The implementation strategy is recommended to be four six-month phases:

- **Planning:** The planning phase should be where detailed requirements/user stories for the CRM are refined by a selected Systems Implementor (SI) versed in CRM implementations.
- **CRM Implementation:** The CRM Implementation phase is where the SI builds prototypes against the previous phase's requirements. The implementation approach should include successive prototype production in a sandbox environment for iterative Program feedback. The prototype should be demonstrated for future users and feedback should be given against a tangible prototype.
- **Integration Implementation:** The third phase of the implementation is where the CRM should be integrated with the grants management solution followed by the MIMSY art collection solution. These interfaces have been investigated in detail as a part of the feasibility study. The MIMSY integration should be based on a script to export a data file to an Secure File Transfer Protocol (SFTP) site and a script to ingest the data from the SFTP site. The Submittable grants management integration should be an API integration between Submittable and the CRM using REST API protocols; this should not be an integration with 3<sup>rd</sup> party Zapier due to implementation issues experienced by AZ Arts Commission using Zapier.
- **Stabilization and Optimization:** Once the broader IT ecosystem is integrated, the programs should have an opportunity to refine their solution in the final phase. This approach allows for learning, application, and quick wins, with a CRM solution in place within one year and fully refined solution by the end of year two.

Throughout all phases of the implementation plan outlined here, the team expects to have external Quality Assurance (QA) professionals providing oversight in addition to OCIO oversight. This will help to ensure the quality of the project progress in all stages. Each month the QA team will provide an updated view on the progress of the project with recommendations and accolades as appropriate. The Quality Assurance team has participated in the review of the feasibility study and have provided ongoing guidance to achieve a high-quality output. The QA team provided constructive feedback for this decision package and the team has incorporated all feedback received. The QA team has also produced a readiness report, that speaks to how the organization should approach readiness for the CRM project. This proactive inclusion of QA demonstrated ArtsWA's commitment to delivering a high-quality project in all stages of the project delivery.

## Deliverable Example: Market Research Summary



### Market Research

Market research can be presented in a variety of methods. Below is an excerpt from a Market Research Summary table. This serves as a tool to quickly present holistic market research conducted during a feasibility study, which will inform adequate cost estimates, implementation approach, implementation planning, schedule, and resourcing in general. There should also be room to collect and apply lessons learned by other organizations selected for benchmarking.

Case	Interview Suitability	Business Functionality	Technical Functionality	Costs	Contract	Size	Schedule	Level of Effort	Lesson's Learned
What organization?	Based on ISG interactions, how suitable does the solution seem?	Compare functionality (what is included in their solution?)	Confirm critical features: configurable, security, electronic signatures, rules engines, regulatory requirements	Identify costs: What were the one-time implementation costs? What are the annual M&O costs?	Contract model: Is this a SaaS, hosted by vendor, hosted on-site, etc.?	Is the size compatible with DOR's UCF program?	How long to launch from contract award?	State staff #: for project to implement; on-going solutions operation	What are the lessons learned from DDI and M&O? What are two or three areas the system could do better?
State of Wisconsin	Migrated from Conduent UPS 2000 in June of 2015. Director said they are "all online now" with a focus on self service for holders and claimants. They do not need to take paper anymore because the system is intuitive and user friendly.  KPI: On average, they process claims in 20 days and reconcile holder reports in three.	ISG Rating: Highly aligned.  Match Score: 16/16 functional areas confidently addressed by system in current installed state.	Infrastructure: PaaS (IaaS, disaster recovery, data management, security) Role based w/ SSO integration. Software: SaaS platform (modular, configurable, extendable, scalable). Platform Integration: Robust SOA and API based platform. Document Management: Robust document management capabilities. Data Analytics and Reporting: Robust data management/data mining capabilities; robust reporting capabilities	Year: 2016  One-time: \$1M  Ongoing: est. \$300K (rolled into master licensing agreement with software vendor)	DDI: Fixed bid from software vendor.  M&O: Subscription based contract for PaaS/SaaS platform	Internal Staff: 6 program staff + 1 CSR  Holder Reports: 43k (annually) Claims Filed: 40k (annually) Funds Paid: \$25M (annually)	DDI: 10 months (Two phases)  Securities module for reconciliation took the longest to implement and dial in for optimal efficiency.	DDI: Five internal SMEs. One executive sponsor. One dedicated business analyst from IT team.  M&O: .5 IT support for enhancements and service pack application.	Be aggressive with the securities module because it took longer than anticipated.  Consider automating and moving away from paper as much as possible to leverage the system.  Be courageous and set expectations with holders for electronic reporting to control the input.
State of Tennessee	Migrated from mainframe in 1999 to address Y2K concerns. System is functional and "gets the job done" for Tennessee.  KPI: With the implementation of a web portal for reporting and payment, 80% of Holder reports are reconciled within 1-2 weeks vs 2-3 months with mainframe system.	ISG Rating: Moderately aligned.  Match Score: 12/16 functional areas addressed by system in current installed state. Tennessee gave a "limited" assessment to 4 high level business functions identified as core by DOR. Those functions include: - Holder Billing/Collections support - Owner Claims support - Withdrawal and Deliver support	Infrastructure: Client/Server architecture with database hosted on-prem. Role based w/ SSO integration. Software: named user license model. Platform Integration: API based platform. Document Management: Hosted by software vendor. Limited search functionality. Data Analytics and Reporting: Limited. Requests for enhancements to Crystal report goes to the vendor.	Year: 1999  One-time: est. \$125K  Ongoing: \$60K + \$150-\$250/hr for T&M	DDI: Fixed bid (Sole Source as there was no competition in the market place at the time.)  M&O: Maintenance agreement for patches paid on annual basis over multi-year term. T&M for enhancements, reports and customizations.  Performance Assessment: Relatively smooth implementation. The data conversion was a challenge, but they pulled it off.	Internal Staff: 13  Holder Reports: 11k* (annually) Claims Filed: 44k (annually) Funds Paid: \$47.8M (annually)  *State does not require "negative" reports	DDI: 30 months (Big Bang Method)  Ran both systems parallel for testing to ensure data accuracy, identify bugs, refine workflows and get the staff accustomed to the new system.	DDI: Software vendor worked with State IT staff for the data conversion which took time. 5 program staff provided SME input for the duration of the project.  M&O: Minimal for program staff. State Infrastructure IT Group estimated at \$.25/month for scripting, upgrades and enhancements.	Make sure your data is in good shape and ready for the migration.  Identify differences in field values and fields overall to ensure the "crosswalk" goes well.



# State of Washington Department of Revenue

Unclaimed Property System Replacement -  
Feasibility Study Phase

Project Management Plan

April 25, 2018

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## Section 1 Project Overview

Integrated Solutions Group (ISG) will provide the Department of Revenue (DOR) with a study of feasible alternatives to replace their current Unclaimed Property (UCP) System.

### Purpose

The purpose of this project is to develop a feasibility study, in accordance with Office of Financial Management (OFM) and Office of the Chief Information Officer (OCIO) standards, that objectively analyzes a set of options for DOR consideration in replacing their existing, aging UCP system.

### Objectives

The objectives of this project are:

1. Identify a set of feasible alternatives for replacing the existing system
2. Assist DOR in selecting the most feasible direction for system replacement
3. Provide timely, sufficient information about the alternatives to support DOR's potential request for additional funding (Due to OFM by September 2018)

### Scope

The scope of this project is limited to the work identified in contract #K1629 between DOR and ISG. The feasibility study is to provide enough detail to compare and contrast options so DOR can make a decision on its preferred replacement approach. The feasibility study will not evaluate specific replacement products or solutions.

### Deliverables

The following six deliverables will be produced as part of the project as defined in contract #K1629:

1. Project Management Plan and Schedule
2. UCP Business Process Documentation
3. High-level UCP Documentation of System Requirements
4. Market Research Results Documentation
5. Fit/Gap Analysis and COTS and SaaS Solution Documentation
6. High-level Implementation Plan and Approach for COTS and SaaS Solutions

## Section 2 Project Organization

### Approach

ISG has assigned a team to conduct this study for DOR. The team approach will support the need to tackle multiple tasks over the course of the summer and produce the study in time to support the department's potential budget request due to OFM this fall. An ISG project manager is assigned to ensure the team's work is coordinated and effective.

### Resources

The following ISG staff are assigned to this project for the duration:

Gena Cruciani, Engagement Manager  
Kathy Pickens-Rucker, Project Manager

Dave Ruble, Business Lead  
Tom Boatright, Technical Lead  
Dillon Mullenix, Financial Lead

Estimated hours and costs for all ISG resources are included in contract K1629. In addition to ISG resources, DOR staff will be involved in this project fulfilling some very important roles. These are identified in the table below.

## Roles & Responsibilities

Below is a table identifying the key roles and responsibilities for resources needed to complete the UCP Feasibility Study.

Role	Responsibilities	Name(s)
ISG Engagement Manager	Ensure delivery of quality deliverables that meet DOR business objectives	Gena Cruciani
ISG Project Manager (PM)	Manage the day to day team activities of the business, technical, and financial leads. Author and maintain this plan. Collaborate with the DOR Project Manager. Manage the schedule and facilitate bi-weekly status meetings and reports.	Kathy Pickens-Rucker
ISG Business Lead	Lead development of business processes and system requirements deliverables	Dave Ruble
ISG Technical Lead	Lead the industry research needed for the study	Tom Boatright
ISG Financial Lead	Support the industry research and interviews with other states with emphasis on preparing the Cost Benefit Analysis (CBA) and proposed implementation plan	Dillon Mullenix
DOR Project Manager (PM)	Manage overall project, primary contact for ISG team	Julie Hindman
DOR Project Sponsor(s)	Keep project aligned with DOR strategy and portfolio direction	Randy Simmons, John Ryser, David Sorrell, Stuart Thronson, and Celeste Monahan
DOR Subject Matter Experts	Provide expert knowledge of UCP business needs, statutory requirements, and existing systems through interviews conducted by ISG	Various staff to be identified

## Section 3 Project Management Plans

The UCP Feasibility Study project will utilize the following project management plans as appropriate to help ensure the project achieves its objectives.

### Communications

What	When	How	Responsible	Audience
PM check-ins	Weekly	Meeting Wednesday @ 4PM	ISG PM	Agency PM
Status reports	Bi-weekly	Written report in agreed upon format due on Wednesdays	ISG PM	Agency PM
Steering Committee/Sponsor meetings	No less than monthly	Slide presentation & status report	ISG PM	Agency sponsor(s), PM, and other attendees
Change requests	When needed	Within the status report	ISG PM & Engagement Manager	Agency sponsor(s) and PM
Project issues	When needed	Within the status report	ISG PM	Agency PM
Project risks	Bi-weekly	Within the status report	ISG PM	Agency PM
Project schedule	Bi-weekly	Within the status report and via a more detailed project schedule in Excel	ISG PM	Agency PM

### Scope Management

Changes to project scope must be carefully managed to avoid jeopardizing project success. If a change is needed, it will be reviewed with the Agency PM. A formal request will be sent by the ISG PM to the ISG Engagement Manager, outlining the following information at a minimum:

1. Description of the change
2. Reason or need for the change
3. Information on any discussions to date with the agency

The Engagement Manager will determine whether or not and how to involve the agency in discussions about the change as there will likely be contract implications. In the meantime, the change request will be tracked to resolution by the ISG PM.

## Issue Management

Issues and action items may be raised during the project by any member of the project team. Issues and actions may stem from meetings, analysis, document reviews, workgroups, and other project activities. Identified issues/action items are documented in meeting minutes and tracked to resolution by the ISG PM.

Some issues may require involvement of DOR staff to be resolved. These types of issues will be discussed by the ISG PM with the agency PM to determine an appropriate course of action to resolve the issue.

## Risk Management

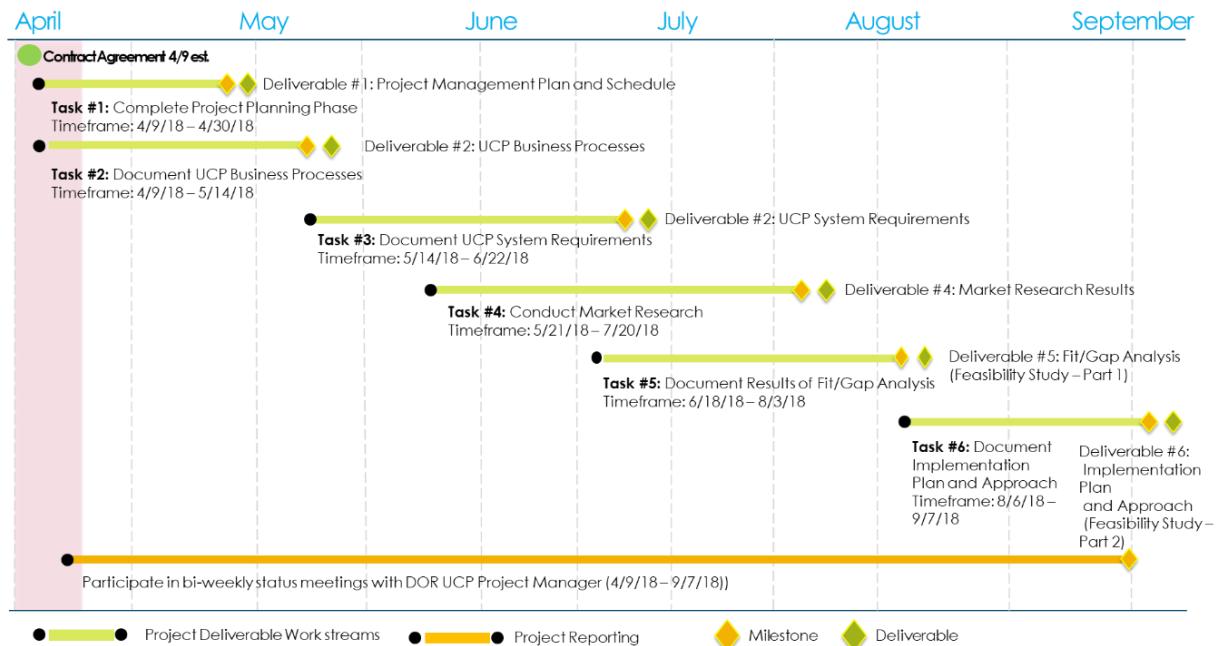
Anyone involved in the project may identify risk. Once identified, they will be reflected in the project status report along with the planned risk response. The ISG team will assess risks for potential impact on either scope, schedule or resources as well as for probability of occurrence and severity of impact so that an appropriate risk response can be determined. The process is reflected in the table below.

ID & Analyze	Plan	Track	Control
1. Identify potential risk 1. Evaluate impact of risks 2. Rank risks	1. Develop response plan 2. Assign risk manager 3. Review Risk & Response Plan with Agency PM	1. Track and report status	1. Implement response plan 2. Adjust project plan as needed 3. Close risks 4. Document lessons learned 5. Report Status of Risk Plan to Agency PM

## Section 4 Project Schedule

Below is a graphic depicting the project schedule. A more detailed project schedule is also available as a separate Excel file at this location:

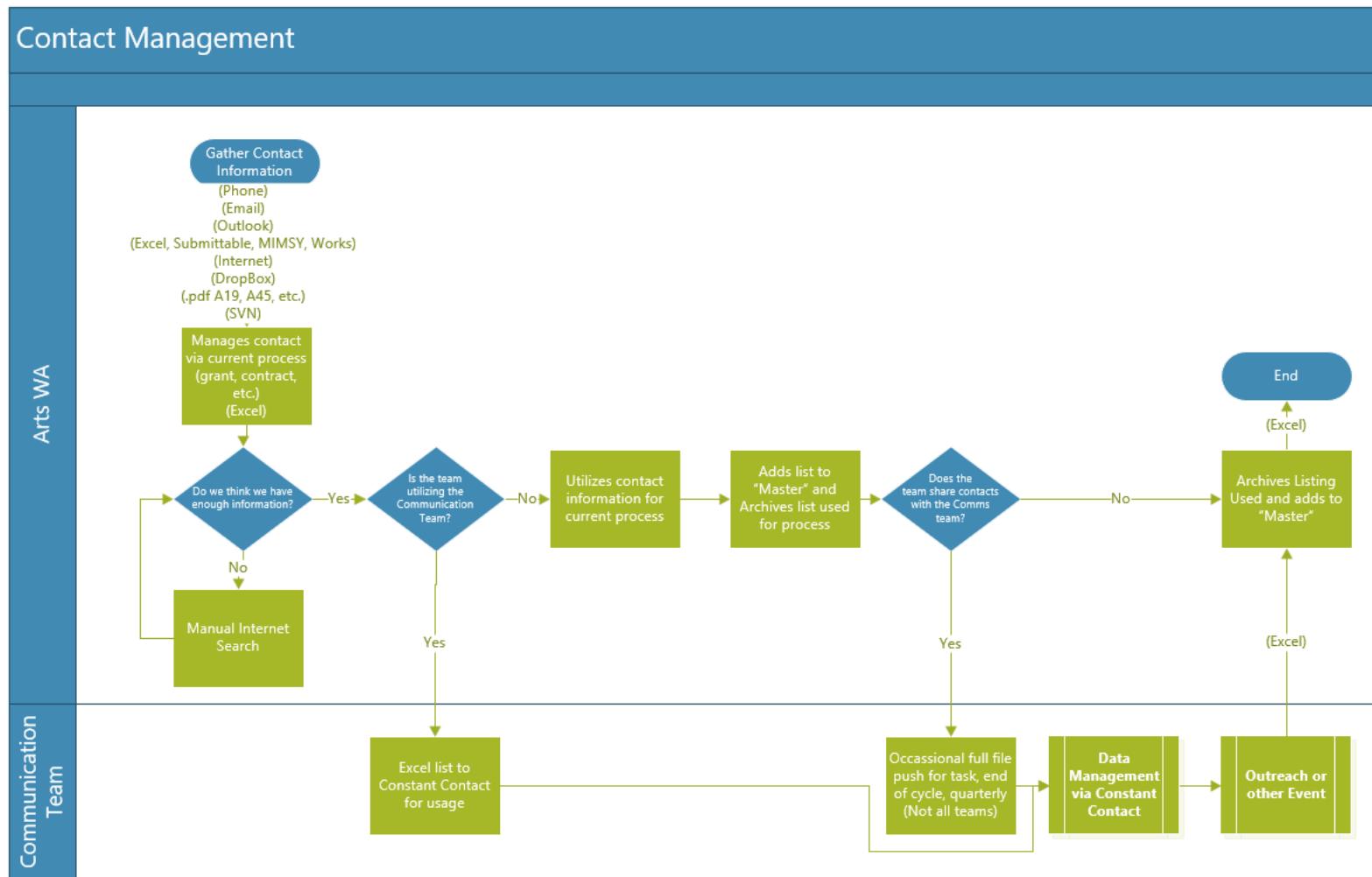
<http://pwa/Projects/UCP%20Replacement%Project/>



## Deliverable Example: Business Process Diagram

### Business Process Diagram

This is an example of one of the ten business process documents delivered to WA Arts Commission (ArtsWA) to support their feasibility study development for a Customer Relationship Management system. This is a high-level business process diagram for how the organization manages contact data.



## Deliverable Example: Business Process Diagram



## Business Process Narrative

This is an example of an excerpt from a narrative business process document delivered to DOR to support a feasibility study to replacing the Unclaimed Property Management system. This presentation is intended to help illustrate the skills ISG has to document business processes in a variety of methods.

The main content of the business process document was divided into two sections:

1. **Business Process – High Level Description** – Contains a listing of the business processes that are in scope and includes a short description of each.
2. **Business Process Event List and Descriptions** – Contains a more detailed description for each business process in the list based on interview notes with management and staff as well as review of existing documentation. The format takes an event-based approach and, as much as possible, lists the business functional descriptions next to the event to which the Department of Revenue is responding. Within these sections, we have also called out some opportunities for improvement that we have observed, and challenges conveyed to us in regard to the limitations of the existing systems.

### 1. Business Process – High Level Description

<b>Holder Reporting</b>	Holder reporting is how the state finds out about unclaimed property. Holders of unclaimed property are required to report unclaimed property to the state per abandonment period by property type. Currently, reports are due annually on November 1 <sup>st</sup> . Future legislation may add an additional period. The scope of this business process includes the intake and validation of holder reports, filing of negative reports by holders, requests for extensions and assessment of penalties for non-compliance when a holder fails to file a report as expected.
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## 2. Holder Reporting – Event List and Description

Event	Description
Holder reports unclaimed property to state	<p>Holders are required to report unclaimed property to the state per abandonment period by property type. Reports are due annually on November 1<sup>st</sup>. Property reportable as of November 1<sup>st</sup> is that which is held as of the prior June 30<sup>th</sup>.</p> <p>Most of all filing is done electronically nowadays. Holders filing on paper must request an exception and pay a 5% penalty fee for paper submission.</p> <p>Holder Report consists of a header identifying the holder and line-level detail with each line representing an instance of property with one or more owners listed along with the owner's last known address.</p> <p>Currently there are ~52,000 active holders that should be reporting.</p> <ul style="list-style-type: none"> <li>• 7,000 – 8,000 report unclaimed property</li> <li>• ~30,000 file negative reports</li> </ul> <p>Most file before the November 1<sup>st</sup> deadline. The biggest surge is middle to end of October.</p> <p>Holders may report through third party web sites, such as UP Exchange. Many national holders will do this because they can file in one place for many states.</p> <p>DOR also accepts reports mailed in on disk. Sometimes a submitted disk has hundreds of files.</p>
New holder reports unclaimed property to state for first time	<p>Holders filing a report for the first time are established in the system and issued a reporting number.</p> <p>If the holder has never filed before, they go online and log in and then they can submit their report. Most holders have an access number. DOR just needs their Federal Employer Identification Number (FEIN).</p>
Holder reports an “Aggregate” – group of items under \$50 each in value that does not identify individual owners.	<p>If the amounts are \$50 or less, the holder can aggregate them, which means to remove the owner information. Sometimes they'll send in a spreadsheet. Most holders won't do an aggregate until it gets down to about \$20 or less. Aggregates are highly unlikely to ever pay out.</p>
Holder files a negative report	<p>Holders who are required to report unclaimed property that have no new unclaimed property to report must file a negative report.</p> <p>Volume = ~30,000/year</p>
Holder files for reporting extension	<p>Holders are supposed to file and remit before the due date. If they are going to ask for an extension, they must request it before the due date, or else it becomes a penalty waiver request.</p> <p>There are little criteria for granting the extension. It can be granted for any reasonable reason as determined by DOR staff on a case-by-case basis, however, if they get an extension one year, they will be denied any extension request for the next two (2) years.</p>

<b>Event</b>	<b>Description</b>
Holder fails to report unclaimed property to state	<p>This is the event of a holder who is a regularly-reporting holder to the state fails to file a UCP report (positive or negative) within the anticipated time period.</p> <p>2016 was the first year DOR assessed penalties for holders failing to report. The majority came in during October. DOR had done a lot of outreach and it made a difference. They are still getting some reports and in some cases into the new filing year.</p> <p>All open and active business should be filing reports. To discover who hasn't filed, DOR runs a delinquency report looking back one year. Everyone that hasn't filed gets a mass mailing. Then DOR gets a percentage of reports filed (even if it's a negative report), and then the DOR starts calling the remainder. The Compliance Team works those in house.</p>
DOR conducts administrative review	<p>DOR decides on whether a holder qualifies for a penalty waiver. There is a brief adjudicative process. If DOR denies a penalty waiver and it goes thru a 21 process and a presiding internal officer rules. Or can go straight to court which can take up to a year.</p>

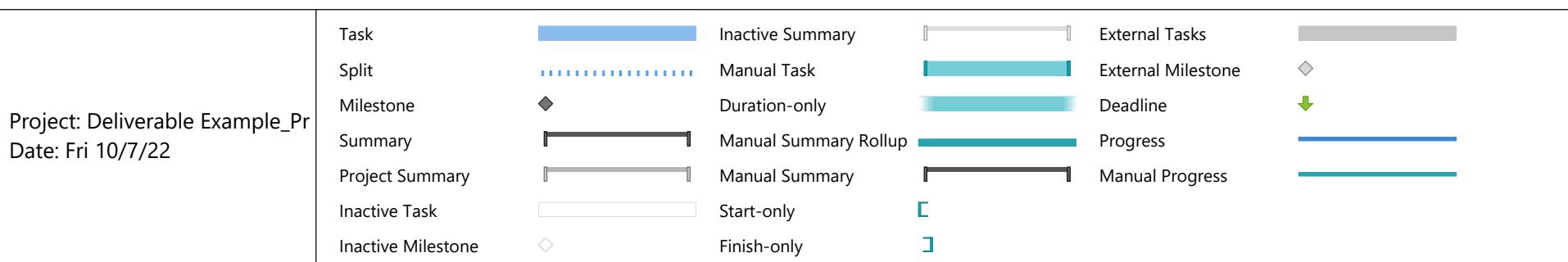
#### **Out of Scope for the UCP System:**

The Holder sends due diligence letters outside of the UCP system. This is something the Holder does on their own. Holders are required to send letters to owners on stocks, safe deposit box contents and amounts over \$75. Letters go out between May 1 and August 1 to the last known address. It is obvious when a large holder fails to send out due diligence letters because once their report balances and is released and DOR sends claim notices out to owners, there is an onslaught of claims. The requirement of sending due diligence letters is supposed to shift the burden of contact, claim and payment to the holder wherever possible before it would come to DOR. DOR has the potential of assessing penalties for failure to send due diligence letters when they do an audit, although they have not assessed any penalties for this reason to date.

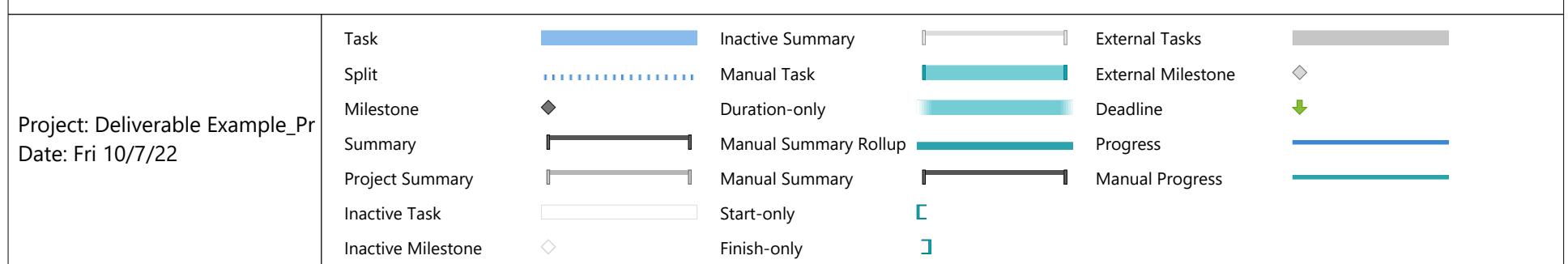
#### **Opportunities:**

DOR has made great strides in recent years expanding the number of holders that are reporting. However, the remaining large number of businesses who are not reporting, coupled with cumbersome current process within DOR, which has the existing team working at capacity, suggests that efficiencies introduced by a new system could enable the agency to expand their outreach more aggressively and take on more holders than are currently not reporting.

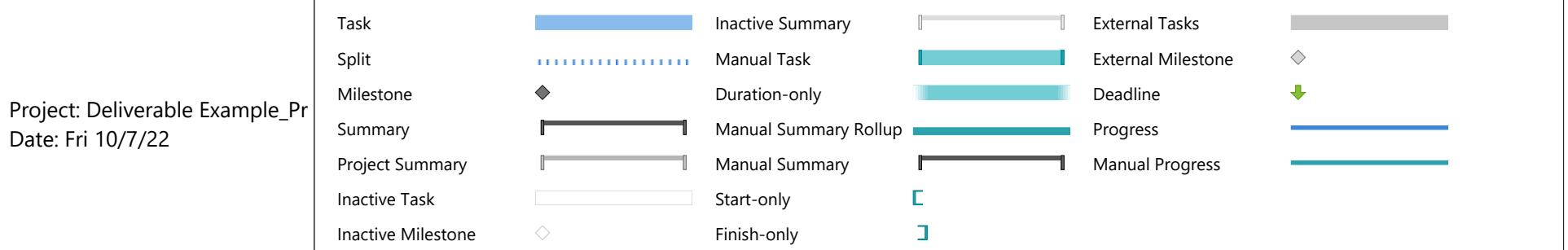
ID	Task Name	Duration	Start	Finish	Actual Finish	% Complete	Prec.	Resource Names	Milestone
1	Project Start	0 days	Fri 6/24/22	Fri 6/24/22	NA	0%			Yes
2	<b>Planning</b>	<b>16 days</b>	<b>Fri 6/24/22</b>	<b>Mon 7/18/22</b>	<b>Mon 7/18/22</b>	<b>100%</b>			No
3	Prepare to Meet with Project Sponsor	1 day	Fri 6/24/22	Fri 6/24/22	Fri 6/24/22	100%	1	Emily Davis	No
4	Project Kick-Off with ArtsWA Team	0 days	Fri 6/24/22	Fri 6/24/22	Fri 6/24/22	100%		Annette Roth,Brenda Hays,I	Yes
5	Project Kick-Off with QA Team	1 day	Fri 7/8/22	Fri 7/8/22	Fri 7/8/22	100%		Annette Roth,Brenda Hays,I	No
6	<b>Project Management Schedule</b>	<b>8 days</b>	<b>Thu 6/30/22</b>	<b>Tue 7/12/22</b>	<b>Tue 7/12/22</b>	<b>100%</b>			No
7	Deliver Draft Project Schedule	1 day	Thu 6/30/22	Thu 6/30/22	Thu 6/30/22	100%	1	Brenda Hays,Emily Davis	No
8	Review Draft Schedule with WA Arts Commission & QA	6 days	Fri 7/1/22	Mon 7/11/22	Mon 7/11/22	100%	7	Annette Roth,QA	No
9	Finalize Project Schedule	1 day	Tue 7/12/22	Tue 7/12/22	Tue 7/12/22	100%	8	Emily Davis	No
10	<b>Project Management Approach</b>	<b>6 days</b>	<b>Mon 7/11/22</b>	<b>Mon 7/18/22</b>	<b>Mon 7/18/22</b>	<b>100%</b>			No
11	Deliver Draft Project Management Approach Deck	2 days	Mon 7/11/22	Tue 7/12/22	Tue 7/12/22	100%		Emily Davis	No
12	Review Draft Project Approach with WA Arts Commission & QA	2 days	Wed 7/13/22	Thu 7/14/22	Thu 7/14/22	100%	11	Annette Roth,QA	No
13	Finalize Project Management Approach	2 days	Fri 7/15/22	Mon 7/18/22	Mon 7/18/22	100%	12	Emily Davis	No
14	<b>Develop DED with ArtsWA PM</b>	<b>6 days</b>	<b>Mon 7/11/22</b>	<b>Mon 7/18/22</b>	<b>Mon 7/18/22</b>	<b>100%</b>		<b>Emily Davis</b>	No
15	Draft DED for Feasibility Study	3 days	Mon 7/11/22	Wed 7/13/22	Wed 7/13/22	100%		Emily Davis	No
16	Review Draft DED with WA Arts Commission & QA	2 days	Thu 7/14/22	Fri 7/15/22	Fri 7/15/22	100%	15	Annette Roth,QA	No
17	Finalize Project DED	1 day	Mon 7/18/22	Mon 7/18/22	Mon 7/18/22	100%	16	Emily Davis	No
18	<b>Document Business Processes</b>	<b>20 days</b>	<b>Fri 6/24/22</b>	<b>Fri 7/22/22</b>	<b>Fri 7/22/22</b>	<b>100%</b>			No
19	Review Historical Information	10 days	Fri 6/24/22	Fri 7/8/22	Fri 7/8/22	100%	1	Emily Davis,Brenda Hays	No



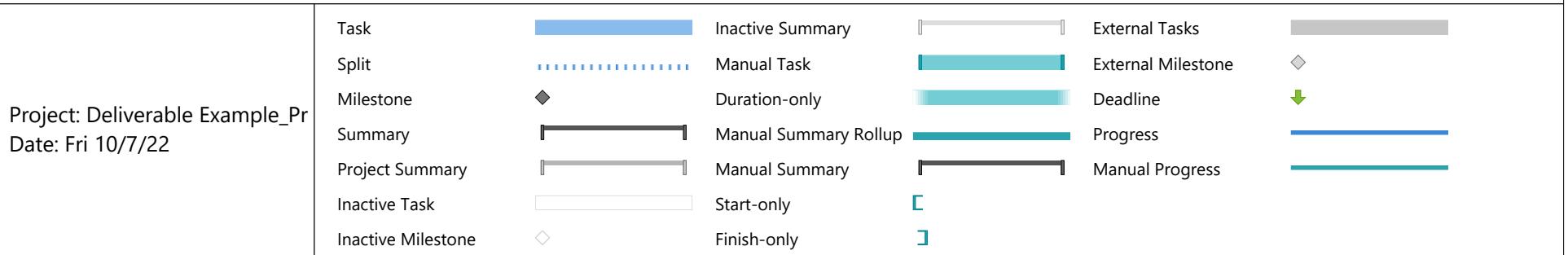
ID	Task Name	Duration	Start	Finish	Actual Finish	% Complete	Prec.	Resource Names	Milestone
20	Confirm 10 Core Processes	1 day	Fri 7/8/22	Fri 7/8/22	Fri 7/8/22	100%		Annette Roth	No
21	Conduct Interviews About Core Processes	5 days	Mon 7/11/22	Fri 7/15/22	Fri 7/15/22	100%		Brenda Hays	No
22	Grants Management	5 days	Mon 7/11/22	Fri 7/15/22	Fri 7/15/22	100%	20	Brenda Hays	No
23	Contracts Management	5 days	Mon 7/11/22	Fri 7/15/22	Fri 7/15/22	100%	20	Brenda Hays	No
24	MIMSI Managed Art Activities by Legislative District	5 days	Mon 7/11/22	Fri 7/15/22	Fri 7/15/22	100%	20	Brenda Hays	No
25	Contacts Management	5 days	Mon 7/11/22	Fri 7/15/22	Fri 7/15/22	100%	20	Brenda Hays	No
26	Outreach Campaigns	5 days	Mon 7/11/22	Fri 7/15/22	Fri 7/15/22	100%	20	Brenda Hays	No
27	Vendor Management	5 days	Mon 7/11/22	Fri 7/15/22	Fri 7/15/22	100%	20	Brenda Hays	No
28	Invoice Management	5 days	Mon 7/11/22	Fri 7/15/22	Fri 7/15/22	100%	20	Brenda Hays	No
29	Reporting Capabilities	5 days	Mon 7/11/22	Fri 7/15/22	Fri 7/15/22	100%	20	Brenda Hays	No
30	Data Management	5 days	Mon 7/11/22	Fri 7/15/22	Fri 7/15/22	100%	20	Brenda Hays	No
31	Data Quality Improvement	5 days	Mon 7/11/22	Fri 7/15/22	Fri 7/15/22	100%	20	Brenda Hays	No
32	Deliver Draft Business Processes	1 day	Mon 7/18/22	Mon 7/18/22	Mon 7/18/22	100%	21	Brenda Hays	No
33	Receive Comments from ArtsWA & QA	2 days	Tue 7/19/22	Wed 7/20/22	Wed 7/20/22	100%	32	Annette Roth	No
34	Finalize and Deliver Business Processes	2 days	Thu 7/21/22	Fri 7/22/22	Fri 7/22/22	100%	33	Brenda Hays	No
35	<b>Document System Requirements</b>	<b>17 days</b>	<b>Mon 7/25/22</b>	<b>Tue 8/16/22</b>	<b>Tue 8/16/22</b>	<b>100%</b>			No
36	<b>Facilitate requirements gathering workshop</b>	<b>3 days</b>	<b>Mon 7/25/22</b>	<b>Wed 7/27/22</b>	<b>Wed 7/27/22</b>	<b>100%</b>			No
40	Conduct walk-through of System Requirements	2 days	Thu 7/28/22	Fri 7/29/22	Fri 7/29/22	100%	37	Brenda Hays	No
41	Deliver Draft System Requirements	1 day	Mon 8/1/22	Mon 8/1/22	Mon 8/1/22	100%	40	Emily Davis,Brenda Hays	No
42	Receive Comments from ArtsWA & QA	3 days	Tue 8/2/22	Thu 8/4/22	Thu 8/4/22	100%	41	Annette Roth	No
43	Finalize and Deliver Results of Systems Requirements	3 days	Fri 8/5/22	Tue 8/9/22	Tue 8/9/22	100%	42	Emily Davis,Brenda Hays	Yes



ID	Task Name	Duration	Start	Finish	Actual Finish	% Complete	Pred.	Resource Names	Milestone
44	OCIO Feedback	5 days	Wed 8/10/22	Tue 8/16/22	Tue 8/16/22	100%	43	Lyle Tillet	No
45	<b>Conduct Market Research</b>	<b>42 days</b>	<b>Mon 7/11/22</b>	<b>Wed 9/7/22</b>	<b>Wed 9/7/22</b>	<b>100%</b>			<b>No</b>
46	Collaborate with PM on who to interview	6 days	Mon 7/11/22	Mon 7/18/22	Mon 7/18/22	100%		Emily Davis	No
47	Research contact info	3 days	Tue 7/19/22	Thu 7/21/22	Thu 7/21/22	100%	46	Emily Davis	No
48	Send introductory email and request	1 day	Fri 7/22/22	Fri 7/22/22	Fri 7/22/22	100%	47	Emily Davis	No
49	Draft interview questions and tool	3 days	Mon 7/25/22	Wed 7/27/22	Wed 7/27/22	100%	48	Emily Davis,Brenda Hays	No
50	Conduct interviews via phone (assume 10 mins per interview)	5 days	Tue 8/2/22	Mon 8/8/22	Mon 8/8/22	100%	41	Brenda Hays,Emily Davis	No
51	Document Market Research Information	3 days	Tue 8/9/22	Thu 8/11/22	Thu 8/11/22	100%	50	Brenda Hays,Emily Davis	No
52	Conduct walk-through of Results of Market Research	3 days	Fri 8/12/22	Tue 8/16/22	Tue 8/16/22	100%	51	Emily Davis,Brenda Hays	No
53	Deliver Draft Results of Market Research	2 days	Wed 8/17/22	Thu 8/18/22	Thu 8/18/22	100%	52	Emily Davis,Brenda Hays	No
54	Receive Comments from ArtsWA & QA	3 days	Fri 8/19/22	Tue 8/23/22	Tue 8/23/22	100%	53	Annette Roth	No
55	<b>Finalize and Deliver Results of Market Research</b>	<b>5 days</b>	<b>Wed 8/24/22</b>	<b>Tue 8/30/22</b>	<b>Tue 8/30/22</b>	<b>100%</b>	<b>54</b>	<b>Emily Davis,Brenda Hays</b>	<b>Yes</b>
56	OCIO Feedback	5 days	Wed 8/31/22	Wed 9/7/22	Wed 9/7/22	100%	55	Lyle Tillet	No
57	<b>Complete Fit/GAP Analysis</b>	<b>18 days</b>	<b>Fri 8/12/22</b>	<b>Wed 9/7/22</b>	<b>Wed 9/7/22</b>	<b>100%</b>			<b>No</b>
58	Background and Business Needs	5 days	Fri 8/12/22	Thu 8/18/22	Thu 8/18/22	100%	51	Emily Davis,Brenda Hays	No
59	Objectives	5 days	Fri 8/12/22	Thu 8/18/22	Thu 8/18/22	100%	51	Emily Davis,Brenda Hays	No
60	Impacts	5 days	Fri 8/12/22	Thu 8/18/22	Thu 8/18/22	100%	51	Emily Davis,Brenda Hays	No
61	Org Effects	5 days	Fri 8/12/22	Thu 8/18/22	Thu 8/18/22	100%	51	Emily Davis,Brenda Hays	No
62	Proposed Solution	5 days	Fri 8/12/22	Thu 8/18/22	Thu 8/18/22	100%	51	Brenda Hays,Emily Davis	No
63	Alternatives Considered	5 days	Fri 8/12/22	Thu 8/18/22	Thu 8/18/22	100%	51	Brenda Hays,Emily Davis	No
64	Conformity w/IT Portfolio	5 days	Fri 8/12/22	Thu 8/18/22	Thu 8/18/22	100%	51	Brenda Hays,Emily Davis	No
65	Draft Fit/Gap Analysis	4 days	Fri 8/19/22	Wed 8/24/22	Wed 8/24/22	100%	58	Emily Davis,Brenda Hays	No
66	Deliver Draft Fit/Gap Analysis	1 day	Thu 8/25/22	Thu 8/25/22	Thu 8/25/22	100%	65	Emily Davis,Brenda Hays	No

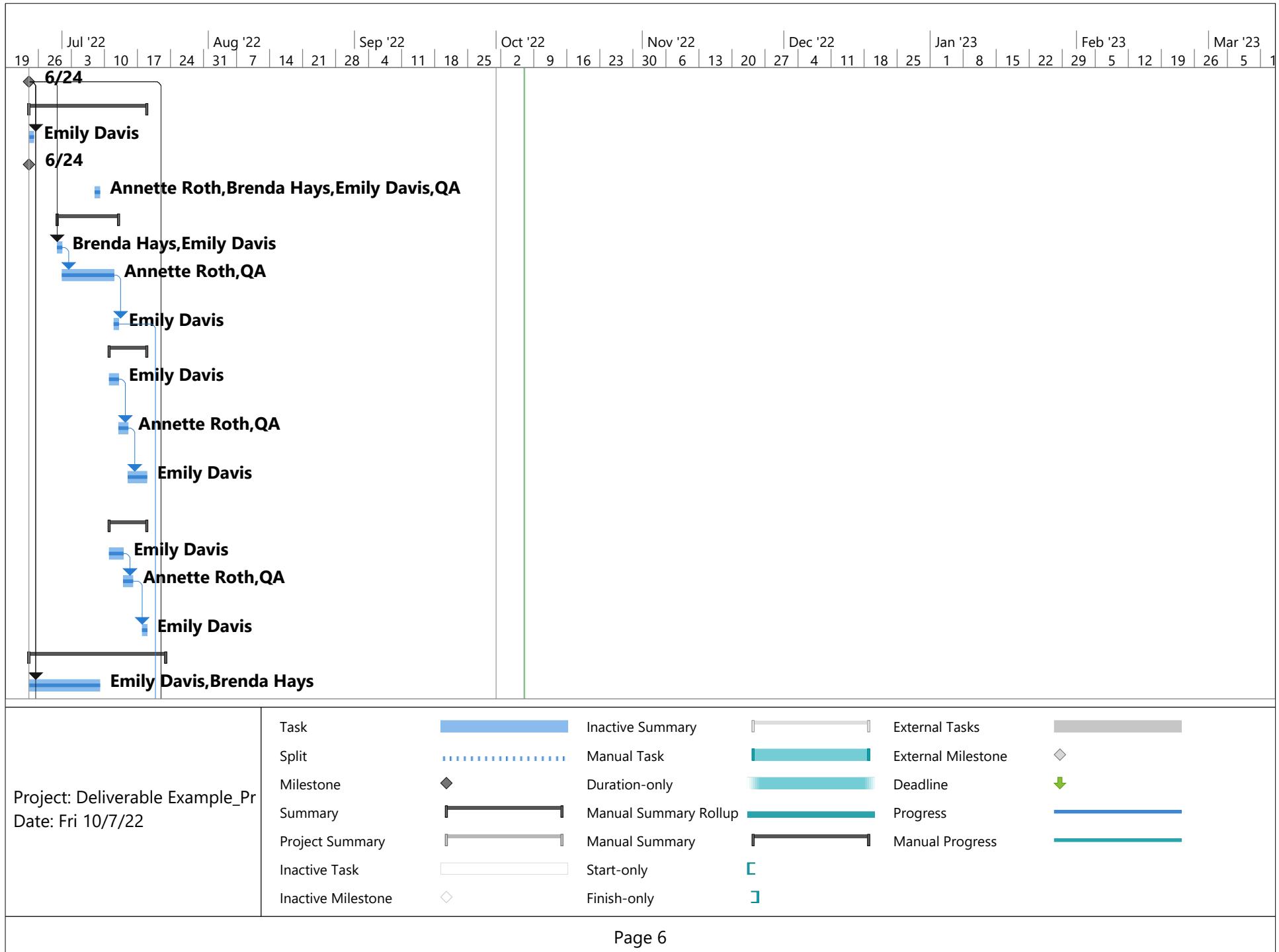


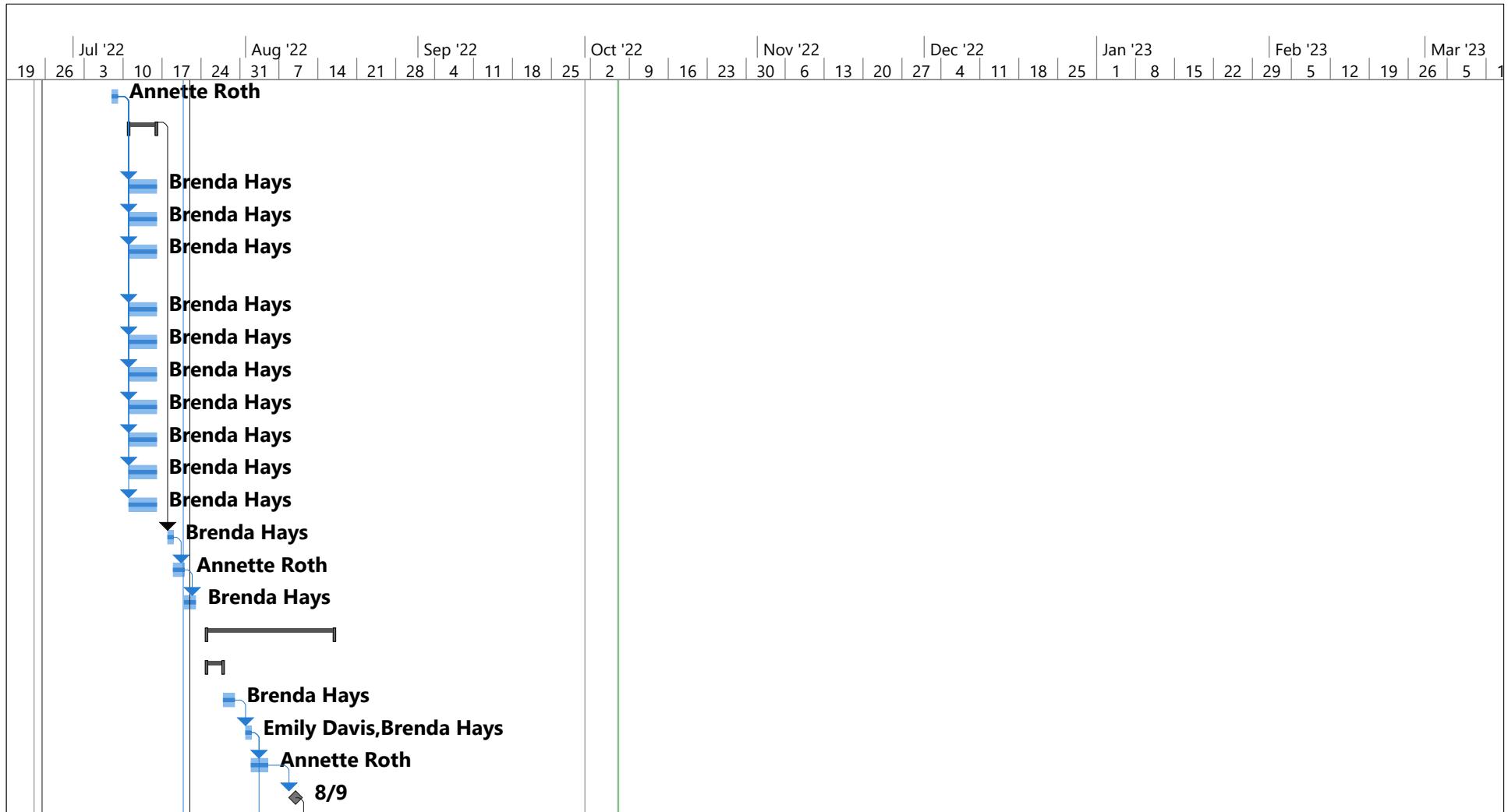
ID	Task Name	Duration	Start	Finish	Actual Finish	% Complete	Pred.	Resource Names	Milestone
67	Receive Comments from ArtsWA & QA	2 days	Fri 8/26/22	Mon 8/29/22	Mon 8/29/22	100%	66	Annette Roth	No
68	Finalize and Deliver Results of Fit/Gap Analysis	1 day	Tue 8/30/22	Tue 8/30/22	Tue 8/30/22	100%	67	Emily Davis,Brenda Hays	Yes
69	OCIO Feedback	5 days	Wed 8/31/22	Wed 9/7/22	Wed 9/7/22	100%	68	Lyle Tillet	No
70	<b>Implementation Plan/Approach</b>	<b>12 days</b>	<b>Wed 8/31/22</b>	<b>Fri 9/16/22</b>	<b>Fri 9/16/22</b>	<b>100%</b>			<b>No</b>
71	Draft Exec Summary	3 days	Wed 8/31/22	Fri 9/2/22	Fri 9/2/22	100%	68	Emily Davis	No
72	PM Approach and timeline	3 days	Wed 8/31/22	Fri 9/2/22	Fri 9/2/22	100%	68	Emily Davis	No
73	Acquisition, implementation and maintenance	3 days	Wed 8/31/22	Fri 9/2/22	Fri 9/2/22	100%	68	Brenda Hays	No
74	Agency and Vendor Staffing to Implement	3 days	Wed 8/31/22	Fri 9/2/22	Fri 9/2/22	100%	68	Emily Davis	No
75	Implementation Timeframe	3 days	Wed 8/31/22	Fri 9/2/22	Fri 9/2/22	100%	68	Emily Davis	No
76	Business Impacts and ROI	3 days	Wed 8/31/22	Fri 9/2/22	Fri 9/2/22	100%	68	Emily Davis,Brenda Hays	No
77	Issues and Risks	3 days	Wed 8/31/22	Fri 9/2/22	Fri 9/2/22	100%	68	Emily Davis	No
78	Technical and organizational implications	3 days	Wed 8/31/22	Fri 9/2/22	Fri 9/2/22	100%	68	Brenda Hays	No
79	Best practices and improvement opportunities	3 days	Wed 8/31/22	Fri 9/2/22	Fri 9/2/22	100%	68	Brenda Hays	No
80	Compile draft Implementation Plan	3 days	Wed 8/31/22	Fri 9/2/22	Fri 9/2/22	100%	79F	Emily Davis	No
81	Deliver Draft Implementation Plan	1 day	Tue 9/6/22	Tue 9/6/22	Tue 9/6/22	100%	80	Emily Davis,Brenda Hays	No
82	Receive Comments from ArtsWA and QA	2 days	Wed 9/7/22	Thu 9/8/22	Thu 9/8/22	100%	81	Annette Roth	No
83	Finalize and Deliver Implementation Plan	1 day	Fri 9/9/22	Fri 9/9/22	Fri 9/9/22	100%	82	Emily Davis,Brenda Hays	Yes
84	OCIO Feedback	5 days	Mon 9/12/22	Fri 9/16/22	Fri 9/16/22	100%	83		No
85	On-going bi-weekly status meetings and status updates	69 days	Fri 6/24/22	Fri 9/30/22	Fri 9/30/22	100%	1	Emily Davis	No
86	<b>Board of Commissioners</b>	<b>0 days</b>	<b>Tue 8/9/22</b>	<b>Tue 8/9/22</b>	<b>Tue 8/9/22</b>	<b>100%</b>			<b>Yes</b>
87	Initial Project Introduction	0 days	Tue 8/9/22	Tue 8/9/22	Tue 8/9/22	100%		Emily Davis,Brenda Hays	Yes
88	<b>DP Production</b>	<b>8 days</b>	<b>Fri 9/9/22</b>	<b>Tue 9/20/22</b>	<b>Tue 9/20/22</b>	<b>100%</b>			<b>No</b>
89	Deliver Draft 1 of DP	2 days	Fri 9/9/22	Mon 9/12/22	Mon 9/12/22	100%	82	Emily Davis,Brenda Hays	No



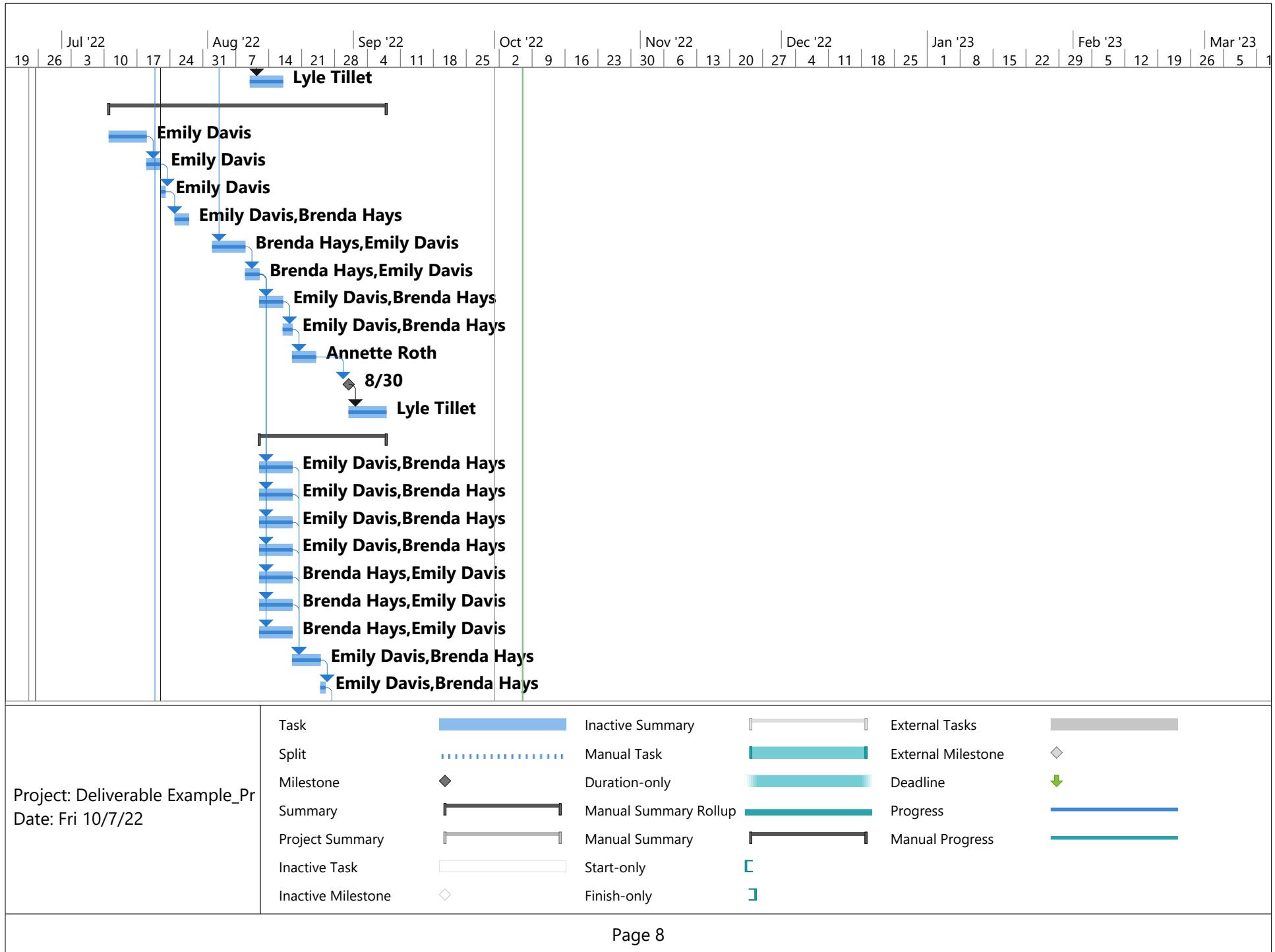
ID	Task Name	Duration	Start	Finish	Actual Finish	% Complete	Pred	Resource Names	Milestone
90	Receive Comments from ArtsWA and QA	3 days	Tue 9/13/22	Thu 9/15/22	Thu 9/15/22	100%	89	QA,Annette Roth,Karen Har	No
91	Share DP with OFM & OCIO Contact	3 days	Tue 9/13/22	Thu 9/15/22	Thu 9/15/22	100%	89	Lyle Tillet,OFM Contact	No
92	Finalize DP	2 days	Fri 9/16/22	Mon 9/19/22	Mon 9/19/22	100%	90	Emily Davis,Brenda Hays	No
93	Submit Final Decision Package	1 day	Tue 9/20/22	Tue 9/20/22	Tue 9/20/22	100%	92	Annette Roth	Yes
94	<b>WaTech Partnership</b>	<b>28 days</b>	<b>Fri 7/22/22</b>	<b>Tue 8/30/22</b>	<b>Tue 8/30/22</b>	<b>100%</b>			No
95	Meet with WaTech for guidance and vaida	0 days	Fri 7/22/22	Fri 7/22/22	Fri 7/22/22	100%	9	Brenda Hays,Emily Davis	Yes
96	Ongoing Provision of Sections to WaTech	128 days	Fri 7/22/22	Tue 8/30/22	Tue 8/30/22	100%	1,9	Emily Davis	No
97	Incorporate WaTech Feedback Received	28 days	Fri 7/22/22	Tue 8/30/22	Tue 8/30/22	100%	1,9	Emily Davis,Brenda Hays	No
98	End Project	0 days	Fri 9/30/22	Fri 9/30/22	Fri 9/30/22	100%	85		Yes

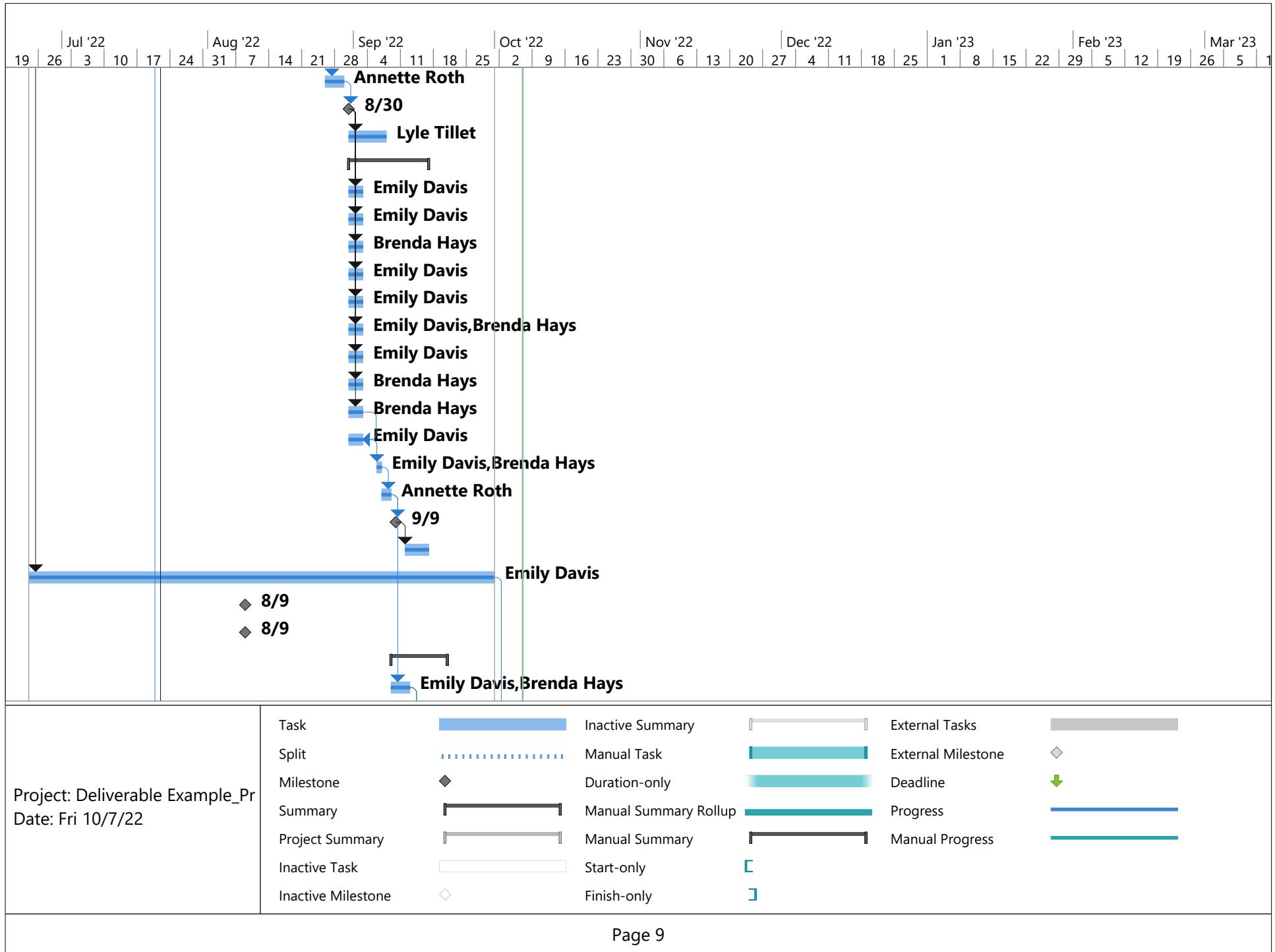
Project: Deliverable Example_Pr Date: Fri 10/7/22	Task		Inactive Summary		External Tasks	
	Split		Manual Task		External Milestone	
	Milestone		Duration-only		Deadline	
	Summary		Manual Summary Rollup		Progress	
	Project Summary		Manual Summary		Manual Progress	
	Inactive Task		Start-only			
	Inactive Milestone		Finish-only			

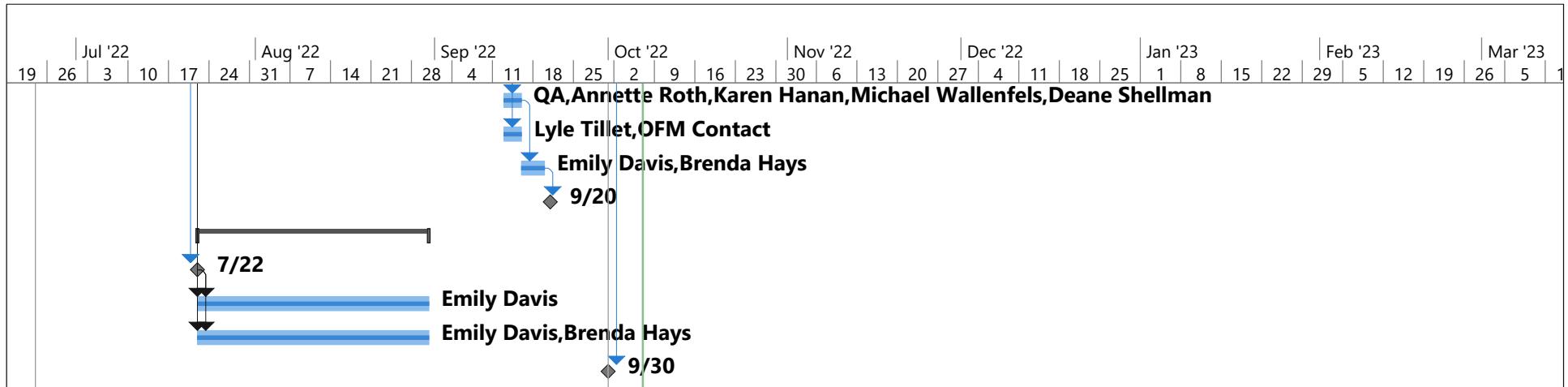




Project: Deliverable Example\_Pr  
Date: Fri 10/7/22







Project: Deliverable Example_Pr Date: Fri 10/7/22	Task		Inactive Summary		External Tasks	
	Split		Manual Task		External Milestone	
	Milestone		Duration-only		Deadline	
	Summary		Manual Summary Rollup		Progress	
	Project Summary		Manual Summary		Manual Progress	
	Inactive Task		Start-only			
	Inactive Milestone		Finish-only			

## Deliverable Example: Project Status Report

PROJECT MANAGEMENT OFFICE STATUS REPORT – Week Ending 8/26/2022		PROJECT RADAR - Discovery Phase
Project Name: WA Arts Commission CRM Feasibility and Decision Package Consulting Project (2023-25 Biennial Package) Executive Sponsor: Annette Roth    Technical Advisor: Brenda Hays    Engagement Lead: Emily Davis		 Scope  Schedule  Budget
PROJECT DELIVERABLES	PROJECT ACCOMPLISHMENTS	
Project Implementation Schedule 10 Core Business Process Flows Feasibility Study DED Universal CRM Requirements Feasibility Study Decision Package IT Addendum Decision Package Word Document Prioritization Excel Spreadsheet Presented to Board of Commissioners 6 Benchmarking Sessions: SC Arts Commission South Arts (Regional Arts Organization) AZ Arts Commission IL Arts Commission The Colony, TX Department of Veterans Affairs (WA)	Initial Consultation with OCIO Developed Draft 1-4 of Feasibility Study Developed Draft 1-3 of Decision Package Scheduled 1:1 Consultation with OCIO Provided Decision Package to OFM for Feedback	 <b>CRITICAL PATH RISKS &amp; ISSUES</b> <b>RISK:</b> The Agency ranking of this decision package will have major impact on the funding outcome. It is encouraged to rank this investment as a top priority.
		 <b>STRATEGIC DECISIONS &amp; CONSIDERATIONS</b> Data Consultant 4 was selected as the appropriate CRM admin level.
PROJECT LOOK-AHEAD	KEY INTERDEPENDENCIES	
	Complete SAP Benchmarking Interview Obtain OCIO feedback Obtain ArtsWA Leadership Team Feedback	 <b>KEY INTERDEPENDENCIES</b> One WA Program - Grants Solution Migration Earmarked for 2026-2027 MIMSY Database Upgrade Earmarked for Mid-term Horizon (3-5 years)
<b>PROJECT RADAR LEGEND - Definition</b>		
<ul style="list-style-type: none"> <li>● Project is on track. The risks are not expected to impact the other project metrics or overall business outcomes.</li> <li>○ Some course correction may be required. One or more identified risks may impact the program's other metrics or overall business outcomes. Work stream lead involvement.</li> <li>■ Mitigation strategies are under development or already invoked to avoid increased risk to impacts on the program's scope, schedule, or budget. Project leadership involvement required.</li> <li>■ The program is experiencing or may experience showstoppers. Mitigation strategies are invoked as the project's scope, schedule or budget will be impacted. Escalation to executive director and/or project sponsor required.</li> </ul>		

## Delivery Example: Universal Requirements Document



### Business Universal Requirements Document

This is an example excerpt from a Customer Relationship Management universal requirements document that was prioritized by WA Arts Commission (ArtsWA) to identify key features available in the market for Customer Relationship Management systems. Each requirement was identified as a high, med, low, or N/A as a priority for ArtsWA. The outcome of prioritizing this set of potential requirements was a set of requirements to assess vendors in the marketplace against. This served as a tool that was weighted to identify the degree that each vendor could satisfy the key requirements for ArtsWA. Not all requirements are presented in this excerpt for brevity. An example of Functional, Technical, and Statutory requirements is presented here:

Main Category	Sub Category	Requirement	Requirement Type	Arts WA Desired Feature? (Yes/No)	Priority	Available Points
Accounts & Contact Management	Accounts Hierarchy	The solution offers hierarchy in account management by linking related accounts with their parent account. It enables viewing child account information directly from the parent account page, thus helping to identify cross-selling and upselling opportunities.	Functional Requirement	Yes	High	10
Accounts & Contact Management	Account Management	The solution allows creating accounts to store profile information of companies or business units. It offers a unified view of account details and associated contacts, opportunities, tickets, notes, billing information, communication history, and more.	Functional Requirement	Yes	High	10
Accounts & Contact Management	Appointment Scheduling	The solution allows creating a custom scheduling page, and include calendar links in individual emails to send them to customers and request them to pick a date and time.	Functional Requirement	Yes	High	10

## Delivery Example: Universal Requirements Document



Main Category	Sub Category	Requirement	Requirement Type	Arts WA Desired Feature? (Yes/No)	Priority	Available Points
Platform Security	Data at Rest Encryption	The solution encrypts all types of idle data at rest, such as relational databases, file stores, backup copies of databases, etc. using various encryption technologies.	Statutory Requirements	Yes	High	200
Platform Security	Two Factor Authentication	The solution allows configuring two-factor authentication for all the users or a group of users using various methods like security questions, one-time passcodes, security tokens, etc. *OCIO Policy requires the use of Enterprise Active Directory or Secure Access Washington for authentication. The system will need to be able to use single sign-on using ADFS or SAML.	Statutory Requirements	Yes	High	200
Platform Security	Compliance	OCIO Policy#141.10 Compliance	Statutory Requirements	Yes	High	400
Platform Security	Compliance	SOC2 Compliant	Statutory Requirements	Yes	High	200

## Delivery Example: Universal Requirements Document



Main Category	Sub Category	Requirement	Requirement Type	Arts WA Desired Feature? (Yes/No)	Priority	Available Points
Integration and extensibility	APIs	The solution provides open APIs to fetch, create, update, or delete information like records, modules, and custom views or create custom integrations with third-party systems.	Technical Requirement	Yes	High	10
Integration and extensibility	Business Phone Systems Integration	The solution integrates with popular business phone system (PBX, VOIP, etc.) providers like Talkdesk, RingCentral, GoToConnect, etc. to make and attend calls from within the CRM, and attach call histories under each record.	Technical Requirement	Yes	High	10
Integration and extensibility	Calendar Integration	The solution integrates with Google, Office 365, and Apple calendars to sync all CRM events like appointments, contacts, meetings, etc. It helps to keep track of important events and deadlines.	Technical Requirement	Yes	High	10